

# EMPLOYEE BENEFIT PLAN (EBP) CASE STUDY

## How a Top 10 US-based CPA firm boosted efficiency & capacity with SAPRO

### SCOPE

Our client faced a **complex opportunity in managing and executing Employee Benefit Plan (EBP) audits while implementing new EBP software**. SAPRO partnered with them during their pilot implementation season, streamlining processes, optimizing resource allocation, and **successfully completing 60 EBP audits within a tight four-month deadline**. The engagement delivered high-quality results, ensured compliance, established a scalable workforce model, and provided valuable insights to refine and enhance future operations.

### SOLUTION

- **Workforce Consulting & Advisory:** Conducted in-depth assessments, segmented audit plans, and implemented a structured weekly sprint model for effective planning, execution, and tracking.
- **Global Talent Deployment:** Leveraged highly skilled EBP professionals from India, the Philippines, and South Africa to provide around-the-clock audit support.
- **End-to-End EBP Audit Services:** SAPRO managed the entire audit process, reducing partner workload and ensuring a smooth final review process.

### RESULTS

- **Efficient Execution:** 60 EBP audits completed within four months.
- **High-Quality Delivery:** Audit files were partner-ready and met regulatory compliance.
- **Scalable Workforce Model:** Flexible resource allocation allowed for adaptability based on seasonal needs.
- **Process Optimization:** Reduced duplication of efforts and streamlined collaboration.
- **Regulatory Compliance:** Full adherence to ERISA and DOL regulations ensured audit accuracy.
- **Client Satisfaction:** The firm deemed the engagement highly successful, affirming SAPRO's approach.

### CHALLENGES

- **Capacity Constraints:** A shortage of quality reviewers created a bottleneck, limiting the firm's ability to scale EBP audits.
- **Efficiency Struggles:** Partners were spending too much time on audits, affecting profitability and client service.
- **Workforce Limitations:** U.S.-based teams needed to focus on higher-value consulting but lacked the capacity to do so.
- **Technology & Process Gaps:** Implementing OnPoint EBP software, onboarding new managers, and reducing redundancies posed integration challenges.

### BENEFITS

- 60 audits completed in just four months
- Seamless global team integration across India, the Philippines, and South Africa
- Optimized processes that reduced redundancy and enhanced efficiency
- Scalable workforce model allowing flexible resource allocation
- High-quality audits ready for partner review with full compliance