

# ACTEC Software Survey

## Technology in the Practice Committee

**Reviewer Name**

Karen M. Stockmal

**Date (mm/dd/yyyy)**

10/04/2017

**Operating System**

Windows 10

**Software being reviewed:**

PowerPoint

**Version Number, if any:**

2016

**Vendor Name:**

Microsoft Office

**Vendor URL:**

www.microsoft.com

**How long have you used the software?**

	Demo only	Less than 1 year	1-3 years	4-6 years	7-9 years	10+ years
Software usage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

**How satisfied are you with the software?**

	Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Customer support	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of Use	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Overall, does this software meet your needs?**

- Yes
- Somewhat
- No

**Have you used any software in the same category? If so, please include name:**

I used Visio as an associate 10 years ago.

**Please provide a substantive review of this software below.**

We prepare a flow chart for every estate planning and administration client in our office, typically prior to the initial meeting, based on an intake questionnaire. Primarily for cost reasons, we decided to go with PowerPoint because it was included in our Office 365 suite license and so it didn't cost us anything extra.

The pros:

1. You can customize each chart completely. There are no constraints because you are essentially drawing each flow chart by hand.
2. For Microsoft Office users, the shortcuts are the same and the menu selection for different tools and options is very familiar.

The cons:

1. It is easy to make mistakes because everything is done by hand. There are no calculations performed by the software, so when you change a value in one box, it will not update the derivative values that flow from that box. That has to be done by hand.
2. The regular user needs to know how to do certain "higher level" functions that are not obvious to make the chart look polished. Several examples are aligning and spacing boxes and making them the same size. Otherwise, the chart can look unprofessional.

In our office we save the charts for our more typical plans as templates and work from them whenever possible.

Please return your completed survey to  
Karen Stockmal at [karen.stockmal@kmslawoffices.com](mailto:karen.stockmal@kmslawoffices.com).

All surveys will be reviewed before being submitted  
for publication on the private side the ACTEC website, [www.actec.org](http://www.actec.org).