

USER RESEARCH

Tax preparer personas

Four archetypes derived from in-depth interviews with 33 professional tax preparers using Drake tax software.

33

INTERVIEWS

4

PERSONAS

100%

QUALITATIVE

AT A GLANCE

The four personas

Each persona represents a pattern of behaviors, tools, and attitudes toward cloud adoption, drawn from transcripts and interview notes.



Harold Prescott

THE SOLO VETERAN

Solo practice · 40 to 300 returns / yr

Desktop-only. Content with current workflow. Will not consider web-based.

10 interviewees



Janet Bergman

THE SMALL-FIRM POWER USER

2 to 10 preparers · 200 to 2,500 returns / yr

Heavy feature user. Security-sophisticated. Wants depth, not change.

14 interviewees



Marcus Chen

THE TECH-FORWARD MODERNIZER

Solo or solo plus admin · 40 to 250 returns / yr

Cloud-native mindset. Sees Drake as capable but dated.

8 interviewees



Rebecca Voss

THE ENTERPRISE OPERATOR

6 to 200+ preparers · 400 to 20,000+ returns / yr

Scale- and cost-focused. Will adopt if economics and control work.

2 interviewees



Harold Prescott

THE SOLO VETERAN

10 INTERVIEWEES

“I know what I have and it works. I don’t feel the need to chase whatever the next thing is.”

AGE

60 to 70

FIRM SIZE

Solo practice

ANNUAL RETURNS

40 to 300

YEARS WITH DRAKE

20+

MAIN TASKS AND DEMANDS

- Prepares primarily 1040s with occasional small partnerships or LLCs
- Works from home, sometimes with a spouse or part-time helper
- Handles client communication by phone and in person
- Prints paper copies for clients who prefer them

TOOLS USED

- Drake Desktop
- QuickBooks (desktop preferred)
- Email and phone
- SecureFile Pro, occasional use

TECH COMFORT

Drake expertise



Automation and broader tech



Knows the workflow deeply, rarely explores features he hasn’t needed. Self-rates high based on years of use.

GOALS

- Keep things running smoothly with no disruption
- Maintain direct access to local files
- Predictable annual cost, no monthly subscriptions
- Fast, knowledgeable phone support when needed

FRUSTRATIONS

- Being asked to change what already works
- Monthly subscription pricing models
- Setup friction on web tools: accounts, sync, passwords



Janet Bergman

THE SMALL-FIRM POWER USER

14 INTERVIEWEES

“I know where to find everything. When support picks up, we can usually solve it together in a few minutes.”

AGE

45 to 65

FIRM SIZE

2 to 10 preparers

ANNUAL RETURNS

200 to 2,500

YEARS WITH DRAKE

15+

MAIN TASKS AND DEMANDS

- Oversees mix of 1040s, S-corps, partnerships, trusts, and multi-state work
- Coordinates preparers working remotely or in-office
- Reviews and approves other preparers' returns
- Acts as firm's go-to for software troubleshooting

TOOLS USED

- Drake Desktop (unlimited) and Drake Accounting
- SecureFile Pro, Gruntworx, CSM, Drake Portals
- QuickBooks and Microsoft 365
- VPN, MFA, authenticator apps

TECH COMFORT

Drake expertise



Automation and broader tech



Expert. Uses macros, manages remote access for staff, maintains WISP, often gives feedback to Drake directly.

GOALS

- Move faster through complex returns without losing accuracy
- Multi-window and split-screen support
- Real billing and time-tracking module
- Keep control over local files and firm data

FRUSTRATIONS

- Cannot open multiple returns at once
- Reporting feels dated and limited
- Long-requested features that never ship



Marcus Chen

THE TECH-FORWARD MODERNIZER

8 INTERVIEWEES

“I’m fine with desktop if it works best. But every time I switch into Drake I can feel the decade of design that’s missing.”

AGE

30 to 50

FIRM SIZE

Solo or solo plus admin

ANNUAL RETURNS

40 to 250

YEARS WITH DRAKE

3 to 15

MAIN TASKS AND DEMANDS

- Runs an operations-heavy practice: portals, proposals, engagement letters
- Often specializes in non-profits, specialty entities, or complex businesses
- Works from anywhere, sometimes while traveling
- Experiments actively with new tools, workflows, and automations

TOOLS USED

- Drake Desktop, sometimes cloud-hosted, sometimes alongside ProConnect
- TaxDome, Karbon, or Canopy for practice management
- Calendly, Ignition, Content Snare for client flow
- Zapier or Power Automate, Slack, Dropbox

TECH COMFORT

Drake expertise



Automation and broader tech



Operations-advanced. Sophisticated about automation and integration; has not invested time in Drake macros or advanced desktop features.

GOALS

- Work from anywhere on any device, without reinstalling or sync
- Reduce every repetitive task through automation
- Workflow visibility and capacity planning
- Modern navigation that feels like the rest of his stack

FRUSTRATIONS

- Drake navigation feels dated next to daily-use tools
- Re-entering the same data across screens
- Inconsistency between return types (1040 vs 1120 vs 990)



Rebecca Voss

THE ENTERPRISE OPERATOR

2 INTERVIEWEES

“At our scale, cost per return is the lens for every decision. The current setup is boring, and boring is exactly what we want.”

AGE

40 to 60

FIRM SIZE

6 to 200+ preparers

ANNUAL RETURNS

400 to 20,000+

YEARS WITH DRAKE

10+

MAIN TASKS AND DEMANDS

- Makes or influences firm-level software decisions
- Coordinates across offices, servers, and hosted infrastructure
- Manages cost-per-return economics, licensing, and scaling
- Trains new preparers and standardizes workflow

TOOLS USED

- Drake Desktop via Right Networks or similar hosting
- Proprietary or enterprise billing software
- Centralized servers with controlled update windows
- Microsoft 365 or G-suite at organizational level

TECH COMFORT

Drake expertise



Automation and broader tech



Drake-expert and fluent in firm-scale IT. Strategic about operational tradeoffs at enterprise scale.

GOALS

- Keep cost per return low
- Standardize workflow across many offices and staff
- Reliable uptime during tax season
- Billing that reflects piece-work compensation

FRUSTRATIONS

- Software priced for solo practitioners that scales expensively
- Missing enterprise-grade capabilities and admin controls
- Change-management burden of web alternatives