FIELDGUIDE

Product Overview

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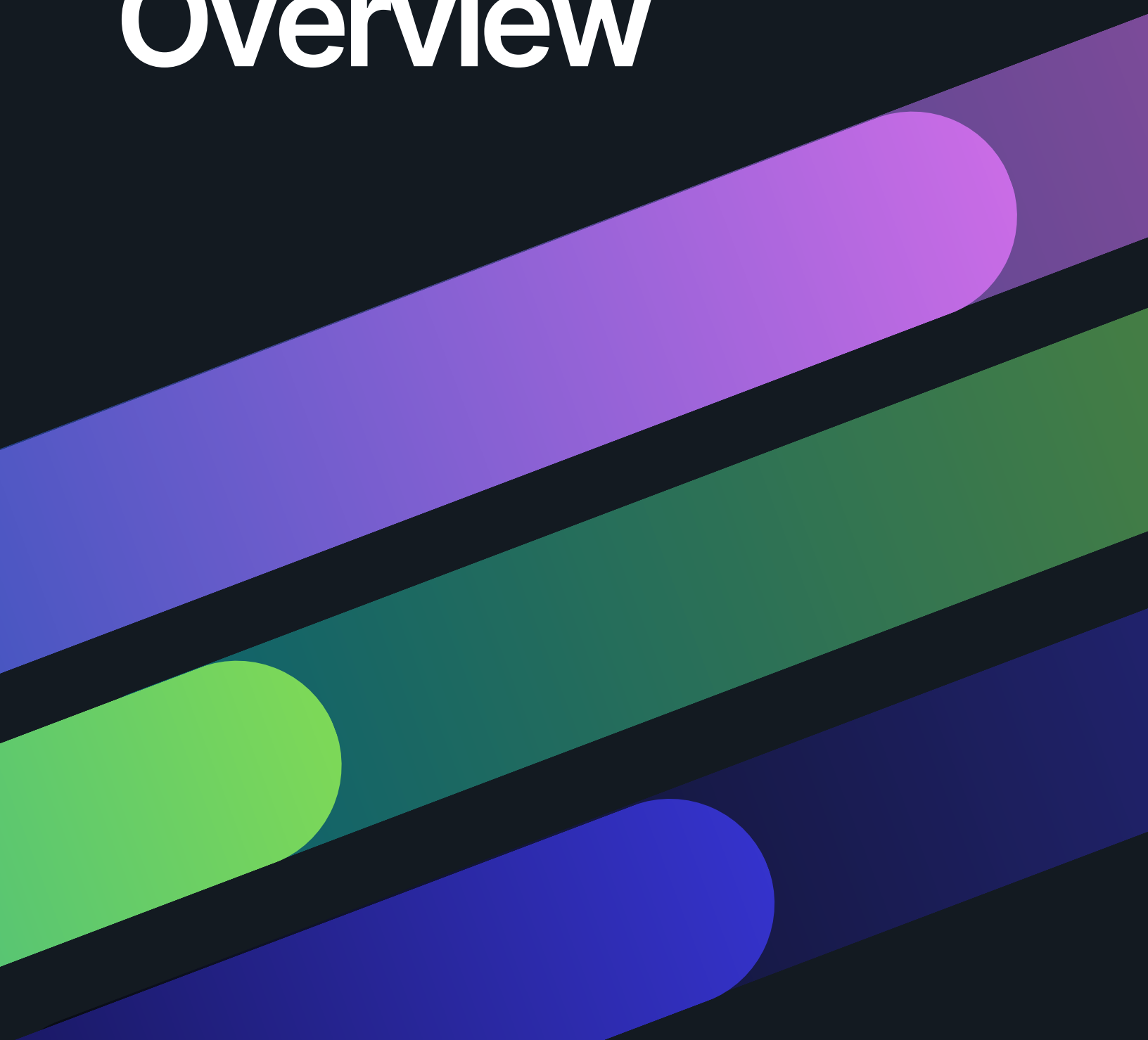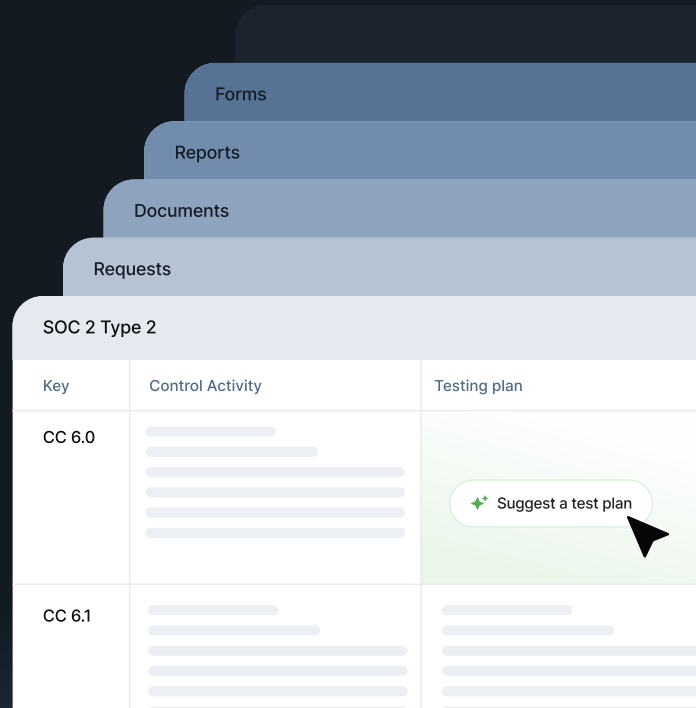
Fieldguide Powers the Future of Trust

Founded by former auditors and consultants, Fieldguide is the first automation and collaboration platform designed specifically to enable audit and advisory firms to streamline and manage any type of engagement within a single solution. In the face of unprecedented demand for audit and advisory services, combined with a sharply declining talent supply, Fieldguide is on a mission to deliver technology that will provide the leverage that firms need to consistently deliver highly profitable, modern advisory services to their clients.

Fieldguide provides end-to-end visibility across all engagements, streamlined collaboration with distributed clients and teams, and unparalleled staff productivity for any risk framework, including SOC 1 & SOC 2, HITRUST, PCI, and many more. Instead of juggling siloed legacy tools, practitioners can rely on Fieldguide as a single source of truth, complete with the comprehensive set of capabilities required to efficiently manage engagements from kickoff to completion. AI-powered recommendations, streamlined requests, collaborative document management, intelligent framework mapping, and one-click reports are just some of the unique Fieldguide features designed to help firms drive greater visibility, efficiency, and profitability across all engagements, while consistently delivering a world-class client experience.

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

WIPFLI   withum✢   Warren Averett   Aprio✦   BerryDunn

The Fieldguide Difference

End-to-End Automation

Fieldguide provides firms all the capabilities they need for engagements, from readiness to the final audit report

→ End-to-end functionality for the entire engagement lifecycle, including readiness assessments, requests, testing, workpapers, and reports

→ AI-powered recommendations for documents, test plans and requests

→ Built-in best practices for any compliance framework like SOC 1 & SOC 2, HITRUST, PCI, and many others

Intuitive Ease of Use

Easy, intuitive and modern features help streamline engagements

→ Streamlined document management, including collaborative document editing and versioning

→ Intelligent cross-mapping and linking across documents, controls, and frameworks

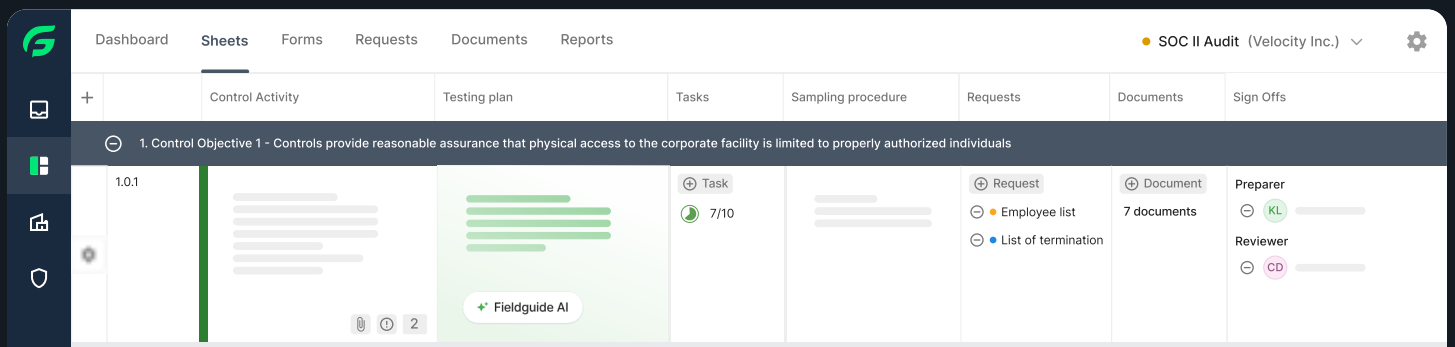→ Easy "one-click" report creation and collaboration for any framework
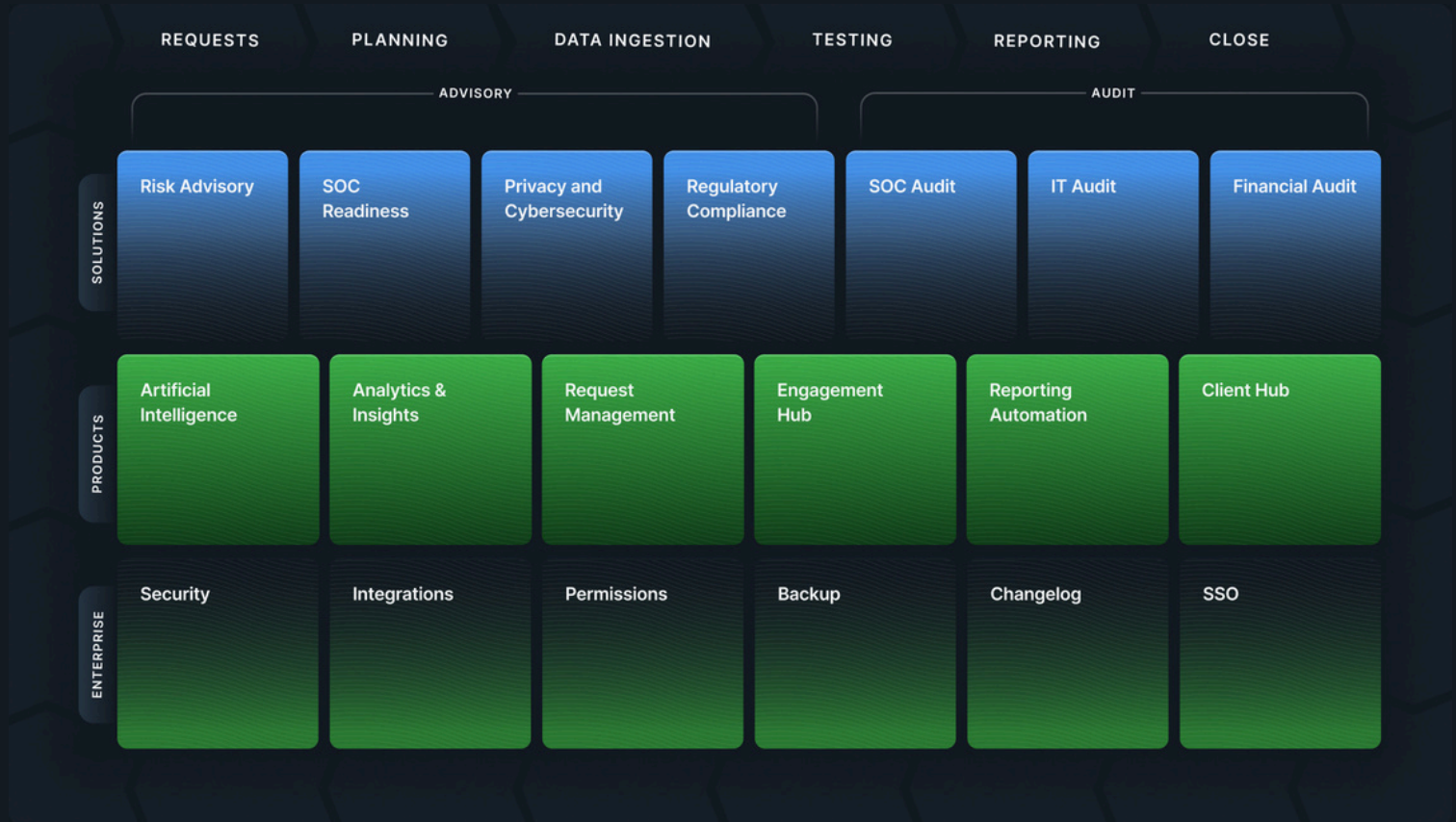
Exceptional Experience

Fieldguide's first-class collaboration capabilities help firms transform the client experience

→ Single source of truth for firms and clients that keeps project work on track and on budget

→ Streamlined communication via client questionnaires, real-time collaboration, requests, approvals, and chat

→ Cloud-native platform for secure and easy access anywhere

| REQUESTS | PLANNING | DATA INGESTION | TESTING | REPORTING | CLOSE |

ADVISORY				AUDIT		
SOLUTIONS	Risk Advisory	SOC Readiness	Privacy and Cybersecurity	Regulatory Compliance	SOC Audit	IT Audit	Financial Audit
PRODUCTS	Artificial Intelligence	Analytics & Insights	Request Management	Engagement Hub	Reporting Automation	Client Hub
ENTERPRISE	Security	Integrations	Permissions	Backup	Changelog	SSO

Fieldguide's AI Platform for Advisory & Audit

Fieldguide is built on a modern cloud platform with a full set of capabilities to support your advisory services engagements. With Fieldguide, customers can increase efficiency and save 35 - 50% of hours per engagement by

→ Driving visibility, consistency, and control across all clients, engagements, and services

→ Increasing efficiency and delighting staff by reducing manual work and potential errors

→ Improving the client experience by reducing miscommunication and simplifying collaboration

"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

Key Highlights

→ Industry-Leading AI: The industry's first AI solution tailor made for auditors. Fieldguide AI provides recommendations to improve client documents and policies, as well as AI suggestions to improve compliance to internal audits for clients. Teams can eliminate highly manual engagement tasks, so they can focus on critical and higher margin work

→ Fieldguide Requests: facilitate client collaboration, eliminate back-and-forth emails, and improve client satisfaction. Both practitioners and clients can easily see what requests are pending or complete for their internal audit engagements.

→ Fieldguide Sheets: centralize everything a practitioner needs for fieldwork in one source of truth, including requests, sign offs, sampling, and testing – all in one easy to manage risk control matrix.

→ Integrated Document Management: replaces manual audit binders with integrated workpaper management. Integration to Microsoft Office eliminates tedious check-in/check-out, document renaming, and version control.

→ Collaborative One-Click Reporting: whether you are generating a deliverable or sharing your workpapers with external auditors, Fieldguide saves countless hours by replacing the traditional copy/paste approach with just one click that generates custom templated reports for all types of internal audit engagements.