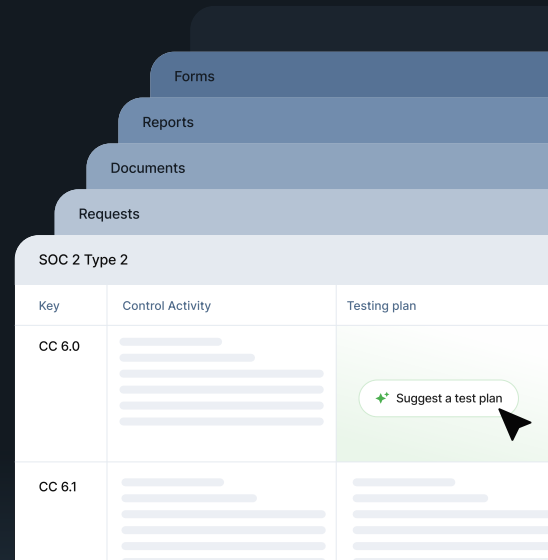# FIELDGUIDE

Fieldguide University

Datasheet

Fieldguide University

In today's competitive landscape, firms are under constant pressure to do more with less. A shrinking talent pool, pricing pressures, and increasingly demanding clients require firms to find new ways to optimize operations and deliver value. Fieldguide University offers an interactive and comprehensive learning management platform that equips your team with the knowledge and tools they need to excel — faster. The sooner your team masters Fieldguide, the sooner your firm can unlock increased productivity, higher quality engagements, and an enhanced client experience.

Top 500 firms trust Fieldguide to improve efficiency, revenue, and client experiences.

WIPFLI   withum   Warren Averett   Aprio   BerryDunn

Forms

Reports

Documents

Requests

SOC 2 Type 2

Key	Control Activity	Testing plan
CC 6.0		✦ Suggest a test plan
CC 6.1		

Fieldguide University drives impactful growth for your firm
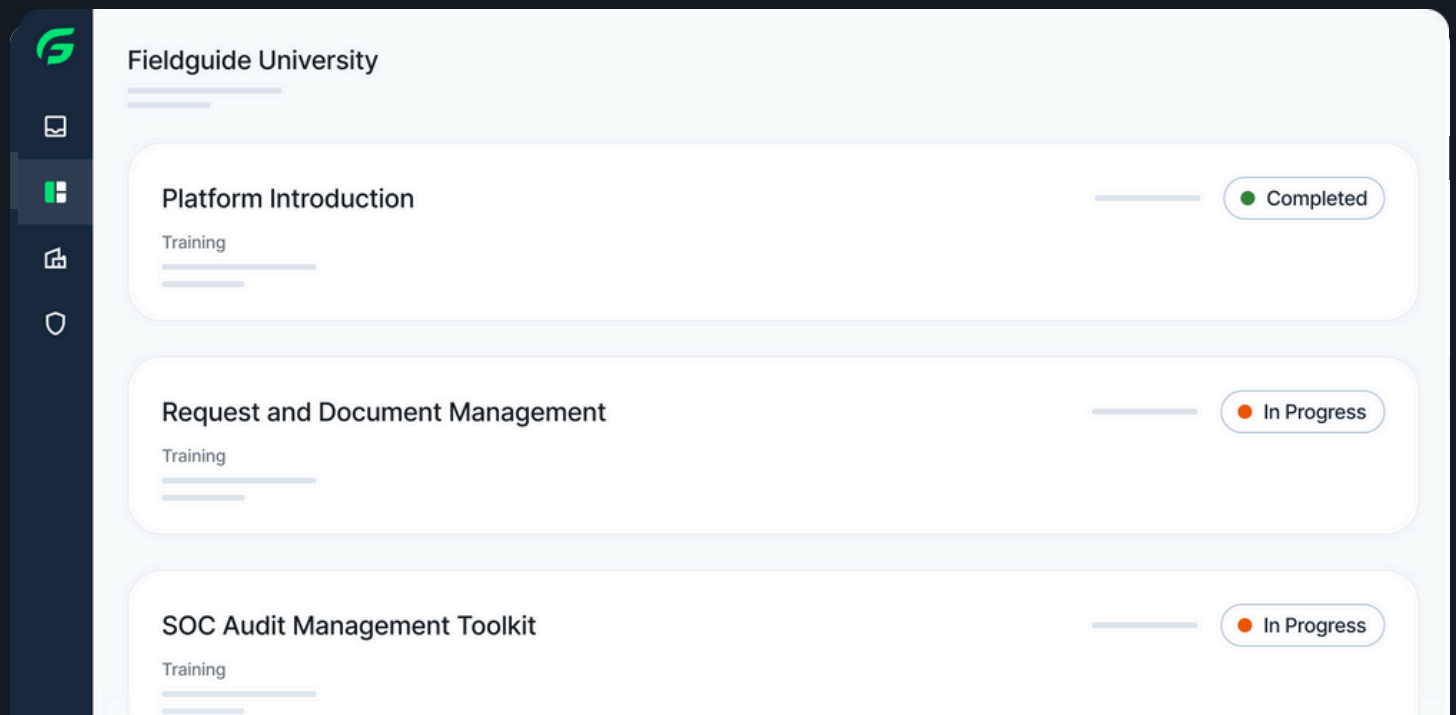
Increased efficiency and higher margins

→ Give your team the skills they need to become highly productive and proficient with every aspect of Fieldguide.

→ Reduce unbillable and unproductive time by ramping up team members faster.

→ Streamline team collaboration by getting everyone on the same page with Fieldguide's best practices and templates.

Greater client satisfaction

→ Provide the training to allow for faster and clearer communication and responsiveness to client requests.

→ Create a consistent experience for your clients, no matter what engagement or team member they're working with.

→ Showcase Fieldguide certifications to promote your firm's technical expertise to clients.

Improved staff retention

→ Use guided and self-paced training to reduce frustration and confusion with learning new technologies.

→ Showcase your commitment and investment in building employee skills.

→ Easily find and recruit qualified professionals to your firm by searching for Fieldguide-certified staff.

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Platform Introduction
Training
● Completed

Request and Document Management
Training
● In Progress

SOC Audit Management Toolkit
Training
● In Progress

Fieldguide Fundamentals

Standardized training empowers your firm to fully capitalize on Fieldguide's capabilities, driving a greater ROI while significantly reducing support issues across your organization. With everyone on the same page, your team can operate more efficiently, solve problems faster, and deliver results with fewer roadblocks — ultimately boosting performance and profitability.

- Introduction to Fieldguide: Basics of navigating and using Fieldguide, including a consolidated Inbox, Engagement Dashboard, and task view.

- Terminology and Best Practices: Understanding the key terms and best practices for using the system effectively and productively, including how to best use client requests, document management, Fieldguide Sheets, and report generation.

Training created by experts in the AI field:

- Commonly Used AI Features: In-depth tutorials on the most frequently used AI features in Fieldguide ensure that everyone knows how to use AI effectively and responsibly.

- Fieldguide AI Mastery: Comprehensive training on Fieldguide's more advanced AI features, including document review and analysis, document annotation and highlighting, and AI-generated requests.

- Prompt Engineering: Develop skills to create and optimize AI prompts – like suggesting a custom test procedure, identifying testing gaps, or identifying risks – maximizing the effectiveness of Fieldguide AI.

Fieldguide at Your Pace

Fieldguide University delivers training that puts you in control, with personalized content tailored to your specific needs. Whether you're mastering key topics through self-guided tutorials or diving into targeted course assignments designed for your role, you can learn at your pace and on your terms, so you can build expertise faster and more effectively.

- ✓ **Self-Guided Tutorials:** Robust and engaging, self-guided courses allow practitioners to easily learn at their own pace. From managing client requests to advanced features like AI prompt creation, Fieldguide University covers the most essential topics needed.

- ✓ **Targeted Course Assignments:** Each course assignment is tailored around an auditor's specific needs, ensuring the most relevant and efficient learning experiences.

Fieldguide Badges

Fieldguide University cements your firm's position as an industry leader in the advisory and audit industry. As practitioners complete courses, they earn knowledge badges, which demonstrate mastery of different Fieldguide capabilities. These badges can showcase staff expertise and commitment to professional development. Firms can also highlight their Fieldguide-certified staff to potential clients, while practitioners can highlight their expertise to the industry.

By making Fieldguide badges a standard for all practitioners, you can drive a consistent level of expertise and quality across your team, setting your firm apart with a proven commitment to excellence that clients can trust. These badges become a mark of distinction, showcasing your firm's technical proficiency and client focus.

"Software for accounting firms is notoriously outdated, slow, and hard to use. Fieldguide is different – it's a streamlined, cloud-first approach."

Kate Williams
Risk Assurance & Advisory Partner
Maxwell Locke & Ritter

ML&R
Maxwell Locke & Ritter

The *future* of Trust.
Powered by Fieldguide.

Top New Product 2024

Top New Product
AccountingToday

2024 · 2023 · 2022 · 2021

Technology Innovation Award
4x Winner — CPA Practice Advisor