MISCHIEF MANAGED: TAKING CONTROL OF YOUR INBOX

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Center For Practice Management | North Carolina Bar Association

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Email Management: Keeping a Clean and Minimal Inbox

A cluttered inbox can drain productivity and increase stress, especially for legal professionals who must juggle urgent messages, maintain confidentiality, and adhere to meticulous record-keeping. It is all too easy for this central channel to become cluttered, distracting, and overwhelming. What are some practical methods for achieving and maintaining a clean inbox?

Convert Email to An Event/Appointment

Many emails involve discussions regarding an upcoming appointment or meeting. Depending on the email client you use (Outlook, Gmail, etc.) you can convert an email into an appointment with the email subject line will become the event name, and the email recipients will be added to the guest list. In Outlook, the body of the email message will appear in the event description.

In Outlook (New and Classic) to convert an email into a meeting invitation, click on the "Reply By Meeting" button, adjust the date and time, and send the email. You can then move the email into the correct folder. If you want to turn this into a workflow in New or Classic Outlook, you can use the Quick Steps feature. Create a Quick Step that uses the Reply By Meeting and also automatically moves the email to a folder. You can create a folder called "Meetings" to keep this simple.

If you receive an email that requires a significant amount of time to respond to in Outlook, you can drag the email to your calendar. In Outlook Classic this action will add an appointment to your calendar so you can block time to respond. In New Outlook dragging an email to the calendar creates a meeting, so just remove the attendee. Then folder the email appropriately.

Convert Email to a Task

Using your inbox as a task management tool is common, but not the best practice. Marking email messages as unread, pinning them, flagging them, and other methods that focus on your inbox as a task manager makes it difficult to triage, plan your day, and review your task list. Best practices suggest that you convert the email to a task. How you do that depends on what task management tool you use. Explore options in Microsoft 365 like Planner/ToDo, Tasks in Google Workspaces, tasks in your project management or law practice management application, or notebooks like OneNote, Evernote, Notion, etc.

Moving an email into a task management tool lets you add context to the task, a due date, prioritize it, and share the responsibility or delegate to someone else. You can view your task management application and sort by urgency or due date. This will help you focus and prioritize away from your busy and burgeoning inbox. Folder the email in a folder called "to do" or in the client/matter folder.

Reduce the Noise

In addition to actual correspondence, the inbox holds a lot of messages that include newsletters, announcements, and other information that requires no affirmative action on the part of the recipient. Instead, you read the email and file it away. Or it remains in your inbox. Or you create a rule where the emails pile up, unread. A quick way to separate the signal-to-noise ratio is to use the Focused inbox in Outlook, or use Gmail's automatic filters. There are many reduce and manage low priority email, see: Silencing Your Noisy Inbox.

Storing Email

With the advent of better email search, one may question whether it is necessary to move email into folders or with the client/matter. For many, a cluttered inbox can make you feel like you're constantly behind, even if you are not. With fewer emails in your inbox, it's easier to spot and respond to urgent or important messages without wading through outdated clutter.

If you have a law practice management application that has integrates with your email client or a document management system such as iManage or NetDocuments, move emails to the client/matter record as soon as you can. That way, the correspondence is not siloed in your personal email folders, your email client will be faster, and records retention will be much easier. You and your team can review relevant communication, alongside documents, notes, deadlines, and tasks. When email correspondence remains separate from the rest of the activity taken on behalf of a client, it leaves a huge knowledge gap. These platforms often provide Outlook add-ins, allowing you to save, tag, and share emails within your secure digital matter files, supporting compliance and discovery obligations.

If you do not use a practice management or document management application that integrates with your email client, move emails to their proper folder as soon as you can. At this point, with tasks and meetings taken care of, the email is an artifact and part of the client record so don't let it clog up your inbox.

Templates

If you have unanswered emails in your inbox that are waiting until you have the time to find an example from your sent mail and copy/paste/edit the response, there are lots of ways to reduce that friction. In Outlook and Gmail, you can create templates to respond to routine correspondence. Or consider a text expander for even more flexibility.

Also, close the loop when possible. Leverage tools like automated calendaring tools to move work forward when you need to create time and space to address an email. Just respond (with a template) that you would like to schedule time to focus on the request or question and get it on your calendar.

Clean Up Day

There will always be new emails. Aim for “clean enough” rather than obsessing over an empty inbox at all times. Schedule a time every week to go through your inbox and make sure you have taken appropriate action on the emails. Move those that you have turned into tasks, meetings, appointments, or delegated to the appropriate place. Those that might have fallen through the cracks will become more apparent. Decide what you need to do to deal with them appropriately and turn the email into an action item.

Mindset Shifts for Lasting Success

Sustainable inbox management is about more than tools; it requires a change in mindset. Rather than striving for perfection, it’s important to accept that new emails will always arrive. Focus on keeping your inbox “clean enough” instead of obsessing over reaching zero. Shift your attention to taking action: respond, delegate, or decide on next steps, rather than simply reading and moving on. Not every message merits your time or a reply, so learn to quickly discern which emails truly matter. In embracing a form of digital minimalism, treat your inbox as you would your physical workspace, taking pride in a streamlined, orderly digital environment.

Conclusion

A clean, minimal inbox isn’t a dream reserved for productivity gurus; it’s an achievable goal for anyone willing to adopt the right strategies and stick with them. By focusing on action, leveraging automation, and committing to regular maintenance, you can transform your inbox from a source of stress into a tool that supports your goals and your peace of mind. Start today, and rediscover the clarity and efficiency that comes with a tidy digital space.

Silencing Your Noisy Inbox

Lawyers get a lot of emails. Important email. But interspersed with the important email, you also get a lot of unnecessary, unimportant, or low-priority email. Some of those emails can be categorized as spam, but many of them are noise that you get by nature of the way information has been delivered for many years. Of course, there is actual spam – unsolicited emails that are not harmful, but very annoying. Then there are the malicious emails – phishing attempts that try to thwart your cybersecurity. To reduce the email in your inbox to allow you to focus on the important/urgent messages, versus the not urgent/not important messages, you must first classify these messages and manage them. In this installment, we will focus on managing noise but not spam or malicious emails.

Focused Inbox

A quick and effortless way to help conquer inbox overload is to use the filtering built into your email application. In Microsoft Outlook, you can turn on Focused inbox, which shows you messages that require your attention and all else goes to the "Other" tab. It works remarkably well. If you see an email in the "Other" tab, right click on it to "Move to Focus" or "Always Move to Focus." Or right click on an email in the Focus tab to "Move to Other" or "Always Move to Other." Focused inbox for Outlook works in the browser and the Outlook app for your mobile devices.

If you are a Gmail user, Gmail has even more automatic filtering, creating categories for Primary, Social, Updates, Forums, and Promotions. In Settings, you can turn these filters into Tabs. You can also enable bundling of top promos. Select a message to indicate that the email has been miscategorized. If you want to create your own tabs, change your inbox type to Multiple Inboxes and you can create custom sections based on search criteria. While the Default inbox type with categories works on your smartphone app, Multiple Inboxes can only be viewed on a computer. Note that you can't turn on inbox categories if you have more than 250,000 messages in your inbox.

Sales & Marketing Emails

When you purchase something online or sign up to receive a whitepaper, you are indicating that you agree to continue to receive marketing emails in addition to confirmations, unless there is a box to indicate you do NOT want to receive further marketing messages. In some cases, your email address is also shared with affiliate companies. Technically, this is not spam, it is bacn. To combat this, you can create a disposable email address or an alias email.

Email Aliases

In Gmail you use your current account and append a + or . to your email address. For instance, username+newsletter@gmail.com or username+whitepaper@gmail.com. These emails will go into your Gmail account, but you can easily add labels and filters to manage them more easily. If you get too many of these emails you can block the sender or write a filter to delete the emails automatically.

If you need to use your work email to sign up for purchases or whitepapers, and you use Microsoft Outlook with either hosted Exchange or Microsoft 365, you can get your administrator to set up an email alias. You can set up to 400 aliases per user, and there are no additional fees or licenses required. You can have aliases like subscriptions@xyzfirm.com or purchase@xyzfirm.com. However, to write a rule that deals with the alias (e.g., filter to a folder) the rule must be written to identify the alias in the message header, otherwise these emails will just automatically go to your inbox.

You can create email aliases in iCloud Mail and Outlook.com (f/k/a Hotmail).

Disposable email addresses

If setting up an alias, especially in Microsoft Exchange or 365 environments, seems a little daunting, there are many services that offer disposable contact information. This Wired article highlights options native to Apple devices, or alternatives such as 10 Minute Mail or Burner Mail and offers options for disposable phone numbers too. Other options include the venerable Spam Gourmet.

Unsubscribe Options

If the sales and marketing emails you are receiving are legitimate, under CAN-SPAM they are required to provide an unsubscribe link. If you see marketing emails from a company that you have done business with (and you trust) offer an unsubscribe link at the bottom of an email, just click it and stop receiving emails from that provider. You can even search your inbox for the word "unsubscribe" to find all the emails that offer that possibility to make it easier when you have a moment to focus on cleaning up your inbox and reducing the incoming messages.

If there is no unsubscribe link and you are quite confident that the message is truly spam, you can mark it as spam in either Outlook or Gmail. If, however, it is not technically spam but it is noisy, like a very persistent salesperson, in Microsoft Outlook click the "Ignore Conversation" button to remove all related and future messages to your Deleted Items folder. In Gmail you can Mute messages.

There are third-party unsubscribe options. However, those have suffered from reputational issues, mostly due to privacy concerns like that of Unroll.me. There are paid plans from companies like Leave Me Alone that offer features to unsubscribe from email as well as "rollups" to manage email newsletters and much more.

Notifications

If you get notifications from social media and other accounts in your inbox, and you never read or act on them, you can change your notifications to ping you in the app, via SMS (if you really need to) or in the browser. This also applies to Google News Alerts and emails from

Slack, Teams, Planner, Asana, and online communities. See if you are really reading them and acting on them. If not, you don't need an email alert or notification after all.

Email Newsletters

Email newsletters can be a reliable source of information fed directly to you. However, if you find that they are just cluttering up your inbox unread, there are some ways to manage your email newsletters more effectively.

Current Subscriptions

Going through and changing your address for a lot of newsletters is unwieldy at least. You may want to continue to associate them with a work email. There are several ways to tackle the existing subscriptions you have.

Rules and Filters

In Outlook and in Gmail, you can easily write rules to filter e-newsletters and skip the inbox and go straight to a folder. You can check the folders with unread messages at your leisure. However, if you find that you never actually read the emails because they skip your inbox, you have other options.

Use an RSS Feed Reader

RSS feed readers still exist and are useful for reading news headlines without having to subscribe to an email newsletter at all. You have one place, usually through a browser, to scan headlines without involving email at all. You can set your feed reader as your browser home page and just get into the habit of skimming your headlines. If your email newsletter subscription renders a readable page in a browser when you click "read in browser," there is a good chance you can add it to your feed reader.

If you are subscribing to a lot of your newsletters in Gmail, you might check out Meco. Meco creates a feed from your existing email newsletters. You can categorize them, and then instead of reading the newsletters in your Gmail, you go to the Meco site and log in to see a nice feed reader style layout. Meco also has an option to use Outlook but carefully read the terms and privacy policy to determine if you want to connect to your work email.

Future Subscriptions

If you don't mind changing the email you use to subscribe to a newsletter or when subscribing to a new newsletter, there are many options.

You can use a feed reader like Inoreader (requires the Pro plan at $5 a month). Other services like Kill the Newsletter will convert your email newsletters to RSS feed to be read with your reader of choice. Mailscribe creates a custom email for you to use for the purpose of receiving newsletters and then sign in and your newsletters will be organized and waiting for you.

Final Thoughts

There are a few products on the market that purport to help you get your inbox under control with paid plans such as Sanebox. Sanebox has a lot of options to help filter newsletters, unwanted email, email receipts, unsubscribe and more. The basic plan with one email account and two features ("snack") starts at $59 per year. Another multi-tool, Leave Me Alone, offers to turn your newsletters into digests (roll ups) as well as screen your inbox by controlling who is allowed to contact you, smart email blocking, priority senders, unsubscribes, and more. Ongoing plans start at $9 per month.

There are a lot of ways to combat inbox overload. First you have to decide what is causing it, finding a cure for the particular issue, and then you can start focusing on managing email communication without all the noise.

Make Email Less Dangerous

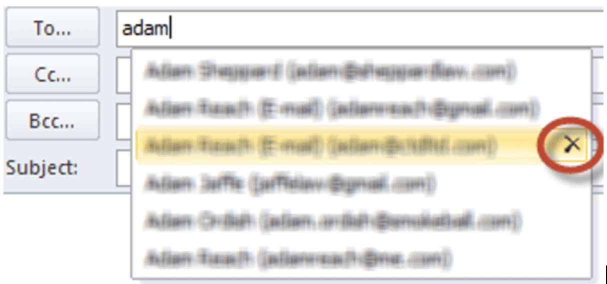
It is too easy to do and it happens all the time, most recently in a headline-making gaffe from Uber. You realize, too late, that you sent an email to the wrong recipient. In your personal life, this can be embarrassing. In a law firm it can result in inadvertent disclosure that no disclaimer can protect from, especially if the unintended recipient is not a lawyer. Law firms have made headlines for accidentally leaking client secrets to the Wall Street Journal, and for using "reply all" to a distribution list that included reporters. It can get worse, like in CRIT Corp/Peoplelink vs. Barns & Thornburg et al and Terraphase Engineering, Inc. v Arcadis, U.S., Inc, where errant emails were the cause of malpractice claims, counterclaims, and breach of fiduciary duty. Fortunately, there are quite a few ways to reduce these risks!

Turn off Autocomplete in Microsoft Outlook and Gmail

The auto-complete list is a feature which displays suggestions for names and email addresses as you begin to type them. These suggestions are possible matches from a list of names and email addresses from the email messages you have sent/received, not just those in your address book. By default, this feature is turned on in Outlook.

To turn *off* Auto-Complete List name suggestions in MS Outlook:

1. Click the FILE tab.
2. Click OPTIONS.
3. Click MAIL.
4. Under SEND MESSAGES, clear the USE AUTO-COMPLETE LIST TO SUGGEST NAMES WHEN TYPING IN THE TO, CC, AND BCC LINES check box.
5. For extra security, you can also click the button “Empty the Auto-Complete List”.



If you don’t want to turn off Auto-Complete at the least when you are typing someone’s name and see an old email address crop up along with a new one, or you only see the old one, click the “X” to the far right of their name/email address to remove just that email address from the auto-complete list.

In Gmail, there is no equivalent way to turn auto-complete off, but you can edit a contact’s information, essentially editing autocomplete function for that user:

1. Log into your Gmail account
2. Click the 3×3 grid in the upper right corner, and select CONTACTS (you might have to scroll or hit MORE first).
3. Click the contact you want to edit and select the pencil to the right of the name.
4. Click on the contact’s email address field. Once you click in the text box, an X icon shows to the right. You can either edit the address and click SAVE NOW or click the X icon to delete.
5. If you no longer want the contact record, you can click the three vertical dots to the right of the pencil icon and select DELETE.
6. Sign out of Gmail and log back in.

Delay Send or Undo Send

You can also buy some time for when you realize you may have hit “Send” in Outlook without carefully scrutinizing the recipients or you can “Undo Send” in Gmail. There are some options for your smartphones as well.

To Delay Send in MS Outlook:

1. Click FILE.
2. Click MANAGE RULES & ALERTS.
3. Click NEW RULE.
4. Under START FROM A BLANK RULE, select APPLY RULE ON MESSAGES I SEND. Hit NEXT.
5. Select conditions if you want to apply any. If you want it to apply to all messages you send, do not select any conditions. Hit NEXT. If you did not apply any conditions, hit YES when asked if you want it to apply to every message you send.
6. Check the box next to DEFER DELIVERY BY A NUMBER OF MINUTES. Click on the underlined section of text when that command appears in the box below, and specify how many minutes you want it to be held before sending. Hit OK, and hit NEXT.
7. Select any exceptions you want to apply. Hit NEXT.
8. Name the rule, and select any rule options you want to apply. The TURN ON THIS RULE box should be checked, if nothing else.
9. Hit FINISH.

Set Up Undo Send in Gmail:

1. Click the gear icon towards the upper right corner of your screen and select SETTINGS.
2. Select GENERAL (you’re probably automatically there).
3. Scroll until you see “Undo Send: Send cancellation period…” Use the drop-down box to set it to 30 seconds, the maximum amount of time.

To USE undo send in Gmail:

1. Send an email.
2. A window appears in the bottom left corner of your screen. It says “Message has been sent,” and gives two options – UNDO and VIEW MESSAGE. To undo the send, hit UNDO.

It is also very easy to inadvertently email the wrong person from your smartphone email app. The options are less robust but there are some ways to reduce the risk.

Add a Delay to Outgoing Email in Android Email App:

1. Open Email app
2. Click on the vertical ellipsis
3. Choose “settings”
4. Click “Delay Email Sending”
5. Check the box to delay email sending
6. Click Set Length of Delay
7. Choose between 3 and 30 seconds
8. Close

Now when you click to send an email a countdown timer will appear over the email. You can click cancel if you realize you are sending an email you didn’t check carefully.

Add a Delay to Outgoing Email in iPhone Gmail App

1. Once undo send is activated, it pops up on your mobile device in a similar fashion. Once you hit SEND, a black bar appears along the bottom of your screen. Just tap “UNDO” to recall the message. This option will be available for however long you select, up to 30 seconds.

Microsoft Outlook Add-ins

There are a number of third party tools for Microsoft Outlook that can help avoid sending an email to the wrong recipient.

ReplyToSome

From the website: “ReplyToSome is designed to prevent mistakes and absent-minded slips through three sets of features. The first is a user interface that displays email addresses in easy-to-read rows and allows users to quickly understand the “state of play” with respect to a given email. The second is a set of tools designed to help users automatically identify omitted or unintentionally added email addresses. These include our “Intruder Alert” tool which highlights any “outsider” address in what is supposed to be an internal message and our “Blackline” tool which allows users to compare the list of addresses in an email with previously used lists or distribution groups. The third set of features allows users to more easily create, modify, and use distribution lists, which can help simplify the process of gather addresses for multi-party communication.” The cost is $50 for the add-on is a one-time fee for a single user. Over 10 licenses can be negotiated.

Payne Group Outlook Send Assistant

From the website: “Outlook Send Assistant provides the extra layer of security needed before the send or reply all button is clicked and confidential or embarrassing information is released. It handles distribution lists, blind carbon copy notification handling, internal and external mail handling, and more. It is your “second chance” layer of defense against accidental disclosure. The administrator module called feature manager is available for enterprise clients that maintain annual maintenance. This tool allows you to configure many additional options to deploy to your organization.” The cost is $45 (once) per license. Over 20 licenses call for the enterprise version.

SendAware by TechHit

The Pro version prompts to confirm all recipients before you hit send. It also cautions you when there are multiple domains being responded to (internal and external), when there are new recipients in a message thread, and it can prompt you to encrypt messages based on certain criteria. It is completely configurable. The cost is $60 a year, and there is an enterprise version.

Keep Internal Communications Internal

Some of the more egregious missent emails are meant for internal recipients but sent externally instead. One way to reduce this factor is to consider using an alternative internal communication method, whether Slack, Microsoft Teams or a chat tool built into your practice management application like Rocket Matter’s Communicator. These tools will let you converse with your team but reduce the opportunity to inadvertently respond to an email where a client is cc’ed, or send an email to an outside party that was meant for an internal recipient. Plus, your inbox will be cleaner and it will be easier to manage client emails!

Conclusion

Inadvertently sending an email to the wrong person can be embarrassing or much worse. There is no magic solution to keep you from ever making another email mistake. Your best bet is to train yourself to pause, check the recipients, check for correct reply levels before hitting “send.” Consider not adding your recipient’s email address until AFTER you’ve done all this. It reduces the likelihood of you forgetting to run through the self-check, or of accidentally pressing send before you’re ready. Want to see some of these tools and techniques demonstrated? Watch the video “How To Prevent the “Whoops” Moment When Sending Email”.

Three Reasons Lawyers Use BCC And Why To Stop

Lawyers often use BCC (blind carbon copy) in email to keep clients informed, to make it easier to capture sent email in the client folder, and to send email to multiple recipients. However, there are better and less risky ways to meet these goals.

BCC To Keep Clients Informed

Many attorneys, for the ease of keeping a client informed of a matter, blind carbon copy (bcc) their clients on emails to opposing counsel. However, it is far better to forward the message to your client. Why?

In the days of letter writing lawyers often generated a copy of a letter sent to opposing counsel and mailed it as a heads up to their clients. In email, BCC would seem the electronic equivalent. However, this method of telling the client can have unintended consequences.

For example, what if the client who is bcc'd responds using "reply all?" In the Superior Court of Massachusetts, we have the Charm v. Kohn case as an example of what could go wrong. A lawyer bcc'd his client on correspondence and the client used the "reply all" function to respond to his attorney, divulging confidential information to all parties including opposing counsel. The question before the court was whether a client's own inadvertent disclosure of an otherwise privileged communication to adverse counsel was a waiver of the attorney-client privilege. While the court found that privilege was not waived, the opinion states: "They, and others, should take note: Reply all is risky. So is bcc. Further carelessness may compel a finding of waiver." Simply forwarding the email to keep the client informed is a better and safer course of action.

Interestingly, the New York State Bar Association issued Opinion 1076 (12/8/15) which, in digest, suggests: "[a] lawyer may blind copy a client on e-mail correspondence with opposing counsel, despite the objection of opposing counsel. Because a lawyer is the agent of the client, sending such a blind copy is not deceptive. However, there are practical reasons why the lawyer should consider forwarding the e-mail correspondence to the client rather than using 'bcc.'" The hypothetical in this opinion focused on whether the practice of Bcc'ing a client was deceptive under Rule 8.4(c), "conduct involving dishonesty, fraud, deceit or misrepresentation."

Another scenario is that you "reply all" to an email you receive from opposing counsel when they have bcc'd their client. Are you in violation of Rule 4.2, the "anti-contact" rule? In North Carolina attorneys should read Suzanne Lever's article from 2011, "You Can't Touch This – A Look at the Anti-Contact Rule," 2012 Formal Ethics Opinion 7, "Copying

Represented Persons on Electronic Communications," and Rule 4.2, "Communication with Person Represented by Counsel." NC 2012 FEO 7 states that "the fact that a lawyer copies his own client on an electronic communication does not, in and of itself, constitute implied consent to a 'reply to all' responsive electronic communication."

While there are some Microsoft Outlook add-ins that may help you maintain awareness of who you are responding to in an email, you may reply to an email from opposing counsel with a "reply" instead of "reply all." Then you can copy any other necessary and visible email addresses from the "CC" line from their email into the CC line for your outbound email to reduce the risk of running afoul of the "anti-contact" rule. If you recognize none of the other visible email addresses, or recognize the parties copied could be a client, reply to the opposing counsel only.

With regard to cc of an email to parties, the ABA issued Formal Opinion 503 on November 2, 2022, which explores communication and ABA Model Rule 4.2. This new opinion suggests: "Absent special circumstances, lawyers who copy their clients on emails or other forms of electronic communication to counsel representing another person in the matter (infers) consent to a 'reply all' response from the receiving counsel". Accordingly, the reply all communication would not violate Model Rule 4.2." Another recent opinion (Washington State Bar Association Advisory Opinion 202201) addressing the CC of clients in attorney email concludes, "counsel should establish at the outset a procedure for determining if and when counsel may 'reply all' to a represented party copied on the email. This will also avoid any incorrect assumption about implied consent."

If you have questions about replying all to an email where a represented person is or may be copied, or other questions about the NC Ethics Opinions and Rules as they apply to your practice, contact the North Carolina State Bar Ethics Hotline.

Bcc'ing Yourself on Sent Email

Many attorneys BCC themselves on email sent to clients so they can then go into their inbox and move the sent message to the proper client folder to keep all the correspondence in one place instead of looking in both the client folder and the "Sent" folder. But is there another way?

If your firm uses a document management system, like NetDocuments, consider looking at their NDMail add-on. It integrates with MS Outlook and Gmail and helps you instantly file emails, both incoming and sent messages, into the client folder with the documents.

If you are using a law practice management system (LPMS) you likely have a variety of ways to move emails into the client correspondence to store with the rest of the matter in the system. Some LPMS applications have Outlook and Gmail plugins to let you invoke a side panel and associate and copy a sent email with the client/matter. Some let you BCC a unique email address that emails to the matter correspondence folder. Others integrate directly with MS Outlook. Still more handle email from within the application, so instead of using Outlook or Gmail, you email from within the LPMS, and correspondence is automatically associated with the matter. If you are using a LPMS, ask the vendor what features can make sure both incoming and outbound client emails are easily managed and stored with the rest of the record.

Another method, if you are a MS Outlook user, is to file the sent email in a folder before you send it. When finished composing your email, either by creating a new email or replying to an existing one, click on the Options tab at the top of the email and choose "Save Sent Item To" in the "More Options" group. Then click "Other Folder" and choose the destination folder from your folder structure. If you have a lot of folders this may take some time, but not significantly more than combing your inbox for emails you Bcc'd to yourself and moving them to the proper client folder. For ease of use, add the "Save Sent Item To" option to your Quick Access toolbar by right clicking on it and you will be one step closer.

Another option for MS Outlook users is an add-on from TechHit called SimplyFile. It runs on current and older versions of Outlook. The Pro version costs $60 yearly per user, and it can be deployed and administered across a network for multiple users. SimplyFile uses artificial intelligence to identify which folder you might want to store an incoming or outbound email in with the click of a button. If you invoke SimplyFile for sent messages, whether you are replying to an email or sending a new one, once you click "Send" a dialog box appears. SimplyFile tries to identify the best folder match for the email, and if it doesn't get it right, you can just type the name of the folder. Then you can choose options like "Send and File," "Send, File and File Original," "Send and Save in Sent Items" or under "More Actions," choose "Send, File, and File Original Thread," "Send, File, File Original and Task it," and more.

Sending Email Blasts

If you are emailing to a lot of recipients, whether for a firm newsletter or to send an FYI to clients about changes to the law, you may use BCC to protect their confidentiality. If one client replies all and asks you a question regarding their matter or about potential representation, you may have created a confidentiality issue. A better way? Use tools designed to send blast emails that eliminate the option to reply all, make opt-out easy, and track opens and clicks.

If you are sending a newsletter or marketing email, tools like MailChimp have free tiers to get started for up to 2,000 subscribers. Mass mailing services also help you track your success, manage subscribers, and follow CAN-SPAM. The hard part about a newsletter is coming up with a compelling message that makes people want to open and read it. Legal news and legislation that impacts your clients, community and local information, comings and goings at the firm, your blog posts, resources, deadlines, consumer protection tips, and more are all content types that can help you craft a compelling newsletter. Determine how often you can send it out and be consistent. You can start with your list of current and former clients, contacts, and referrals, and make it easy for people to subscribe (and unsubscribe).

If you are not planning to start a formal newsletter, but need to email clients *en masse* occasionally, be aware that spammers use BCC to send mass emails. Because of that, if you don't break up your emails to send to 15-20 people at a time it is likely their spam filter will divert your email and they will never see it. For occasional emails to a lot of recipients, you can use tools like TinyLetter, which is free.

If the content you are sending to clients is sensitive, you can also use Microsoft Word's Mail Merge. Create your letter in Microsoft Word. Then collect the email addresses, names, and other variables in a spreadsheet. Use the Mail Merge Wizard (Mailings – Start Mail Merge – Step-By-Step Mail Merge Wizard) and choose "Email Messages" as the document type. Follow the steps to choose the spreadsheet with the email addresses and names. You can customize your message by using merge to address each recipient with their name and other information in the email. Then click "send." Each recipient will be mailed individually. Here are the basic instructions.

Conclusion

Lawyers use email every day, but it is not without inefficiencies, potential pitfalls, and problems. Think about how you may use BCC and consider your options to reduce risks and assert more control over inadvertent disclosure and privilege waiver, issues arising from the "no contact" rule and confidentiality and following CAN-SPAM and other similar laws.

For Further Reading

Sending Mass Emails: Tools, Tips, Pros and Cons - North Carolina Bar Association
Stop Emailing Attachments - North Carolina Bar Association
Silo Busting: Sharing Client Emails within the Firm - North Carolina Bar Association
Are There Alternatives to Email? - North Carolina Bar Association

Microsoft Outlook Hidden Gems - North Carolina Bar Association
Outlook Life Savers - North Carolina Bar Association
New Outlook June 2025 Feature Update - North Carolina Bar Association
What's To Like About the New Outlook? - North Carolina Bar Association
What To Expect from The New MS Outlook - North Carolina Bar Association
New(er) Collaboration Tools in MS Outlook/365 - North Carolina Bar Association
Gmail Tricks You Can Use - North Carolina Bar Association
What's New with Google's Gmail and Docs? - North Carolina Bar Association