

ProSeries

1. What overall rating would you give your tax preparation software?		
1—Very bad	6	1.3%
2	10	2.2%
3	59	12.9%
4	189	41.4%
5—Very good	192	42.1%
Total	456	100.0%

2. How easy was the update/installation process?		
1—Very difficult	1	0.2%
2	5	1.1%
3	11	2.5%
4	90	20.4%
5—Very easy	334	75.7%
Total	441	100.0%

3. How easy was the software to use?		
1—Very difficult	2	0.4%
2	3	0.7%
3	36	7.9%
4	165	36.2%
5—Very easy	250	54.8%
Total	456	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	2.7%
3	19	16.8%
4	59	52.2%
5—Very good	32	28.3%
Total	113	100.0%

5. Did your software contain all of the forms you needed?		
Yes	331	73.6%
No	119	26.4%
Total	450	100.0%

6. How well did your software handle updates during tax season?		
1—Very poorly	4	0.9%
2	10	2.2%
3	47	10.3%
4	134	29.4%
5—Very well	261	57.2%
Total	456	100.0%

7. How well did your software handle transfers of data within returns?		
1—Very poorly	2	0.4%
2	6	1.3%
3	41	9.1%
4	135	29.9%
5—Very well	267	59.2%
Total	451	100.0%

8. How easy was electronic filing?		
1—Very difficult	2	0.4%
2	7	1.5%
3	30	6.6%
4	102	22.5%
5—Very easy	313	68.9%
Total	454	100.0%

9. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly	2	0.9%
2	15	7.0%
3	30	14.0%
4	78	36.4%
5—Very well	89	41.6%
Total	214	100.0%

10. If you ran the software's conversion package, how would you rate it?		
1—Very bad	0	0.0%
2	5	6.2%
3	15	18.5%
4	30	37.0%
5—Very good	31	38.3%
Total	81	100.0%

11. What did you like best about your tax preparation software? (choose three)		
Accuracy	189	16.0%
Conversion process	7	0.6%
Ease of importing data	19	1.6%
Ease of use	327	27.8%
Installation process	122	10.4%
Integration with other software	18	1.5%
Learning curve	69	5.9%
Number of forms/comprehensiveness	151	12.8%
Price	159	13.5%
Support	67	5.7%
Tax research included in package	29	2.5%
Other	21	1.8%
Total	1178	100.0%

12. What did you like least about your tax preparation software? (choose three)		
Accuracy	13	1.4%
Conversion process	19	2.1%
Ease of importing data	62	6.8%
Ease of use	25	2.7%
Installation process	17	1.9%
Integration with other software	67	7.3%
Learning curve	25	2.7%
Number of forms/comprehensiveness	93	10.2%
Price	219	24.0%
Support	165	18.1%
Tax research included in package	150	16.4%
Other	59	6.5%
Total	914	100.0%

13. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	15	3.6%
2	28	6.7%
3	176	42.1%
4	124	29.7%
5—Very well	75	17.9%
Total	418	100.0%

14. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	292	64.0%
No	164	36.0%
Total	456	100.0%

15. How easy to was it to get technical support from the vendor?		
1—Very difficult	50	17.1%
2	40	13.7%
3	56	19.2%
4	79	27.1%
5—Very easy	67	22.9%
Total	292	100.0%

16. How good was the technical support you received?		
1—Very bad	18	6.2%
2	32	11.0%
3	65	22.4%
4	88	30.3%
5—Very good	87	30.0%
Total	290	100.0%

17. For how many clients did your firm prepare returns during this year's tax season?		
1 to 50	102	22.4%
51 to 100	76	16.7%
101 to 200	87	19.1%
201 to 500	108	23.7%
501 to 1,000	60	13.2%
1,001 to 2,000	15	3.3%
2,001 to 5,000	7	1.5%
5,001 or more	0	0.0%
Total	455	100.0%

18. What percentage of those returns were for individuals?		
0%	2	0.4%
1% to 25%	10	2.2%
26% to 50%	50	11.0%
51% to 75%	197	43.3%
76% to 100%	196	43.1%
Total	455	100.0%

19. What percentage were business returns?		
0%	29	6.4%
1% to 25%	267	58.7%
26% to 50%	126	27.7%
51% to 75%	22	4.8%
76% to 100%	11	2.4%
Total	455	100.0%

20. How much responsibility do you have for tax preparation software purchasing decisions in your firm?		
I make the decision	405	88.8%
I have input into the decision	40	8.8%
I am not involved in the decision	11	2.4%
Total	456	100.0%

21. How many preparers work in your firm?		
1	249	54.6%
2 to 5	170	37.3%
6 to 20	30	6.6%
21 to 100	2	0.4%
101 to 500	2	0.4%
501 or more	3	0.7%
Total	456	100.0%