

# Pinnacle Law Group LLP

**Law firm creates searchable archive of case documents, letters, and faxes with Adobe Acrobat and Acrobat Messenger**

## PROFILE

- Law firm with practices in real estate transactions and related matters, and complex civil litigation
- Employees: 15
- Headquarters: San Francisco, California
- [www.pinnaclelawgroup.com](http://www.pinnaclelawgroup.com)

## BENEFITS SUMMARY

- Acrobat Messenger enables Pinnacle to conveniently convert paper documents to searchable Adobe PDF files that look exactly like the originals.
- Pinnacle uses Adobe Acrobat to easily convert documents to Adobe PDF files to comply with federal and state court requirements for electronic filing.
- Forms features in Acrobat software speed the completion and submission of federal and state court materials in Adobe PDF.
- By e-mailing Adobe PDF files to clients and the courts, Pinnacle saves \$10,000 a year in labor, courier, and fax costs.
- Adobe PDF meets lawyers' needs because it maintains exact fidelity with original documents, including signatures.
- The ability to search Adobe PDF files enables Pinnacle to quickly identify conflicts of interest, a task that previously took hours or days.
- Attorneys can save Adobe PDF files on CD-ROM and bring them to court for evidence.
- File clerks use Acrobat Messenger to e-mail Adobe PDF files of postal mail to employees working off-site.

Pinnacle Law Group LLP in San Francisco revolutionized how it handles case-related documents, letters, and faxes with a searchable document archive based on Adobe Acrobat software, Acrobat Messenger software, and a Worldox electronic document management system (EDMS). For the firm, the ability to efficiently manage client files and quickly review and retrieve information is critical. The Adobe technologies, which were recommended to the firm by Adobe integrator Baker+Cadence Solutions, aid Pinnacle in streamlining costly and administration-intensive tasks.

With a staff of 15 lawyers, paralegals, and administrative assistants, Pinnacle specializes in real estate transactions and related matters, and complex civil litigation. Like most law firms, Pinnacle invested an enormous amount of time and resources in managing volumes of paper; yet paper fell short of meeting attorneys' needs. For example, documents that arrived by postal mail or fax, such as lease agreements and credit checks, could not be accessed by attorneys working off-site. And attorneys who wanted to bring supporting materials to court had to carry multiple binders, often with thousands of pages, which were nearly impossible to search thoroughly in limited time.

## Complete, searchable archive

Pinnacle overcomes these challenges by converting documents—Microsoft Office files, faxes, postal mail—to Adobe PDF (Portable Document

Format). Each night, the Worldox EDMS indexes new documents created that day. "Adobe PDF is great for archiving legal documents because it maintains exact fidelity with original documents, including signatures," says Jason Heard, firm administrator at Pinnacle. And unlike the TIFF files used by some firms, Adobe PDF files can include both images and searchable text in one compact file.

Searchable files save hours and days of work for Pinnacle. If attorneys want everything relating to a waiver of subrogation for a project, for example, paralegals can search the archive and generate a list of related documents in ten seconds. "Paging through documents to identify conflicts of interest previously took days," says Heard. "With searchable Adobe PDF files, it takes seconds—and we don't run the risk of overlooking something."

## Paper-to-digital link

When the firm receives paper documents, such as faxed client lease agreements and credit checks, file clerks simply scan them at a centrally located Acrobat Messenger workstation shared by staff company-wide. Acrobat Messenger instantly converts the documents to Adobe PDF files and then stores them in the archive, e-mails them, or faxes them. "Acrobat Messenger is the paper-to-digital link in our electronic workflow, enabling us to convert upward of 1,000 paper documents weekly to Adobe PDF," says Heard.

*“By converting documents to Adobe PDF with Adobe Acrobat and Acrobat Messenger, we enable all of our attorneys to search for and access relevant files from any location.”*

*Jason Heard  
Firm administrator  
Pinnacle Law Group LLP*

Once archived, Adobe PDF files can be printed or saved on CD-ROM. When attorneys go to court, they copy the needed Adobe PDF files to a CD-ROM for their laptops. If a particular reference is needed, they can find it in seconds.

#### **Facilitating off-site work**

The benefits of Adobe PDF extend beyond the courtroom to off-site work. Previously, lawyers who worked off-site had their mail remailed or faxed, creating delays. Now clerks open the mail and use the Acrobat Messenger station to convert the correspondence to Adobe PDF files for delivery by e-mail. “With Acrobat Messenger, attorneys receive their office mail the same day, and can search their correspondence and add it to our central archive,” says Heard.

#### **E-filing of case documents**

Whereas Pinnacle uses Acrobat Messenger for scanning paper documents, it uses Adobe Acrobat software to fill in and save federal and state court forms in Adobe PDF and create new Adobe PDF documents from briefs authored in Word or WordPerfect. “Filing case documents in Adobe PDF enables us to file in seconds, avoiding mail delays and courier costs,” says Heard. “And interested parties can access filed documents immediately instead of waiting for requests to be processed and paying for pages.”

Pinnacle plans to use the digital signature feature in Adobe Acrobat to streamline the process of obtaining signatures on case documents. Presently, if documents to be filed need signatures, Pinnacle prints the Adobe PDF files, has the required parties sign, and uses Acrobat

Messenger to generate a new Adobe PDF file with signatures. The built-in digital signature functionality in Acrobat 5.0 software will eliminate the need to print documents.

#### **Quick ROI**

Pinnacle saves more than \$10,000 a year in courier charges, fax costs, and administrative time thanks to Acrobat Messenger. E-mailing a 60-page document involves no incremental costs, compared to \$75 for a courier or \$10 for a fax. And Heard estimates the firm will save about 180 hours a year in staff time by eliminating the need to manually search for documents and fax materials. “Acrobat Messenger will pay for itself in less than a year,” he says. “The Acrobat Messenger station can be run by anyone. It’s just scan and go.”

Yet the hard-cost savings are dwarfed by the intangible benefits, such as being better prepared for cases. “In the past, the large volume of paper made it difficult to find information—and impossible for attorneys in remote locations,” says Heard. “By converting documents to Adobe PDF with Adobe Acrobat and Acrobat Messenger, we enable all of our attorneys to search for and access relevant files from any location.”

#### **TOOLBOX**

Adobe Acrobat  
Adobe Acrobat Messenger  
Microsoft Office  
Worldox EDMS

Fujitsu 3092 DC scanner  
PCs

