

## Mailsafe Case Study - Accountants

Morris Owen – Swindon

IRIS Users

# MorrisOwen



### Background information

Morris Owen was founded in 1934 and is a six partner practice with offices in Swindon and Cirencester, with a total of forty five users. A wide range of services are offered by this Chartered Accountants practice who are also business advisers, independent financial advisers and chartered tax advisers.

IRIS's software is used for 'day to day' practice activity.

There are approximately 6000 emails per week (excluding SPAM, Out of Office Replies etc) that flow in and out of their Exchange 2007 server with Outlook 2007 for users.

Before installing and using Mailsafe, emails were copied and pasted to an Outlook client folder or saved to a Windows client folder. Copies of emails were copied around the office to keep people informed which took up Exchange Store space. Client folders in user Mailboxes were private and personal to only them and could not be easily shared.

What were the problems with their existing email system?

One partner was particularly concerned about the lack of an audit trail for emails because they could be edited or deleted without any trace being made. He wanted email compliance.

Another partner was concerned with the time that was lost trying to file and search for emails.

When staff were out of the office for any reason, and emails needed to be seen, then it was very difficult to know where the email had been filed. It was often a lengthy, time consuming process to search and find relevant emails in Outlook.

Emails were not integrated into IRIS.

Why was Mailsafe chosen?

Email filing practicality and it met email compliance requirements with a central email store.

For users it is a user friendly program and was compatible with their current programs i.e. Exchange, Outlook and IRIS.

What Mailsafe features do Morris Owen use?

All emails are automatically archived to a central store outside of Exchange so that there is a permanent record of all emails for the Practice. The central email store is accessible by users from a Mailsafe toolbar in Outlook for fast searching, finding and viewing. Users no longer need to save their emails to folders 'just in case' they might be needed in the future

Morris Owen use manual tagging of emails in the central store, using the six tagging fields that are available in Mailsafe. Across the practice an indexing standard is used so that searching for a Client's emails results in all the emails being shown for that were sent or received by all users.

A strong reliance is also placed on Mailsafe's text search facilities when searching for emails as well as 'Google style' searching within results.

What benefits has Morris Owen found by using Mailsafe?

No email is ever lost or mislaid and is compressed and encrypted so that the original email cannot be changed or deleted.

The automatic sharing of emails via tagging makes life a lot easier.

Email searches are much faster and easier.

Regarding time savings, with 6,000 emails per week the time saved by using Mailsafe is in the order of 25 hours per week across the practice which at an average charge out rate of £50 per hour equates to a potential annual benefit of £60,000 to the practice.

'The introduction of Mailsafe has given us a tool and has brought us two main benefits:

Firstly – the knowledge that every email has been captured without any reliance on individuals, essential if ever we need to recover or disclose.

Secondly – visibility and ease of searching across all communication for a particular client. The client now touches many different parts of the firm and having this complete picture, conveniently indexed with very little effort or time spent has given us a very quick payback period for the software.'

IAN SUMBLER - Partner



Techne-Comm Ltd, Albany House, Albany Road, Fleet, GU51 3PT 01252 622345

[www.Techne-Comm.co.uk](http://www.Techne-Comm.co.uk) and [www.Mail-safe.co.uk](http://www.Mail-safe.co.uk)