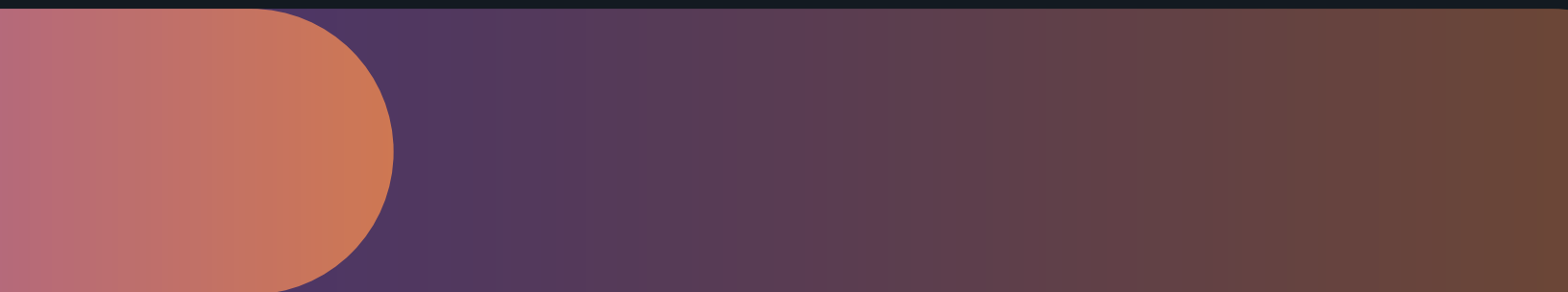
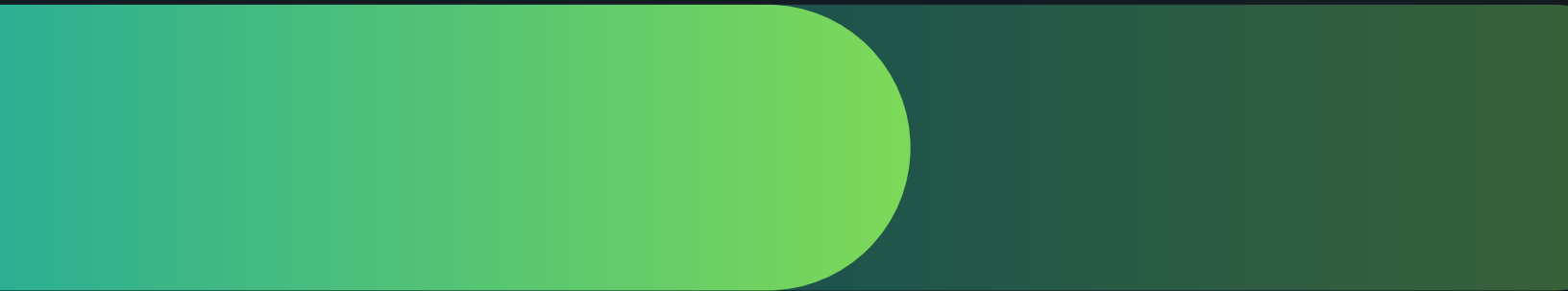




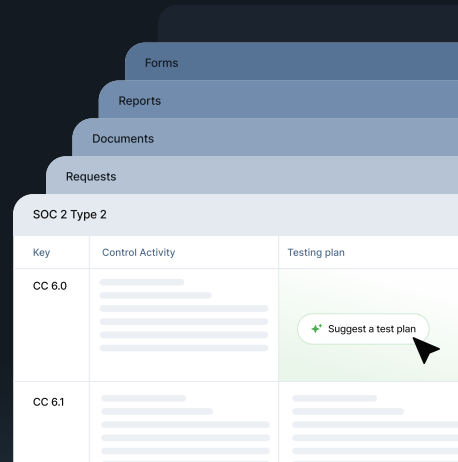
Fieldguide Accelerator



Fieldguide Accelerator

Fieldguide Accelerator is our firm onboarding program designed to help you reach Fieldguide Nirvana in record time. Our program has been carefully designed with flexibility, effectiveness, and efficiency in mind. We know you're busy, but we also know you want to get the most out of your new software investment. Our experts will work with you to ensure your onboarding experience is a success. With Fieldguide Accelerator, rest easy with a differentiated approach to software implementation.

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



What makes us different?

A true partnership

Your clients' success is important to us. We believe "going live" is a process, not a moment. We will work with you to launch your first few clients on the software – beyond an arbitrary go-live date.

Fast time to value

With a platform as intuitive as Fieldguide, your runway to launch will be much shorter compared to legacy solutions. Customers have launched their first client engagement in as little as two weeks.

Your feedback matters

We want to hear your continued feedback. Product needs and suggestions are communicated directly to our development team.



"We are coast-to-coast working here, and knowing we can quickly get someone to help via chat or the phone just makes things a whole lot easier. If our team has a question, they shoot an email or send a chat message and have a solution quickly. Plus, they also get a training video on how to do something better"

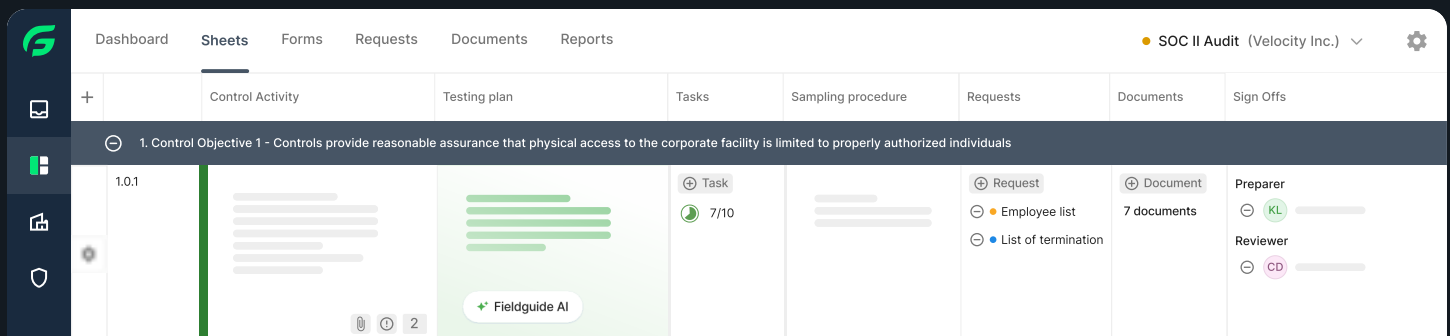
Paul Perry
Risk & Controls Practice Leader
Warren Averett



25% ▲

Higher Realization

Warren Averett increased engagement realization by up to 25% with automated report generation and real-time collaboration on controls



Launch Phases

Your firm will be assigned a dedicated Fieldguide expert to guide you, from your first log in to your first client launch and beyond.

Average speed to launch first client engagement: 2 to 4 weeks

1 Accelerator Orientation

- Introduction
- Expectation setting
- Planning & scheduling

To ensure your experience is tailored to meet the needs of your firm and solidify mutual expectations, key team members from your firm and your Fieldguide expert will meet for introductions and Accelerator planning.

2 Launch Team Workshops

- Understand your firm's processes
- Configuring Fieldguide for your firm
- Hands-on experience
- Launch Team training
- Additional user training, if applicable

Our Workshops are designed to understand your process, strengths, and opportunities to configure Fieldguide in an optimal way. To prepare for your launch, we will work from your firm's example files and information, with a focus on migrating from your legacy program. Between sessions, Launch Team members may have assignments to complete to be ready for Training and Client Launch.

For additional users beyond the Launch Team, Fieldguide will work with you to customize their training. Each interaction will provide education on key features and hands-on platform usage.

3 Client Launches

- Preparedness evaluation
- Client setup and kickoffs
- Question & answer op

Prior to your first client launch, your Fieldguide expert will meet with you to maximize your comfort and confidence. But the program doesn't end here. We will continue to support the launch of additional engagements.

4 Ongoing Success

- Recurring meetings
- Product roadmap updates
- Questions and enhancement requests
- Keeping positive momentum
- Question & answer opportunity

After your first few client launches, we will meet on a recurring basis for continuing questions, software enhancement suggestions, and product roadmap updates.



"If we need help, the Fieldguide Customer Success team knows who we are and how we use the system, so they are quick to help us with any question or issue we have."

Kate Williams
Risk Assurance & Advisory Partner
Maxwell Locke & Ritter



Firm Roles

Use this guidance to determine who to include in your Fieldguide Accelerator engagement.

Project Manager

Use this guidance to determine who to include in your Fieldguide Accelerator engagement.

- Be the primary point of contact for your designated Onboarding Specialist
- Attend all Fieldguide Accelerator: phases
- Communicate with other Launch Team members regarding scheduled workshops and interactions, progress on open items, and gathering questions or issues
- Champion Fieldguide in your firm and communicate team-wide so future Fieldguide users have the latest and greatest information
- Dedicate time for data gathering and program setup, when needed
- Be a decision maker

Launch Team Members

To ensure you have key perspectives across your workflow from the start, your Launch Team should span a variety of roles from your audit practice, such as managers, seniors, staff, and administrative staff. Launch Team Members will:

- Contribute insights regarding the firm's current audit processes and future goals
- Actively participate in relevant workshops
- Complete any assigned items from your Onboarding Specialist or your Project Manager

Timeline

Firm Workflow Review

Two Hours with your Launch Team and dedicated Onboarding Specialist learn about your firm's workflow.

Launch Team Workshops

Three workshops, each two hours with your Launch Team and Onboarding Specialist. Amount and duration of sessions can be adjusted to fit your firm.

Client Launches

One hour per engagement for your first three to five engagements launched, at minimum.

Ongoing Success

30 minute meetings each week with your firm's Launch Team and Onboarding Specialist

The *future* of Trust.
Powered by Fieldguide.



Top New Product
AccountingToday



Technology Innovation Award
3x Winner — CPA Practice Advisor



Fieldguide is the category-defining AI Advisory & Audit Cloud that helps firms streamline the entire lifecycle of any engagement. A five-time industry award winner, Fieldguide has won multiple Accounting Today Top New Products Awards and CPA Practice Advisor Technology Innovation Awards. Fieldguide is backed by top venture capitalists such as 8VC, Y Combinator, and Floodgate. Visit fieldguide.io to learn more.

