

# Fieldguide Launches Practitioner-Centric AI to Help Build the Firm of the Future

*AI-powered, Advisory Services Platform improves engagement quality, increases margins, and delights clients and staff*

SAN FRANCISCO, CA, UNITED STATES, June 7, 2023 /EINPresswire.com/ -- [Fieldguide](#), provider of the first and only Advisory Services Platform, today announced the launch of Fieldguide AI, the industry's first secure and private AI solution that helps firms future-proof their business. The new AI capabilities allow firms to securely leverage the latest AI innovations in order to significantly reduce the work and tedium associated with drafting and analyzing tests, requests, and document reviews, so that staff members can focus on more critical and higher margin work. With the latest Fieldguide AI features, firms can increase engagement quality, margins, and staff retention, while allowing practitioners to leverage their professional expertise in more productive ways.

With Fieldguide AI, practitioners can:

**Draft control tests based on control activities:** Fieldguide's AI suggests the appropriate control tests to perform based on the control activities identified in an engagement. This feature helps practitioners quickly and accurately identify the necessary tests to perform, streamlining the engagement process.

**Draft requests based on control activities:** Fieldguide's AI suggests the appropriate requests for documentation and evidence based on the control activity identified in an engagement. This feature helps practitioners quickly and accurately identify the necessary information to request from clients.

**Assess a document's adequacy for addressing a control:** Fieldguide's AI analyzes documents related to an engagement and suggests whether they meet requirements for a control activity. This feature helps practitioners identify potential issues early in the engagement and take corrective action as needed.

**Suggest improvements to a document:** Fieldguide's AI analyzes documents related to an engagement and suggests recommendations to better implement the control activity. This feature helps practitioners improve the quality of their engagements and provide better service to their clients.

"We are excited by the launch of Fieldguide AI, since it is a significant development to positively impact our firm and the larger Advisory Services industry. AI technology enables us to work both more strategically and efficiently, and we expect it to greatly enhance the client experience. We look forward to utilizing Fieldguide AI's capabilities as we position our firm for success," said Kurt Gresens, Managing Partner at [Wipfli](#).

Mark Koziel, President and CEO of [Allinial Global](#), stated: "Fieldguide AI is a step change in the CPA profession that addresses the talent pipeline challenges head-on. With its advanced AI technology, firms can automate the laborious tasks that consume valuable time, enabling professionals to focus on strategic initiatives and cultivate closer relationships with clients. This innovation propels us into a new era that empowers teams to deliver exceptional service while moving the industry forward."

With the launch of the new AI capabilities, Fieldguide takes the security and privacy of client data seriously. Fieldguide does not use user-submitted data to train or improve AI models. When interacting with Fieldguide AI, only a limited set of data is created and used to query AI models, and data is never used for training any AI models, ensuring that users' data is kept secure and private. As a result, Fieldguide AI is one of the safest ways for CPA firms to leverage AI models while maintaining data privacy and security.

Jin Chang, CEO and cofounder of Fieldguide, stated: "CPA firms must embrace AI and automation as a key part of the servicing equation. AI is the future and our latest AI capabilities are a significant innovation for the industry. By automating tedious tasks such as drafting tests and requests, as well as assessing document adequacy, we enable practitioners to use their expertise in more productive ways."

## About Fieldguide

Fieldguide is a comprehensive and client-friendly Advisory Services platform that manages the entire engagement lifecycle for any compliance framework, including SOC, HIPAA, PCI, HITRUST, ISO, NIST, SOX, and dozens more. For two years in a row, Fieldguide has been recognized by Accounting Today, receiving the Accounting Today 2022 Top New Products Award and the CPA Practice Advisor 2022 Technology Innovation Award. Fieldguide is backed by top venture capitalists such as 8VC, Y Combinator, and Floodgate.

To learn more about Fieldguide's game-changing technology, please visit [fieldguide.io](https://fieldguide.io).

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