CHECKLIST WHEN CHANGING EMAIL SERVICES
Tips from Practice 2.0, the State Bar’s practice management program

First, obtain a new email address.

There are many options for email, including but not limited to G-Suite (Google for Business), Office 365 (Outlook) and services from which you may purchase a domain name who will also host your email, such as GoDaddy. We do not recommend free email services as they are not sufficiently secure or confidential.

Next, arrange to forward email sent to your now-former email address to your new email address.

Then, **within the first 24 – 48 hours**, notify the following of your new email address:

**Professional**

- State Bar(s)
- Federal Bar(s)
- Local or affinity Bars
- Clients
- Opposing counsel
- All courts in which you practice or are admitted to practice
  - Allied court services, including court reporters and court interpreters

No later than the **next two business days**, notify the following of your new email address:

- Vendors/business contacts
  - Credit card companies
  - Bank(s)
  - Companies that provide bills/invoices to you by email
  - Companies from whom you lease equipment
    - Phone
    - Copier
    - Office equipment
    - Office furniture
  - Landlord, property management company, mortgage company
- Insurance carriers
  - Professional liability
  - Workers comp
  - Premises (fire, casualty, etc.)
- Software, Saas providers
- IT support company
- Utilities (office-related)
- Maintenance company
- Alarm company
- Brokers, retirement accounts
You will also need to change your email address as promptly as possible on:

- Website
- Advertisements
- Business cards
- Letterhead stationery
- Social media
- State Bar Online Community, listservs and other professional forums

Personal

If you use your professional email for personal use as well, you will also need to notify:

- Credit card companies
- Utilities
  - Electric, phone, gas, trash
- Service providers
- Landlord/mortgage company
- Banks
- Any company that bills you electronically
- Insurance company
  - Personal, auto, home
- Social media
- Loyalty programs, discount programs
- Newspapers/magazines/subscriptions
- Security (home alarm) company
- Your social network

Also:

This is the perfect opportunity to clean up your email.

- Delete old emails
- Unsubscribe from advertising/targeted marketing emails you want to discontinue
- Move client information into paper or electronic client files and out of email
  - This is a perfect time to consider moving from paper to paperless if you haven’t already done so.
    - Contact Practice 2.0, 602-340-7332, for a consultation about email management.

Need more help with cloud computing, cybersecurity, law office/law practice management or other law-related technology? Practice 2.0 has additional resources as does AZCLE.