

**Inc.
5000**



The New Faces of Entrepreneurship

Inc. 5000 Conference & Gala
October 16-18, 2024



Honoring this year's Inc. 5000

And the 5000 (or so)
things it took to get here.

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How Inc. 5000 Companies Are Paving the Way to the Future

T

To encounter the Inc. 5000 list of the fastest-growing companies is to encounter the future. Every year, the nimblest, most innovative companies give us a glimpse of where business is headed with the technologies, services, and even industries they've created. In this 43rd installment of our annual ranking, we see how Inc. 5000 companies are not only growing financially but also redefining how we think about leadership, culture, and work itself. We're including some of those stories in this yearbook.

Vitalize Health (No. 1) is transforming health care by addressing social and emotional needs alongside medical care.

Co-founders Amer Alhajar and Faris Ghawi have built a system that proactively supports patients, even solving non-medical issues, such as arranging care for a patient's pet parakeets so she could undergo critical heart surgery.

Allyse Jackson started **Beehive Meals (No. 399)** with the simple goal of paying her mortgage, but it quickly scaled into a multimillion-dollar meal-kit empire built off a Facebook post and the WFH model. Beehive Meals exemplifies the flexibility and resourcefulness of Inc. 5000 businesses, employing stay-at-home parents who prefer flexible hours.

Daniel Winer, founder of **HexClad (No. 786)**, transformed cookware by combining nonstick, cast iron, and stainless-steel qualities into a pan that performs so well, even Gordon Ramsay loves it. And **Branwyn (No. 109)**, led by CEO Jeff Shafer and president Deanne Buck, redefined what was possible for both wool and underwear. (They go together better than you'd expect.)

These are just a few of the Inc. 5000 companies that generated 874,940 jobs and \$317 billion in revenue, showing not only their financial might but also the dynamism

of the economy at large.

As this year's Inc. 5000 CEO Survey shows, honorees are also eager adopters of new technology. Over 60 percent of Inc. 5000 CEOs surveyed plan to use AI for workflow automation, content creation, and marketing, while almost half plan to upgrade their sales software in the next year. And for more proof that Inc. 5000 CEOs tend to go their own way, three-quarters of respondents bootstrapped their companies, with 40 percent actively turning down offers for more money, as you'll see in the results from our 2024 CEO Survey.

But whatever the year, the story of Inc. 5000 founders is fundamentally the same: These entrepreneurs start with little more than a good idea and the confidence to make it happen. (The vast majority of 2024 founders surveyed—60 percent—started with less than \$10,000.) Then, they build the companies that sustain America.

There's a reason the Inc. 5000 has become one of the most prestigious honors in the country—and that reason is the people who make the list. Enjoy getting to know some of them in the pages of this yearbook. Celebrating them is Inc.'s mission and privilege.



**Inc.
5000**

Congratulations!



On behalf of everyone at Capital One Business, congratulations on making the Inc. 5000!

We recognize that this milestone achievement didn't happen overnight. Making the list is the sum of thousands of small moments, hurdles and triumphs. To us, that is precisely what makes this transformative week so special: it offers the rare opportunity to take a step back and reflect on *all* of the steps, no matter how small, you took to arrive here today.

Capital One Business is driven by a dedication to the innately human expedition of entrepreneurship, and a commitment to empowering business owners at every challenge and every triumph. Our partnership with Inc. was founded in 2019 upon this shared mission: to support and elevate the fast-growing companies inventing the future of America. We are honored to celebrate six years as the official partner of the Inc. 5000, and to continue to demonstrate our commitment to serving you at every step of your journey.

Year over year, the Inc. 5000 Conference proves to be the apex of our partnership because it allows us to meet, learn from, and celebrate you. While you're here in Palm Desert, we hope you will take a few moments to spend some time with us. Whether it's visiting the Capital One Business experience in the Marketplace to share *your* 5000 steps towards making this list, attending one of our sessions in the Inc. Pavilion, celebrating at our Inc. 5000 Conference Party on Thursday or toasting with us at the Gala on Friday evening, we welcome the opportunity to connect with you.

Cheers to the 5000 (or so) things it took to make it here. We can't wait to hear your stories.



Aparna Sarin
Chief Marketing Officer
Capital One Business

For the innovators, big thinkers and disruptors

Design an office that's as dynamic as your vision.



Congratulations to this year's Inc. 5000 list!

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Cut From a Different Cloth

With sustainable merino, Branwyn (No. 109) makes surprisingly soft performance wear to support women—and the planet.

—By Strawberry Saroyan

From the September 2024 issue.

I

It's hard to say exactly when serial entrepreneur Jeff Shafer soured on the apparel industry. It might have been when he learned, while sourcing for his fourth brand, Agave, that organic cotton wasn't necessarily organic. ("Ten times the amount of organic cotton is sold on the planet than is actually produced," he recalls being told. "Because of lying and blending.") Or when he saw other brands promote recycled polyester—a fabric made of plastic—as a sustainable option. Or when the toxic chemicals involved in indigo dye production became untenable to him. ("There are rivers in China that are blue," he says, because regulations of what's dumped into them there are even laxer than in the States.)

Shafer was at his wit's end when he and his wife, Lauren, sold Agave, a jeans and T-shirt brand, in 2016. Being in the clothing business felt like working in clean coal. "I just didn't see any point in it," he says.

Casting about for his next move, he wasn't convinced it would be in the garment business. That is, until he found his next idea

at a Portland, Oregon, craft fair. Between booths selling kombucha and CBD oil, he encountered a 27-year-old mom selling merino wool underwear. He was knocked out by its surprisingly soft feel and seamless design, as well as the sustainable potential of merino; its production on regenerative sheep farms can make it carbon negative. "Just like planting a tree," says Shafer.

He bought a pair of underwear for his wife, an expert pattern maker, who was a bit more skeptical. "I know him, and his brain was just racing," Lauren says with a laugh. Once she tried them, she was won over by formfitting comfort so striking she forgot she was wearing them. "I never want to wear anything else," she says.

Shafer bought her 14 more pairs—and eventually, the company. Months earlier,

“We’d like to see Branwyn become a brand known in the marketplace where women can work and build products they love in an environment where they feel safe.”

—Jeff Shafer, co-founder,
Branwyn

he had emailed the woman at the craft fair to offer consulting services, which she declined. Now, she had reached out to him. With a second child on the way, she wanted to devote more time to being a parent and asked Shafer if he was interested in taking over her business. His answer was a resounding yes.

Today, the Shafers say that Branwyn is a first-of-its-kind merino wool performance wear brand solely focused on women's bras and underwear for athletic women like hikers and climbers. It's on track to make \$10 million in sales this year.

Most activewear is made of petroleum-based fibers such as nylon and polyester, so Branwyn's use of wool—sourced from ethically raised New Zealand sheep—sets it apart. It's also been a challenge. "Women might have a preconceived notion, what we call a limiting belief, that wool is hot and scratchy, that it's like their grandmother's scarf or sweater," says Shafer.

They overcame that assumption by making the garments of ZQ merino, a superfine sheep's hair that meets the highest animal welfare and environmental standards, and sewing them on Santoni seamless machines—which Shafer characterizes as the Lamborghini of knitting machines.

Company president Deanne Buck says that if she ever wants to reconnect with the heart of why they do what they do, she just spends time looking at some of the many thousands of reviews. Branwyn's apparel is

SHEEP'S CLOTHING
When co-founder and CEO Jeff Shafer and company president Deanne Buck want reminding of their why, they read some of the thousands of positive reviews their company has received.



not only naturally moisture-wicking, temperature regulating, and antimicrobial, but fans say it's "life-changing," and "the only bras I wear anymore," and they appreciate its remaining scent-free days into strenuous activity. They also trust the company, which eschews emailing its DTC base with frequent sales or new drops. Instead, it regularly updates its blog with posts addressing under-explored issues that women face. Branwyn's

biggest problem today, says Buck, is keeping the products in stock.

The only real lingering challenge, at least for Shafer, has been his self-consciousness about leading a company that he sees as standing for female empowerment. That's why he will cede the title of CEO to Buck this fall, and why he trusts her to carry the business forward while holding true to its sustainable values.

"We'd like to see Branwyn become a brand known in the marketplace where women can go work and build products they love in an environment where they feel safe," he says. "I'm not saying that we will be the next Nike or Under Armour or Adidas," but no matter how big the company grows, it will be only with "products by women for women, and sustainable. That is the dream."

Inc.5000
COMPANY
SPOTLIGHTN°2305
2024 Ranking2016
Year
FoundedHQ
Guntersville,
Ala.226%
3-Year
Growth

The Trailblazing Company Making Care More Affordable

Attentive bridges the gap between the benefits employers wish they could offer and those they can afford.

Most businesses want to offer high-quality employee benefits. But with the cost of health care steadily increasing, many small and midsize businesses (SMBs) struggle to offer the benefits their teams deserve. Attentive is on a mission to make a wide variety of programs accessible without a negative impact on business budgets.

Through Attentive, employees gain access to a suite of benefits, including mental health resources, with no direct cost to the employee or employer. These offerings target chronic health issues, potentially reducing medical costs. The kicker, though, is that Attentive pioneered a “cashflow positive way” for businesses to offer these benefits, explains President Josh Kirkland. Attentive’s ingenuity has been recognized by many experts, including *The CPA Journal*.

A NEW SPIN ON HEALTH CARE ECONOMICS

When businesses offer the Attentive program, employee enrollment creates tax savings for themselves and the business via

Attentive’s proprietary plan design. The tax savings becomes the revenue to cover the costs of various benefits programs. The concept is the brainchild of a seasoned team led by David Chaviers, CEO, one of the company’s founders. Chaviers and the ownership team that includes Kirkland; Brenda McGinnis, chief operating officer; Terri Brownlow, chief counsel; and Jo Ann Kirkland, chief people officer; all have long resumes in employee benefits.

Kirkland notes that insurance brokers and other business advisers love the program because it gives them a way to save clients money while investing in their people. Through a network of thousands of advisers across 45 states, Attentive has steadily scaled program enrollment among businesses, schools, nonprofits, and more. The pandemic played a role in the company’s growth, too. People had no choice but to adopt virtual care protocols during quarantine. Attentive’s cost-neutral virtual benefits were a welcome option for companies and employees. The Inc. 5000 honoree is projecting another 75 percent bump in yearly revenue this year.

A SOLUTION THAT WILL LAST

If imitation is the sincerest form of flattery, Attentive must be tickled pink: many competitors using Attentive’s blueprint have emerged. Besides being pioneers, Kirkland believes Attentive stands out for its best-in-class technology and infrastructure. He believes Attentive has just scratched the surface of what is possible, and that they have built something that will rapidly grow in the short term and thrive for the foreseeable future.

“[Former Starbucks CEO] Howard Shultz said, ‘To be an enduring, great company, you have to build a mechanism for preventing or solving problems that will long outlast any one individual leader.’” Kirkland notes. “That is what we have. We’ve got a solution that will outlast all of us.”



→ David Chaviers, founder and CEO, Attentive

BEATTENTIVE.COM

Inc. 5000
COMPANY
SPOTLIGHTN°117
2024 Ranking2,874%
3-Year
Growth4X
Inc. 5000
HonoreeHQ
Estero, Fla.**XIL**
health

A Tech Startup Defined by Patience and Perspective

This founder took lessons from leading enterprise health care companies to build XIL Health and shape a new generation of female leaders.

Some tech startups focus on scale at all costs, but not XIL Health. “Our growth is very steady. We know which levers to focus on, what we think matters,” explains CEO Susan Lang. “I want my team to have a different experience here, so they can create different companies later on.”

Lang left a C-suite role at health care giant Express Scripts to start XIL Health—an analytics and health care technology company that builds complex predictive platforms to help reduce drug costs—in 2013. She takes pride in building an ethical culture and in mentoring young female leaders. “At age 50, I decided to become an entrepreneur and bet on myself—and on a team that I could create,” she explains. Her wager proved a wise one. XIL Health has made the Inc. 5000 list for the fourth time, and Lang is accumulating leadership honors. She also founded, scaled, and sold HooPayz, a patient advocacy company.

A NEW VENTURE MAKES A DIFFERENCE

XIL Health is born from Lang’s leadership experience, understanding of health care services and pharmaceutical economics, as well as strong relationships. A main driver of its growth is the launch of an affiliated company, Visory Health, a pharmacy cash discount program that provides affordable access to prescriptions. “If you have been in this industry as long as I have, you look at how you can make a difference and what really matters to people. And what really matters to people is being able to afford their medication,” Lang explains. In addition to saving patients money, Visory Health preserves pharmacies’ profit margins. Its first client was the large retail company Kroger, a past partner of Lang’s.

THE TEAM TO ACHIEVE A BOLD VISION

XIL Health companies are on track to hit 4.8 million customers in 2024. By year-end, Lang plans to launch a new, tangential offering. During the next five years, she expects the businesses to expand internationally and hit the 50 million-customers mark. Her vision



→ Susan Lang, CEO, XIL Health

is achievable because of a strong female executive team, most of whom she has worked with before, and up-and-coming leaders.

Lang also believes in fostering the next generation of leaders. Many of XIL Health employees are young professionals, and Lang believes they will grow with the business and later lead companies of their own. She invests in their well-being via generous benefits and ample learning opportunities. “I love mentoring. I love working with people,” she says. In addition to skill-building, Lang focuses on bolstering confidence. “The more confident you are,” she explains, “the bolder your vision can be.”

XILHEALTH.COM

Inc. 5000
COMPANY
SPOTLIGHTN°3868
2024 Ranking119%
3-Year Growth\$94M+
2023 Revenue435
Employees

A National Resource for Science and Engineering Knowledge

Founded with the goal of preserving vital information, TechSource now marks its 10th time on Inc. 5000 list.

When the United States began transitioning from its Cold War stance, two former national lab scientists became concerned about the prospect of losing decades of scientific and national security expertise. “There existed an opportunity to bolster the nation’s defense and scientific communities by amassing and preserving that specialized expertise,” says Brian D’Andrea, CEO of TechSource, Inc. Being recognized 10 times on the Inc. 5000 list clearly demonstrates the founders were correct.

D’Andrea joined TechSource in 2001. With his background as an aircraft systems engineer and naval flight officer, he collaborates effortlessly with experts in both defense and commercial mission spaces. Jeff Giangjuli, a former submariner and government contractor executive, joined in 2018 as chief operating officer to scale practices and develop the next-gen leadership. Together they are a formidable leadership team.

THE BUSINESS MODEL

TechSource bridges technical, management, and experience gaps in the nuclear security mission space, an area undervalued despite its critical importance. “Nuclear science and engineering have been around for over a century,” D’Andrea says. “While it lacks the allure of IT or AI, we’ve stayed committed because of its enduring importance.”

TechSource is now key to preserving and transferring knowledge through its nationally recognized and trademarked Weapons Knowledge Preservation and Transfer (WKPT) program. WKPT leverages scarce nuclear program expertise to mentor and develop younger staff, ensuring effective knowledge transfer and continuity in mission-critical programs. “WKPT exemplifies our dedication to providing exceptional value to our clients by utilizing top-tier technical expertise to develop strong, enduring solutions,” Giangjuli says.

As TechSource grows, it adheres to its original vision: identify, recruit, deploy, and empower top-tier talent with a servant leadership approach and mission-driven mindset. “Our experts

enjoy collaborating with the scientific community on meaningful projects without the concerns of the business side,” Giangjuli says.

THE LONG-TERM PLAN

Today, TechSource competes for contracts worth hundreds of millions of dollars. “We focus on the infinite game, not short-term metrics. We expect our leaders to be servant leaders. We plan and execute toward strategic corporate goals. Success is a collective effort and assured with everyone aligned to the mission,” D’Andrea says.

TechSource’s cohort showcases outstanding performance with an impressive 98 percent client retention rate, achieved by prioritizing client needs and ensuring mission success. TechSource’s achievements are intertwined with client success, driving advancements in weapons modernization, hypersonics, and particle accelerator design, while also exploring innovative business models for licensing opportunities. Clients regard TechSource as an invaluable resource and a trusted partner, celebrating successes together and definitely turning to them for the serious challenges.

TECHSOURCE-INC.COM



→ Jeff Giangjuli (left), president, and Brian D’Andrea (right), CEO, TechSource

Inc.5000
COMPANY
SPOTLIGHTN°4058
2024 Ranking111%
3-Year Growth<2%
Avg. Employee
Turnover92%
Client
Retention Rate

In Leadership Development, Your Vendor Should Be Your Partner

Insight Experience's customized programs have measurable impacts on employee satisfaction, effectiveness, and retention.

Improving your leadership affects your business performance. This is what Amanda Young Hickman, co-founder and partner of management consulting firm Insight Experience shows her clients with every engagement. By showing that connection through modeling and simulations, Insight Experience helps the correlation become clearer to the leaders who are its clients.

Hickman and co-founder Nick Noyes didn't intend to start a company, but in 2001, Noyes landed a leadership development project for senior leaders, bringing Hickman in to help. The duo, who had previously worked together, realized the value in learning experiences that demonstrate the business impact of effective leadership. Insight Experience now works with leaders at all levels to accelerate their growth through business simulations, case studies, peer coaching, and other custom solutions.

FOCUS ON PEOPLE

Insight Experience uses its proprietary platform and suite of core products to distribute business challenges to teams, collecting data and developing analytics as the foundation for facilitated dialogue about leadership. The company tailors engagements to company objectives and industry. "One of our values is 'care for each other,' and we live that. We work in partnership with our clients. We don't just deliver as a vendor—we want to learn their business and speak their language," Hickman says.

The biggest reward is when a leader tells the Insight Experience team that the learning experience shifted their perspective and behaviors. Clients often see that impact in areas like improved employee satisfaction, leader effectiveness, or business opportunity framing. "When we work with clients over time, we can see the change in how quickly someone is promoted, or the differential in an organization's retention rates," says Hickman.

THE GROWTH OF AI AND ATTENTION ISSUES

Since co-founding Insight Experience, Hickman has seen the rising challenges in learners' attention spans. "Trying to get leaders to



→ Nick Noyes (left) and Amanda Young Hickman (right), founding partners, Insight Experience

mentally step out of the operational space into the learning space has become dramatically more difficult," she says. They've needed to create more compelling and engaging experiences in response.

She also notes that the leadership development industry is at an interesting inflection point. "AI is going to create all kinds of opportunities and challenges for how companies develop leaders," Hickman says. Her company wants to continue evolving and adapting to provide relevant learning and is determining ways to incorporate AI into their teaching points. That might mean providing content and AI tools to help leaders be more efficient and use time effectively.

"I predict the nature and mix of work will look different going forward," she says. "It's an interesting entrepreneurial challenge to bring that mindset to this seismic shift."

[INSIGHT-EXPERIENCE.COM](https://www.insightexperience.com)



KEEPING SCORE
Javon Frazier's decision to launch a startup brought him closer to his wife and two daughters.

Startup Success Has Been All Fun and Games for This Former Marvel VP

CEO Javon Frazier of Maestro Media (No. 167) raised a million dollars in 90 minutes with one of the biggest Kickstarter campaigns of all time. He only went up from there. —As told to Rob Verger

From the September 2024 issue.

J

Javon Frazier, 46, grew up in a single-parent home in L.A. His mom worked hard to support him, so comic books and video games were like his babysitters. That nerdy childhood translated into an animated career: After business school, Frazier inked a job with Marvel Entertainment, and then Studio71, a media company, where he would become chief product officer, making frequent trips to China to handle manufacturing for merch like fidget spinners. It was great, until it wasn't—he realized that he was away from home too much. Frazier struck out on his own with Maestro Media, and in 2021 launched a card game on Kickstarter called the Binding of Isaac: Four Souls Requiem. There was a problem, though: Frazier needed capital before the campaign started. A lot of capital.

I had a conversation with my wife when I was starting the business: “I need to pull some money out of the house.” She goes, “Well, how much?” I go, “All of it.” My wife is the most supportive person ever, but I’m not kidding—I remember it like it was yesterday—it was as if someone had

dropped a boulder on her. She physically sat down. It hit her so hard. But eventually she said OK. At that point, we knew we were all in.

I had to figure out how to get from January 2021 to June 2021. I had a guy who did my taxes, and I asked him to be my CFO. I got an attorney. I got a head of operations. I was hiring people, and we were burning through cash like crazy. In about April or May, my CFO said, “Hey, man, we’re out of cash.” I was like, “Dude, get me to the starting gate.”

We launched our Kickstarter campaign on June 1, 2021, and did a million dollars in the first 90 minutes. And everything was OK. If this thing hadn’t worked, I would have lost my house. We did \$6.7 million in 30 days. It was one of the biggest Kickstarter campaigns of all time. It was the first project we had done as Maestro Media. And it was life changing. I bet on the amazing creator of the game, Edmund McMillen. I’d be remiss not to talk about him. He’s the creative genius. I’ve learned so much from him. We have a licensor-licensee relationship, but very much a partnership.

Roughly 48,000 people backed that campaign. We were designing and delivering the game during Covid-19, and the world wasn’t shipping or manufacturing at the rate that it was pre-Covid. So one of the cool things that we did was launch our subscription program. Because we knew it would take some time for people to get their packages from China, we launched a thing called the Unboxing of Isaac in 2022. It was a monthly subscription that came with a T-shirt, cards, and a bonus

item. We built that amazing community of people with the subscription to keep them engaged. Then we delivered more than 150,000 packages for the Binding of Isaac Kickstarter. The game came in 12 languages—that was another way we grew our business. The model is that we are able to drive tons of engagement and awareness through crowdfunding.

We went from one game to 10 games, with potentially 30 games by 2026—we’re on track for that. We went from one person to 12 people. We’re fully remote. We’re releasing Hello Kitty this fall; we’re releasing Smurfs after that.

Back when I was at Studio71, I was flying 150,000 miles a year, and my wife was like, “Dude, this is a lot.” I didn’t know what my kids ate for breakfast, for god’s sake. I thought to myself, “I have to figure something else out.” I had to spend more time with my kids. I wasn’t part of pickup or drop-off. I needed to get more involved. I come from a single-parent home, and my mom sacrificed everything for me. And I want my daughters to have the best life, so I had to do this for them.

Now, it’s great to share Maestro with them. I joke all the time that they’re the most underpaid play testers in the world; they have to play all the games. Anything that I’m working on, they want to be a part of, because their dad’s a part of it.

I made a change because I saw my life going in a direction I didn’t want to go. I didn’t want to lose my family or be apart from my wife. I’m so blessed to be here, to be at home, to be with my family.



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Inc. 5000
COMPANY
SPOTLIGHTN°4345
2024 Ranking98%
3-Year Growth\$53M
2023 Revenue220
Employees

In the Fast-Paced Manufacturing Industry, This Company Thrives

Unfazed by the constantly evolving needs of clients in multiple industries, PTEC Solutions, Inc. delivers customized electronic products with a quick turnaround.

Twenty-five years ago, PTEC Solutions began as a modest machine shop. Today, it stands as an electronic manufacturing powerhouse, providing an array of services from precision machining, electro-mechanical and opto-mechanical box build, printed circuit board design and layout, and copper cable harnesses, to fiber optics assembly customization. The company also has broadened its customer base, now serving a wide range of sectors, from defense contractors to medical device makers, as well as telecommunications and semiconductor manufacturers. This evolution wasn't just about increasing the company's capabilities—it was about refining the ability to adapt quickly to the ever-changing demands of different industries. This adaptability has fueled a three-year revenue growth of 98 percent.

In the fast-paced world of manufacturing, where quick turnaround times are the norm and specifications are king, PTEC Solutions thrives. "We have to cater to every customer's specification," says Huy Ha, director of operations.

The company's ability to execute myriad components in house, under one roof, sets it apart from the competition. "We know how long material procurement can take," says founder and CEO Peter Pham. "With a machine shop, cable harness, box build, and clean room all integrated, we can slash long lead-times and pass on the cost savings to our customers."

THRIVING ON CHAOS

The frenetic pace of the manufacturing world is where PTEC Solutions finds its rhythm. "We thrive in that chaos," boasts Pham. This mindset isn't just a tagline; it's woven into the company's DNA, driving the team and making it stronger with each challenge they overcome. The company has strategically expanded its operations, with three new locations—one in Katy, Texas, and two in Vietnam—to better meet the growing demands of its clients.

The company's growth isn't just physical. PTEC has heavily invested in technological upgrades, from new CNC machinery to refined systematic processes, all aimed at increasing efficiency and delivering high-quality products.

THE POWER OF TEAMWORK

At PTEC Solutions, success is a team sport. The company's ability to meet stringent customer standards and continuously improve its operations hinges entirely on teamwork. From prototype to full-scale assembly, management, administrative, and production teams work hand in hand, troubleshooting issues and maintaining compliance with quality control protocols. No team member's role is too small; every team member is pivotal in keeping the production process smooth.

Investing in its people is a core principle at PTEC. The company keeps its training programs current, understanding that every employee's growth contributes directly to the company's success.

"We have a collective goal to ship out a quality product," Ha states, a sentiment that echoes throughout the company.

[PTECSOLUTIONS.COM](https://www.ptecolutions.com)



→ The PTEC Solutions team at a company gathering.



**Inc.
5000**

Grow on and celebrate, Trailblazers.



On behalf of everyone at Salesforce, congratulations on your remarkable achievement.

Securing your spot on this coveted list proves how much hard work you've put into growing your business. By sparking new ideas, demonstrating resilience, and raising the standard for future honorees, you truly embody the spirit of a Trailblazer.

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Adam Alfano

Adam Alfano
EVP, Small Business Sales Americas
Salesforce

salesforce

Nice work, Inc. 5000.

Congratulations to all the hard-working honorees blazing trails, fueling our economy, and changing the world. We're proud to help businesses like yours work faster and better through every stage of growth, so you can do more of what you love: building your business, strengthening communities, and celebrating milestones like this one.



When Tiny Changes Reap Enormous Results

Amer Alnajar and Faris Ghawi aimed to create a primary-care clinic that produced better results at lower costs. With Vytalize, they ended up reframing American medicine—and landed at No. 1 on the Inc. 5000.

—By Christine Lagorio-Chafkin

From the September 2024 issue.

T

To understand the power of small, non-obvious changes, consider the Long Island patient who kept landing in the emergency room after failing to show up to her scheduled heart surgery. Vytalize Health, the No. 1 company on this year's Inc. 5000, sent a social worker to the patient's home and discovered two dozen pet parakeets. The patient had refused to leave the birds alone to go to her procedure. After Vytalize secured an animal-care organization to step in more than a year ago, the patient received the surgery, and she hasn't been hospitalized in more than a year.

"The thing a lot of folks forget about health care is that it's more than just biochemical reactions," says Vytalize co-founder and chief medical officer Amer Alnajar. "A lot of it is social or emotional."

Vytalize's breakthroughs in health care extend far beyond domesticated-bird detection. The company functions as a middleman between private practice and Medicare, helping doctors manage their patient relationships and improve health

outcomes while saving the U.S. Medicare system money. When it works, patients live healthier lives, doctors are better compensated for their time, and taxpayers benefit too. Since 2020, Vytalize's revenue has expanded an astounding 90,779 percent, to the tune of \$775 million in 2023.

That astronomical growth began with myriad tiny tweaks to how medical private practice operates, particularly in relation to its Medicare patients. It took a pair of restless outsiders to view the functionality of the U.S. medical system differently. Alnajar, a physician, and Faris Ghawi, a civil engineer, have been best friends since they met at a college party at Lehigh University and discovered their shared Jordanian heritage. They bonded in an undergrad population that mostly didn't look like them; Ghawi had come to the U.S. to attend college, while Alnajar had immigrated at age 6.

When Alnajar went on to pursue an MD

and a medical residency in Philadelphia and Ghawi moved to New York City to work and earn an MBA, they still texted often. They'd toss around startup ideas, such as a UV-light stethoscope cleaner, based on frustrations and inefficiencies Alnajar was discovering in the health care system. They didn't pursue the stethoscope project, but when Alnajar went to visit Ghawi in New York one weekend, he floated a bigger idea.

While the American health care system's problems can seem insurmountably large—insurance bloat, overbooked providers, overpriced prescriptions—Alnajar framed the issue differently. He envisioned improving patient outcomes by making tiny, manageable changes. "There are so many little things being dropped, things being neglected, that if they were improved could make a world of difference for patients," he explains. Primary care needed to be more consistent and proactive. That perspective lit up Ghawi's engineer mind.

Alnajar's couch-crashing weekend in Ghawi's 400-square-foot NYC walk-up turned into six months. They moved to a nicer two-bedroom apartment and a glass-walled cube in a nearby WeWork. Over the next three years, they worked together to engineer a small, mostly virtual private practice that Ghawi describes as a "care-delivery model with the goal of keeping patients at home, reducing hospitalizations, and managing patients holistically."

By 2016, they'd expanded the practice to a large office in New Jersey. Alnajar saw patients, set up care plans, and recruited

NO. 1 **VYTALIZE HEALTH**
EXECUTIVE CHAIRMAN:
AMER ALNAJAR
LOCATION:
HOBOKEN, N.J.
THREE-YEAR
REVENUE GROWTH:
90,779%

THE MBA & THE MD
Faris Ghawi (seated)
and Dr. Amer Alnajar
parlayed their
friendship into this
year's No. 1 company.



physicians. Ghawi, as CEO, applied his engineering skills to complex problems. Some solutions, such as sending nurse practitioners out on monthly home visits to certain patients, were a gamble. Alnajar and Ghawi could bill Medicare only about \$100 for a preventive house call, but their bet was that they'd head off larger health problems early and end up providing better care in the long run.

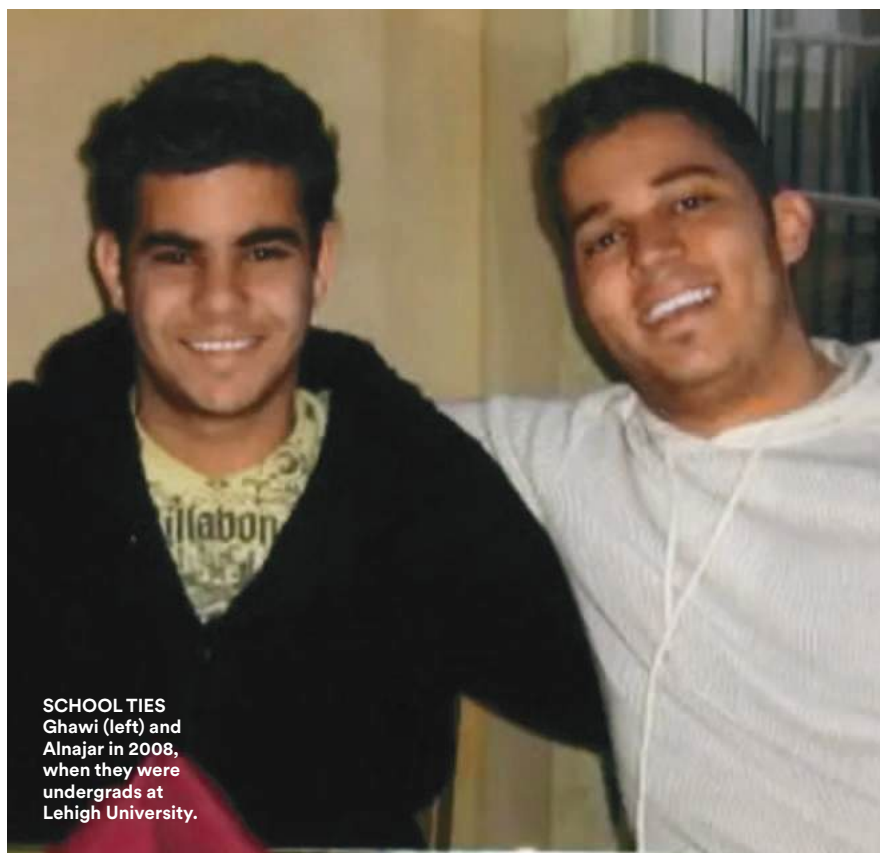
A health care attorney's recommendation changed everything in 2017. He advised Vytalize to join an accountable care organization; ACOs were established by the Affordable Care Act as a way for multiple health care providers to share risk and provide a financial incentive for higher-quality care at lower prices. When Medicare reduces its costs by working with an ACO, it shares the savings with the organization, which in turn pays out to member practices. Vytalize's services, it turned out, cost only 87 percent of Medicare's estimates.

"That was our moment of, 'Whoa, we have something here!'" Alnajar says. It was proof that the company's focus on earlier diagnoses and fewer hospital stays was paying off.

Vytalize saw an opportunity to establish its own ACO in 2019 and improve the model. The company took the systems it had built to manage its private practice and applied them to other practices in the organization. As a tech-enabled physician-support system, Vytalize was able to make small changes at a much broader scale—and reap savings accordingly.

The company has grown from 20 to 301 employees since 2020. And its revenue growth in the past year has been due in large part to tripling the number of practices it works with, growing from 99,500 total patients to just over 300,000.

So how far might this model scale? It's hard to say. Not every practice is a good fit for Vytalize. Being proactive with patient communication and doing biweekly calls with Vytalize's medical team to monitor patient care isn't a light lift. The company asks 10 to 15 percent of its practices to depart annually.



SCHOOL TIES
Ghawi (left) and Alnajar in 2008, when they were undergrads at Lehigh University.

For those that are a fit, the upside is meaningful. In 2022, a practice that worked with one of Vytalize's top two ACOs averaged \$125,000 in savings. Jory Capital's Dave Wichmann, the former CEO of UnitedHealth Group, invested in Vytalize in 2023 on the basis of those sorts of results. "People had been talking about value-based care for a long time,"

"There are so many little things being dropped, things being neglected, that if they were improved could make a world of difference for patients."

—Amer Alnajar,
co-founder, Vytalize

Wichmann says, "but it was all talk. Here, physicians are rewarded for really great care, and patients can live long, healthy lives at home with care and dignity."

Vytalize's priority care program is one way the company is working to ensure those kinds of outcomes persist—it's how the parakeet conundrum was solved. In another case, Vytalize successfully lobbied the New York City public housing authority for a wheelchair-using senior experiencing claustrophobia to be moved out of a studio and into a much larger apartment.

These aren't standard-cut pieces of the health care mosaic; they are shape-changing, extremely human problems that don't fit into the medical establishment as it currently operates. Vytalize sees them as ripe for just the kind of small changes it has ridden to the top of the Inc. 5000. "We win as a company only when our patients win," Alnajar says. "That's what makes it beautiful and noble."

Inc.5000
COMPANY
SPOTLIGHTN°976
2024 Ranking9
Employees2
LocationsHQ
Redding, Calif.**BRIGHT LAKE**
WEALTH MANAGEMENT

Golden Years Ahead: Helping People Create the Retirement They Deserve

Bright Lake Wealth Management has developed a specialized financial planning process designed to help people worry less and enjoy their retirement more.

Ted Thatcher will never forget the time he and his family were at a restaurant celebrating his grandfather's retirement. His grandmother instructed each of the kids to order only from the chicken and pasta section of the menu. She thought spending too much on a fancy dinner would eat into the couple's modest retirement savings.

"She was worried about that at a time when the only thing she should have been concerned about was celebrating her husband of over 40 years," says Thatcher, who decades later would use that moment as a motivation to start his own retirement planning firm, Bright Lake Wealth Management.

5 RETIREMENT PLANNING PILLARS

Thatcher founded the Redding, California-based company in 2016. The company is known for its trademarked planning process, created to serve clients who, just like his grandparents, are anxious about having enough money for their retirement.



→ Bright Lake Wealth Management's trusted team of retirement planning experts

"The process is built on five key pillars: a comprehensive income plan beyond just investments, a tailored investment strategy, a tax-planning approach, advanced planning for health care and long-term care, and a well-structured estate plan."

Thatcher says the holistic approach to retirement planning succeeds because it recognizes there are many types of financial risk. He recalls one client who had taken out a second home mortgage and put all the money into Bitcoin. The fear of missing a huge earning opportunity had pushed the move, Thatcher says, but the client had overlooked the risk of not being diversified.

"At the time I met with them, they had lost almost all of that money because Bitcoin had crashed," Thatcher says. Bright Lake Wealth Management strives to help people create a plan based on their individual needs instead of trends or market fluctuations.

MONEY FOR WHAT MATTERS

Besides helping clients avoid risks that jeopardize their financial security, Bright Lake Wealth advisors also view educating the community as part of their mission. The firm partners with non-profit organizations to host free educational workshops about retirement planning.

At one of those sessions, a couple asked for a private chat with Thatcher and ended up becoming clients. He discovered that one of the wife's most pressing concerns was whether she would have enough money to continue traveling from California to visit her grandchildren on the East Coast if something happened to her husband. The conversation brought Thatcher back to the main reason he founded Bright Lake: to make sure retirees have the financial security they need to do the things that matter most to them.

"We've built our process entirely around our client experience and putting service at the center," he says. "Our slogan is: Everyone deserves to have hope in a bright future."

[BRIGHTLAKEWEALTH.COM](https://www.brightlakewealth.com)

This AI Tool Is Helping Managers Tackle Tough Talks on Workplace Discrimination

In the face of corporate backtracking, Praxis Labs (No. 150) is using AI to foster inclusivity. —By Samhita Mukhopadhyay

From the September 2024 issue.

A

A well-meaning man at work consistently talks over women in meetings. A few women have filed complaints about the employee, and you, the manager, are tasked with giving him feedback. But you are dreading the conversation. It will likely be uncomfortable, and it's unclear how he might react. What do you do?

Praxis Labs is here to help, with a healthy assist from generative AI. The Los Angeles-based company, founded by Elise Smith, 33, and Heather Shen, 27, creates simulated environments for managers to practice giving feedback in delicate situations. The module coaches them and asks them to try again if they don't get their point across sufficiently.

It is apparent why a tool like this is revolutionary, and why companies such as Uber, Amazon, and Accenture have adopted it. Discrimination can play out in the workplace in quiet ways. Diversity, equity, and inclusion initiatives are a human resources strategy aimed at creating harmony in workplaces plagued by the subtle and not-so-subtle hierarchies that leave employees feeling disempowered, alienated, or left behind.

The politicization of DEI has accelerated, with Florida governor Ron DeSantis, among others, describing it as “discriminatory.” Since 2023, at least 85 anti-DEI bills have been introduced in 28 states and the U.S. Congress. So far, 14 have become law. But DEI programs aim to address concrete facts in the workplace. Statistically, people of color, women, and especially women of color are paid less and are less likely to be promoted.

For its part, Praxis isn't interested in working with companies that must be convinced of the case for diversity, its founders say. There are enough companies invested in creating inclusive workplaces for Praxis to find a market for the trainings it offers. Despite backlash to DEI, Smith remains focused on gains made. “We have made progress since the murder of George Floyd in terms of equity and inclusion in the workplace. There have been some losses, but I also think that's partially because we have been successful. There's pushback when the status quo changes.”

Praxis has certainly powered some of that progress. Launched in 2019, the company has raised almost \$19 million and seen three-year growth of 2,352 percent. The secret to its success? Expanding DEI training to every employee and every facet of a client's business. Shen says inclusivity training is most effective when it is “integrated in everything that we're doing.”

Traditional DEI training can be ineffective for various reasons: It's not sustained, generally doesn't change people's attitudes or behavior, is often segmented off as part



Praxis founders Elise Smith (left) and Heather Shen.

of HR rather than being a core part of onboarding, or is only deployed when something goes awry.

There has been a long-standing business case for diversity. But research has found there isn't necessarily a direct relationship between profit and diversity. Still, staff who feel included and empowered are more likely to be invested in their work. Even if that doesn't directly impact your bottom line, it most certainly will indirectly.

You don't see the word diversity much on the Praxis website. Rather, the focus is on inclusion and how everyone, despite their identity, has a clear sense of belonging and understanding of where their career is going. “It's about creating a culture where everyone can do their best work,” says Smith.

Inc. 5000
COMPANY
SPOTLIGHTN°2941
2024 Ranking171%
3-Year Growth\$35M
2023 Revenue25
Employeessuitebriar

Turning Pandemic Panic into a Booming Business

From educational classes to consulting, Google reseller Suitebriar's novel approach to products is fueling growth.

Chris Jones left a comfortable job at Google in March 2020 to join Suitebriar, an up-and-coming Google partner company. A week later the U.S. went into lockdown. "There was some panic," he says about the move. "I thought maybe I'd made a mistake."

That worry was short-lived. Within two years, Jones rose to CEO, overseeing the company's rapid growth. By the end of 2024, the company is on track to have generated about \$50 million in revenue, up from \$9 million when he joined as chief revenue officer.

Virginia's Suitebriar is one of Google's top resellers and partners. Most of its revenues come from reselling Google products like Google Workspace and Google Cloud to midmarket businesses and other companies. Its consulting and services offerings, which include helping businesses transition to the cloud and incorporating artificial intelligence into workflows, for example, are emerging growth areas.

PANDEMIC PUSH

Suitebriar's business boomed during the pandemic, as companies needed to rapidly transition to the cloud to satisfy work-from-home requirements. It also took advantage of a strong M&A market at that time, helping acquired businesses move from their existing cloud provider to Google's platform.

As the M&A market slowed and more people returned to work, Suitebriar has had to find new ways to service its clients. Unlike many of its competitors, which only resell Google products, Suitebriar is also selling and implementing complimentary services that integrate well with Google, such as LumApps, an employee intranet platform, and several cloud monitoring, reporting, and security products that sit on top of Google Cloud. This ability to sell and service non-Google products offers a competitive advantage. "We look at customer relationships holistically factoring both Google and non-Google related needs into a single proposal," he explains.

AI OPPORTUNITY

AI is a significant growth area. Suitebriar is already helping clients embed AI functionality into existing software platforms, via chatbots and other solutions. Although clients can buy technology off-the-shelf, Suitebriar can index and clean data from disparate platforms and data sources to create a more tailored solution. "We're uniting these data sources and making sure users can interact with the AI agents we create using natural language prompts," he says.

For Jones, moving from a tech giant to a smaller operation was an adjustment, but it's been a rewarding adventure. "As a partner, we're committed to standing out by adding real value, which gives me the opportunity to engage in more meaningful conversations about customers' needs and plans—something I can do even more frequently now than in my previous role."

SUITEBRIAR.COM



→ Christopher Jones, CEO, Suitebriar



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Glowbar's Facials Are Great. Its Real Estate Strategy Is Better.

With Glowbar (No. 409), third-generation skin-care entrepreneur Rachel Liverman combined her love for the family business with a location plan that meets women where they are.—As told to Sydney Sladovnik

From the September 2024 issue.

T

There is no shortage of competition in the \$144 billion skin care industry. Still, Rachel Liverman, 39, knew she had an original idea when she founded Glowbar in 2019. She offered 30-minute facials for \$60 on a monthly subscription model—well below the average price—or \$75 à la carte. Five years later, those rates remain the same. But Liverman's scaling strategy has as much to do with rent than retinol. She signed a 10-year lease for her first store in New York with no proof of concept, just high hopes and trust from her landlord.

Skin care is practically in my DNA. My grandmother founded the Catherine Hinds Institute of Esthetics in Woburn, Massachusetts, in 1977, which grew into one of the top esthetician schools in the U.S. My mom bought it from her in 2001 and still runs it today.

One day over dinner in 2017, my mom and I were discussing the state of skin care. Facials had become too long, expensive, and complex. So I thought, why not solve this myself? I had 10 years of professional experience behind me, having held direc-

tor titles at Birchbox and Beautyblender. So, in 2018 I got my esthetician's license and developed the concept for Glowbar: 30-minute facials on a monthly \$60 subscription model. I thought I would reach customers at an accessible price point and be a more sustainable time commitment.

To bring the theory to life, I sought out a location that was readily available to routine-oriented women between the ages of 20 and 60. They could get a facial, and then go to brunch or a workout class and spread the word of Glowbar. I didn't have the money for a robust marketing strategy, so I needed word of mouth to work.

The first location ended up being in a building in Tribeca owned by a French woman, Laurence. She agreed to meet me in person to discuss the lease. I told her about my background, the story of my mom and grandma, and my plans for Glowbar, all of which was the human validation she needed from me as a tenant. I signed a 10-year lease that day.

From the beginning, I planned to grow slowly. I had less than \$1 million raised from angel investors to pay for rent and

building supplies, and this was my first time being a business owner, so I wasn't in a hurry to open dozens of retail stores. I just wanted one.

I opened the first Glowbar in June 2019. Within three months, we became profitable, and in nine months we had more than 1,000 subscribers. I couldn't get too excited, though, because Covid struck a few months later. It took months before the state of New York gave direction on how estheticians and beauty salons could operate; I even organized a committee of estheticians and salon owners to send a petition to the governor's office for guidance. I sold Glowbar's inventory of skin care products online and held virtual skin care consultations for the six months the salon was shut down, which rounded out to a third of our typical sales.

After reopening in September 2020, I kept the slow-and-steady mentality for Glowbar. I remained bullish about in-person services and signed a lease for a second location, which opened on the Upper East Side of Manhattan in the same month. Glowbar is now on track to have 18 stores in New York, New Jersey, Connecticut, Washington, D.C., Massachusetts, and Pennsylvania by the end of the year, and I still insist on meeting the landlord every time I open a new Glowbar. The process of finding a location, negotiating contracts, construction, inspections, and finally opening takes between nine and 12 months.

When I'm scouting out new locations, I prioritize areas near local fitness studios

Facials had become too long, expensive, and complex. So I thought, why not solve this myself?

not only to draw customers, but also to open doors for potential business partnerships. For instance, this year, we ran a promotion with the workout studio Barry's in New York City, offering customers two free classes when they signed up for Glowbar. Location managers also facilitate deals with local businesses, like serving baked goods from a nearby bakery.

My hope is to instill trust among business

Money isn't the impetus for Glowbar. It was watching my grandmother and mom grow a skin care esthetics business and finding my own love for beauty.

partners, whether they're next door, future landlords, employees, or investors. So far, that mindset has proved effective. By the end of this year, we expect to hit \$16 million in revenue. Money isn't the impetus for Glowbar, though. It was watching my grandmother and my mom grow a skin care esthetics business and finding my own love for beauty. Now I get to carry on this family legacy.



SKIN IN THE GAME
The same day Rachel Liverman met her first landlord, she signed a 10-year lease.



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From a Trade Show Find to a Billion-Dollar Brand: The Rise of HexClad Cookware

Inspired by a trade show in China, Daniel Winer made HexClad (No. 786) a cookware sensation, with a heavy dash of Gordon Ramsay's support.

—As told to Christine Haughney Dare-Bryan

From the September 2024 issue.

D

Daniel Winer was touring a trade show in Guangzhou, China, when he spotted a Korean vendor selling barbecue plates with a laser-etched stainless steel design. As a former national sales manager at a cookware brand, Winer, now 58, knew innovation when he saw it. He called Cole Mecray, his co-founder on a failed juicer company, with a new idea: They would work with the Korean vendor to create pans with nonstick, cast iron, and stainless steel qualities and sell them directly to consumers. In 2016, Winer and Mecray launched the cookware under the name HexClad. It became the *It pan of the pandemic* and caught the attention—and the endorsement—of Gordon Ramsay. The celebrity chef signed on as an equity partner in 2021, and in 2023 HexClad booked \$380 million in revenue for a reported valuation of \$1 billion.

We decided we were going to be the first direct-to-consumer cookware company. That juicer drained us. And I was hopeful that HexClad would take off, but nothing was assured.

Cole and I used every resource we had to

fund the company, from maxing out our credit cards to dipping into our savings and 401(k)s.

It took a while to figure out how to connect with people online. Finally, in late 2017, we hit on an ad that got a ton of engagement. It was a really cool picture of the pan and it said, “Who says cookware can’t be sexy?” That was it.

We also had a meeting with Costco. They let us demonstrate at the store in Fountain Valley. I’ll tell you, we were so broke at that point, I couldn’t afford to get the cookware shipped in retail-ready boxes from the factory. We boxed them ourselves. We had so many paper cuts, we bled all over the boxes.

Our first demo sold out quickly and Costco put in a reorder. It also led to an expansion of the demo program.

It was our strategic content play and DTC success that initially caught Gordon’s eye on social media. I got a phone call from our social media guy, who said, “Do you know Gordon Ramsay’s following us on Instagram?” I’m like, “Holy shit, I’ve had a mancrush on him for years!” We sent over our hero 12-piece set for them to test. We asked, “By the way, does Gordon have a cookware deal?”

Five days later, I’m sitting in a parking lot in L.A., and I’m on a call with his business manager, Michael Thomas. He told me, “Gordon doesn’t do a lot of partnerships. If you want to pay him whatever, for filming a commercial, he’ll do that.” We had one more call, and Thomas said, “If you’re flexible, you’re gonna get more than you bargained for.” I go, “Well, we’re flexible, so let’s do it.” We set up a Zoom call, and Gor-



don’s like, “Danny!” And I’m like, “Gordon!” Then he said, “Good to meet you. By the way, I love the fucking frying pan.”

Gordon’s input as both a culinary icon and as a businessman has been immensely valuable. He supports both our product development and our strategic growth decisions. Gordon tests all of our prototypes, and his feedback and point of view are invaluable. We recently launched our pizza steel, which he used to cook a full English breakfast on the barbecue to test its versatility.

He wants to talk about the advertising strategy. He wants to hear about how sales are going. He does stuff he doesn’t have to do, like putting our cookware in his restaurants. He uses our cookware on all his TV shows, and we’re not paying for that. You know, that’s just because he believes in the product. And that’s been incredible. Gordon is a fantastic, fantastic partner.

Inc. 5000
COMPANY
SPOTLIGHTN°3439
2024 Ranking141%
3-Year Growth\$36M
2023 Revenue209
Employees Network Optix

The Video Software Company Building the Next Big Operating System

Network Optix's founder wants to build the next great operating system and "transform civilization" with data.

Ever since Nathan Wheeler owned a scuba diving shop in Hawaii, he has known the power of visual information. "If I can see it, I can run it," says the cofounder and CEO of San Francisco Bay area-based tech company Network Optix. "If a customer is milling around the sales floor, I can get my reps engaged."

Wheeler has an eclectic background ranging from teaching mixed-gas deep diving to selling supercomputer time and data center colocation services. In 2006, he started selling first-generation, high-powered megapixel security cameras, mostly to high-end retail stores. He knew immediately that these devices had a much broader market.

At the time, however, most video was not high-resolution, nor could it produce any tangible insights. He wanted to develop a system that could, "transform civilization" through video-enabled analytics and automation. "I knew these cameras were going to run everything," he says, "and the world would need a new operating system for that."

BUILDING THE NEXT BIG BUSINESS

In 2010, Wheeler started building software for networked video management systems. Network Optix now develops sophisticated solutions that turn video imagery into data that companies across industries can use.

For instance, its transportation-focused Nx Go product, which is used in the State of Georgia, uses Network Optix's software platform to manage nearly 30,000 cameras that analyze traffic patterns and vehicle data. One unnamed space exploration business uses the company's software to turn video from thousands of cameras into data used to improve its production lines and rocket-testing processes.

These use cases have helped Network Optix generate \$36 million in revenue in 2023. It also has more than 200 employees in California and Oregon, and in Amsterdam, Belgrade, and Taipei.



Nathan Wheeler, cofounder
and CEO, Network Optix

A NEW OPERATING SYSTEM

With data becoming more important to businesses and organizations, and camera technology improving, Wheeler says video technology needs an entirely new operating system. He envisions becoming the next Google. "Google tapped into this idea that access to high-quality data is how we gain our own intelligence," he explains. "We can do something similar with video for businesses and enterprise organizations."

He sees the company's future in its enterprise video operating system (EVOS) platform. With technology costs plummeting, more cameras will send more streams of real-time video to supercomputers running EVOS from the edge to the cloud.

"Access to quality data is how humans become smarter and make better decisions," says Wheeler. "A visual operating system is how we will run companies, parking enforcement, automated car washes, retail chains, shipping ports, sports stadiums—the list goes on."

NETWORKOPTIX.COM

Scaling Homemade Dog Food Into a Hit Business

With dual degrees from MIT and an MBA from Harvard, Katie Spies built her success—and her company, Maev (No. 38)—by making better meals for her dog.

—As told to Sara Deeter

From the September 2024 issue.

K

Katie Spies, 32, doesn't know how to live without a pet. In 2015, after graduating from MIT with dual degrees in mechanical and environmental engineering, she rescued George, a 6-month-old Italian greyhound. But when George's first birthday arrived, Spies couldn't find much to celebrate. Her "spry and spunky" puppy had become tired and lethargic. He began having seizures; medications didn't work. Then a vet mentioned a raw food diet. Spies went to the grocery store for some ground beef and chicken liver, which she mixed with peas, carrots, and berries. Within a day—she swears—George was excited about food again, and soon his health had improved dramatically. At first, having George back was enough—until 2019, when, as a student at Harvard Business School, Spies decided to stake her claim to the \$18 billion market for raw, frozen, and fresh dog food.

When I got George, I was working for an agtech startup in the Bay Area—I had

always loved food systems. But when this thing with George happened, it didn't cross my mind that it could be a business. Plus, I had always associated entrepreneurship with tech. So for the first couple of years, I was doing this just for George and my friends. I made the food in my kitchen and froze it in ice cream pint containers; my customers picked it up on the weekend.

Before business school, I took a year to clear my head. I quit my job, became a dog walker, and met a lot of people who bought my dog food. I craved a way to make it more than a side hustle, but I still didn't think of it as a business. I think I had to be obsessed with it for long enough that I was unwilling to dedicate time to anything else.

At Harvard, we'd meet in small groups to think up business ideas. Inevitably, I would bring up pet food. Most of my classmates didn't jump on that, so I began working

on it myself. Then, in 2017, the Farmer's Dog launched. They sold cooked food, but they were very loud about educating consumers, and I was like, "They're stealing my idea!" In my second year at Harvard, I spent every waking moment on this concept. I decided to call the brand Maev, after a larger-than-life Irish wolfhound I'd met while dog-walking.

We hit the ground running in 2019 in New York City. We moved from my kitchen to a commissary kitchen. We hired an engineer, an operations lead, and a community manager. We contacted meat-and-produce suppliers to area restaurants and hotels. And we built inventory, running small-scale tasks to iterate on product, though when we launched it was pretty close to being right. George and I had done so much work—what flavors do dogs like? What ingredients? What excites them?—and that really accelerated things.

We knew we wanted to grow quickly. Venture funding made sense, but VCs typically look for unicorns. So a lot of my early thinking was about how to achieve this thing called LTV to CAC—customer lifetime value to customer acquisition cost—which VCs measure software businesses against. We chose to launch with a subscription model, starting at \$50 per five-pound bag of frozen food. Most pet owners are used to buying subscriptions, and the base economics are really compelling. A tech VC firm led our first funding round, in 2019; we raised \$2.2 million.

If you show up in a park with a cooler filled with dog food, dogs swarm, and you can have interesting conversations.



PET PROJECT
Katie Spies led her company to \$11.7 million in revenue on inspiration from George (on lap) and his sister, Winnie.

We spent no money on marketing in those early days, but we did a lot of events. If you show up in a park with a cooler filled with dog food, dogs swarm, and you can have interesting conversations. I wanted to be a brand people liked enough to talk about, which is where our social following started—people in our community would run their own events on Maev's behalf.

In the spring of 2020, we built a website, and that unleashed the beast. We rented

our own commercial kitchen in New York, and while my peers were creating slide decks, I was obsessing over the most efficient way to cut meat and the importance of stirring peanut butter every hour, on the hour. In 2021, we moved with five employees to Austin—a hub for CPG brands, and a great talent pool for supply chain and marketing candidates.

Today, we have 20 employees and various partners that are way better at

making food than I am. We've moved away from a purely subscription model—a lot of people want to buy one order at a time—and we've established four manufacturing sites and seven shipping facilities to enable Amazon-style one-day shipping. In 2023, we did \$11.7 million in revenue.

George is 10 now. We have a dog-friendly office with beta product all over—he is always a taste-tester. He's living large.

Easing the Pain of Health Care Costs

Inspired by his mother's struggle, Alex Cyriac co-founded Lively (No. 148) to simplify health care savings for families. —As told to Brian Contreras

From the September 2024 issue.

H

How can something so vital to human life feel so lifeless? That's the question Alex Cyriac found himself asking about the health insurance industry after medical complications left his mother struggling with years of chronic pain. As the bills stacked up and his family faced tough financial decisions, Cyriac—who has a background in software, operations, and sales—thought there had to be a better way. By 2016, that conviction led him and his childhood friend Shobin Uralil to found Lively, a fintech that offers health savings accounts, or HSAs. For Cyriac, now 41, the goal is to be a consumer-friendly alternative to industry mainstays: fewer forms and fees, plus no getting brushed off by unhelpful customer service reps. It's a mission that's clearly resonating.

When I was getting married, I was in Texas, where my parents live, doing wedding stuff and casually talking to my mom. She mentioned that she'd stopped taking one of her medications because the co-pay had increased by a couple hundred dollars.

I'd been financially supporting my parents, and given that I was paying for the wedding, she thought that was too much to ask of me. So she did what every mother does, which is sacrifice herself for her kids.

That's when I called my partner, Shobin. Our family friendship dates back to the late 1940s. In the '70s and '80s, there was a wave of emigration from Kerala—where I was born—to the U.S. His parents immigrated to New York; mine to L.A. Despite that distance, we grew up together.

We started talking to our group of friends and realized everyone is kind of in this boat. That's when Shobin and I started looking at the HSA. Not like, "Oh, let's start a company," but more like, "OK, this is a great way to help soften the blow for us, for our families, as we get older." And as we immersed ourselves in the product, we realized two things about HSAs: One, it's the best savings account that you can have in America; and two, it's an industry that lacked modern products.

People hated the HSA because of the experience of using it. That was our aha! moment. People generally understand the benefits of this thing, but if they had a better product, they actually might use it. So we decided one day: We're gonna quit our jobs and start a company.

We launched a DTC product first, and then we went to small businesses. We started with an HSA and now have flexible spending accounts and six other products. We built the entire record-keeping platform



ourselves and invested early on in SEO. We currently have 170 employees.

We're still a small nobody in our industry, though we have over \$1.5 billion in HSA assets on the platform. Every year we make more of a dent. We make it easy for employers to onboard and for account holders to interact with the product. We're going full steam on being this central place where people can navigate the complexity of the American healthcare system.

My personal mission is to not have people do what my mom did—defer care because of the cost. I want people to get the care they need.

The DTC Business You Never Expected—Custom Manhole Covers

With customers like GE, Manhole Covers Direct (No. 388) is proving that almost anything can thrive in the DTC space. —As told to *Bill Saporito*

From the September 2024 issue.

T

The direct-to-consumer sales model has demonstrated repeatedly that stuff you wouldn't think could be sold online absolutely can: mattresses, windows, diamond rings, eyeglasses, e-bikes. Manhole Covers Direct brings a new category of product to the DTC space. For instance, who buys custom-made manhole covers? It even seemed a bit crazy to founder Alexander Conklin, who started the company more on a whim than on an actual business plan. But Conklin, 34, understood the market potential, and he could source the product. Still, he wasn't quite ready to launch until a very big customer came knocking.

Our family was already in the manhole cover business. We don't make them for city streets—those are ductile iron and super heavy. That's where Manhole Covers Direct comes in. We are predominantly commercial: Our big-dollar jobs are utility companies and property management companies. We custom-make everything out of fabricated steel, to tight specifications.

I grew up on a farm in New Jersey. I took engineering and AutoCAD courses,

machining, and welding in high school and college. Most people will quote things but won't give you a drawing. We give you the whole package. You give me a napkin drawing, I'll engineer it for you and give you a formal quote. Everything is made to order. Every single person gets a one-off, custom piece.

The average price is between \$1,000 and \$1,200. Some are just 300 bucks, but I also sold one for \$25,000—all stainless steel. We get a lot of jobs from the government, and from military bases, where they have to be American Iron and Steel-compliant under the Buy American Act. Everything we sell is made in America, which helps.

In 2014, I bought the domain name Manhole Covers Direct on GoDaddy. I created the website and then never looked at it for a couple of years. It was a side project. Then, one day in 2017, GE contacted me. They needed a manhole cover with a smaller access port for underneath one of their windmills. I did an AutoCAD cover and sent them a quote, which they approved. I had an order, but I didn't have a company. They said, "Hey, send us your W-9" I had to go form the company as an LLC and get a tax ID.

It was a small order—one cover for \$1,300. But when I was growing up, my

grandfather worked for GE. Everything in our household was GE: light bulbs, refrigerators, televisions—you name it. Once that first sale happened, I thought that maybe I should pay more attention to the business. I started with a Google ad. I spent a dollar a day. Every time I got a sale, I doubled the ad spend. Now we're spending \$30,000 a month in advertising.

The website and advertising are everything. We started from scratch, with no catalog, no customer channels, and no brick and mortar. We've had our ups and downs with marketing companies. When Google changes its algorithm, we take a 50 percent hit in sales until we figure it out. I surrounded myself with smart people and I owe a lot of success to them.



Alexander Conklin.

Inc.5000
COMPANY
SPOTLIGHTN°1405
2024 Ranking366%
3-Year Growth\$20M
2023 Revenue115
Employees

An Entrepreneurial Approach to Senior Care

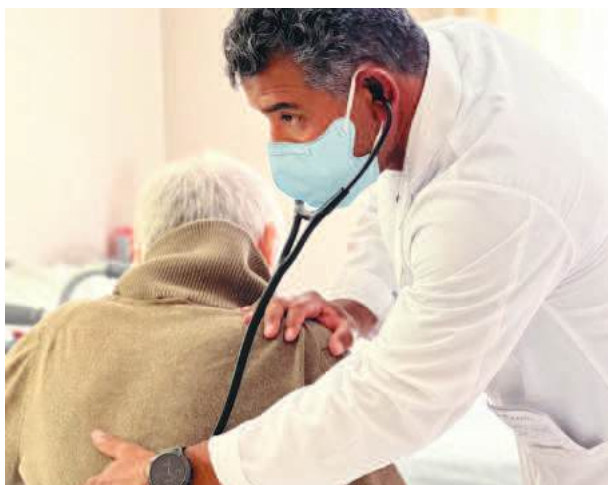
By changing the way nursing homes operate, Dr. Alfonso Brochero is making a major impact in the medical world.

Already a practicing medical doctor, Alfonso Brochero left his home in Colombia at age 26 and moved to the United States. After years of dedication, he earned his green card and medical accreditation, setting the stage for a career that would soon make a major impact on senior care.

Settling in Roanoke, Virginia, Dr. Brochero quickly realized two things: he was an entrepreneur at heart, and he had a deep passion for working with seniors in nursing homes, a population often overlooked by the health care system. "I wondered, 'At what point did we as health care providers decide that this population wasn't worth our best effort?'" That question sparked the mission and founding of Universal Health Corporation.

A NEW APPROACH TO SENIOR CARE

In 2012, Brochero founded Universal Health with a single client, driven by a clear mission: to provide top-tier care for nursing home residents while helping facilities meet their business needs.



→ Dr. Alfonso Brochero, founder and CEO, Universal Health Corporation, examines a patient.

From humble beginnings, Universal Health has grown into a major player, now serving more than 40 nursing homes in the mid-Atlantic region and generating over \$20 million in annual revenue.

"Our goal was always the same—delivering excellent care for nursing home residents," Brochero says. That goal became even more crucial in 2020.

MEETING THE COVID CHALLENGE

When the pandemic hit, it exposed a glaring need for better clinical care and training in nursing homes. Universal Health was ready to step in, leading to a surge in demand for its services. "Now, everyone understands that the nursing home industry needs to be better equipped," Brochero notes. "We need better clinical outcomes, better training, and, in general, better care."

INNOVATIVE CARE SOLUTIONS

One of the things that sets Universal Health apart is its 365-day coverage. Unlike other nursing home providers, where medical staff decreases on weekends, Universal Health provides seamless care by employing custom care coverage in every home.

In addition to providing unparalleled coverage, Universal Health also offers operational support, clinical knowledge with specialized training for providers and nursing home employees, and regulatory expertise. "Some facilities have enough staff but lack the training needed for operational efficiency and/or regulatory compliance," explains Brochero. Universal Health addresses this gap by helping nursing homes achieve their clinical, financial, and regulatory goals.

Whether through hands-on care or education, Universal Health is committed to elevating the standard of care in nursing homes. "We want to touch as many lives as possible and deliver the care they deserve," Brochero says, summing up the company's core mission.

UHEALTHPRO.COM

Inc. 5000
COMPANY
SPOTLIGHTN°2552
2024 Ranking202%
3-Year Growth\$3.75M
2023 Revenue20
Employees

MDRN CAPITAL

One-Stop Shop Covers Everything Those 55+ Need in a Retirement Plan

MDRN Capital targets people near retirement, with comprehensive planning at no extra cost.

Like many financial advisors, Aaron Cirksena once hustled to get clients. He held regular in-person seminars and workshops, building his independent financial advisory client base person by person. He rented out high-end space in downtown Annapolis, Maryland, for clients to talk through their financial needs. And then Covid hit. Cirksena pivoted to web-based marketing and client interactions.

The pandemic's peak passed, but clients remained happy with virtual contact. "They cared more about convenience and efficiency than the fluff," Cirksena says. He felt overhead costs could be better deployed but also wanted to help more people with retirement planning than he could on his own.

That meant expanding the individual advisor role and scaling up. In 2023, the founder and CEO rebranded his advisory to MDRN Capital, an all-virtual national company serving people ages 55 and older. Gone were the live marketing seminars; in came a marketing funnel of educational financial planning videos leading to appointments with financial advisors.

INCLUSIVE RETIREMENT PLANNING

Cirksena passed the rent savings on through lower fees and comprehensive financial services. "We are a one-stop shop for everything [our clients] need for retirement: Medicare planning, Social Security advising, investments, tax planning and filings, estate planning, and trusts," he says. The firm partners with experts in different states for these services, covering the cost.

Even while providing these services, MDRN Capital is 30-40 percent less expensive than brick-and-mortar firms, he says. A broader portfolio offering such as annuities and money market accounts with no client fees is part of that model, reducing client costs and often giving better protection and returns.

Listening to clients is vital, Cirksena maintains. Clients get upset paying fees when their accounts lose money, so MDRN freezes advisory fees if accounts are down for two consecutive quarters. "We don't want to make problems worse for clients," he says.



→ Aaron Cirksena, founder and CEO, MDRN Capital

HIGH GROWTH POTENTIAL

Since rebranding, MDRN has hired 13 advisors and will have more than 50 next year. Advisors typically come from large financial institutions; MDRN trains them to work with its client base. "The mentorship portion is appealing, and advisors are happy to get qualified prospects setting up time to talk with them," Cirksena says. They learn MDRN's planning philosophy and how to operate virtually.

"With 10,000 people retiring every day, many of whom have more than \$500,000, it's almost impossible to fill the financial planning demand," he asserts. Clients like his model and the personal attention. "When they see the level of difference of what we do, and the lower cost, they wish we existed sooner."

MDRNCAPITAL.COM

Getting Influencers to Post on Time—and Stay on Message

After 12 years as founder and CEO of Mirror Digital (No. 1,113), Sheila Marmon knows how to harness creators' creative impulses.

—As told to Kayla James

From the September 2024 issue.

W

Working with influencers is the exact roller coaster you think it is—they can be as mercurial as they are savvy and their often outsize personalities can be explosive. Mirror Digital, which represents more than 1,000 publishers and creators, has learned to harness that volatility—booking nearly \$24 million in revenue from clients such as Amazon and General Motors last year alone. After 12 years of business, Mirror's 42-year-old founder and CEO, Sheila Marmon, is unambiguous about the source of her success.

As a digital media company, we help brands connect with diverse audiences on digital ad platforms. We have a network of websites, creators, and podcasters. So brands tell us the audience they want to reach. Then we get a digital ad from a media agency of record. We take those assets and

run them on our array of partner websites on behalf of our brand partners so they can connect with diverse communities.

My first big brand client was Macy's. We were helping them reach the Hispanic market through digital advertising. They were interested in getting their message out in front of Hispanic audiences in both English and Spanish. Then we launched into working with them on the African American audience, and later on the Asian American audience. We've worked with them for years.

Engaging with creators isn't always easy because some of them run lifestyle businesses, meaning you may need them to post a picture and they may decide that they'd rather go to the gym. Sometimes it's hard to wrangle folks and make sure

they're getting their deliverables done on time. There are some instances when we've had creators not want to adhere to the specs of what was asked of them.

We were working with a large streaming company in 2020 and the assignment was a video journal-style message about a particular movie that was coming out. We had creators reject the videos because they didn't think they looked glamorous enough. We had creators want to redo the videos and make them look more like commercials, even though that wasn't the assignment. In those instances, we're liable. We did not charge the client for the program, even though there was a significant investment in video production.

That was a major snafu. We had to smooth over those relationships by going above and beyond what was asked in the next campaign. You learn over the years and you add that to the checklist for the next time, and that has helped us maintain relationships. If creators are challenging to work with because they're not responsive, we do create files. We have a repository on each of our creators, and challenges are noted.

The brands we work with are entrusting us with their reputations, and so when you stumble, it's really hard to come back, because they feel burned. So what we try to do is codify the process.

If creators are not responsive, we do create files. We have a repository on each of our creators, and challenges are noted.



MIRROR IMAGE
Sheila Marmon has grown her company by focusing on communities of color and other underrepresented groups.

Successful social media programs require a mix of organic and paid reach. Mirror has extensive paid media capabilities with deep knowledge in how to efficiently target diverse audiences, despite shifts in algorithms. While most of our creators and publishers post across social platforms—100 percent are on Meta,

which includes Facebook, Instagram, and WhatsApp, and about 80 percent are on TikTok—the biggest driver for us is digital video and creator programs on the various social platforms.

Our growth has mainly come from centering on communities of color and other underrepresented groups. When we started,

there really weren't media companies thinking about these audiences. Diverse creators tend to be undercapitalized versus some of the more traditional media publishers, so they don't have the same level of technology support and infrastructure. That's why we're launching technology tools to help them. One of the first tools we're adapting is an enterprise WordPress product. Most websites have the mom-and-pop version of WordPress, and by launching an enterprise opportunity, it allows creators to have best-in-class technology for their website.

It hasn't always been easy. As a woman—and a woman of color no less—I had a very difficult time trying to raise money in the early days. So we bootstrapped. I didn't decide to bootstrap—I didn't have a choice. There's real significance in making sure that advertising isn't so homogeneous. There's also a need for us to acknowledge multicultural audiences as growth audiences; they are the fastest-growing populations in the United States.

People of color in the U.S. would be the third-largest global economy with respect to buying power if we were on our own. We'd be larger than any country in Latin America, or any country in Europe. When you get your mind around what that means, you can see how the level of investment within these communities is so woefully inadequate.

Inc. 5000
COMPANY
SPOTLIGHTN°2788
2024 Ranking182%
3-Year
Growth\$43M+
2023 Revenue1,975
No. of Clients
per Week

Practice Offers One-Stop Shop for Pediatric Therapy

Compleat Kidz's laser-focused mission is to help kids with developmental delays and their families.

It's hard enough to raise a child with development delays, but having to bring kids to multiple locations for therapy makes it even harder. Children with these delays often need more than one kind of therapy. Compleat Kidz is proud to be a one-stop shop, providing occupational, physical, and speech therapy, along with applied behavior analysis (ABA) in one location.

While the company has been serving North Carolina families since 1989, Compleat Kidz's growth accelerated in 2020 upon offering ABA. North Carolina laws changed prior to that, mandating autism treatment insurance payments for these services. When Bob Fremgen, vice president of marketing joined the company that year, Compleat Kidz billed about 880 hours weekly for ABA. Now they're billing more than 16,000 hours weekly.

COMMUNITY AND HOLISTIC INVOLVEMENT

They also have a mission to treat the family, not just the child. "Without home support, you're not going to see any development in the kid," says Fremgen. Compleat Kidz offers parent meetings and in-clinic ABA training to help parents better manage home life.

Compleat Kidz is also invested in the 17 communities it serves. The company hosts events open to the public, with features like dog therapy, bicycle riding, and Halloween trunk-or-treats. The company gives hearing protectors and eyeglasses kits to first responders to use on calls where they encounter children on the autism spectrum to mitigate sensory overload.

FLATTEN THE CHART

To keep a free-spirited culture in what can be a stressful environment, Fremgen says, the company holds internal staff contests, whether holiday decorating, costumes, or which office takes the most steps that month.

Compleat Kidz also has a relatively flat organization, so people are equals. "My job isn't to be a boss and tell people what to do, but to assign someone to make a decision," he says, to avoid

decision making by committee. In doing so, many feared the ship would be rudderless, but the opposite happened: the mission became laser focused.

Ultimately, what the company does is working. "We've had parents break down in tears," he says, about what others may think are simple things. Parents have said, "Now I can go to the grocery store, and my child does not have a major meltdown. We can see a movie without having to leave halfway through." One parent said that when their child was diagnosed with autism, "I thought it was the end, and Compleat Kidz showed me it was the beginning."

COMPLEATKIDZ.COM



→ Compleat Kidz provides occupational, physical, speech therapy, and applied behavior analysis (ABA) in one place.

Inc. 5000
COMPANY
SPOTLIGHTN°2807
2024 Ranking4X
Inc. 5000
Honoree181%
3-Year Growth2017
Year
Founded

Feed the People: The Business on a Mission to Deliver Quality Seafood

Cofoods, a frozen seafood importer and wholesaler, carefully selects global supply chain partners to achieve the company's mission and power fast growth.

Baoying Liao, founder and CEO of Cofoods, a frozen seafood importer and wholesaler, began his career in food distribution. His firsthand experience in the industry provided him with invaluable insights into the seafood supply chain and the importance of quality control. "Every success story begins with hard work and determination," Liao reflects. "I believe in the power of perseverance, and I'm proud to have built a company that not only thrives in sales but also upholds sustainable practices that benefit our communities."

Cofoods has established a strong brand reputation, supported by a dedicated team passionate about seafood and sustainability. As the company continues to expand its operations, it remains steadfast in its core values of quality, sustainability, and community engagement. Within five years, Cofoods has expanded its product catalog and grown to \$200 million in sales with a team of eight people. This year marks their fourth consecutive Inc. 5000 win.

PRIORITIZING QUALITY DRIVES SUCCESS

Before founding Cofoods, Liao held positions at a large food distributor, a seafood processing factory, and a U.S. seafood importer and wholesaler. He understands the entire supply chain, from "the overseas farm to the table," as he says. Throughout his career, he observed that many businesses prioritized profit over product quality. Recognizing an opportunity to differentiate Cofoods, he chose to focus on three key elements: safety, nutritional value, and taste. Launched in 2017 with the mission "to bring high-quality food products to the people," Cofoods operates with this principle at its core. Financial success didn't come overnight, but Liao's strategy has proven effective: prioritizing quality will lead to business success.

STRONG VALUES UNITE AN EFFICIENT TEAM

Cofoods partners with factories rather than operating its own. Liao is meticulous in his selection process, regularly visiting



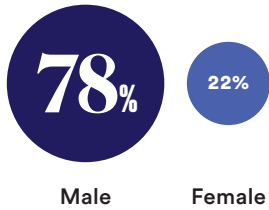
Baoying Liao, founder and CEO, Cofoods

facilities in person and overseeing quality control himself rather than outsourcing it. By sourcing directly from suppliers, Cofoods takes full advantage of the best time to purchase seasonal items. This strategy ensures competitive pricing and enhances cost management for both the company and its customers.

The backbone of the company's strategy, and the "co" in Cofoods, is cooperation with factories, suppliers, and distributors. This value, along with equality, integrity, and innovation, unites the company's highly efficient team. These principles and processes have established Cofoods as a trustworthy and reliable partner. Meanwhile, Costar products continue to gain traction as customers recognize the brand name stands for quality. Despite its modest size, Liao is confident that Cofoods has all the elements needed to become a market leader in the frozen seafood industry, known for its high-quality products and well-managed operations.

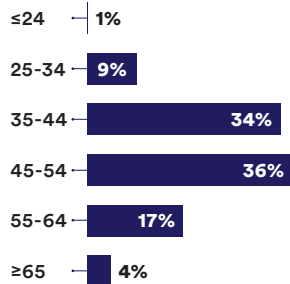
COFOODS.COM

GENDER

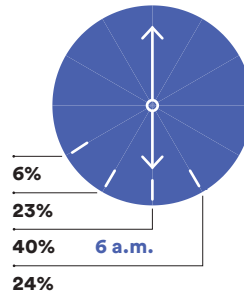


0.07% of respondents identified themselves as transgender or nonbinary.

AGE



WAKE-UP TIMES



THEIR MOST EFFECTIVE SELF-CARE ROUTINE OR RITUAL

- “Transcendental Meditation and a regular sauna.”
- “A walking treadmill under my standing desk.”
- “IV nutrient therapy on a regular basis.”

WHICH SUCCESSFUL ENTREPRENEUR THEY ADMIRE MOST AND WHY

JENSEN HUANG

“He remains grounded, accessible, and committed to fostering a culture of transparency and trust.”

OPRAH WINFREY

“Her ongoing focus on personal growth is an inspiration.”

YVON CHOUINARD

“He did it all his way and didn’t follow a single playbook.”

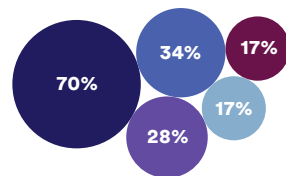
29%

have been asked by their customers for AI-related solutions.

91%

use or plan to use AI in their business.

PERCENTAGE ALREADY USING AI FOR:

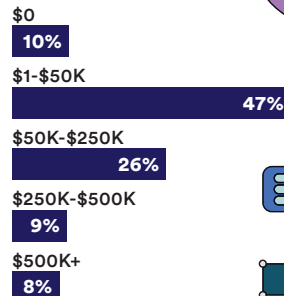


- Marketing
- Sales
- Services
- Account management
- Other

91%

are optimistic about AI’s potential to help their business.

HOW MUCH THEY PLAN TO INVEST IN SALES TECHNOLOGY IN THE NEXT YEAR



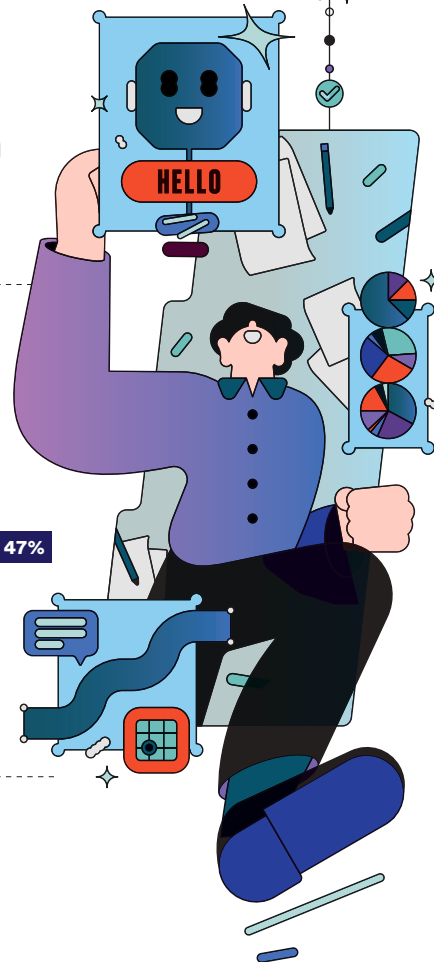
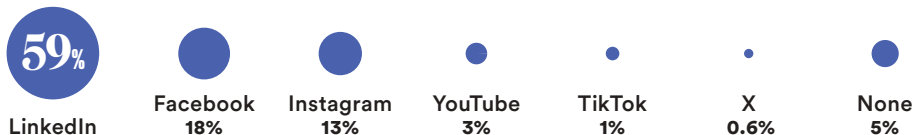
THE TOP FIVE EXPECTED AI USE CASES

- 1 WORKFLOW AUTOMATION 68%
- 2 CONTENT CREATION 63%
- 3 MARKETING 62%
- 4 MANAGING CUSTOMER FEEDBACK 27%
- 5 ENGINEERING SUPPORT 24%

THEIR MOST POPULAR AI SERVICE PROVIDER

- 1 CHATGPT OpenAI
- 2 COPILOT Microsoft
- 3 GEMINI Google

THEIR MOST IMPORTANT SOCIAL MEDIA PLATFORMS FOR BUSINESS



How a Stay-at-Home Mom Turned a Facebook Post Into a Multimillion-Dollar Meal-Kit Empire

Allyse Jackson started Beehive Meals (No. 399) to pay the mortgage. Now she employs more than 100 people from home. —As told to Ali Donaldson

From the September 2024 issue.

W

When Allyse Jackson, 30, started Beehive Meals in 2019, it was to help pay the mortgage until her husband, Adam, found a new job. But with just one click and a post to her neighborhood Facebook group, this stay-at-home mom landed on something all entrepreneurs crave: product-market fit. Within the crowded \$8.7 billion meal-kit delivery space, she found a niche by delivering fresh ingredients for Crock-Pot concoctions designed to streamline dinnertime for families, no chopping required. Before too long, her freezer-meal delivery service started scaling so fast that Jackson solved her family's original problem—by hiring her husband.

Our meals include all of the preassembled raw ingredients. We vacuum seal and deliver them to the homes of our customers, who can just throw them into their slow cooker. I launched the business on Facebook and, on my first day, did about \$10,000 in sales. I thought, Wow. What did I just do? I called my husband and said, “I think I started a business.”

That fall, I continued generating around

\$10,000 a month in sales. People gave me their money three or four weeks in advance just to get on my schedule, so I started a subscription model. That’s grown to be one of our best assets. By February 2020, I wanted to be able to do more, so I brought on two employees. Little did I know the pandemic was going to hit.

All of a sudden, grocery store shelves were bare. We started seeing sales double month after month. In 2019, Beehive Meals did \$30,000 in sales; in 2020, we did \$1 million, and it was like holy crap! Then in 2022, we did \$8 million.

Growing a food business during the pandemic, when ingredients were hard to procure, we had to get creative. At that time, I was still using wholesalers. I remember going into Sam’s Club, and the store limited what people could buy. I needed to serve 50 to 60 families, so I went to the butcher and rang the bell to get a chicken. Then I would leave and my husband would go in. Eventually, we switched to true restaurant wholesalers like Sysco.

We started growing out of the commercial kitchen we were renting, so we upgraded. Now, we’re up to 25,000 square feet.

Beehive Meals handles all of the manufacturing, production, logistics, and distribution in-house. We have refrigerated vehicles and send our drivers out every day to different locations. They can drive to Idaho, deliver, stay the night in a hotel, and drive back to Utah the next day.

We have been very scrappy. From day one, Beehive Meals has been profitable

and able to sustain itself. We cash-flow the whole business and spend money only as revenue comes in. We have never taken out a loan, and I’ve never put a single penny of my own money into the company.

Today, we have just over 100 employees, including about 40 on the production side. We’ve found a niche with stay-at-home moms, who like our 9 a.m. to 2 p.m. schedules. We’ve tapped into people who otherwise wouldn’t be working. We can teach them our process; I just need somebody who’s willing and reliable.

I went from being a stay-at-home mom to realizing I’m really good at running operations. I like setting an example that I can be a good mom and a good CEO. I have one daughter. She’s the oldest of our four kids, and all she’s going to know is having a mom who grew a successful business.



Inc. 5000
COMPANY
SPOTLIGHTN°291
2024 Ranking1473%
3-Year Growth\$22M+
2023 Revenue511
Employees

digitalzone

Marketing to Marketers: Demand Gen Firm Provides the Total Package

Vertically integrated Digitalzone helps clients convert qualified leads at higher rates.

While many companies were fighting to stay alive during the pandemic's early days, Rishikkes Pawar saw a need to pivot. As a lead supplier to demand generation vendors, Digitalzone saw firsthand the gaps in the industry and decided to remove the middleman and adopt a direct supplier model.

While other lead generation companies chase their competition, "Digitalzone chases the buyers' needs," says Pawar. The founder and CEO wanted to fill the holes he saw in this changing niche and disrupt the norm in demand generation.

A TECH FOCUS

Starting as a database provider, Digitalzone grew from a single layer of contact information into a multi-dimensional dynamic data cloud, equipped with real-time engagement data and proprietary intent signals. This allows deeper insights to the individual B2B buyer, rather than aggregated insights at the account level.



→ Rishikkes Pawar, CEO, Digitalzone

The vertically integrated company owns every aspect of its operations from data and campaign delivery to its go-to-market team, Pawar says. Other vendors own pieces of this, but then out-source the rest. "Lead generation is critical for B2B marketers, but we have found the best outcomes for clients come from our ability to not only generate leads, but to nurture those leads with our proprietary intent and nurture solutions," resulting in their ability to help convert leads into revenue at a higher rate, he says.

Digitalzone has taken its success and reinvested more than \$2 million back into the company, preparing to launch software that will further empower the B2B marketer. Their new product will help clients gain greater insights into their campaigns using AI and help streamline optimizations. "Our investment in R&D is based on what customers need," he says, which is "more campaign transparency."

HIGH GROWTH, HIGH CLIENT RETENTION

Founded in India in 2014, the bootstrapped company is now headquartered in New York City, with clients in Europe and Asia-Pacific (APAC).

When expanding in the U.S. Pawar hand-picked his leadership team, from sales to marketing to customer success. "It's difficult to get the best people and more difficult to ensure they stay with you and work as if it's their own business," he says. Digitalzone embodies a culture of transparency and a 'win together' spirit. "The credit for our growth over the last five years goes to our leadership team," he says.

Digitalzone prioritizes investing in its own marketing, counter to industry practices, Pawar says. "We provide marketing services, so we believe that marketing moves the needle for businesses, including our own." This approach has paid off, with a 95 percent client retention rate and 120–125 percent year-over-year net revenue increases in client spend.

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