FIELDGUIDE

Fieldguide Insights
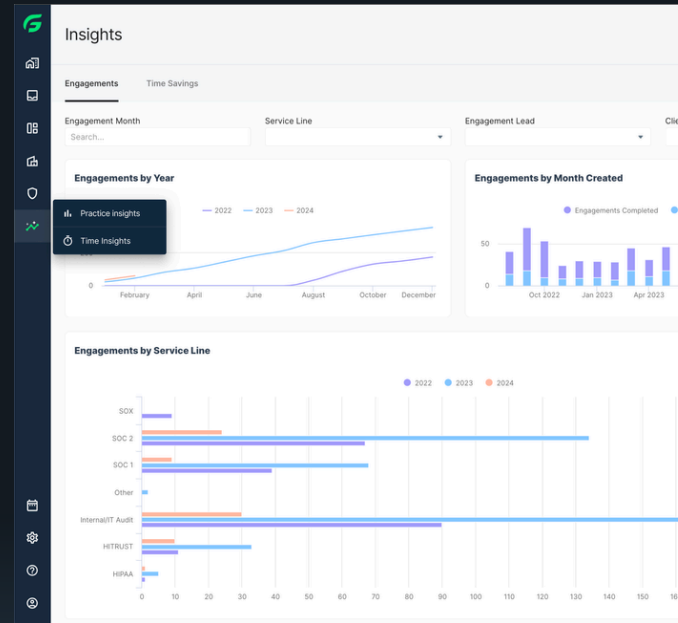
FIELDGUIDE

Insights to power your firm's growth

With the lingering talent shortage in the accounting industry, firms need to be smarter and more vigilant with their engagement, resource, and client metrics. Fieldguide Insights provides end-to-end analytics into how accounting leaders can improve engagement efficiency, reduce resource bottlenecks, and improve client relations. The solution contains multiple dashboards and reports that highlight information that can help a firm grow their business, including personalized recommendations where a firm can save time on their engagements, activities where team members are spending the most time across engagements, and potentially problematic client interactions.

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

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The Fieldguide Difference
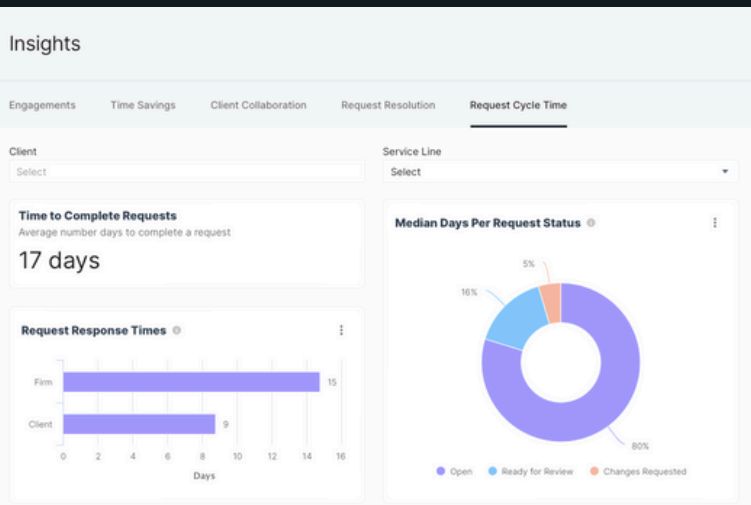
Time Savings Insights

Fieldguide Insights shows how much time firms are saving across different phases of their engagements - from planning to reporting and closing. It also provides personal recommendations on how firms can save additional time. For example, Fieldguide may recommend more broadly automating requests and evidence collection to save an additional 10 - 15 hours per engagement.

Practice Insights

Fieldguide's analytics highlight client responsiveness to requests, showing how long clients take to respond, requests with multiple changes, and other client interactions that may cause project delays. For example, practice leaders can quickly see which types of client requests tend to take more time, and then implement changes to ensure there are less review cycles needed.

Time Tracking Insights

Fieldguide provides detailed information on how team members are spending their time on engagements. Detailed analytics and dashboards show how much time staff members spend on different activities and engagements, enabling your practice to identify and troubleshoot which areas are taking too much effort.

The *future* of Trust. Powered by Fieldguide.

Top New Product 2024   2023   2022   2021

Top New Product
AccountingToday

Technology Innovation Award
3x Winner — CPA Practice Advisor

Fieldguide is the leading AI Platform for Advisory and Audit Services, streamlining the entire engagement lifecycle for firms and their clients. Top 100 and innovative firms like Wipfli, Mazars, and Aprio trust Fieldguide to increase revenue, boost client satisfaction, and improve profits. Fieldguide is a six-time winner of AccountingToday and CPA Practice Advisor awards, and the company is backed by top venture capitalists such as 8VC, Y Combinator, and Floodgate. Visit fieldguide.io to learn more.