

# netmail

## email policy retention & BYOD workshop

**Netmail**, the experts in email risk management and compliance, provide customized Email Retention Policy Workshops aimed at enabling stakeholders (IT, Legal, and other departments) within your organization to develop two workable policies: the retention and destruction of email, and BYOD -- bring-your-own-device. The workshop is not intended to force particular policies. Rather, the outcome ultimately depends on the stakeholders. At the outset, it's impossible to foresee what the different stakeholders will say and how long any particular discussion will take. This two-day workshop includes technical and non-technical topics and is held on site at your organization where confidential discussions of company-specific issues can be carried out, making them far more cost-effective than similar courses at remote locations. The number of attendees is limited only to the size of the classroom.

Our focused workshops will help you understand industry-adopted best practices including case studies, legal concerns, as well as the human resources perspective to assist your team in building strong retention and deletion policies. We will provide research of what similar organizations are doing to mitigate risk and manage email for compliance and eDiscovery. We will also discuss the "New" HIPAA regulations put forth by the American Recovery and Reinvestment Act and help you to develop an iron-clad email policy customized and tailored for your organization.

Upon completion of our Email Retention Policy Workshop, your organization will have an email retention and deletion policy tailored to your business needs ensuring the highest level of email security and compliance with record retention laws. Let our team of IT and highly experienced legal experts help you design policies that will manage the full lifecycle of business critical email – from the moment an email is sent or received to its end-of-life destruction.

### Sample Workshop Overview

#### Day 1

9:00 - 10:00	<b>Workshop Introduction</b> Overview of eDiscovery, litigation hold, and your organization's thinking and experience with email retention and other document retention.
10:00 - 11:00	<b>Case Studies</b> Various examples of how different enterprises (hospitals, medical centers, university hospitals) have addressed email retention.
11:00 - 11:15	Break
11:15 - 12:00	<b>Practical Issues</b> Introduction of issues surrounding BYOD.
12:00 - 1:00	Lunch Break
1:00 - 2:00	<b>Sample Policy Language</b> Discuss example language developed in previous workshops for both email retention and BYOD.
2:00 - 2:15	Break
2:15 - 4:00	<b>Drafting of Language</b> Attempt to articulate major points of policy to see if consensus emerges.

**Regulatory compliance, litigation support, and storage management all begin with an efficient email archiving process.**

## Day 2

9:00 - 10:30

### Recap of Day 1

Are we moving toward consensus? Have new ideas emerged? Can we finalize language? Other issues? How to get management approval? How to implement the policy in practice?

10:30 - 10:45

Break

10:45 - 12:00

### Flexible

If any unresolved issues surrounding your email policy and/or BYOD policy remain, extra time is allotted to address them accordingly.

Afternoon

### Policy Refinement

Revised draft policies are circulated and clauses are discussed. Open issues to be resolved by higher management are defined. Use of time in the afternoon is flexible, depending on staff availability. Focus is on refining final policy language.

## Email Retention Policy Workshop

Attendees: Executives, Directors and Stakeholders

Where: Onsite at Your Organization

When: Month, Days, Year

RSVP: Month, Day, Year

This workshop will enable your teams to better understand the requirements behind a good email lifecycle management policy and help you to a rapid consensus on what should be implemented.

### Workshop Goals:

- Learn about best practices in email retention and destruction
- Learn what others in your industry are doing to manage risk and comply with various laws
- Review, revise and confirm email retention policy
- Create new policies as necessary

### Workshop Benefits

- Policies will be current and in-line with industry standards
- Assists in efforts to better estimate the cost of an email archiving solution for electronic discovery compliance
- Advance knowledge in risk management and email compliance

### Financial Overview

The total investment required for an intensive two day, onsite policy workshop includes all travel expenses and accommodations for our team and guest legal counsel.

