
THE VALUE OF VALUES



SPONSORED BY THE INC. REGIONAL HONOREES WHO APPEAR IN THE FOLLOWING PAGES

Your company's values are everything. They're the cornerstone of the most successful ventures. The very foundation of every business decision you make. Actually, not just the foundation. They are the mortar holding the bricks. The grout between the tiles. The caulk and paint, too. All that stuff.

So it's reasonable to start considering what your company stands for the moment you launch, right? Wrong. That's too late. Not only must you establish your values before day one, you must also refine them throughout the life of your venture. You actually needed to start yesterday. And, also, start now. And then restart tomorrow.

But building a values-based company is not as simple

as declaring a few bromides and tacking them on the wall. To implement your values, you must assemble and guide a team that will follow them—better yet, *embody* them. That hotshot Brad from Wharton who isn't going to go the extra mile? Don't hire him. That strategic partnership with GloboDrone that will sideline the needs of your customer? Steer clear.

If it seems like all this values stuff takes a lot of effort—well, it does. So we asked scores of founders to share their hard-earned insights into how they built their values-based businesses, and how you can do the same. Because while your company values might be unique to you, no one says you have to manage them on your own.

Defining Your Values



Simon Sinek
Business author

“Values should be written as verbs. They’re things we do. Innovation is not a value. Honesty is not a value. You can’t walk into someone’s office and say, ‘Be more innovative!’ or ‘Be more honest!’ Instead, write, ‘Always tell the truth,’ or ‘Look at the problem from a different angle.’ Those are values, because values have to be actionable.”

Sinek has written several best-selling business books, including Start With Why, Leaders Eat Last, and The Infinite Game.

Cami Téllez
Founder and CEO
PARADE

“Our value ‘We’re box packers’ literally came from several moments when I and the rest of the company were in the office, on the floor, packing boxes to send out to our community. I realized everyone should be that close to our consumers, be that hands-on with our product, and be really willing to do the detailed work.”

Since launching in 2020, Téllez’s Brooklyn-based underwear brand has sold more than three million pairs.

65%

OF COMPANIES SAY ONE OF THEIR CORE VALUES IS “INTEGRITY,” THE MOST COMMONLY CITED VALUE.

Source: MIT Sloan Management Review



Amy Errett
Founder and CEO
MADISON REED

“Before we even had our products finalized, we set our company values. This is about defining the soul of your company. It can’t happen retrospectively—it is a core action that sets everything in motion.”

Errett’s San Francisco-based hair-coloring business is one of Inc.’s Best-Led Companies of 2021.



Bruce Eckfeldt
Founder and CEO
ECKFELDT & ASSOCIATES

“Companies often make the mistake of creating an idealized set of aspirational values that feel nice, rather than a list of descriptors that illustrate reality. I like to joke that your values should be 15 pounds overweight, have a receding hairline, and drink a little too much. If your values look perfect, then they are probably not right.”

Prior to starting his business coaching firm, Eckfeldt founded a technology consulting business that made the Inc. 5000 five years in a row.



Danish Qureshi
Co-founder and chief growth officer
LIFESTANCE HEALTH

“We undertook a month-long process where we engaged with team members across all sections of the company. It was important that our values resonated with all of our 6,000-plus team members, regardless of position or seniority, and that they each could find something in our values that they personally identified with. I would recommend going as broad and inclusive as you can when starting the process for identifying your company values, to ensure true representation and the largest impact. Agonizing and focusing on every word and syllable, though difficult, pays off in ensuring your choices resonate as broadly as possible, and allows you to rally your team around company culture.”

Lifescape, a Scottsdale, Arizona-based provider of virtual and in-person outpatient mental health care, went public in 2021.

Successful Health Care Recruiters Are Made, Not Just Hired

With trust, training, and financial incentives, Ironside HR sets up recruiters for success

IRONSIDE HR IS GROWING fast enough that its vice president of recruiting now focuses full time on training. CEO Doug Carter stepped back from sales and marketing, focusing on other aspects of running the health care recruiting company. "We're finding ourselves in the crosshairs of a growing company," he says. Ironside grew from 17 staff members in 2020 to 25 last year and could double by year end.

To ensure that Ironside is ready to meet these growth challenges, the firm's financial consultants have urged Carter to reduce compensation packages. Carter shared that Ironside currently pays 10 percent more in commission than its closest competitor, stating that "while it's tempting to pay people less, that's simply not how we got to where we are." Carter also urges employers to "pay your employees well and don't be stingy," and says that his preferred compensation model is high commissions, a livable base salary, and no commission caps.

Carter sees the difference higher pay makes in his staff members' lives. In the past year, five employees bought first homes, and four bought new cars. "They all told leadership they couldn't have done it without Ironside," he says.

A DIFFERENT PERSPECTIVE

Typically, new Ironside employees don't know they are receiving higher commission rates than the competition offers. That's because Carter hires from outside the industry. The commission is a carrot to stay, not to join the company.

Carter prefers training new recruiters, rather than hiring recruiters with preconceived notions. Ironside hires from industries with high customer interaction levels, like retail, fitness, restaurant, and valet. In addition to internal training, Carter now brings in a Sandler Training staffing professional. The staffing pro teaches techniques for prospecting candidates and gauging their

Inc.
Regionals
SOUTHWEST

► Ironside HR's strength is its team, shown here at the company's Dallas headquarters.

2022 REGIONAL
RANKING
No. 71

2011
YEAR FOUNDED

25
EMPLOYEES

80%
ANNUAL CLIENT
RETENTION RATE



IRONSIDE HUMAN RESOURCES
HEALTHCARE TALENT ACQUISITION



interest, teaching them how to deal with resistance and conflict in business. "It's been an incredible growth spurt for the team," Carter says.

The outside training has paid off with better closing ratios, lower stress levels, and an improved culture. Staff members are making more money and enjoying their jobs more, too.

COLLABORATION AND TRUST

While many companies are cutting back on office space and pushing hybrid/remote work, Ironside is preparing to double in square footage. "In this environment, it's counterintuitive to work remote," Carter says. In 2021, Ironside was fully in person and will continue unless a new mandate arises. "Our business is one of collaboration," he says. "People collaborate when working together in a fast-paced environment."

Ironside also provides all recruiters direct access to top-market recruiting tools, instead of having only a few people use the tools to delegate. While the direct access model is more expensive, Carter says the return on investment is 10 times what he pays, allowing recruiters to better manage their business. "Our team does an incredible job that keeps our clients coming back," he says.

IRONSIDEHR.COM



Adam Grant
Author and organizational psychologist

“Don’t just list your values; rank them in order of importance so they help you choose between competing priorities—honesty versus loyalty, freedom versus security.”

In addition to his work as a professor at the Wharton School, Grant has written five best-selling books.

27%

OF U.S. EMPLOYEES SURVEYED STRONGLY AGREE THAT THEY BELIEVE IN THEIR COMPANY’S VALUES.

Source: Gallup

Ajay Pattani
Founder and CEO
PERFECT SEARCH MEDIA

“We found that the best time to brainstorm core values was during our weekly company meetings. We’d split up into small groups, and each would list the qualities that they believed we embodied. Once we had each team’s list, we noticed overlap and patterns—which was reassuring. Our team decided that five was a reasonable number that’s easy to remember, while thorough enough to cover all the bases. Then we narrowed the full list, chose the most important values, and workshopped them into concise statements.”

Pattani founded his Chicago-based digital marketing agency in 2010. It made the Inc. 5000 in 2017 and Inc.’s Best Workplaces list the following year.

52%

OF GLOBAL CONSUMERS PREFER TO BUY FROM BRANDS THAT STAND FOR SOMETHING THAT ALIGNS WITH THEIR PERSONAL VALUES.

Source: Accenture

Heidi Zak
Co-founder and CEO
THIRDLOVE

“The best way to craft meaningful values is by using short, impactful sentences. When you just choose one or two words, the value seems vague—and it becomes difficult for someone to actually internalize it. ‘Action’ is a great value, sure, but it doesn’t exactly inspire action or help guide anyone in the same way ‘make it happen’ does.”

Founded in 2013, Zak’s San Francisco women’s lifestyle brand has donated more than \$50 million worth of its products to women in need.



Communicating Your Values

Neil Blumenthal Co-founder and co-CEO WARBY PARKER

“Core values are easy to write and hard to live up to. Many of us have had the experience of working at companies whose core values were purely theoretical—or, worse, existed in active opposition to the day-to-day workplace environment. It’s a depressing situation. To breathe life into the collection of words we call values, we’re constantly coming up with ways to enact them, and regularly surveying employees to find out where we’re missing the mark.”

New York City-based Warby Parker has distributed 10 million pairs of glasses to people in need through its Buy a Pair, Give a Pair program.



Robert Glazer Founder and board chairman ACCELERATION PARTNERS

“Keeping someone whose views and actions clash with the culture sends a very bad message to the rest of the company. Even if someone is a top performer, the best companies cut the cord when they realize there is a culture or values mismatch.”

Acceleration Partners, a Boston-based affiliate and partnership marketing agency, made Inc.’s Best Workplaces in 2019 and is a four-time Inc. 5000 honoree.

94%

OF CEOs FEEL A PERSONAL RESPONSIBILITY TO LAY OUT THEIR COMPANY’S CORE PURPOSE AND ROLE IN SOCIETY.

Source: Accenture

Jenn Lim Co-founder and CEO DELIVERING HAPPINESS

“Values act as a compass, helping each individual navigate both clear and murky work challenges. Knowing that your employees are making decisions based on the strategy and ethical standpoints of your business, you no longer have to feel like you’re fighting every fire.”

A 2020 Inc. 5000 honoree, Delivering Happiness provides businesses with culture coaching and consulting services.

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From Freight Forwarder to Global Mover and Shaker

International Van Lines has become a market leader by hiring top talent and nurturing partner relationships

JOSH MORALES started his international moving career at age 18 working for a freight forwarding company, where he arranged door-to-door transportation for ocean and air cargo. When the owner closed the company, Morales started International Van Lines, his own freight forwarding venture. However, he discovered that clients had moving needs beyond ocean transport.

"Many of the freight forwarding accounts I had were asking me to help relocate employees' household goods overseas," Morales says. Although he lacked experience in that type of moving, he partnered with origin agents, or moving companies, in the U.S. and more than 150 countries, to help him get shipments from Point A to Point B almost anywhere in the world.

Today that network of global industry partners tops 3,000. International Van Lines has a 50,000-square-foot warehouse in Chicago, its main hub, as well as 20,000- and 30,000-square-foot warehouses in Florida, Texas, and California.

INVESTING IN TALENT AND TECHNOLOGY

The key to the company's success, Morales says, has been hiring people who are smarter than he is. "That can be hard for a lot of company owners, who are more comfortable being in control," he explains. He admits that he went through that, too. However, "When I decided to let go and hire people who I thought were brilliant, they helped me grow the business," he says.

International Van Lines was also a pioneer in applying video tour technology to the moving industry. In the early days of the pandemic, when everyone wanted to move but no one wanted to let moving staffers into their homes to prepare estimates, the company's MoveOne software was a workaround—a contactless way to get a thorough look at the furniture and home goods to be moved. The use of video tour technology also

reduced the turnaround time on quotes from three to five days, down to one hour.

NURTURING RELATIONSHIPS

Forging and maintaining personal relationships with employees, agents, and marketing partners is also critical, Morales says. He stays in touch regularly and schedules Zoom check-in meetings and dinners, on top of ensuring that bills are paid on time.

Customers are taken care of by assigned personal account managers, who are available to them 24/7, which is practically unheard of, Morales says.

Honesty is another trait that can make or break a business. "If you say you're going to do something, you have to do it," Morales says.

All that honesty, in sharp contrast to the increasing moving scams online, has netted the company regular referrals from satisfied customers. Morales estimates that 80 percent of new customers come from positive word of mouth. That is on top of the honors the company has garnered. "We're rated number one on multiple third-party websites," according to Morales, including *Newsweek*, *Forbes*, *Better Homes and Gardens*, and *Architectural Digest*, to name a few.

"The last two years have been busier than ever, thanks to the investments we've made," Morales says.

INTERNATIONALVANLINES.COM

**Inc.
Regionals**
SOUTHEAST

2022 REGIONAL
RANKING
No 111

\$29.6
MILLION
2021 REVENUE

375%
3-YEAR GROWTH

105
EMPLOYEES



► International Van Lines management and employees celebrate 15 years in business.



Providing Students Health Care on Demand

With an exclusive focus on higher education, TimelyMD fills an urgent need in the virtual health care market

WHEN TIMELYMD WAS FOUNDED in 2017, telehealth was still a novel idea in the world of higher education. Then the Covid-19 pandemic came along. Colleges and universities sent students home and taught them virtually. However, many of those students still relied on campus medical and mental health care services on campus. Suddenly, TimelyMD, then the only virtual health care provider specializing in the higher education market, had a customer base eager to adopt the technology.

Luke Hejl, TimelyMD CEO, co-founded the Fort Worth, Texas-based company with Chris Clark, chief strategy officer, and Alan Dennington, MD, chief medical officer. All three co-founders are alumni of Abilene Christian University, which became TimelyMD's first institutional partner. Together, these results-focused leaders and longtime friends have channeled their passion for well-being and their entrepreneurial experiences in business, technology, and health care to help students get the care they need to thrive.

MEETING NEW DEMANDS

Colleges and universities cover the cost of partnering with TimelyMD, which means services are free for students. At first, the company offered only on-demand medical telehealth services. Soon, it added 24/7 access to mental health care, an important resource for struggling students. Since the pandemic, the demand for mental health support has surged from 10 percent of user visits to more than 70 percent.

Along with scheduled and on-demand medical and mental health services, TimelyMD also offers health coaching, psychiatry, digital self-care content, and faculty and staff guidance. Its basic needs assistance program links students to financial, housing, food, and transportation resources. Students access services with a video or phone call.

**Inc.
Regionals**
SOUTHWEST

2022 REGIONAL
RANKING
NO. 7

200+
MILLION
U.S. CAMPUS
PARTNERS

\$65
MILLION
IN FUNDING

150+
FULL-TIME
EMPLOYEES

timelyMD

▶ TimelyMD partners with colleges and universities to give students greater access to health care.

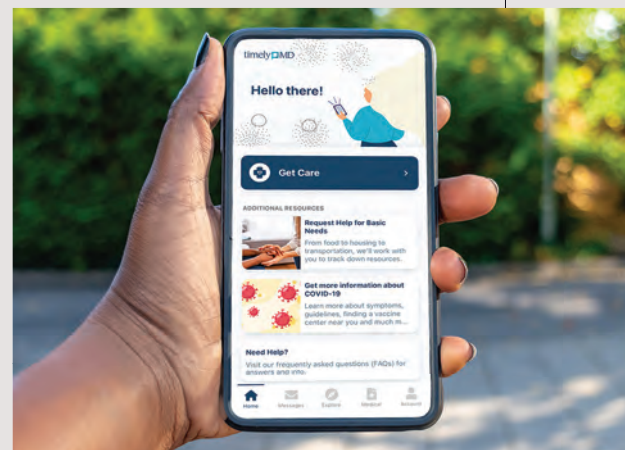
With more than 550 providers in its proprietary TimelyCare platform, TimelyMD enhances campus resources by making care more readily available to students when they need it, limiting the spread of illness, reducing the stigma of mental health issues, and granting peace of mind to students and their families.

MORE EQUITABLE ACCESS TO CARE

As the leading virtual health and well-being solution in higher education, TimelyMD now serves one million students at more than 200 U.S. campuses. The roster of institutional partners includes the University of Chicago, Duke University, Emory University, Georgetown University and University of Notre Dame, among others, as well as dozens of community colleges, historically Black colleges and universities, and faith-based institutions.

"Meeting the need for more equitable, on-demand access to care is an issue that every institution is looking to solve," Hejl says. "We're helping them do that by extending care beyond the campus walls."

TIMELY.MD



Building an Award-Winning Freight Marketplace

Emerge connects an estimated 80,000 trucking companies in the U.S. to corporate shippers in need of transportation services

DESPITE ITS massive size, the \$800 billion U.S. trucking industry has, until recently, relied exclusively on phone calls, emailed bids, and spreadsheets to manually arrange shipments. Companies of all sizes with freight to move from one location to another typically track each shipment with a spreadsheet, send an email blast to brokers and carriers to request bids, and then choose transport based on pricing and timing, explains Andrew Leto, founder and CEO of EmERGE.

Based in Scottsdale, Ariz., with two other locations in Boulder and Atlanta, EmERGE has revolutionized the for-hire trucking industry with its 2017 launch of a digital marketplace—the only one of its kind thus far, Leto says. Now, instead of phone calls, emails, and manual bid tracking, the EmERGE platform efficiently connects freight in need of shipment with the most cost-efficient and available carriers.

The development of the platform “was the whole gamechanger,” according to Leto, who says the company has “gotten 4 percent of the for-hire trucking market” in five short years.

LEVELING THE FOR-HIRE PLAYING FIELD

EmERGE makes it possible for the smallest trucking companies to do business with some of the largest corporations in the U.S., Leto says. Small and midsize trucking companies that normally get locked out of the bid process now have a seat at the table, thanks to EmERGE, which charges carriers a small fee for each successful bid.

Larger shippers, in turn, have access to a platform that automates much of the freight procurement process at no cost to them. From posting shipping needs to receiving bids, awarding the business, and digitally issuing an onboarding packet for the carrier to sign and return electronically, EmERGE eliminates the manual steps that slow the process down.

Inc. Regionals ROCKY MOUNTAIN



EmERGE
Founder and
CEO Andrew
Leto shares
his vision for
the company's
future in a town
hall meeting.

2022 REGIONAL
RANKING

Nº2

\$169
MILLION
2021 REVENUE

451%
3-YEAR GROWTH

300+
EMPLOYEES

EmERGE



MORE DATA MEANS MORE BUSINESS

As EmERGE grows, so does the amount of data it has regarding shippers' needs. “Our system gets better and better as our network grows,” says Leto. With each new trucking company that registers on the platform comes new information about the freight they carry and all of its moves, he says. That additional data makes it possible for shippers to potentially find new truckers and faster deliveries.

“I don't think we have a driver problem. I believe there's a data problem,” Leto says, and the solution is a marketplace for freight that allows carriers to optimize loads, by filling trucks to capacity with less driving in between.

“There's never been a marketplace for transportation,” Leto says. “We're starting with trucking but plan to move into all the modes, including intermodal, drayage—which is the ports—and then truckload, which is what we do now. Our next thing is moving into the FCL market, which is containers, because our customers are asking for it.”

“Transportation is the last big marketplace that has yet to be built,” Leto says.

EMERGEMARKET.COM

Communicating Your Values

CONTINUED FROM PAGE 88



Miguel Garza
Co-founder and CEO
SIETE FAMILY FOODS

“Your company values should be a grounding force within your business. If the values are outlined correctly, and your organization is really committed to building something using those values—whether you are a team of 7, 70, or 700—then those values will remain true.”

Garza’s Austin-based company, which makes gluten-free Mexican foods, had \$200 million in sales in 2021.



Cameron Johnson
Founder and CEO
NICKSON

“Ask questions to determine if a candidate has an inherent alignment with your values. For example, if your work requires extreme attention to detail, you can ask a person, ‘How often do you proofread emails or cards you send to family?’ If you probe deeply enough into past behavior, you’ll be able to test for value alignment.”

Johnson’s Dallas-based subscription furniture rental company closed a \$12 million Series A round in 2021.

23%

**OF U.S. EMPLOYEES
SURVEYED STRONGLY
AGREE THAT THEIR
COMPANY’S VALUES
GUIDE THE DECISIONS
THEY MAKE AT WORK.**

Source: Gallup



COURTESY SUBJECTS

A New Breed of Digital Agency Helps Life Insurance Agents Thrive

DigitalBGA's new approach uses digital technology to mine sales data for more effective leads

LIKE A LOT OF great ideas, the inspiration for DigitalBGA took root in Austin, Texas. Co-founders Jeff Root and Nic West were each working for firms that helped life insurance agents sell policies over the phone, but they grew frustrated by how ineffective current offerings were.

"The technology, lead quality, training, and support needed for life insurance telesales agents to thrive simply didn't exist, but we couldn't convince incumbent agencies to embrace innovation," Root recalls. So, over burgers and beers one night in 2016, they fleshed out their concept for a paradigm-busting, tech-forward agency.

The tech-driven approach they came up with includes direct television marketing that drives calls to agents, daily live training via Zoom, a free technology platform to automate and simplify selling life insurance virtually, and peer support from a community of hundreds of experienced digital life insurance agents.

INDUSTRY IN TRANSITION

The partners recognized that the life insurance industry is transitioning from face-to-face sales to telephone sales. While the legacy model has agents buying leads from third-party vendors, Root and West saw a glaring disconnect between lead vendors and sales performance. "Lead vendors optimize for profit per lead," Root explains. "Lead quality takes a back seat, but that is the most important factor in terms of an agent's ability to convert leads to sales." The fatal flaw in the legacy approach is that third-party vendors have no visibility into how well their leads perform.

"Without access to the sales data, it's impossible for them to optimize their leads," West says. "We found that is a central roadblock to greater success for agents in the new age of selling life insurance over the phone."

**Inc.
Regionals**
SOUTHWEST



DigitalBGA co-founders and managing partners Nic West (left) and Jeff Root

2022 REGIONAL
RANKING
No 120

173%
3-YEAR GROWTH

2016
YEAR FOUNDED

31
EMPLOYEES

 **DigitalBGA**



METRIC-DRIVEN LEADS

The secret sauce behind DigitalBGA's success is technology that connects its marketing efforts to every metric in the sales process. "Since we generate all our leads internally, we can look at this sales data to identify winners and losers and then optimize our marketing accordingly," Root says. "No one else in the industry can do this for their agents. It is the reason our success rate with agents is so high."

One challenge Root and West have faced is that life insurance agents have grown jaded by other agencies overpromising and underdelivering. "That makes it hard for agents to believe our value proposition," West notes. "It almost seems too good to be true, so we let our sales leaderboards, online reviews, and testimonials do the talking."

That talk is being heard, with the company growing no less than 50 percent year-over-year since 2016, and the partners see more opportunity ahead. "There is so much to accomplish and change in the industry still," Root says. "We're working on some big projects that will create even more value for our agents and the industry as a whole."

DIGITALBGA.COM



Hip Rock Star Advertising is an award-winning, socially conscious 360 agency that works exclusively on impact advertising and marketing initiatives that are gateways to Black culture. With more than two decades of brand-building experience, the team has completed more than 1,300 marketing and communications campaigns and deployed \$3 million in advertising budgets. Hip Rock Star has a proven approach for achieving breakthrough outcomes and rockstar results.

"We're honored to be ranked in Inc. magazine. In spite of a pandemic, we made smart pivots and trusted the process."
Jessica Garrett Modkins,
 president and founder



"With our proven track record, our customers are assured that their IT systems are being delivered on time and operating efficiently."
Deepak Goyal,
 president and CEO

KR3 Information Systems, Inc. has been providing information technology (IT), management consulting, and staff augmentation services to Fortune 500 companies, small businesses, and state and federal governments nationwide since 2005. We also provide public health IT, cybersecurity, cloud management, mobility, and IT systems development/maintenance. Our technically specialized staff and commitment to quality allow us to consistently and successfully deliver high-quality solutions to support complex business functions, thousands of systems, and millions of users.



"Despite all the buzz, very few companies are doing digital profitably and at scale. We're changing that."
Joe Kashurba,
 founder and CEO

Hungry for more business, but still struggling to scale your digital advertising? Partnering with Kashurba could be your ticket to massive growth! Kashurba is the secret weapon digital advertising firm behind some of the largest and fastest-growing companies in the United States. Through data-driven, direct response social media and online video platform advertising, Joe Kashurba and his team have helped individual companies grow their revenue by more than \$100 million per year.





"Being on *Inc.*'s regional fastest-growing company list is an honor. After 10 years of providing safety staffing and solutions, we're just getting started!"
 Sherri Luehr,
 founder and CEO

Parachute Consulting LLC has your project protectors, construction champions, and workplace wing-people! When you need onsite medics, safety staff, and project managers, our team of professionals is ready to step in. Need a crane supervisor for a power plant outage? Contact us. Looking for a standby rescue squad or onsite safety medics to support challenging work environments? We can help. Let our decades of experience protect your team. Be safe out there; start right here.



"Mentour Corporation helps companies harness the digital age's energy with speed and confidence. We use modern technologies to reimagine processes and transform experiences."
 Sumanth Neelan,
 founder and CEO

Mentour Corporation's global team of IT innovators brings forth new strategies, solutions, and insights to help bring tomorrow's technologies to life. We work with our clients to embed digital innovation at the center of their business models. Mentour's cloud services help companies across industries make the most of artificial intelligence, data analytics, 5G, and the internet of things. Our global scale, local knowledge, and commitment to responsible employment practices set us apart.



"We make industry-leading AI accessible to SEO and content teams of all sizes and skill levels."
 Charles Frydenborg,
 CEO

MarketMuse is a team of search engine optimization (SEO) experts, content strategists, marketers, engineers, and data scientists on a mission to improve content across the internet. We've built an artificial intelligence (AI)-powered content strategy platform to help marketers craft high-quality content that audiences love and search engines reward. Our patented topic-modeling technology helps content teams make informed decisions about what content to create and update and how to do it.



"All your dreams can come true if you work hard and have what it takes to pursue them!"
 Dragos Sprinceana,
 founder and CEO

GoldCoast Logistics Group provides total logistics solutions to customers across the U.S. and beyond. With more than 1,500 trucks and trailers and 2,000 employees, we have the resources and knowledge to deliver best-in-class results. Our family-owned company started in 2007 with a vision of providing better service solutions. Exceeding expectations, being agile, and embracing change have propelled our growth in order to meet our customers' needs. Our trucking and brokerage divisions work 24/7 to deliver exceptional results in the industry.





Tiffany Guarnaccia

Founder and CEO
KITE HILL PR

“Recently, external factors have impacted the evolution of our values. We introduced our value of ‘balance’ last year, after seeing the impact the Covid-19 pandemic was having on our team, personally. We value our employees and their overall well-being and want to make sure our company values reflect that. By introducing balance, we were demonstrating to them that it’s OK, and expected, to put yourself first when you need to.”

Guarnaccia founded Kite Hill PR in 2013. The New York City-based agency has worked with clients including Snapchat, BuzzFeed, and TripAdvisor.

Rana el Kaliouby

Deputy CEO
SMART EYE

“Years ago, Affectiva received a preliminary investment offer from a government agency that wanted to use our technology for surveillance. We desperately needed the money, but I couldn’t ignore the fact that this application of our technology would be in direct violation of our core values. So we walked away from the investment. It was scary, but that decision left the door open for other relationships we forged in its wake with partners and investors who share our values.”

In 2021, Affectiva, el Kaliouby’s Boston-based business, was acquired by Sweden’s Smart Eye, another A.I. company.



73%

OF LARGE COMPANIES LIST BETWEEN THREE AND SEVEN CORPORATE VALUES.

Source: MIT Sloan Management Review

Josh Haas

Co-founder and co-CEO
BUBBLE

“The clearest indicator that a change in values might be warranted is that they drop out of use: Employees are reluctant to reference them because they don’t ring true to the team.”

New York City-based no-code software development platform Bubble is a 2021 Inc. 5000 honoree and has raised more than \$100 million in funding.

Dia Simms

CEO
LOBOS 1707 TEQUILA AND MEZCAL

“We were intentional about looking for an office space in a neighborhood that reflected our company value of promoting diversity and representation. We chose New York City’s Lower East Side, and opened up our office as a creative studio space for the local community and emerging artists to use as a way to drive that goal home.”

Simms has raised funding for the New York City-based spirits maker from celebrity investors including LeBron James and Arnold Schwarzenegger.

Seth Godin

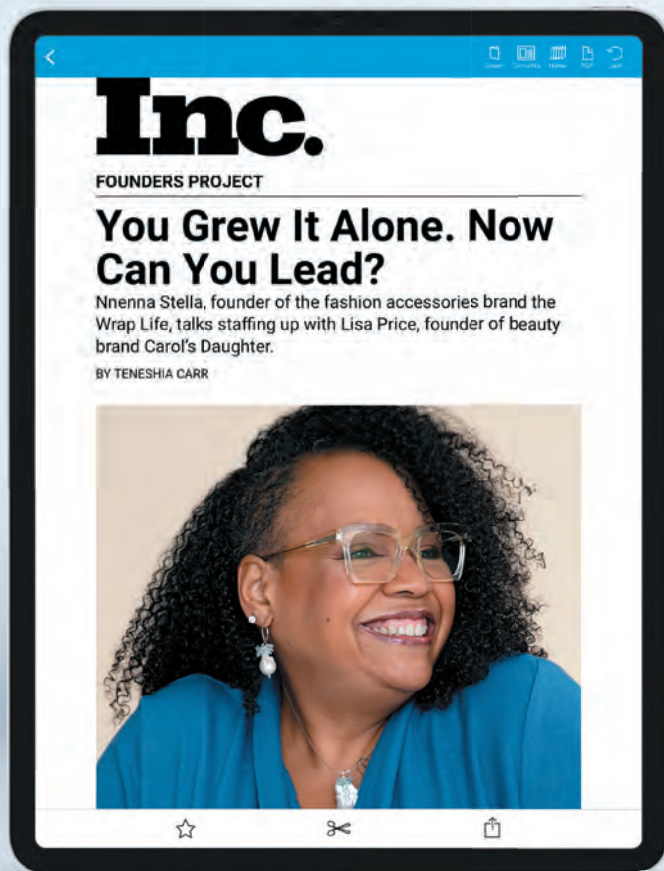
Author and marketing guru

“If you aren’t willing to live your values now, when will you start? A company that starts with its priorities straight—about how it will keep promises, treat its workers, support causes it believes in—will rarely have trouble becoming the kind of company that does this at scale. But if you put it in a folder marked ‘later,’ it may never happen.”

Godin is a speaker, a serial entrepreneur, and the author of 20 best-selling books.



The Essential Resource for Starting, Running, and Growing a Business



Stay inspired and be informed on your entrepreneurial journey. Get the Inc. Magazine App and keep the latest news on hand.

Download the app today:



Changing the Way Americans Think About Taxes

Tax Relief Advocates powers fast growth by putting people first and delivering guaranteed results for clients



MOST AMERICANS see taxes as a once-a-year nuisance—an inescapable burden. Tax Relief Advocates (TRA), an Irvine, Calif.-based financial services company, is on a mission to change that. TRA offers tax preparation, planning, and resolution services. The business's larger goal, though, is to transform the way people think about taxes through education and tax planning.

When the TRA team works with clients, they start with their dreams, not just their taxes. This customer-first approach has contributed to a jaw-dropping 7,864 percent two-year growth rate and earned the business the number one spot on the Inc. Regionals 2022: Pacific list. Co-founder and CEO Jeff Nickel says that when he and his partners began the company in 2017, they wanted to become the biggest tax relief business in the country. Now they are striving to become one of the largest tax preparation companies, as well.

A PEOPLE-FIRST APPROACH

TRA models the hospitality industry by putting customers first. The company offers tax resolution customers a money-back guarantee based on results, which was unheard of in the industry when TRA started, Nickel says. Another differentiator is integrity. In 2021, TRA earned a

Inc. Regionals PACIFIC



(Left to right) Jeff Nickel, CEO, and managing partners Lindsay Oglesby, Andrew Park, and George Nunez receive the 2021 Better Business Bureau Torch Award for Ethics.

2022 REGIONAL
RANKING

No 1

**\$21
MILLION**

2021 REVENUE

7,864%
2-YEAR GROWTH

250
EMPLOYEES

TRA
TAX RELIEF
ADVOCATES

BBB Torch Award for Ethics for its dedication to providing honest, professional tax support.

Whether helping a client with tax planning or resolving a difficult problem with the IRS, TRA's 250-plus tax specialists work to understand each customer's aspirations and approach every engagement with empathy and creativity. They conduct an in-depth investigation to determine the most effective tax strategies to deliver the best results possible. They encourage people to see tax planning as a year-long strategy rather than a once-a-year fire drill.

A CULTURE OF CARE

You can't change the way people think about taxes without passionate employees, Nickel says. "Our employees want to go in [to work] to find ways to save people money. They want to fight for people. That's the enjoyment—that's the fulfillment that they get."

To attract and retain top talent, TRA invests in people, rewarding achievements, facilitating fun bonding experiences, and promoting from within. No one is pigeonholed, Nickel says. Additionally, TRA shatters preconceived notions with its office design, which is fresh and modern—not what one might envision when picturing CPA offices. TRA also prioritizes community outreach, providing support to Colette's Children's Home, which provides shelter to homeless women and children, and running toy drives and food drives with Community Action Partnership of Orange County. Last year, TRA was the region's top fundraiser for the American Cancer Walk. "We try to do something every quarter," Nickel explains.

TRA strives to make a difference for clients, by helping them save and earn money they can put toward their dreams. "If you invest in tax-planning strategy, it's going to pay off tenfold," he says.

TRA.COM

Mortgage Tech Solution Built From Industry Experience

Mobility Market Intelligence provides the critical data clients use to build partner relationships and prospect new business

REAL ESTATE technology company Mobility Market Intelligence (MMI) has grown rapidly since late 2017, when the founders retook control from venture capital (VC) investors. From the five-person team it had that year, the Salt Lake City-area company has quadrupled to a staff of 20. More than 350 mortgage companies nationwide use MMI's mortgage data software service, including 20 of the industry's top 25, says co-founder and CEO Ben Teerlink. The clientele also includes a long list of title companies.

"We've built and rescaled the company, but we've been able to keep the team relatively small while also moving quickly to provide new features that our clients want," says Teerlink, a former residential real estate agent. Word of mouth, not paid advertising, has driven MMI's fast expansion.

LENDERS LOOKING FOR REALTORS

MMI responded to the need for mortgage companies to access information to guide their choices of real estate agent partners. Teerlink and his team realized that while all of the necessary information existed, it was difficult to find, sort, manage, and analyze.

"We gathered all the information out there about real estate agents, mortgage companies,

and title companies," Teerlink says. "We created a simple, easy-to-use dashboard that lets you see what's going on and where the opportunities are to work with people."

While lenders use MMI to find real estate agents, title companies use it to find both lenders and agents.

TECH BUILT FROM EXPERIENCE

MMI's leaders all have backgrounds in the real estate or mortgage industries, which Teerlink thinks gives the company an edge over its competitors. "So many other tech companies in this space create products coming from the tech perspective," he says. "Often, those tools don't get used because their creators don't understand what a loan officer or an agent needs."

Another advantage is the company's shorter product development cycle. Instead of taking a year or more to get from client wish list to market, MMI gets solutions up and running in months. A product the company created in response to the recent spike in interest rates is a good example. Low rates had provided mortgage companies a robust refinance business. But as Teerlink notes: "When interest rates go up, refi business goes away."

Suddenly, mortgage lenders needed to refocus on finding agent partners to help grow their purchase business. MMI supplied the solution in its Agent Wallet Share Report, which lists each mortgage company's previous agent partners and the volume of business they represent. Viewing the report opens up opportunities for mortgage companies to expand their existing agent relationships into other loan categories as market conditions change.

"It's been huge for our lenders," Teerlink says. "They've loved it."

MMI.IO

**Inc.
Regionals**
ROCKY MOUNTAIN

2022 REGIONAL
RANKING:

No 29

350

ENTERPRISE
MORTGAGE,
COMPANY ACCTS

21

NEW ENTERPRISE
ACCTS, FEB. 2022

150K+

LOAN
ORIGINATORS,
CLIENT
COMPANIES

MMI
MMI.IO



Mobility Market Intelligence gives lenders and title companies the data they need to guide their businesses.



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Leeatt Rothschild

Founder and CEO

PACKED WITH PURPOSE

“Values should be reevaluated every time your company experiences growth or significant change. You may find that some of your core values are redundant, compete with one another, or have happily become a commonplace aspect of the company culture, so you don’t need to reiterate their importance.”

Rothschild’s Chicago-based business, which sells corporate gifts sourced from purpose-driven organizations, is No. 149 on the 2021 Inc. 5000 list.

18%

OF LARGE COMPANIES DO NOT LIST ANY OFFICIAL CORPORATE VALUES.

Source: MIT Sloan Management Review

Eric Ryan

Co-founder

WELLY

“Your values should act as the operating system to guide you through decision making. For example, we once had a minor product quality issue that was a borderline decision for a recall. Even though we didn’t believe it would cause issues for our consumers, our values allowed the team to decide in minutes that we would recall the product and make sure it was 100 percent right. Values are what you do when nobody is watching.”

Ryan has founded multiple successful companies other than Minneapolis-based Welly, including consumer products maker Method.

Fawn Weaver

Founder and CEO

UNCLE NEAREST

“When you keep company values front and center in all planning and decision-making processes, the conflicts are very easy to identify when they arise. And the best way to address them is quite simple: These things or these partners do not align with our values, so they cannot be a part of what we are building. Period. There can be no ambiguity in this process. It is incredibly black-and-white.”

Weaver’s whiskey brand, based in Shelbyville, Tennessee, was a 2020 Inc. Best in Business honoree.

