

Drake

1. What overall rating would you give your tax preparation software?		
1—Very bad	2	0.4%
2	2	0.4%
3	30	5.9%
4	142	27.8%
5—Very good	335	65.6%
Total	511	100.0%

2. How easy was the update/installation process?		
1—Very difficult	3	0.6%
2	3	0.6%
3	16	3.3%
4	56	11.7%
5—Very easy	401	83.7%
Total	479	100.0%

3. How easy was the software to use?		
1—Very difficult	4	0.8%
2	6	1.2%
3	27	5.3%
4	169	33.3%
5—Very easy	302	59.4%
Total	508	100.0%

4. If you received training from your software provider, how would you rate the training?		
1—Very poor	1	0.6%
2	0	0.0%
3	11	6.2%
4	66	37.1%
5—Very good	100	56.2%
Total	178	100.0%

5. Did your software contain all of the forms you needed?		
Yes	447	87.6%
No	63	12.4%
Total	510	100.0%

6. How well did your software handle updates during tax season?		
1—Very poorly	1	0.2%
2	2	0.4%
3	7	1.4%
4	56	11.0%
5—Very well	442	87.0%
Total	508	100.0%

7. How well did your software handle transfers of data within returns?		
1—Very poorly	7	1.4%
2	8	1.6%
3	39	7.7%
4	129	25.6%
5—Very well	321	63.7%
Total	504	100.0%

8. How easy was electronic filing?		
1—Very difficult	2	0.4%
2	4	0.8%
3	14	2.8%
4	73	14.5%
5—Very easy	412	81.6%
Total	505	100.0%

9. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	3	1.1%
2	9	3.4%
3	27	10.1%
4	88	32.8%
5—Very well	141	52.6%
Total	268	100.0%

10. If you ran the software's conversion package, how would you rate it?		
1—Very bad	2	1.8%
2	6	5.5%
3	13	11.8%
4	41	37.3%
5—Very good	48	43.6%
Total	110	100.0%

11. What did you like best about your tax preparation software? (choose three)		
Accuracy	107	7.5%
Conversion process	10	0.7%
Ease of importing data	8	0.6%
Ease of use	274	19.3%
Installation process	61	4.3%
Integration with other software	3	0.2%
Learning curve	30	2.1%
Number of forms/comprehensiveness	68	4.8%
Price	464	32.7%
Support	374	26.4%
Tax research included in package	10	0.7%
Other	10	0.7%
Total	1419	100.0%

12. What did you like least about your tax preparation software? (choose three)		
Accuracy	24	2.9%
Conversion process	24	2.9%
Ease of importing data	93	11.1%
Ease of use	35	4.2%
Installation process	20	2.4%
Integration with other software	145	17.3%
Learning curve	74	8.8%
Number of forms/comprehensiveness	86	10.3%
Price	23	2.7%
Support	29	3.5%
Tax research included in package	209	24.9%
Other	76	9.1%
Total	838	100.0%

13. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	45	10.4%
2	41	9.5%
3	174	40.4%
4	84	19.5%
5—Very well	87	20.2%
Total	431	100.0%

14. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	454	88.8%
No	57	11.2%
Total	511	100.0%

15. How easy to was it to get technical support from the vendor?		
1—Very difficult	1	0.2%
2	2	0.4%
3	14	3.1%
4	49	10.8%
5—Very easy	386	85.4%
Total	452	100.0%

16. How good was the technical support you received?		
1—Very bad	1	0.2%
2	11	2.4%
3	31	6.9%
4	101	22.3%
5—Very good	308	68.1%
Total	452	100.0%

17. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	129	25.3%
51 to 100	92	18.0%
101 to 200	102	20.0%
201 to 500	113	22.2%
501 to 1,000	48	9.4%
1,001 to 2,000	22	4.3%
2,001 to 5,000	3	0.6%
5,001 or more	1	0.2%
Total	510	100.0%

18. What percentage of those returns were for individuals?		
0%	0	0.0%
1% to 25%	11	2.2%
26% to 50%	52	10.3%
51% to 75%	237	47.0%
76% to 100%	204	40.5%
Total	504	100.0%

19. What percentage were business returns?		
0%	22	4.4%
1% to 25%	295	58.6%
26% to 50%	158	31.4%
51% to 75%	21	4.2%
76% to 100%	7	1.4%
Total	503	100.0%

20. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	468	91.8%
I have input into the decision	31	6.1%
I am not involved in the decision	11	2.2%
Total	510	100.0%

21. How many preparers work in your firm?		
1	300	59.2%
2 to 5	179	35.3%
6 to 20	24	4.7%
21 to 100	2	0.4%
101 to 500	2	0.4%
501 or more	0	0.0%
Total	507	100.0%