

CASE STUDY

Cortez Business Solutions uses Passpack to combine enhanced security with increased productivity

Who is Cortez Business Solutions?

Cortez Business Solutions is a San Diego-based full-service accounting practice successfully working virtually for over 15 years.

CBS serves multiple clients across a diverse range of industries, across the USA, primarily in California.

Industry: Financial Services



What they're saying about partnering with Passpack

"Passpack gives us the visibility needed across the organization to control password hygiene and related security habits."

"The experience has been terrific, no layers, quick decision making."

"Customer support is excellent, very knowledgeable and fast response times."

"Good see new features being released on a regular basis, like the new UI."

The Challenge

As the owner of the practice, I knew to continue to grow successfully we needed password and credential management in our cybersecurity toolbox. Not just for internal purposes, but also to illustrate for our clients how committed we are to the security of their information.

"Client confidence in our business integrity is priority Number One."
- Frances Cortez, CEO

The Process

Implementation was super easy. When needed, the Getting Started articles on the website and the User Manual were great resources.

It was so rewarding to quickly set up teams based on roles and client lists. The ability to label passwords is a great organizational feature. The learning curve on the app was quick for the entire staff, and when we had a question, customer support was excellent.

The Outcome

The key outcome for CBS is business integrity. Passpack being part of our SOP gives us the confidence that our teams can securely manage client work efficiently. It has helped us scale, and the centralized administrator controls give us 100% visibility into all password-related activities.

Key Results

- ✓ Security and trust delivered
- ✓ Efficient team set up
- ✓ Improved productivity

Get Started with Passpack Today!