



STAY TUNED...

The webinar will start in a few minutes



How Aprio Drives Digital Transformation with PCI and HITRUST Engagements

Industry Webinar Series: Building the Firm of the Future

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September 12, 1pm Eastern

How Maxwell Locke & Ritter Grew its Security & Compliance Practice by 5X
Kate Williams, Risk Assurance & Advisory Partner, ML&R

October 5, 1pm Eastern

Drive Digital Transformation with PCI and HITRUST Engagements
Shane Peden, Managing Director, Aprio

October 24, 1pm Eastern

Unlock AI to Shape Your Firm of the Future
Josh Tong, Head of Product, Fieldguide

Webinar Logistics

- All attendees will be placed on mute to minimize background noise
- Webinar will be recorded & shared along with the presentation slides
- We encourage active participation through the Q&A panel
- Help us learn more about you by answer polling questions
- How did we do? Answer a 5 question survey post webinar before you leave

Thank you!

Today's Speakers



Shane Peden

**Managing Director
Information Assurance Services, Aprio**

- Expertise in PCI, HITRUST, ISO 27001 and SOC 2 certifications
- Executive experience at Grant Thornton, risk3sixty, Patientco



Cameron Ackbury

**VP Go-to-Market
Fieldguide**

- Registered CPA and board Advisor
- Executive experience at Meta, NetSuite, Mindjet

About Aprio



- Ranked #26 on 2023 Accounting Today Top 100
- Over \$300M in revenue
- 71 years in business
- 1800+ professionals
- Services
 - Business Advisory
 - Assurance
 - Tax
 - Wealth Management
 - Outsourcing



Information Assurance Services Practice

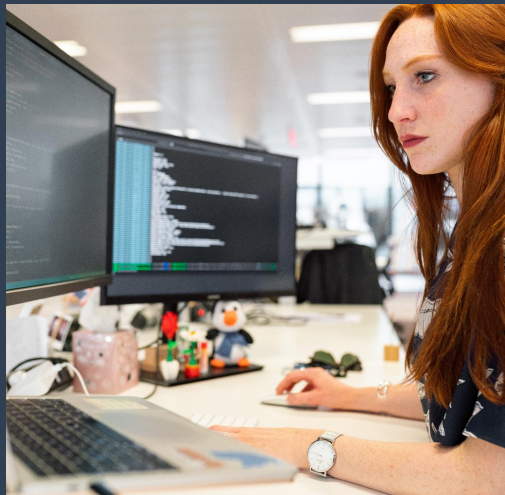


- 60 Professionals Nationally
- SOC 1 & 2
- PCI DSS
- HITRUST
- ISO 27001/27701 and 9001
- Compliance-as-a-Service

Client Experience Trends



**Integration to compliance
tools**



**Greater
automation**



**Proliferating
standards**

Unique Challenges of PCI and HITRUST Projects



HITRUST

- Proprietary software platform is required to use

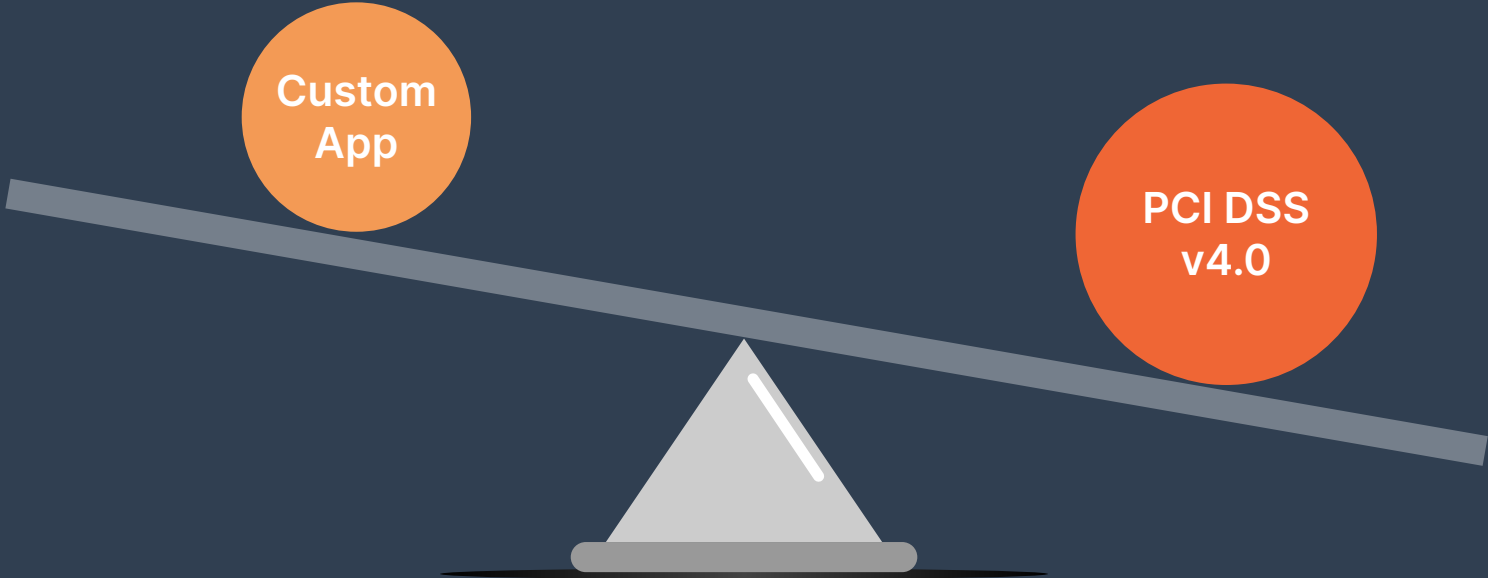
PCI

- Complex and burdensome reporting requirements
- The PCI report format discourages multiple assessors supporting an engagement

Both

- Inefficient project and document request management

A Tipping Point for Our Practice



5 Best Practices for Client Service



- 1 Streamline client communication
- 2 Increase team effectiveness
- 3 Improve engagement quality
- 4 Gain economies of scale
- 5 Focus on staff training

Results to Date

Client Satisfaction
Streamlined communication
Easy, real-time visibility

2

1

Higher margins

Lower overall costs through automation
Freeing up time of senior resources

3

Additional Revenue

Add-on work from similar engagements
Differentiated firm to attract new clients

Q&A

Coming up Next...

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For more information, visit fieldguide.io

