

## About the Authors



### About Daniel J. Siegel

Attorney Daniel J. Siegel has always combined the practice of law with his passion for technology. In the late 1980s, when many law firms were still using electric typewriters, Dan convinced his partners to install a computer network as well as case management software. As the use of law office technology became more common, Dan discovered other products that increased his productivity and his effectiveness as a litigator. Among the products Dan discovered were Adobe® Acrobat® and LexisNexis CaseMap, TextMap, and TimeMap. Dan became

known as an advanced Acrobat user and has written numerous articles and presented dozens of seminars about the product, with attendees regularly commenting about how little they really knew about it.

In 2005, after being a partner at two prominent Philadelphia personal injury and mass tort firms for more than 20 years, Dan decided to be his own boss. Instead of just opening a law firm, he opened a law firm (the Law Offices of Daniel J. Siegel, LLC) and a technology consulting firm (Integrated Technology Services, LLC), with both businesses located in suburban Philadelphia.

Unlike traditional legal consulting firms, Integrated Technology Services, LLC (ITS; <http://www.techlawyergy.com>) provides lawyer- and paralegal-focused guidance to lawyers throughout the country, with the goal of helping clients improve their workflow by using technology. Dan, Pam, and their staff continue to train lawyers and others how to use Acrobat and numerous other products; they also provide case-specific consulting, helping clients get even more out of the products. ITS also sells and supports Acrobat, as well as case management, document management, litigation analysis, and trial presentation products, helping firms with all aspects of practice management, ranging from becoming paperless to trying a complex case before a jury. Clients regularly compliment Dan and his staff for their ability to train them, for their jargon-free approach to technology, and for their advice about how to improve case analysis and present their cases most effectively.

Dan's law firm (<http://www.danieljsiegel.com>) primarily works with and represents other attorneys, assisting them with appeals and complex litigation, as well as providing ethical guidance. The firm also represents injured workers in

workers' compensation and Social Security disability claims, and continues to handle a wide range of personal injury matters. Dan is the author of ten other books, including *The Ultimate Guide to LexisNexis CaseMap* (the second edition of his book, *The Lawyer's Guide to LexisNexis CaseMap*); *How to Do More in Less Time: The Complete Guide to Increasing Your Productivity and Improving Your Bottom Line*; *Checklists for Lawyers* (which he coauthored with Pam Myers); *Android Apps in One Hour for Lawyers*; *Changing Law Firms: Ethical Guidance for Pennsylvania Law Firms and Attorneys* (first and second editions); and *Pennsylvania Workers' Compensation Law: The Basics—A Primer for Lawyers, Workers, Medical Providers, Insurance Professionals & Others* (now in its third edition).

Dan is a graduate of Temple University School of Law and Franklin and Marshall College, and serves as a Commissioner in Haverford Township, Pennsylvania. You can reach Dan by email at [dan@techlawyergy.com](mailto:dan@techlawyergy.com).



### **About Pamela A. Myers**

Pamela A. Myers is Office Administrator for Integrated Technology Services, LLC (ITS; <http://www.techlawyergy.com>) and the Office Administrator, Paralegal, and client liaison for the Law Offices of Daniel J. Siegel, LLC (<http://www.danieljsiegel.com>).

With more than 20 years of experience in the legal field, Ms. Myers is known for her technological acumen (Dan says she is the most “tech savvy” person he has ever worked with), her attention to detail, her ability to anticipate an attorney’s needs, and her dedication to obtaining the best results for clients.

Her genuine enjoyment of technology and what it has to offer helps her to convey to others not only how to use technology but also why they should use and embrace it. Ms. Myers’ obsessive use of checklists, and lists in general, was one of the reasons she coauthored *Checklists for Lawyers* with Dan, and her use of Acrobat contributes to her success.

Ms. Myers has worked as a paralegal since 1996 representing both plaintiffs and defendants. While employed as a paralegal at a large, nationally known firm, she also served as the paralegal coordinator for her practice group, supervising and training the group’s paralegals. Ms. Myers received her bachelor’s degree, with honors, from West Chester University. After working for five years in business management, she decided to pursue paralegal studies at the PJA School, where she graduated at the top of her class. Her professional activities have included serving on the Board of Directors of the Philadelphia Association of Paralegals, as its Second Vice President, and also as Editor-in-Chief of its newsletter.

You can reach Ms. Myers at [pmyers@techlawyergy.com](mailto:pmyers@techlawyergy.com).

## Our Story

When we began working together, Adobe Acrobat was a good program but not an essential one. Adobe had not yet introduced its legal-specific features, its ability to review and search documents was good but needed improvement, and our office was still primarily paper-driven. But handling paper was cumbersome and inefficient. Fortunately, in the mid-2000s lawyers were beginning to embrace paperless technology. We quickly jumped on the bandwagon.

Our decision was an excellent one, because our practice, primarily class actions and mass torts, was also changing. Virtually all discovery was electronic. In addition, we began obtaining our clients' medical records electronically, and reading static images made no sense. When we learned about using optical character recognition (OCR), the process by which Acrobat transforms the scanned electronic images into searchable (and therefore highly usable) text, we could search for keywords and find relevant information quickly. From there, we learned how to create indices and search across multiple documents, and then how to use them to prepare for depositions, motions, and other events, all with Adobe Acrobat.

In addition, discovery was entirely electronic, primarily in image format. Although we used e-discovery software for the millions of pages of images we reviewed, when we culled the documents into what we called "hot docs," we discovered the importance of being able to annotate them using keywords and to highlight information in the documents. Then we began using LexisNexis Case-Map and discovered how other programs (beyond Word and Outlook) could dramatically improve our preparation, particularly in conjunction with Acrobat.

But in 2005, Dan left the firm, and Pam remained as the paralegal overseeing e-discovery. Dan opened a solo firm focusing on workers' compensation, personal injury, and appellate practice, often assisting other attorneys. Dan's practice was virtually paperless, allowing him to remain a solo. He also opened a technology consulting firm, which helped lawyers and their firms improve their workflow with technology. Against that backdrop, Dan honed his tech skills and used Acrobat extensively. When combined with his case management software, the use of Acrobat allowed him to accomplish more work in less time.

From 2005 until 2012, Dan knew that something, actually someone, was missing from his workflow—Pam—and she joined the firm (and the consulting firm), filling in the workflow blank. Pam also assisted Dan with continuing legal education programs, particularly programs about the paperless office and Adobe Acrobat. The programs were consistently highly rated, with attendees often commenting that they learned more in the Acrobat course than in any other, albeit without learning any substantive law. From there, Pam and Dan collaborated on the book *Checklists for Lawyers*, but Dan's passion was to write this book. The result, with Pam as coauthor, is before you.

This book also demonstrates the importance of learning Acrobat (and virtually all software) by discussing it with others. We work together, learning from each other by discussing new features and new approaches as we use the software.

We hope you will learn as much as we have. We also welcome suggestions for how to improve the book, and we look forward to your feedback. Now, it's time to jump in and learn, or learn more, about Adobe Acrobat.