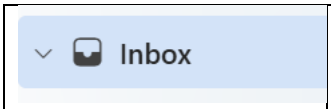
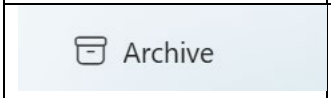
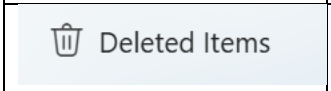
The Fine Print: Best Practices for E-Mail Management

Keep Important E-mails in Approved Systems, Not Your Inbox. E-mail applications such as Outlook are designed to send, receive, and organize messages, but are not intended for long-term storage. Retaining e-mails in Outlook for extended periods of time expands the volume of data subject to potential legal discovery, exposes more information to potential cybersecurity threats, limits organizational knowledge-sharing when critical information remains isolated in individual inboxes, and slows overall efficiency for retrieving information. As outlined below, Wine Institute's Document and Data Retention Policy addresses the amount of time the e-mails you send or receive are kept in Outlook:

 2 years	• When you receive an e-mail, it will remain in your main Inbox—or any relevant sub-folders—for up to **two years.** During this period, you should determine whether the e-mail should be retained outside of Outlook for record-keeping purposes. If it does, please follow technical guidance for saving the e-mail to SharePoint.
 1 Year	• After two years in your Inbox, e-mails are automatically moved to the Archive box located within Outlook. E-mails are stored in your Archive for **one year** before being automatically deleted.
 30 Days	• We encourage you to regularly review your Inbox and delete e-mails that are no longer needed, such as meeting acceptances, newsletters, event confirmations, or system-generated notifications (e.g., password re-sets). Deleted e-mails remain recoverable for **30 days**, after which they are permanently removed.

Important Note: If you ever receive a litigation hold notice from the Legal Department, do NOT *delete*, *modify*, or *alter* any e-mails that are subject to the hold. Comply with the hold until you receive further instructions from the Legal Department.

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Keep What Matters. Let the Rest Go. E-mails that support compliance, document decisions, or affect future operations may need to be retained beyond Wine Institute's e-mail retention period, and must be saved in an approved system, such as SharePoint. E-mails that do not meet these criteria have no long-term business value and should not be retained beyond Wine Institute's retention period. Do not keep e-mails solely to store information that has no lasting value. Use good judgment and consider the questions below.

Organizational-Critical E-Mails	
☐ **Compliance**	• Does the e-mail contain audit-, legal-, or contract-related information? Pay attention to e-mails involving contracts, intellectual property, financial decisions, or compliance matters. Ensure critical e-mails and attachments are saved in an approved location as specified in Wine Institute's Document and Data Retention Policy.
☐ **Approvals, Decisions, and Obligations**	• Does the e-mail document an official decision, approval, or obligation? If an e-mail contains an official decision, approval, or obligation that is not captured in another record, then retain the e-mail.
☐ **Operations**	• Does the e-mail contain information needed for daily work? Keep e-mails that provide procedures or guidance essential for performing routine tasks. E-mails that are temporary, documented elsewhere (e.g., in a policy or system), or no longer relevant should not be retained. A helpful test: would a new employee need this e-mail to maintain continuity or understand the work?

Tips for How to Identify Organizational-Critical E-Mails

- Date: Organize e-mails by date to track the sequence of important communications and understand the timeline of decisions or actions. Consider saving the "top level" communication of an entire thread.
- Sender: Organize e-mails by sender to easily locate correspondence from key stakeholders, vendors, or internal departments.
- Key Terms: Search for relevant terms such as "approval," "decision," "confidential," "legal," "contract," or "audit" to quickly find e-mails that may contain critical information.

- Advanced Searches: In the search bar, you can click the downward arrow to open advanced search options to focus searches on only emails with certain individuals, attachments, subjects, urgency, and much more.
- Ask IT: Request assistance from the IT Department if you need help locating, retrieving, or organizing important e-mails efficiently.

E-Mails With No Long-Term Value	
☐ **Announcements and Updates**	• Does the e-mail provide information for awareness only with no required action, decision, or obligation? E-mails that are purely informational—such as announcements, routine updates, or notifications—do not create a lasting record of decisions or obligations. Keeping these e-mails beyond the retention period is unnecessary, especially as the information may be outdated or irrelevant.
☐ **Drafts and Brainstorming**	• Does the e-mail contain drafts, brainstorming notes, or preliminary ideas? Once the concepts or projects are finalized or stored in a more permanent format, these e-mails are of little long-term value.
☐ **Newsletters**	• Is the e-mail an external newsletter? Newsletters usually provide short-term information that loses value quickly or include content that can be found elsewhere in the future.
☐ **Scheduling and Logistics**	• Does the e-mail contain information regarding scheduling and/or travel? Routine correspondence related to scheduling or travel lacks long-term value.