

COMMON MISTAKES TO AVOID WHEN BUILDING A LEGAL TEAM'S INTERNAL EMAIL PROCESS



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As you build your team's internal email process, it is important to ensure that the tools simplify work rather than add unnecessary complexity. The goal is to create a consistent, reliable process that supports efficient communication and task management across the team.

The following common mistakes can reduce the effectiveness of your workflow, create confusion, or introduce unnecessary risk. Reviewing and avoiding these pitfalls will help ensure that your new email process remains practical, organized, and sustainable.

1. Creating Too Many Folders

A folder should help you make faster decisions. If you create too many folders, you may spend more time deciding where an email belongs than deciding what to do with it.

Better approach: Organize your additional folders as subfolders under your five core folders when possible.

2. Filing Emails Instead of Making Decisions

Moving an email to a folder is not the same as handling it. If an email requires a response, a task, or a calendar appointment, it needs a next step.

Better approach: Only move an email to a folder that has a calendar time to handle it.

3. Keeping External Subject Lines

When forwarding an email from a non-team-member, remember to change the subject line to your team's format prior to forwarding to a team member.

4. Keeping Emails "Just in Case"

Saving too many emails makes it harder to find what matters. Not every email deserves a folder.

Better approach: Before saving an email, ask: "Will I need this for a decision, task, record, or reference?" If not, delete it.

5. Ignoring the Daily Review Habit

The organization system only works if you continue the daily review routine. Rules and folders support the habit, but they do not replace it.

Better approach: Continue your scheduled email reviews each day and stay within the one-hour daily limit.

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