Drake

1. What overall rating would you give your tax preparation software?		
1—Very bad	1	0.3%
2	4	1.0%
3	24	6.2%
4	113	29.2%
5—Very good	245	63.3%
Total	**387**	**100.0%**

2. Do you plan to use the same tax preparation software next season?		
Yes	134	98.6%
No	2	1.4%
Total	**136**	**100.0%**

3. How easy was the update/installation process?		
1—Very difficult		0.0%
2		0.0%
3	14	3.9%
4	52	14.3%
5—Very easy	297	81.8%
Total	**363**	**100.0%**

4. How easy was the software to use?		
1—Very difficult	1	0.3%
2	5	1.3%
3	26	6.7%
4	132	34.0%
5—Very easy	224	57.7%
Total	**388**	**100.0%**

5. If you received training from your software provider, how would you rate the training?		
1—Very poor	1	0.6%
2	1	0.6%
3	19	11.1%
4	55	32.2%
5—Very good	95	55.6%
Total	**171**	**100.0%**

6. Did your software contain all of the forms you needed?		
Yes	335	86.6%
No	52	13.4%
Total	**387**	**100.0%**

7. How well did your software handle updates during tax season?		
1—Very poorly	1	0.3%
2		0.0%
3	14	3.6%
4	43	11.1%
5—Very well	330	85.1%
Total	**388**	**100.0%**

8. How well did your software handle transfers of data within returns?		
1—Very poorly	1	0.3%
2	10	2.6%
3	25	6.5%
4	98	25.6%
5—Very well	249	65.0%
Total	**383**	**100.0%**

9. How easy was electronic filing?		
1—Very difficult		0.0%
2	3	0.8%
3	17	4.4%
4	47	12.2%
5—Very easy	319	82.6%
Total	**386**	**100.0%**

10. If you filed multistate business returns, how well did your software handle them?		
1—Very poorly		0.0%
2	6	3.2%
3	25	13.2%
4	49	25.8%
5—Very well	110	57.9%
Total	**190**	**100.0%**

11. If you ran the software's conversion package, how would you rate it?		
1—Very bad	1	1.1%
2	2	2.2%
3	13	14.0%
4	27	29.0%
5—Very good	50	53.8%
Total	**93**	**100.0%**

12. What did you like best about your tax preparation software? (choose three)

Accuracy	84	7.8%
Conversion process	7	0.6%
Ease of importing data	8	0.7%
Ease of use	207	19.1%
Installation process	48	4.4%
Integration with other software	2	0.2%
Learning curve	23	2.1%
Number of forms/comprehensiveness	59	5.5%
Price	351	32.4%
Support	281	26.0%
Tax research included in package	4	0.4%
Other	8	0.7%
Total	**1082**	**100.0%**

13. What did you like least about your tax preparation software? (choose three)

Accuracy	28	3.5%
Conversion process	26	3.6%
Ease of importing data	65	11.0%
Ease of use	41	5.5%
Installation process	19	1.0%
Integration with other software	133	18.3%
Learning curve	54	9.4%
Number of forms/comprehensiveness	60	9.8%
Price	14	1.4%
Support	16	2.6%
Tax research included in package	138	22.3%
Other	67	11.7%
Total	**661**	**100.0%**

14. How well did your tax preparation software integrate with your accounting and other software?		
1—Very poorly	30	8.9%
2	34	10.1%
3	149	44.3%
4	56	16.7%
5—Very well	67	19.9%
Total	**336**	**100.0%**

15. Did you ever need technical support from your software vendor during this year's tax season?		
Yes	346	89.2%
No	42	10.8%
Total	**388**	**100.0%**

16. How easy to was it to get technical support from the vendor?		
1—Very difficult		0.0%
2	2	0.6%
3	8	2.3%
4	39	11.3%
5—Very easy	297	85.8%
Total	**346**	**100.0%**

17. How good was the technical support you received?		
1—Very bad	3	0.9%
2	5	1.4%
3	20	5.8%
4	77	22.3%
5—Very good	241	69.7%
Total	**346**	**100.0%**

18. For how many clients did your firm prepare returns during this year's tax season?

1 to 50	83	21.4%
51 to 100	64	16.5%
101 to 200	75	19.4%
201 to 500	105	27.1%
501 to 1,000	47	12.1%
1,001 to 2,000	10	2.6%
2,001 to 5,000		0.0%
5,001 or more	3	0.8%
Total	**387**	**100.0%**

19. What percentage of those returns were for individuals?

0%		0.0%
1% to 25%	5	1.3%
26% to 50%	43	11.1%
51% to 75%	181	46.9%
76% to 100%	157	40.7%
Total	**386**	**100.0%**

20. What percentage were business returns?

0%	17	4.4%
1% to 25%	230	60.1%
26% to 50%	119	31.1%
51% to 75%	12	3.1%
76% to 100%	5	1.3%
Total	**383**	**100.0%**

21. How much responsibility do you have for tax preparation software purchasing decisions in your firm?

I make the decision	354	91.7%
I have input into the decision	25	6.5%
I am not involved in the decision	7	1.8%
Total	**386**	**100.0%**

22. How many preparers work in your firm?		
1	195	50.5%
2 to 5	171	44.3%
6 to 20	13	3.4%
21 to 100	4	1.0%
101 to 500		0.0%
501 or more	3	0.8%
Total	**386**	**100.0%**