

S A P R 

*Case Study: Driving Improved Efficiency
and Scalable EBP Offshore Solutions.*

**How we supported
an EBP industry
leader deliver EBP
plans through
Autire during our
pilot season**



SAPRO Case Study: EBP

Client Profile

US-based CPA Firm

Industry

Public Accounting – Assurance (Retirement Plan Services).

Background

The client is a US-based CPA firm delivering Employee Benefit Plan (EBP) audits to a large client portfolio. Entering peak EBP season, the firm faced increasing audit volumes, tight regulatory deadlines, and margin pressure. To address these challenges, the firm sought a trusted offshore partner that could execute EBP audits efficiently, maintain audit quality, and integrate seamlessly with their existing audit technology - Autire.

- SAPRO partnered with the firm to pilot an offshore EBP audit delivery model during the June–October 2025 audit cycle.

The Challenge

- **Capacity Constraints:** The firm needed to offshore 40 EBP audits within their portfolio, due to a compressed filing window while managing limited internal capacity.
- **Margin & Utilization Pressure:** US-based professionals were spending excessive time on audit execution instead of higher-value review and client-facing activities.
- **Quality & Compliance:** The firm required consistent, high-quality audit files that met ERISA and DOL requirements.
- **Technology Enablement:** Successful execution within the Autire EBP audit platform was critical to standardization and efficiency while maximising the ROI on their technology investments.

The Objective

The client sought to outsource EBP audit execution to achieve superior, faster, and more profitable results - while enabling US-based teams to focus on review, oversight, and advisory work.

SAPRO Solution

Offshore EBP Audit Delivery Model

SAPRO provided a dedicated South Africa–based offshore team that was Autire-trained via the Academy, comprising:

- 1 EBP Audit Manager
- 3 EBP Audit Executers

The team worked as an extension of the client’s audit practice, aligned to US audit standards and timelines, and delivered completed EBP files for review.

Technology Integration

- Partnered with Autire to provide tailored training to ensure readiness and support throughout the engagement
- Standardized workflows to ensure consistency across all plans

Project & Quality Management

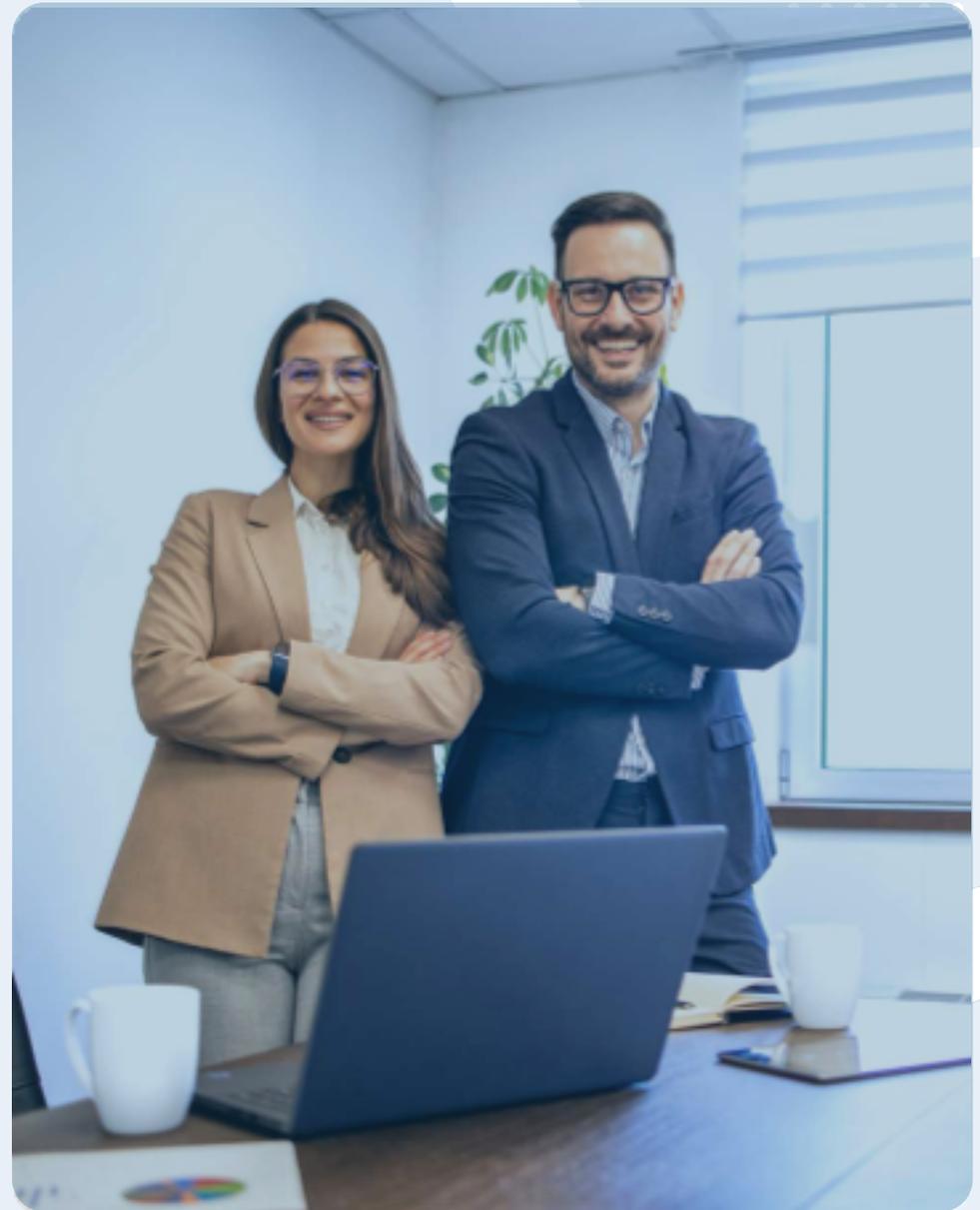
- A SAPRO Project Manager (client-side oversight) tracked:
 - Utilization
 - Hours per plan
 - Delivery timelines
 - Audit quality
- Structured planning, execution, and review cycles ensured transparency and accountability throughout the engagement.
- End-to-end execution through the Autire methodology and automation ensures that targeted hours are consistently met.



Execution & Delivery

- **Engagement period:**
 - June – October 2025
- **Total EBP audits completed:**
 - 40 plans
- **Hours per plan:**
 - 40-50 hours
- **Delivery model:**
 - Offshore execution with US-based final review
- **Parameters:**
 - Managed the PBC items via CPA firm manager
- **Deadlines:**
 - 100% of plans filed on or before due dates
- Financial statement preparation, AUC and rep letter

Regular status updates, issue tracking, and quality checkpoints ensured smooth collaboration between SAPRO and the client's US team.



Results and Impact



100% On-Time Filings:
All 40 EBP audits were completed and filed before statutory deadlines.



Improved Efficiency:
Predictable hours per plan enabled better budgeting and resource planning.



Enhanced Scalability:
The offshore model allowed the firm to handle peak-season volumes without increasing permanent US headcount.



Optimized US Resource Utilization:
US-based professionals focused on higher-value review, client communication, and advisory activities.



Consistent Audit Quality:
Audit files were delivered ready for US review, meeting regulatory and firm quality standards.

Key Takeaways for CPA Firms

Offshore EBP audit execution can be reliable, scalable, and compliant when supported by strong project management. Integrating offshore teams directly into EBP audit software (Autire) drives standardization and efficiency.

A dedicated offshore team with clear ownership delivers better outcomes than ad hoc staff augmentation.

End-to-end audit execution from Document gathering to financial statement preparation (Including Audit Report and Management representation letters)

Conclusion

By partnering with SAPRO, the client successfully executed a high-volume EBP audit season with confidence, efficiency, and predictability. The engagement demonstrated that a well-structured offshore delivery model - supported by strong project oversight and deep EBP expertise - can improve margins, reduce delivery risk, and free US-based teams to focus on higher-value work.

This case study highlights SAPRO's ability to serve as a trusted offshore EBP audit partner for US CPA firms seeking faster, more profitable, and scalable audit delivery.

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