



Lisa Dionisio, CPA
Owner of Paxus CPA Group

Secure Growth for a Modern Advisory Firm

“*Rightworks has fundamentally changed how we operate. Our team can securely access exactly what they need without ever sharing usernames and passwords.”*

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About Paxus CPA Group

Paxus CPA Group is a Norman, Oklahoma-based bookkeeping and advisory firm specializing in nonprofit organizations and professional services firms. With a hybrid workforce operating across the U.S. and the Philippines, the firm supports more than 140 monthly and quarterly client engagements.

The Challenge: Security Needed to Scale with Growth

As Paxus CPA Group expanded its hybrid workforce, leadership needed a more secure and efficient way to manage client access across employees, contractors, and international team members.

Frequent movement between dozens of client accounts created operational inefficiencies and increased complexity around credential management and access controls.

“Bringing on international team members was a turning point for us in how we approached security,” said Dionisio.

Key Obstacles

-  Managing secure access across a distributed workforce
-  Fragmented client access workflows
-  Administrative burden managing credentials and logins
-  Supporting secure onboarding for employees and interns
-  Protecting sensitive client financial information
-  Scaling operations while maintaining efficiency and control

At the same time, the firm wanted to maintain the flexibility and responsiveness that clients expected from a modern advisory partner.

The Solution: Secure, One-Click Access with Rightworks

Paxus CPA Group implemented Rightworks to centralize and secure access to client systems across the organization. Employees can now securely access only the systems assigned to them, without sharing usernames or passwords. The platform also simplified onboarding and reduced the administrative burden of managing credentials and troubleshooting login issues.

The firm established:

- Secure, one-click access to client systems
- Role-based permissions across teams
- Centralized credential management
- Simplified onboarding for employees and interns
- Greater visibility and control over user access

The Results: Greater Efficiency and Client Confidence

With Rightworks in place, Paxus CPA Group improved operational efficiency while strengthening the protection of sensitive client information.

Employees now move seamlessly between client systems, reducing friction throughout the workday and allowing teams to stay focused on delivering high-value advisory services.

Operational Transformation

- ✓ Faster access across client systems
- ✓ Reduced login and credential management issues
- ✓ Streamlined onboarding and administration
- ✓ Improved productivity across bookkeeping workflows
- ✓ Efficient support for hybrid and international teams

Infrastructure & Support

- ✓ No sharing of usernames or passwords
- ✓ Centralized access controls and credential management
- ✓ Reduced risk across distributed teams
- ✓ Stronger protection of client financial information
- ✓ Increased client confidence in firm security practices

Building a Secure Foundation for Growth

Looking ahead, Paxus CPA Group plans to continue growing intentionally while deepening its focus on nonprofit and professional services clients.

"I really value the partnership with Rightworks," said Dionisio. "They take the time to listen to their customers and continuously improve their solutions."

“We make a point to tell our clients about the investment we’ve made in protecting their data,” said Dionisio. “The peace of mind we have knowing we’re doing what’s best for our clients is invaluable.”

Secure Access. Simplified Operations.

With Rightworks, Paxus CPA Group has established a secure operational foundation that supports both its client-first culture and its long-term growth strategy.



rightworks

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