

Lacerte

1. What overall rating would you give your tax preparation software?		
1—Very bad	5	0.8%
2	16	2.6%
3	78	12.8%
4	239	39.3%
5—Very good	270	44.4%
Total	608	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	491	97.2%
No	14	2.8%
Total	505	100.0%

3. How easy was the update/installation process?		
1—Very difficult	8	1.4%
2	18	3.1%
3	61	10.4%
4	168	28.6%
5—Very easy	333	56.6%
Total	588	100.0%

4. How easy was the software to use?		
1—Very difficult	2	0.3%
2	10	1.6%
3	54	8.8%
4	253	41.3%
5—Very easy	293	47.9%
Total	612	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor	1	0.7%
2	5	3.6%
3	34	24.5%
4	55	39.6%
5—Very good	44	31.7%
Total	139	100.0%

6. Did your software contain all of the forms you needed?		
Yes	468	77.1%
No	139	22.9%
Total	607	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	17	2.8%
2	47	7.7%
3	96	15.7%
4	172	28.1%
5—Very well	280	45.8%
Total	612	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	5	0.8%
2	16	2.6%
3	83	13.7%
4	222	36.5%
5—Very well	282	46.4%
Total	608	100.0%

9. How easy was electronic filing?		
1—Very difficult	1	0.2%
2	10	1.6%
3	36	5.9%
4	148	24.3%
5—Very easy	415	68.0%
Total	610	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	4	0.9%
2	19	4.3%
3	83	18.9%
4	162	36.8%
5—Very well	172	39.1%
Total	440	100.0%

11. If you ran the software's conversion package, how would you rate it?		
1—Very bad	7	8.2%
2	6	7.1%
3	15	17.6%
4	35	41.2%
5—Very good	22	25.9%
Total	85	100.0%

12. What did you like best about your tax preparation software? (choose three)		
Accuracy	349	22.0%
Conversion process	3	0.2%
Ease of importing data	22	1.4%
Ease of use	416	26.3%
Installation process	58	3.7%
Integration with other software	12	0.8%
Learning curve	108	6.8%
Number of forms/comprehensiveness	300	19.0%
Price	76	4.8%
Support	165	10.4%
Tax research included in package	43	2.7%
Other	31	2.0%
Total	1583	100.0%

13. What did you like least about your tax preparation software? (choose three)		
Accuracy	23	1.5%
Conversion process	27	1.3%
Ease of importing data	72	6.7%
Ease of use	27	3.3%
Installation process	47	2.8%
Integration with other software	104	8.1%
Learning curve	32	2.8%
Number of forms/comprehensiveness	53	12.5%
Price	434	25.1%
Support	143	12.7%
Tax research included in package	112	17.0%
Other	106	6.2%
Total	1180	100.0%

14. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	29	5.3%
2	54	9.9%
3	257	46.9%
4	142	25.9%
5—Very well	66	12.0%
Total	548	100.0%

15. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	522	85.3%
No	90	14.7%
Total	612	100.0%

16. How easy to was it to get technical support from the vendor?		
1—Very difficult	23	4.4%
2	57	10.9%
3	108	20.7%
4	179	34.3%
5—Very easy	155	29.7%
Total	522	100.0%

17. How good was the technical support you received?		
1—Very bad	10	1.9%
2	61	11.7%
3	94	18.0%
4	171	32.8%
5—Very good	185	35.5%
Total	521	100.0%

18. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	53	8.7%
51 to 100	46	7.5%
101 to 200	74	12.1%
201 to 500	169	27.7%
501 to 1,000	129	21.1%
1,001 to 2,000	91	14.9%
2,001 to 5,000	42	6.9%
5,001 or more	6	1.0%
Total	610	100.0%

19. What percentage of those returns were for individuals?		
0%		0.0%
1% to 25%	23	3.8%
26% to 50%	96	15.8%
51% to 75%	344	56.7%
76% to 100%	144	23.7%
Total	607	100.0%

20. What percentage were business returns?		
0%	9	1.5%
1% to 25%	274	45.2%
26% to 50%	269	44.4%
51% to 75%	44	7.3%
76% to 100%	10	1.7%
Total	606	100.0%

21. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	391	63.9%
I have input into the decision	178	29.1%
I am not involved in the decision	43	7.0%
Total	612	100.0%

22. How many preparers work in your firm?		
1	165	27.0%
2 to 5	247	40.4%
6 to 20	170	27.8%
21 to 100	28	4.6%
101 to 500	1	0.2%
501 or more		0.0%
Total	611	100.0%