

ProSeries

1. What overall rating would you give your tax preparation software?		
1—Very bad	4	1.0%
2	13	3.3%
3	37	9.3%
4	174	43.7%
5—Very good	170	42.7%
Total	398	100.0%

2. Do you plan to use the same tax preparation software next season?		
Yes	327	97.6%
No	8	2.4%
Total	335	100.0%

3. How easy was the update/installation process?		
1—Very difficult	3	0.8%
2	6	1.5%
3	20	5.2%
4	91	23.5%
5—Very easy	268	69.1%
Total	388	100.0%

4. How easy was the software to use?		
1—Very difficult	2	0.5%
2	5	1.3%
3	37	9.3%
4	152	38.0%
5—Very easy	204	51.0%
Total	400	100.0%

5. If you received training from your software provider, how would you rate the training?		
1—Very poor		0.0%
2	1	1.5%
3	11	16.7%
4	32	48.5%
5—Very good	22	33.3%
Total	66	100.0%

6. Did your software contain all of the forms you needed?		
Yes	282	70.7%
No	117	29.3%
Total	399	100.0%

7. How well did your software handle updates during tax season?		
1—Very poorly	2	0.5%
2	8	2.0%
3	30	7.5%
4	106	26.4%
5—Very well	255	63.6%
Total	401	100.0%

8. How well did your software handle transfers of data within returns?		
1—Very poorly	6	1.5%
2	8	2.0%
3	41	10.3%
4	119	29.9%
5—Very well	224	56.3%
Total	398	100.0%

9. How easy was electronic filing?		
1—Very difficult		0.0%
2	9	2.3%
3	26	6.5%
4	90	22.7%
5—Very easy	272	68.5%
Total	397	100.0%

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	6	2.8%
2	10	4.7%
3	41	19.3%
4	80	37.7%
5—Very well	75	35.4%
Total	212	100.0%

11. If you ran the software's conversion package, how would you rate it?		
1—Very bad	1	1.6%
2	3	4.8%
3	7	11.3%
4	31	50.0%
5—Very good	20	32.3%
Total	62	100.0%

12. What did you like best about your tax preparation software? (choose three)		
Accuracy	156	14.8%
Conversion process	11	1.0%
Ease of importing data	33	3.1%
Ease of use	271	25.7%
Installation process	108	10.2%
Integration with other software	26	2.5%
Learning curve	80	7.6%
Number of forms/comprehensiveness	115	10.9%
Price	144	13.6%
Support	84	8.0%
Tax research included in package	19	1.8%
Other	8	0.8%
Total	1055	100.0%

13. What did you like least about your tax preparation software? (choose three)		
Accuracy	12	1.5%
Conversion process	10	1.3%
Ease of importing data	52	6.7%
Ease of use	26	3.3%
Installation process	22	2.8%
Integration with other software	63	8.1%
Learning curve	22	2.8%
Number of forms/comprehensiveness	97	12.5%
Price	195	25.1%
Support	99	12.7%
Tax research included in package	132	17.0%
Other	48	6.2%
Total	778	100.0%

14. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	18	4.9%
2	20	5.4%
3	152	41.3%
4	111	30.2%
5—Very well	67	18.2%
Total	368	100.0%

15. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	251	62.6%
No	150	37.4%
Total	401	100.0%

16. How easy to was it to get technical support from the vendor?		
1—Very difficult	14	5.6%
2	21	8.4%
3	45	18.1%
4	97	39.0%
5—Very easy	72	28.9%
Total	249	100.0%

17. How good was the technical support you received?		
1—Very bad	12	4.8%
2	22	8.9%
3	40	16.1%
4	85	34.3%
5—Very good	89	35.9%
Total	248	100.0%

18. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	89	22.3%
51 to 100	71	17.8%
101 to 200	69	17.3%
201 to 500	100	25.1%
501 to 1,000	49	12.3%
1,001 to 2,000	19	4.8%
2,001 to 5,000	2	0.5%
5,001 or more		0.0%
Total	399	100.0%

19. What percentage of those returns were for individuals?		
0%		0.0%
1% to 25%	14	3.5%
26% to 50%	35	8.8%
51% to 75%	172	43.0%
76% to 100%	179	44.8%
Total	400	100.0%

20. What percentage were business returns?		
0%	15	3.8%
1% to 25%	248	62.5%
26% to 50%	115	29.0%
51% to 75%	12	3.0%
76% to 100%	7	1.8%
Total	397	100.0%

21. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	344	86.0%
I have input into the decision	42	10.5%
I am not involved in the decision	14	3.5%
Total	400	100.0%

22. How many preparers work in your firm?		
1	212	53.0%
2 to 5	157	39.3%
6 to 20	30	7.5%
21 to 100		0.0%
101 to 500		0.0%
501 or more	1	0.3%
Total	400	100.0%