



Case Study: Project to Implement New Email Policy, Change in Behavior, and New System

Industry: Financial Services

Company: Fortune 1000 Financial Services Company

Services Provided: Project Management, Mentoring / Coaching, Records Management, Change Management

Challenge: The Client implemented a new email policy and system to establish an efficient structure to retain only the emails required by the business - employee feedback was negative. The challenge was to change the ways that employees used their email and to deal with the volumes of unnecessary older emails in personal files (.pst) and in an old email archive system.

Solution: Bluestone worked with the Client project manager to meet with each team, collect information regarding their email requirements and developed a structure that would fit the needs of the teams and provide communications that were concise and written with employee empathy. Bluestone also came up with an approach for the business to evaluate old emails, act as a liaison with business units to conduct this evaluation within a scheduled timeframe and apprise the leadership of process, issues or challenges. Bluestone quickly reviewed policies and provided a template to review emails and job aids to help the teams in one Division comply with the policy going forward.

Result: The Client Division was able to meet the overall Corporate time schedule and deliverables using this approach. The technique, template and job aids developed for the Division were disseminated as a “best practice” to the other Divisions for completing the project.

Value Delivered: The Client had a repeatable project that could be leveraged across the business to clean up obsolete e-mail that addressed both change management and compliance.

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