

SAPRO 

# Employee Benefit Plan Case Study

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*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.

## 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:** US-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.



## 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.



## KEY ACHIEVEMENTS



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



Teams with  
extensive expertise  
in OnPoint EBP and  
a potential Autire  
partnership



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