

The Fast-Moving Email Management Market

Sub Title

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Various studies show that up to three-quarters of corporate intellectual property resides within email and messaging systems. Email management (EMM), (the monitoring, filtering, storage and management of corporate email and IMs) is a fast-moving, rapidly-developing market segment. For about \$40-\$80 per desktop, organizations are supporting their compliance and governance efforts while proactively preparing for the discovery process in any potential litigation.

There have been a flood of new EMM market entrants, acquisitions and product innovations in the past year. Driving the growth of this market are the huge increase in email volumes, their importance in regulatory compliance, corporate governance and litigation, and the new Federal Rules of Civil Procedure (FRCP) governing the legal discovery process and use of electronic information.

An overview of some of the leading and notable EMM software offerings follows:

AXS-One has been very active in the compliance support marketplace. Their email/IM archiving solution is policy-driven and provides a single interface to disparate corporate content systems. It also presents all information in context – simplifying the needs of companies subject to compliance and oversight regulations. The solution includes integrated functionality for secure, scalable e-mail (and IM) management including capture and extraction, storage, supervision, filtering and blocking, access, search and retrieval

The company reports more than 130 customer installations, ranging in size from almost 1,000 to 100,000 users. Its customers include: New York Life, Deutsche Bank, Countrywide Financial and Healthnet.

AXS-One delivers e-mail message archiving for a several email systems including Microsoft Exchange, Lotus Notes/Domino, Bloomberg Mail and SunOne Messaging. Using configurable options, schedule-based extraction from mail servers is based on time periods to capture messages, minimizing the need for additional support and network infrastructure, and minimizing impact on mail servers. The extraction of e-mail header information (To, From, Cc:, Bcc:, Time and Date, and Subject) is used for basic indexing and is also completed at that stage.

CA Message Manager (formerly Assentor Enterprise from iLumin) is a COTS (Commercial Off-the-Shelf) enterprise email and file system management and archiving solution. CA Message Manager offers a broad range of support for e-mail server platforms, (and offers in-house as well as a hosted solution), supporting MS Exchange, Lotus Notes, Novell GroupWise and other popular e-mail services, such as Bloomberg and Oracle Collaboration Suite. CA Message Manager includes a suite of products: CA Message Manager Archive, CA Message Manager Mailbox Management, CA Message Manager Discovery and CA Message Manager Supervision. Archive captures email and IMs and intelligently indexes the content and manages its retention period with integrated support for mass storage devices. Mailbox Management helps balance users needs for archived messages and IT's need to reduce storage volumes. Messages are automatically archived and stubbed (only a pointer to the entire message is indexed, saving storage space and search time) based on a robust policy manager. Legacy archives files can be migrated into the archive and made accessible for end-user searching. Discovery and Litigation Support creates a workflow solution around the litigation support process. It eliminates the need for IT department involvement to locate and retrieve email from a backup server, allowing legal teams search, retrieve, refine, and analyze content.

EMC is a leader in the marketplace with about 2,300 companies using its EMC EmailXtender family of products, an almost 50% increase over last year's reported installed base. Its largest customer has deployed over 55,000 seats of the software. Commenting on the architecture, Stewart Noyce, Senior Product Marketing Manager at EMC, states, "We've built around the platform of capture and ingestion of messages through the use of a binary format, although when retrieved, all messages are in their native format." The EmailXtender family includes: EmailXaminer, which provides e-mail content monitoring and supervision to assist in corporate e-mail governance and regulatory compliance; EmailXtender Archive Edition, which optimizes storage and improves server performance by migrating e-mail messages and attachments into a centralized message archive; EmailXtender User Cache, which provides a local cache to enhance the shortcut functionality of EmailXtender for IBM Lotus Notes/Domino and EmailXtender for Microsoft Exchange.

Headquartered in Toronto, Canada, **Fortiva** provides a hosted SaaS ("software as a service," which is commonly referred to as "on-demand") solution managed email archiving service for regulatory compliance and legal discovery. Eric Goodwin, recently taking over the CEO post at Fortiva draws a distinction between SaaS and traditional hosted systems, "SaaS implementations offer the economy of multi-tenant architecture, and in general tend to have tighter integration and ease of deployment." The pay-as-you-go service looks like it is locally installed to the end user. Fortiva's Archiving Suite offering is strictly an archive-only solution that automatically captures and indexes all internal and external messages for redundant offsite storage. Users access archived data within Outlook or a Web browser with guaranteed search performance. Fortiva also guarantees data privacy through its DoubleBlind Encryption™ technology, offering customers the data security and control of an in-house solution without having to manage the data.

MessageSolution offers a multi-platform solution and its EEA (Enterprise Email Archiving) Linux is the first email archiving solution launched to the market that native-supports the Linux operating system. MessageSolution reports over 100 customers using their software and their largest is a 30,000-user implementation at a university that is archiving 20GB-30GB per day. EEA Suite and the scaled down EEA Express are an archive-oriented set of functions that help organizations improve performance and scalability of email servers while providing secured access to archived messages. With permissions, an entire message archive can be searched. EEA StorageVault stores every important message and the data can be readily accessed and restored in case of failure on the client's primary email server.

"We have an explosion of content in the marketplace, and it's causing chaos in the enterprise," states T.M. Ravi, President and CEO of **Mimosa Systems**, which more than tripled its customer base in the past year to approximately 140. Uniquely, the company provides a live (real-time) content archiving solution to manage unstructured and semi-structured information, including email, documents, and other new data types for purposes of legal discovery, data recovery, disaster recovery and storage management. Mimosa's solution unifies archiving, data protection and disaster recovery. They are primarily focused on the Microsoft market, offering their NearPoint solution to enhance the use of Microsoft Exchange. Ravi adds, "Our customers can make higher quality decisions with fingertip access to all related content they are looking for, not just a standalone silo or two."

Enterprise Content Management (ECM) giant **Open Text**, headquartered in Waterloo, Canada, acquired another leading ECM firm, Hummingbird, Ltd. (also a Canadian company) last year. Open Text offers its LiveLink ECM product with a suite of modules for Email Archiving, Management and Monitoring for either MS Exchange or Lotus Notes. The new FRCP have been a key factor in the growth in email management and archiving installations, says Open Text Executive Vice President Bill Forquer. But he sees some advantages in the new rules, "Certainly, there are new risks and new challenges but the amendments add clarity. They create a sense of urgency and a mandate for companies to have good information management practices in their organizations." Open Text and partner TCDI, a market leader in electronic discovery and litigation support, recently introduced a combined software solution called Livelink ECM – Litigation Management, which helps companies reduce e-discovery costs and resource demands by providing a unified system that manages discovery in-house as litigation arises. It also helps to enforce policies that set out which content is kept or destroyed in accordance with regulations and the company's best interests.

Sherpa Software concentrates on email management, search and archiving to support governance policy enforcement and compliance efforts. Sherpa has about 400 organizations using its Mail Attender, Archive Attender and Discovery Attender suite of products, according to Sherpa vice president Kevin Ogradnik. Mail Attender Enterprise is used to manage MS Exchange mailboxes, public folders and PST files on servers and desktops from one central console. It also helps in policy administration, content management, enforcing records retention rules and searches. Archive Attender automatically archives messages and attachments to an external storage device from Exchange mailboxes, the journal mailbox and PST files to support compliance requirements and storage management needs. The e-discovery process is facilitated with Discovery Attender, which automates search, viewing and retrieval of email and other types of electronic information. It performs real-time content searches that quickly locate information in Exchange mailboxes, PST files and common storage files.

Although its competitors would claim that it uses older technologies that can be limiting, **Symantec** is the market leader in the EMM space, with almost 5,000 user organizations and 8 million mailboxes installed, according to Art Gilliland, Senior Director of Product Marketing. "Several of our largest user have over 100,000 mailboxes implemented," Gilliland states. Its Enterprise Vault product was acquired in the 2005 Veritas acquisition, on the heels of Veritas' acquisition of U.K.-based KVS, which developed the successful Enterprise Vault product. Enterprise Vault 7.0 provides an intelligent archiving platform that stores, manages and enables discovery of corporate data from email systems, file server environments, instant messaging platforms and content management and collaboration systems. Enterprise Vault uses intelligent classification engines and automatic mailbox management, which frees users from quota frustrations without compromising MS Exchange performance and reliability. It also assists in PST file backup, security and storage management.

Zantaz is among the market leaders in EMM, email archiving and EDD (Electronic Data Discovery). As a corporation, they concentrate their efforts on content archiving and electronic discovery. Products include the Digital Safe product family for compliance archiving and the export of high volumes of data into their EDD solution; EAS (Enterprise Archive Solution) for EMM, message retention and e-discovery export; First Archive, a hosted or onsite solution for mailbox management, retention and litigation readiness; First Discovery, an EDD solution; and, Intospect for online review, document production management and litigation readiness. They also offer a data restoration service.

ZipLip, another leader in the EMM market, was founded in 1999 and offers solutions for email archiving, compliance, secure email and secure file collaboration. They call their platform "future-proof" because it uses the newest GRID architecture. ZipLip's Unified Email Archival Suite (ZL UA) is web-based server software for email archiving and management for MS Exchange, Lotus Notes and most other email systems. Features of ZL UA include: Attorney-Client Privilege Flagging & Privilege Logs which ensures that sensitive exchanges between employees and legal counsel will not be turned over to external auditors; Disclaimer-Auto Exclusion, which prevents language in disclaimers from being flagged if they contain sensitive wording such as "stock;" One-click Search & Export to reduce review and audit process times; Pre-Review & Gateway Capture, for Outbound Content Compliance(OCC), this product stops violations before they take place by scanning lexicon; Lexicon-based Mail Auto-Categorization, which categorizes emails according to topic, genre or category; Message Attachment Stubbing, Retention Policy Management, Archive Compression, Advanced search and several other features.

ZyLab has been around since 1983, and began with roots in the full-text search market, which they leverage in their EMM solution (as a part of their ECM platform). ZyLab's Information Access Platform has an XML-based underpinning and can scale larger and search better and faster than EMM solutions that use a database architecture, according the ZyLab CEO Johannes Scholtes. "EMM solutions using a relational database on the back-end is going to be by definition slow in the search process, because of the limitations of the architecture," Scholtes states. ZyLab's Correspondence Management module allows MS Outlook users to register all incoming and outgoing documents (including email, mail and faxes and is connected to ZylIMAGE, their XML-based Information Access Platform. E-mail that is received or sent can be registered automatically by using the Archiving Plug-in for Outlook. The archive option in this plug-in sends the e-mail to the archive and enters a registration in the Correspondence Management Module. ZyLab also offers other products integrated to its Information Access Platform including its Text Mining Suite, Bates Stamping (for legal documents), and XML wrapper and Audit Trail monitor.

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In sum, the EMM market is certainly a moving target with several types of technology approaches. Clearly, users need a solution with the governance and legal pressures they face and making the best choice could not only save headaches, but also millions of dollars in legal fees, fines and potential legal settlements.