# Fieldguide Accelerator

Fieldguide Accelerator is our firm onboarding program designed to help you launch your clients on Fieldguide 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.

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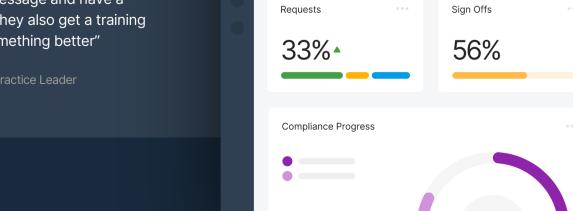
### Fast time to value
With a platform as intuitive as Fieldguide, your runway to launch will be much shorter compared to legacy solutions. Customers have launched their first client engagement in as little as two weeks.

### 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

Acme LLC SOC 2 •

Requests                    Sign Offs

33%▲                        56%

Compliance Progress

FIELDGUIDE

# 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** **Kick-Off Call**

- Introduction
- Expectation setting
- Planning & scheduling
- Understanding your processes

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**

- 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.

# Launch Phases

### **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.

"Having the Fieldguide team onboard, responding quickly to our needs, has kept us chargeable and moving forward. The ease of communication, helpful training videos, and assistance with imports was very key to our success."

Lisa Stover, Senior Manager
Arnett Carbis Toothman

# Firm Roles

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

### Project Manager

Assign one individual to manage the implementation within your firm. This person will:

- Be the primary point of contact for your designated Fieldguide expert
- 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 Fieldguide Expert or your Project Manager

# Timeline

**Kickoff Call**

Two Hours with your Launch Team and dedicated Fieldguide Expert

**Launch Team Workshops**

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

**Client Launch**

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 Fieldguide Expert

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**FIELDGUIDE**

Fieldguide is an automation and collaboration platform for modern assurance and advisory firms. From requests to reporting, the Fieldguide platform digitizes the end-to- end engagement workflow on a single platform. Built by former Big Four practitioners and experienced technology leaders, Fieldguide is trusted by top CPA firms to boost margins, win new business, and build stronger client relationships. Fieldguide was named Accounting Today's 2021 Top New Products for Audit Tools.

Learn more at fieldguide.io/accelerator