LBMC

CASE STUDY: REDUCING AUDIT FATIGUE THROUGH CONSOLIDATED COMPLIANCE REPORTING

symplr OVERVIEW

symplr is a leader in enterprise healthcare operations software and services with a first-of-its-kind operations platform. Trusted in 9 of 10 U.S. hospitals and 400+ U.S. health plans, symplr optimizes operations and maximizes care powered by our cloud-based workforce, quality, provider data management, and spend solutions.

With an expansive client base and a mission grounded in data integrity and trust, symplr invests heavily in security and compliance as part of delivering value to customers. Their compliance efforts, including HITRUST certification, HIPAA, SOC, and NIST, demonstrate that commitment and ensure our solutions can scale confidently with the evolving needs of healthcare organizations.

symplr

LBMC OVERVIEW

LBMC's Cybersecurity practice is a nationally recognized leader in delivering tailored information security, privacy, and compliance solutions, especially for organizations navigating complex frameworks like HITRUST CSF®, SOC 2, HIPAA, and NIST. LBMC brings deep technical expertise and real-world perspective to every engagement. An Authorized External Assessor® since 2010, LBMC was among the first approved and has two assessors serving on the HITRUST Assessor Council and multiple working groups.

LBMC regularly presents at the HITRUST Collaborate conference, sharing expertise on compliance strategies, audit efficiency, and scalable assurance. Through its blend of strategic advisory and hands-on implementation, LBMC helps clients reduce audit fatigue, enhance their security posture, and build long-term, scalable compliance programs. The firm is widely regarded as a trusted partner to healthcare and high-growth companies seeking both assurance and innovation in cybersecurity.

> *"LBMC's hands-on approach is a very welcome benefit to our organization. They work with us throughout the audit to ensure we know what is being asked, answer any questions we may have during the audits, and bring us potential issues timely so we can address them within the audit periods. This created enough trust to consider letting LBMC lead us through an audit consolidation and efficiency improvement."*
> *— Saeed Valian, CISO, symplr*

THE CHALLENGE: DUPLICATIVE ASSESSMENTS AND AUDIT FATIGUE

As symplr expanded rapidly through innovation and acquisition, the company's compliance obligations also grew. With HITRUST, HIPAA, SOC 1 and SOC 2 requirements in scope, leadership recognized the need for a smarter, more efficient way to manage audits. While symplr had multiple certifications and attestation reports in place, the decentralized audit schedule meant teams were spending too much time preparing for overlapping assessments instead of focusing on growth and innovation.

Rather than accept this as status quo, symplr proactively engaged LBMC to help consolidate audits into a unified, forward-looking program that would scale with the business. The goal was clear: reduce audit fatigue, strengthen compliance reporting, and continue to set the standard for security and trust in healthcare operations.

THE SOLUTION: A UNIFIED AUDIT STRATEGY

Rather than treating each audit as a standalone event, symplr and LBMC designed a unified compliance strategy that aligned multiple requirements into a single, scalable program. The approach was rooted in efficiency, transparency, and future-proofing.

1. Centralized Compliance Cycle

LBMC worked with symplr to synchronize timelines across HITRUST, SOC 1, SOC 2, HIPAA, and risk assessments. This eliminated redundant evidence requests, reduced disruption to internal teams, and created one clear compliance calendar that all stakeholders could follow.

2. Strategic Use of HITRUST Certifications

symplr shifted from maintaining separate certifications for different products to adopting a streamlined HITRUST Risk-based, 2-Year (r2) certification that covers enterprise-wide processes and key solutions within the symplr Operations Platform. For new or mid-cycle needs, LBMC guided the team in leveraging HITRUST Implemented, 1-Year (i1) assessments with inheritance from the r2. This smart use of certification types reduced the burden of duplicative testing while still meeting client and regulatory assurance needs.

3. Test Once, Report Many

By creating a centralized evidence collection process, symplr teams now gather documentation once and apply it across multiple audits. This "test once, report many" framework has cut down audit prep time significantly while improving consistency of results across frameworks.

4. Stronger Communication with Customers

Perhaps most importantly, this consolidated model strengthened symplr's ability to communicate compliance efforts externally. With a clear, harmonized approach, CIOs and compliance leaders at hospitals and health plans now see not just proof of certification, but evidence of a partner investing in sustainable, enterprise-grade security practices.

5. Foundation for Scale

The new compliance architecture isn't just a short-term fix — it's designed to grow with symplr. As new solutions are added to the platform or regulatory requirements evolve, the program can flex without overburdening teams or customers.

"Partnering with LBMC has transformed our approach to compliance into a strategic advantage. By managing audits through one coordinated process, we have introduced a proactive and scalable program that has accelerated audit timelines, minimized redundant efforts, and provided a more structured way to communicate security and trust to our customers." — Saeed Valian, CISO, symplr

"This was about more than combining audits. It was about helping symplr build a smarter, more sustainable compliance program. We streamlined their audit calendar, consolidated overlapping efforts, and restructured their HITRUST approach to scale with the business. Now they're getting better outcomes with less internal disruption, and they have a framework that supports both growth and assurance."
— Robyn Barton, LBMC Shareholder and HITRUST Practice Leader

LBMC + symplr: Building a Smarter Audit Strategy

Understanding the Drivers Behind the Work

symplr's compliance strategy is shaped by customer expectations, regulatory requirements, and our own commitment to enterprise security. With clients across thousands of hospitals and health plans, we prioritized building a compliance model that could keep pace with growth while reinforcing trust at every level.

Digging Deeper into What Matters

LBMC partnered with symplr to map each framework to the business outcomes it supported. This clarity ensured every audit effort targeted meaningful assurance, avoided wasted cycles, and reinforced our reputation for safeguarding sensitive healthcare data.

Taking Stock and Aligning the Approach

Together, LBMC and symplr created a coordinated audit program that streamlined timing, scope, and evidence collection. By designing the process for reuse —test once, report many—we elevated efficiency and consistency across frameworks.

Making the Transition Work

Realigning timelines and consolidating scopes required collaboration, but the result was a compliance calendar that fits seamlessly into symplr's growth strategy. Instead of reacting to audits, we now anticipate them and integrate compliance into the rhythm of our business.

Making It Stick

Sustainability was the ultimate goal. The new program ensures:

- Evidence collected once supports multiple assessments
- New products can be added without disruption
- Expectations remain consistent across frameworks
- Compliance is communicated clearly to customers and partners

"Partnering with LBMC helped us elevate compliance into a strategic advantage. Instead of treating audits as separate projects, we now manage them through one coordinated process that saves time, reduces redundant work, and gives us a stronger platform for communicating security and trust to our customers."
— Saeed Valian, CISO, symplr

5 Practical Steps to Streamline Compliance and Cut Audit Fatigue

1

GET A CLEAR VIEW OF YOUR ENTIRE AUDIT LANDSCAPE

Start by pulling together a full picture of all audits, assessments, and risk reviews happening across your organization (HITRUST, SOC 1, SOC 2, HIPAA, PCI, ISO, risk-based assessments and any client-specific requirements). This will help you spot overlaps, duplicate requests, and misaligned schedules that create unnecessary work.

2

SYNC TIMELINES ACROSS FRAMEWORKS

Bring your audit schedules into alignment with a single, coordinated compliance calendar. When testing and reporting periods are in sync, you reduce internal disruption, avoid resource conflicts, and make the audit process more efficient for everyone involved.

3

CENTRALIZE HOW YOU COLLECT EVIDENCE

Set up a shared system for collecting and tracking evidence - one that's easy to follow, has clear owners, and cuts out unnecessary steps. It should be secure, straightforward for both sides, and designed to minimize busy work like duplication or extra admin. At LBMC, we use leading audit software so you can spend more time gathering evidence and less time figuring out how to share it. As part of this, use what you've outlined in step two to make sure evidence checks all the right boxes - scope, timing, and relevance - across multiple assessments. That way, your team only needs to upload documentation once per cycle, saving time and avoiding repeated requests.

4

CONSOLIDATE CERTIFICATIONS WHERE IT MAKES SENSE

If you have multiple certifications, look for opportunities to consolidate - like rolling everything into an enterprise HITRUST r2 certification. For new or mid-cycle needs, consider using i1 assessments with internal inheritance, then fold them into the next r2. It's a flexible, scalable approach that saves time without cutting corners. Similarly for SOC reports, consider scope, timing, and likelihood of any qualifications to determine the number of necessary reports.

5

TAILOR REPORTING TO YOUR AUDIENCE WITHOUT DUPLICATING EFFORT

Partner with a firm that can support all of your assurance needs from a single audit stream. A well-structured process can deliver multiple outputs, like HITRUST reports, SOC 2s, and internal risk summaries, without running separate audits. It's a smarter way to serve regulators, clients, and internal teams all at once.

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Ready to simplify your compliance journey?
Contact our team today!