

# Tax Lawyer Richard Sam Lehman publishes third article in a series about technology & the tax law practice

*Experienced tax lawyer reviews the advancements of technology for the tax practice, and how it is being utilized to enhance the client experience.*

BOCA RATON, FLORIDA, UNITED STATES, November 7, 2018 /EINPresswire.com/ -- In this third article in a series, noted tax attorney [Richard Lehman](#) discusses the advancements and impact of technology upon the tax law practice, and how it is being utilized to enhance the client experience in terms of satisfaction and customer service. As technology reshapes all of modern personal and professional life, the legal profession is no exception. The complete articles will be published on the blog of Richard Lehman at <https://richardlehmanblog.blogspot.com/>

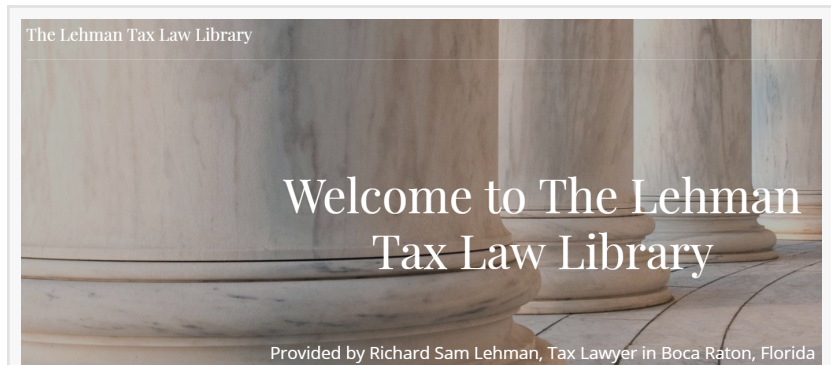
Technology is advancing, and the legal profession must keep up with these technological and societal changes. Many of us still remember when they first saw a personal computer, when cell phones became widely available, and when cell phones turned into smart phones that have become indispensable for many.

Incorporating technology into a tax law practice can make the practice more efficient and increase client satisfaction. In fact, technology may enable the practitioner to exceed client expectations. Here are a few, simple-to-implement options.

## Phone Systems

Phone systems have advanced greatly. A wealth of call forwarding technologies enable clients to call a central number to reach an attorney anywhere. Skype enables you to conduct video conference calls during which you can share a screen and exchange documents.

But with phone forwarding, you may even have a remote answering such as Ruby Receptionists ([www.callruby.com](http://www.callruby.com)), which then takes a message or forwards the call to a specified phone number. Other services with great flexibility include Ring Central ([www.ringcentral.com](http://www.ringcentral.com)), Ooma



The Lehman Tax Law Library Website



Richard S. Lehman, U.S. Tax Attorney

([www.ooma.com](http://www.ooma.com)) and Jive ([www.jive.com](http://www.jive.com)).

Suddenly a physical office or geographical distance are less important. It has become almost normal for clients to work with law firms at a greater distance from their home or business location. Having an office close to your clients (or close to the courthouse) is suddenly not as critical.

Mr. Lehman notes that this also benefits clients, as they may decide to hire an attorney whose office is not nearby. It affords clients access to much greater legal talent and improved access to quality representation than was once available to them in smaller towns/markets.

What used to be an in-person consultation can now be done by email or a video conference. Since the number of in-person meetings is reduced, the cost to clients is reduced as well.

### Virtual Meetings

Getting together for face-to-face meetings with clients can sometimes be difficult, especially when it includes travel. Skype ([www.skype.com](http://www.skype.com)) and EZ Talks ([www.eztalks.com](http://www.eztalks.com)), [www.GoToMeeting.com](http://www.GoToMeeting.com) and other video systems allow you to offer the

experience of a live meeting, which can be much more productive and stimulating than a simple phone call, since human beings communicate to large extent non-verbally, through gestures, facial expressions, etc. Numerous Web-conferencing tools provide such visual and human elements of a live meeting. They allow attendees to communicate, collaborate on documents and even give presentations in real time.

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As technology is advancing, the legal profession is not exempt. Incorporating technology into a tax law practice can make the practice more efficient and increase client satisfaction.”  
*Richard Sam Lehman, Tax Lawyer in Florida*

In fact, there are free (or almost free) services with a lot of functionality that are useful for sharing and discussing on-screen documents, giving a presentation, recording and chat capabilities.

### Client Portals

Online Client Portals are an option especially for a high-volume practice such as bankruptcy or immigration law.

Instead of answering innumerable phone calls with questions such as “What is the status of my

The image shows a YouTube video player and a website profile for Richard S. Lehman, U.S. Tax Attorney. The video player displays the title "New IRS Amnesty, FATCA & FFI Reporting" and the content "The I.R.S. New Amnesty Program Foreign Account Tax Compliance Act (FATCA) Foreign Financial Institutions (FFI's) Report On Americans". The video is by Richard S. Lehman, Esq., Tax Attorney, with the website www.LehmanTaxLaw.com. The website profile includes a search bar, a "Firm Profile" section, and a navigation menu with links to Firm Profile, Attorney Profile, Areas of Practice, Tax Law Articles, Law Blog, Video Library, and Contact Us. The website also features a quote from Judge Learned Hand: "There is nothing sinister in so arranging one's affairs as to keep taxes as low as possible. Everyone does so, rich or poor; and all do right. Nobody owes any public duty to pay more than the law demands; taxes are forced exactions, not voluntary contributions." - Judge Learned Hand. The website also mentions "RESOLVING THE TOUGHEST, MOST SOPHISTICATED TAX CASES" and "LEHMAN TAX LAW" by RICHARD S. LEHMAN, Esq. • ATTORNEY AT LAW.

case?”, the firm offers access to a Portal where clients can see their exact case status in real time. In fact, password-protected portions of a law firm’s website may be a more secure alternative to email. Clients can access their case information day or night, comment on drafts and get updates on court dates. Examples include Practice Panther ([www.practicepanther.com](http://www.practicepanther.com)) and One Hub ([www.onehub.com](http://www.onehub.com)).

Still somewhat expensive due to the cost and complexity of implementation, client portals will undoubtedly proliferate further as the technology matures.

### Social Media

Whether you like it or not, Social Media has become inescapable. Review websites like Yelp! or Avvo list Attorneys regardless and allow anybody to post reviews and comments about one’s practice. Further, Facebook creates “inofficial” Facebook pages for professionals, which in effect may force them to set up actual Facebook pages and join their platform. In many cases, the best option for the legal practitioner may be to embrace Social Media and claim the profile to use and control it to their advantage.

### Google Maps - Locations

In past, even small problems like “I cannot find your office” could interrupt a client relationship. No more. Today you can put “Directions” on your website to ensure that all clients can find your office easily when they have to. Google Maps can be customized for clients, and also shows the way to related locations to one’s Practice (i.e. Courthouse, Government Offices, etc.). Google Streetview also can show clients what your office building looks like from the outside.

### Case Reminders

Everybody is busy. We all receive too many emails. Thus, many messages get lost in the shuffle. Providing communications or updates via email, text message, or voicemail can remind clients of upcoming appointments, deadlines, court dates, etc.

### Sharing Information with Clients

Here at our law firm, at the commencement of services, we fully discuss communication preferences with clients. This includes discussing methods for exchanging confidential information and their preferences for receiving other, general communications.

In fact, proactive communications with clients may be an effective marketing tool, such as an alert to a client about regulatory actions that are about to affect their business.

To be continued. - The complete articles will be published on the blog of Richard Lehman at <https://richardlehmanblog.blogspot.com/>

\*NOTE: The inclusion of a technology or app in this article does not mean an endorsement or approval. The listed technologies are just for illustrative purposes. None of these particular technologies are endorsed or recommended by this author.



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About [Richard Sam Lehman](#)

[Richard S. Lehman](#) has established a sophisticated private practice focusing on tax law. His background, education, and experience has distinguished him in this complex field. A published author and noted speaker, Mr. Lehman has carved a reputation as a powerful client advocate.

Website: [www.lehmantaxlaw.com](http://www.lehmantaxlaw.com)

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Youtube Channel: <https://www.youtube.com/channel/UCTH1JITaiKhUSC3MTxFVXYg>

Attorney Profile: <https://solomonlawguild.com/richard-s-lehman%2C-esq>

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