

Lacerte

1. What overall rating would you give your tax preparation software?		
1—Very bad	3	0.5%
2	13	2.1%
3	55	8.8%
4	222	35.5%
5—Very good	333	53.2%
Total	626	100.0%

2. How easy was the update/installation process?		
1—Very difficult	2	0.3%
2	13	2.2%
3	52	8.7%
4	150	25.0%
5—Very easy	384	63.9%
Total	601	100.0%

3. How easy was the software to use?		
1—Very difficult	0	0.0%
2	10	1.6%
3	52	8.3%
4	233	37.3%
5—Very easy	330	52.8%
Total	625	100.0%

4. If you received training from your software provider, how would you rate the training?		
1—Very poor	0	0.0%
2	3	1.8%
3	29	17.3%
4	78	46.4%
5—Very good	58	34.5%
Total	168	100.0%

5. Did your software contain all of the forms you needed?		
Yes	495	80.0%
No	124	20.0%
Total	619	100.0%

6. How well did your software handle updates during tax season?		
1—Very poorly	13	2.1%
2	23	3.7%
3	79	12.6%
4	194	31.0%
5—Very well	316	50.6%
Total	625	100.0%

7. How well did your software handle transfers of data within returns?		
1—Very poorly	3	0.5%
2	11	1.8%
3	66	10.7%
4	206	33.3%
5—Very well	333	53.8%
Total	619	100.0%

8. How easy was electronic filing?		
1—Very difficult	1	0.2%
2	9	1.4%
3	32	5.1%
4	128	20.5%
5—Very easy	454	72.8%
Total	624	100.0%

9. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	3	0.7%
2	15	3.4%
3	64	14.7%
4	171	39.3%
5—Very well	182	41.8%
Total	435	100.0%

10. If you ran the software's conversion package, how would you rate it?		
1—Very bad	3	3.5%
2	8	9.4%
3	10	11.8%
4	31	36.5%
5—Very good	33	38.8%
Total	85	100.0%

11. What did you like best about your tax preparation software? (choose three)		
Accuracy	376	23.5%
Conversion process	5	0.3%
Ease of importing data	31	1.9%
Ease of use	394	24.7%
Installation process	98	6.1%
Integration with other software	15	0.9%
Learning curve	101	6.3%
Number of forms/comprehensiveness	288	18.0%
Price	46	2.9%
Support	184	11.5%
Tax research included in package	25	1.6%
Other	34	2.1%
Total	1597	100.0%

12. What did you like least about your tax preparation software? (choose three)		
Accuracy	18	1.6%
Conversion process	19	1.7%
Ease of importing data	58	5.2%
Ease of use	36	3.2%
Installation process	34	3.0%
Integration with other software	81	7.2%
Learning curve	25	2.2%
Number of forms/comprehensiveness	52	4.6%
Price	463	41.2%
Support	138	12.3%
Tax research included in package	130	11.6%
Other	69	6.1%
Total	1123	100.0%

13. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	27	4.8%
2	45	8.0%
3	229	40.5%
4	183	32.4%
5—Very well	81	14.3%
Total	565	100.0%

14. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	519	82.9%
No	107	17.1%
Total	626	100.0%

15. How easy to was it to get technical support from the vendor?		
1—Very difficult	15	2.9%
2	53	10.3%
3	96	18.6%
4	161	31.2%
5—Very easy	191	37.0%
Total	516	100.0%

16. How good was the technical support you received?		
1—Very bad	15	2.9%
2	45	8.7%
3	94	18.2%
4	156	30.2%
5—Very good	207	40.0%
Total	517	100.0%

17. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	53	8.5%
51 to 100	57	9.1%
101 to 200	89	14.3%
201 to 500	176	28.3%
501 to 1,000	138	22.2%
1,001 to 2,000	78	12.5%
2,001 to 5,000	32	5.1%
5,001 or more	0	0.0%
Total	623	100.0%

18. What percentage of those returns were for individuals?		
0%	2	0.3%
1% to 25%	22	3.5%
26% to 50%	120	19.3%
51% to 75%	315	50.6%
76% to 100%	163	26.2%
Total	622	100.0%

19. What percentage were business returns?		
0%	8	1.3%
1% to 25%	273	44.1%
26% to 50%	280	45.2%
51% to 75%	47	7.6%
76% to 100%	11	1.8%
Total	619	100.0%

20. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	433	69.6%
I have input into the decision	156	25.1%
I am not involved in the decision	33	5.3%
Total	622	100.0%

21. How many preparers work in your firm?		
1	174	27.9%
2 to 5	278	44.6%
6 to 20	140	22.5%
21 to 100	27	4.3%
101 to 500	1	0.2%
501 or more	3	0.5%
Total	623	100.0%