The Challenge

* Time-consuming manual email filing and retrieval
* No single source of all project email correspondence
* Difficult project collaboration using .PST files
* Maintaining project emails files as staff move between projects
* .PST solution unmanageable and poor performance as size increases

The Benefits

* Project files up-to-date in real time
* Operational efficiently - Filing time reduced by 50%.
* An email filing solution catering and customized for the business
* Email project files made available to all project staff, management and non-project staff
* Reduced risk by having latest project emails available
* Seamless management of staff moving between projects

Wallace Roberts & Todd, LLC (WRT) is a team of planners, urban designers, architects, and landscape architects who value the impact of a collective approach to create simple solutions for complex problems across scales. They serve their communities by designing places that enhance the natural and social environment.

WRT's success is based on a tradition of excellence, innovation, leadership in planning and design, and a commitment to the firm's guiding principles of designing with nature and reinforcing urbanism.

WRT works with communities to address and integrate complex issues related to quality of life, physical character, growth management, economic and fiscal health, infrastructure capacity and resource preservation and activation. WRT embraces their roots, yet does not bind themselves to its style or prose. They build on the strengths of those that have come before, but welcome change as an opportunity to create impact.

WRT believes in simplicity and functionality, working with clarity and purpose to engage and empower communities. Through it all, WRT remains committed to design excellence as they strive to enhance and reflect nature through projects that address the unique concerns and needs of each community - with a process and a product that gains widespread acceptance, reflects citizens' aspirations and serves as a catalyst for future action.

Challenges

As a design services firm, WRT has teams of professionals working on a number of projects for clients who need to collaborate and share information using email. Email correspondence is, therefore, a business critical resource.

WRT had implemented a .PST email sharing/archiving solution which had become difficult to manage and poor performing, making it difficult to share with all project staff. Manual filing of email was time-consuming, as was retrieval.

WRT wanted to build on the experience it already had maintaining .PST project files but improve email management significantly by implementing a simple process for business users to make email filing and retrieval effortless. A solution that could be embedded in Outlook and reduce filing time. A solution that is intelligent, automatic and could be tailored to WRT's specific business requirements and project file structure. A solution that would reduce mailbox clutter and remove the need for .PST files.

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Planners, urban designers, architects and landscape architects

Solution

The main objectives were to create a set of project email folders that supported WRT's projects - allowing business users to find and file emails quickly and create a central store shareable by all staff, including non-project staff.

The Knowledgemill team migrated, indexed, de-duplicated and compressed all emails from the existing .PST files and public folders to create a complete central set of project files containing all project emails.

Knowledgemill provides a solution that can be used by business users from Microsoft Outlook to file and retrieve all of their project-related emails. Email filing was mandatory and automated allowing business users to 'file as they go', halving the time spent on email filing.

As Michael Barr, Director of Information Technology, explained "Knowledgemill met all WRT's business requirements for email filing and importantly integrated seamlessly with Outlook to give a good user experience and reduced filing time by 50% giving a benefits case which was very easy to justify."

Results

A structured set of project folders in Knowledgemill that are easy to access and find emails and are up-to-date in real time.

The ability to work more effectively as a team with collaboration made easy – every member of a project can see the latest communication thread in real time and pick up on it without having to copy or forward to colleagues.

Saving time and effort – WRT is pleased with how Knowledgemill's automated, intelligent email filing has cut down the time spent by staff filing emails, asking colleagues for information or forwarding and cc'ing every email.

Maintaining complete records - WRT now keeps a comprehensive record of all electronic communication, classified and stored by project, which is up-to-date in real time.

Simplicity of adoption – because Knowledgemill works intuitively as part of Microsoft Outlook, and because filing is mostly automatic, there is little cultural change. Users have no problem learning to use it.

The Solution
* Use **Knowledgemill Filer™** to create a single central repository for project emails
* Access all project files from Microsoft Outlook
* File 'as you go' project files up-to-date and in real time
* Migration project emails from existing .PST files

The Results
* Single central set of each project's emails – management confidence and improved communication
* All project team kept up-to-date in real time
* 50% reduction in filing time
* Intuitive and easy to use as part of Outlook
* Reduced business risk

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