

SAPRO 

Case Study: Rapid EBP Audit Capacity Support During Peak Season

Delivering Critical EBP Audit Capacity at Short Notice During Peak Filing Season



SAPRO Case Study: EBP

Client Profile

US-based CPA firm

Industry

Public Accounting – Assurance (Employee Benefit Plan Audits).

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

- **Mid-Season Capacity Shortage:** Internal resources were fully utilized, placing audit deadlines at risk.
- **Time Sensitivity:** Immediate deployment was required to avoid late filings and regulatory exposure.
- **Specialized Skill Requirement:** The firm needed a professional with proven EBP audit experience and hands-on knowledge of Autire.
- **Minimal Onboarding Time:** There was no capacity for lengthy training or process redesign.

The Objective

To rapidly augment capacity by outsourcing the full execution of selected EBP audits to an experienced offshore professional—ensuring timely, compliant delivery with minimal disruption to the firm’s existing audit operations.

SAPRO Solution

Rapid Offshore Deployment – Productized EBP Audit Execution

SAPRO deployed one senior EBP auditor from South Africa with:

- Proven experience in EBP audits
- Hands-on expertise in Autire
- Prior exposure to US CPA firm audit methodologies

The auditor was embedded mid-season and took full ownership of audit execution, delivering completed audit files ready for US-based review and sign-off.

What Our Client Says

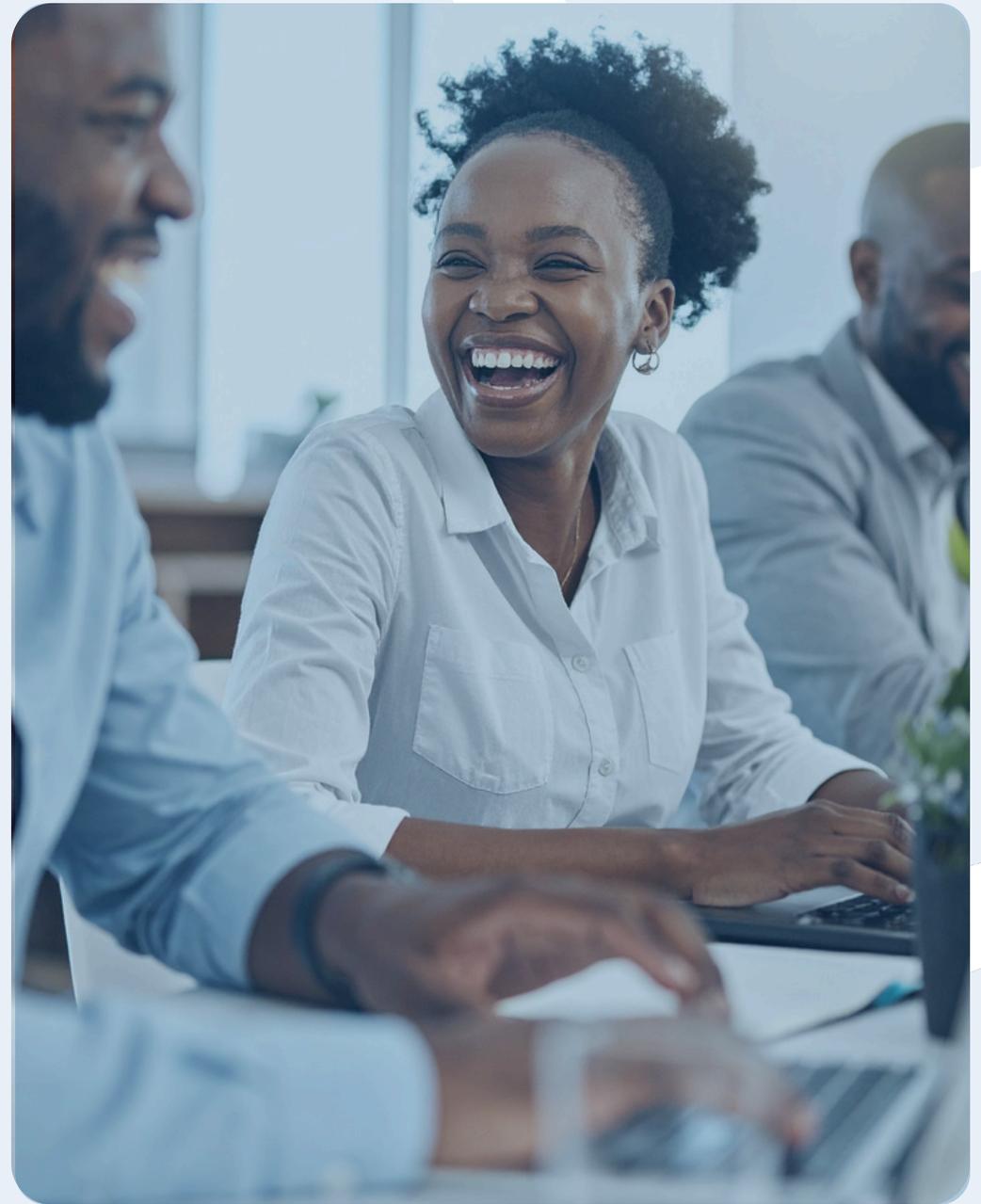
The client conveyed strong appreciation for our assistance with the EBP plans and indicated that our support was critical to the project's success.



Execution & Delivery

- **Engagement timing:**
 - Mid EBP busy season
- **Delivery model:**
 - Fully outsourced EBP audit execution
- **Hours per plan:**
 - 35 hours (Including Financial Statement Preparation)
- **Parameters:**
 - Managed the PBC items via CPA firm manager
- **Total EBP audits completed:**
 - 6 plans
- **Technology:**
 - Autire EBP audit platform
- **Integration:**
 - Aligned to client workflows with minimal onboarding

The engagement required rapid alignment, focused communication, and disciplined execution to meet immovable filing deadlines.



Results and Impact



100% On-Time Filings:

All 6 EBP audits were completed and ready for filing within required deadlines.



Immediate Capacity Relief:

The firm alleviated peak-season pressure without hiring or overloading internal staff.



Minimal Disruption:

The experienced auditor required little oversight, allowing the firm's managers and partners to stay focused on broader client responsibilities.



Quality & Compliance:

Audit files met firm standards and regulatory requirements, supporting smooth review and sign-off.

Why This Matters for CPA Firms

- Demonstrates SAPRO's ability to deploy experienced EBP auditors at short notice
- Validates offshore delivery as a reliable solution during peak season emergencies
- Shows that full audit execution can be successfully outsourced—not just staff augmentation

Conclusion

This engagement demonstrated SAPRO's ability to act as a trusted rapid-response partner for US CPA firms facing EBP busy season capacity constraints. By deploying an experienced senior auditor with immediate Autire capability, SAPRO enabled the firm to meet critical deadlines, maintain audit quality, and navigate peak season with confidence.

The success of this engagement reinforces SAPRO's flexible delivery model—capable of supporting both long-term offshoring strategies and urgent, short-term execution needs.

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