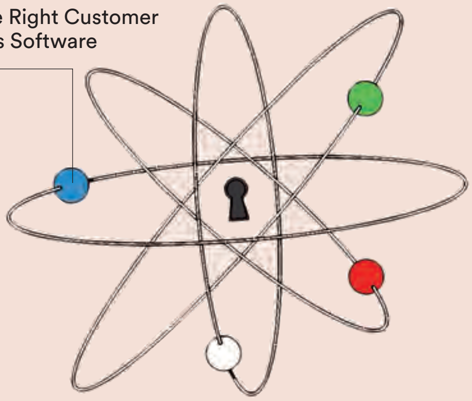
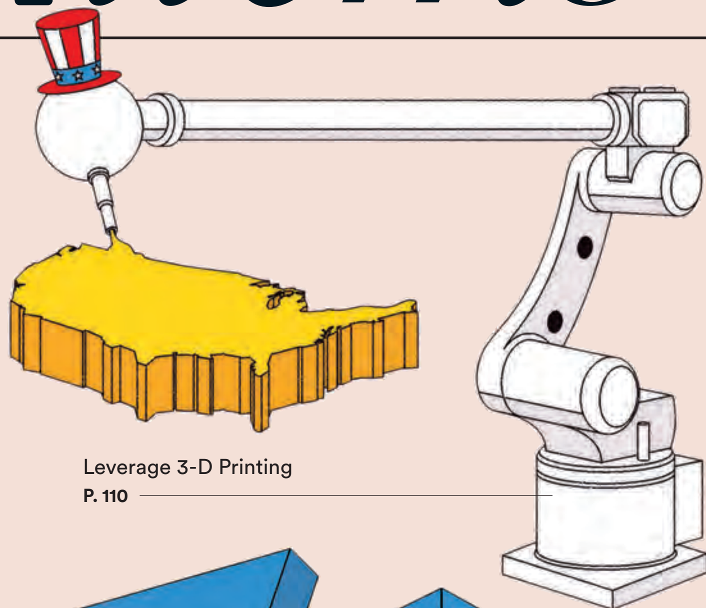
ACTION *items*

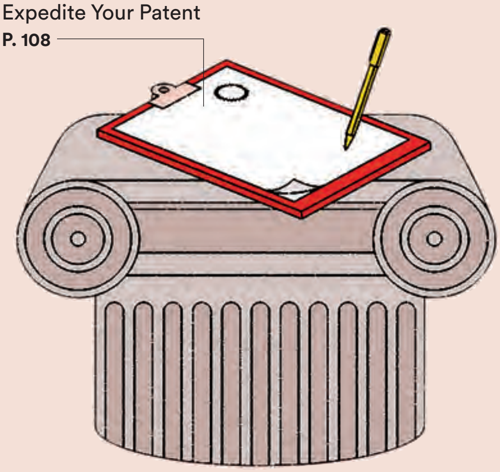
Pick the Right Customer Success Software
P. 115

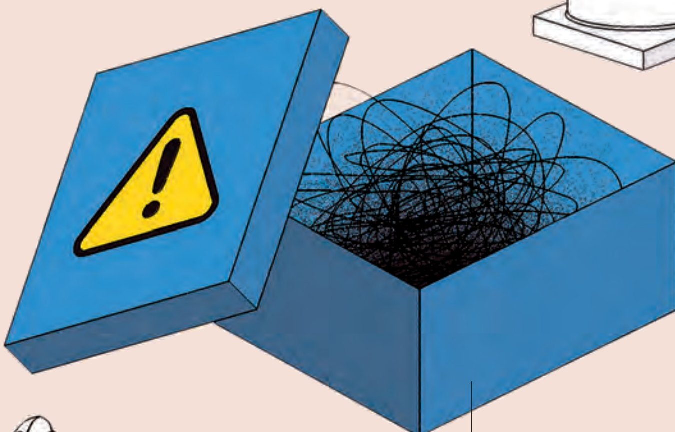




Leverage 3-D Printing
P. 110

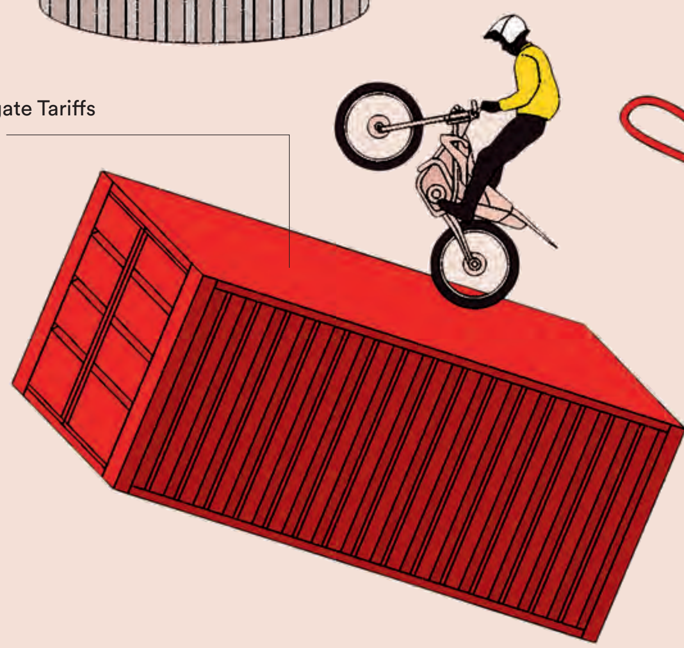
Expedite Your Patent
P. 108

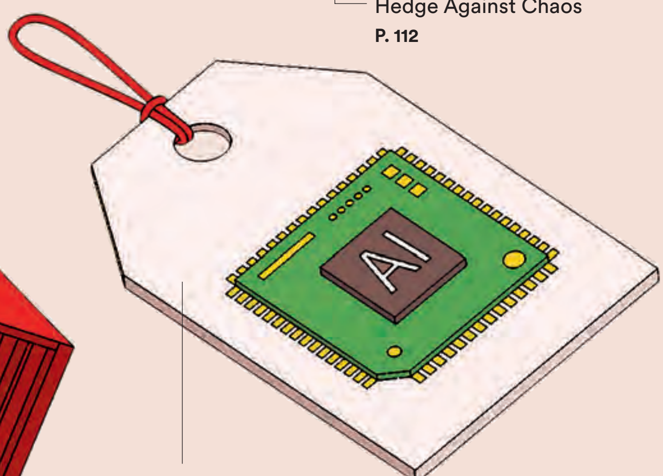




Hedge Against Chaos
P. 112

Navigate Tariffs
P. 106





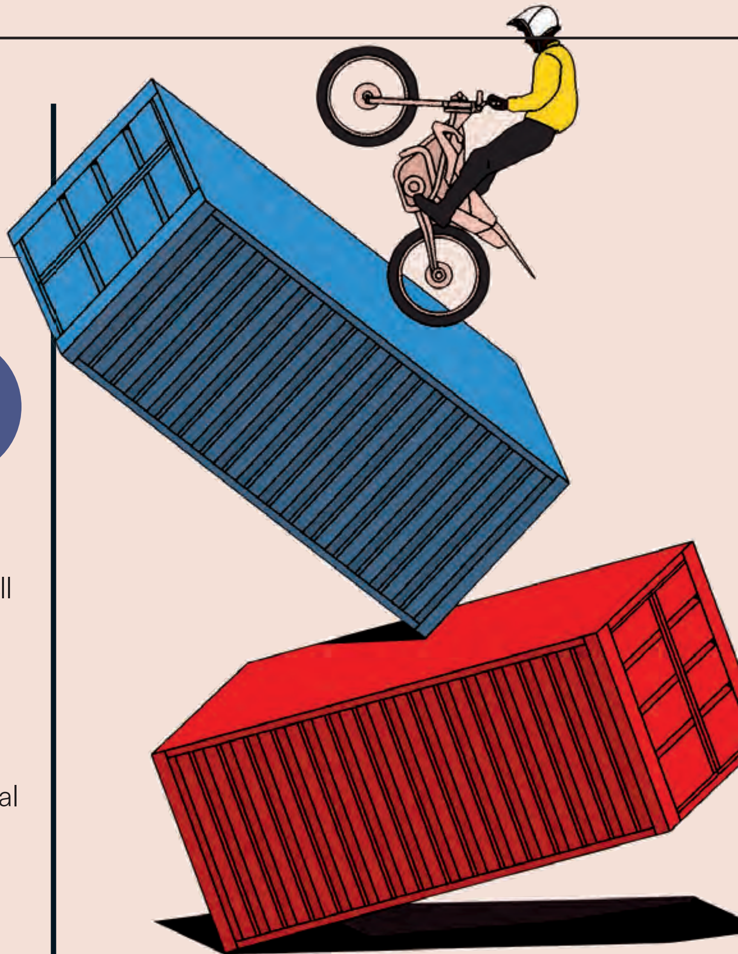
Pricing Pro Tips
P. 122

ILLUSTRATIONS BY ÁLVARO BERNIS

Listen to Warren

“Businesses, as well as individuals with desired talents, … will usually find a way to cope with monetary instability as long as their goods or services are desired. … So, too, with personal skills. Lacking such assets as athletic excellence, a wonderful voice, medical or legal skills, or for that matter, any special talents, I’ve had to rely on equities throughout my life. In effect, I have depended on the success of American businesses, and will continue to do so.”

Warren Buffett
in his 2025 annual letter to Berkshire Hathaway shareholders



Navigate Tariffs

CLASSIFY GOODS PROPERLY
You and your customs broker must know exactly what items you’re importing and where they’re made. Imports get coded according to the Harmonized Tariff Schedule—a detailed list of the tariffs on each type of good, maintained by the U.S. International Trade Commission. If you’re wrong, you could overpay. If you underpay, you could face fines. And Customs can charge up to five years of back taxes. It’s wise to retain a trade attorney to negotiate with Customs and Border Protection in cases of misclassification: “Your broker doesn’t know your business the way you [do],” says Angela Gamalski, a trade attorney based in Ann Arbor, Michigan.

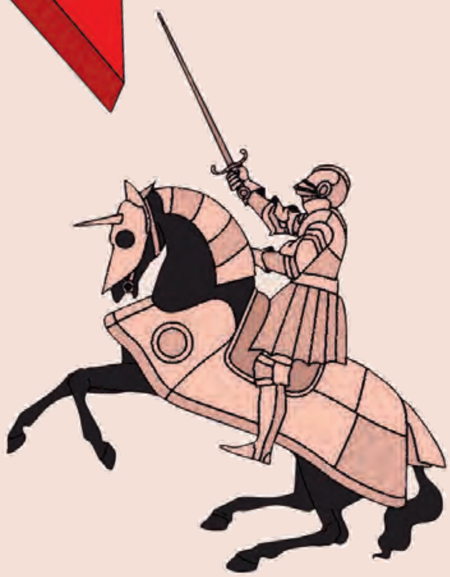
GET USMCA-CERTIFIED
Goods compliant with the U.S.-Mexico-Canada Agreement are generally not subject to tariffs. The agreement, negotiated during Trump’s first term as a successor to the North American Free Trade Agreement, allows for the free flow of goods and integrated supply chains across the three countries. In March, Reuters reported that about 38 percent of goods from Canada and 49 percent of goods from Mexico were eligible—but companies were racing to certify their goods before April 2, the date other goods from Canada and Mexico would become subject to 25 percent tariffs. “It’s much easier to start claiming USMCA than some companies may think,” says Gamalski. The exact criteria to claim eligibility will depend on the product being imported, but companies can use the resources available through the Customs and Border Protection website to prepare a certificate affirming that their goods qualify and laying out exactly why. Importers self-certify their status, but Customs can audit their claims.

WATCH FOR EXEMPTIONS
These requests are handled by the Department of Commerce’s Bureau of Industry and Security and the Office of the U.S. Trade Representative (USTR). They’re not available right now, so sign up for webinars and alerts from both agencies in case a process for exemptions opens up. It’s a lengthy process. You have to prove your product qualifies for the specific exemption and can’t be produced in the U.S. Meanwhile, USTR is looking into whether other countries are undercutting American goods on price through subsidies and other measures. And the office is exploring potential trade actions related to Chinese shipbuilding.

REDIRECTING IS RISKY
Do not move goods from a high-tariff country to a country with lower tariffs, do minor alterations or simply change the labels, and pass off the goods as products of the lower-tariff country. This is almost certainly happening, but Gamalski and others strongly advise against it. If you’re caught, expect to pay fines up to three times the amount of the original tariff—and your company or company leadership could face criminal charges. Customs is conducting regular audits to root out this sort of fraud, and Customs, the Department of Commerce, and the Department of Justice can all bring charges against violators. —*Jennifer Conrad*

PREPARE FOR A ROCKY 2H

To be clear, even with the market volatility earlier this year, which briefly removed $5 trillion worth of value in three weeks, the U.S. is not yet in a recession. That can't be declared until we've seen at least two consecutive quarters of declining economic output. But Wall Street analysts are keeping an eye on things. J.P. Morgan puts the odds of a recession at under 50 percent, while Mark Zandi, chief economist of Moody's Analytics, says there's a 40 percent chance of one. Just in case they're right, here are four ways to prepare.



GET CREATIVE WITH CUSTOMER ACQUISITION

"You need to pay closer attention to your cost of acquisition," says Charlie Goetz, a professor at Emory University's Goizueta Business School. "Frequently, marketing costs go down during recessions as competitors buy less advertising and social media. This is a good time to offer some kind of trial-period pricing options, to get a new customer to purchase."

STAY NIMBLE

J.P. Morgan says it's critical to have a flexible cost structure and business model, along with an action plan for slowing sales or profits. Keep an eye on economic warning signs, the bank suggests, and look for risk-reduction strategies, including locking in interest rates and identifying discretionary expenses that can be cut to maintain margins. Also, consider negotiating agreements with suppliers or exploring the outsourcing of some work to improve efficiency.

CAPITAL IS KING

If sales begin to fall and your organization is already as lean as it can get, a strong balance sheet will help you avoid tough short-term decisions, including layoffs. To build resilience, try now to secure access to external lines of credit, venture debt, or other kinds of financing. Capital not only protects against layoffs, it also lets you invest during a market downturn, which can lead to exponential growth as the economy improves.

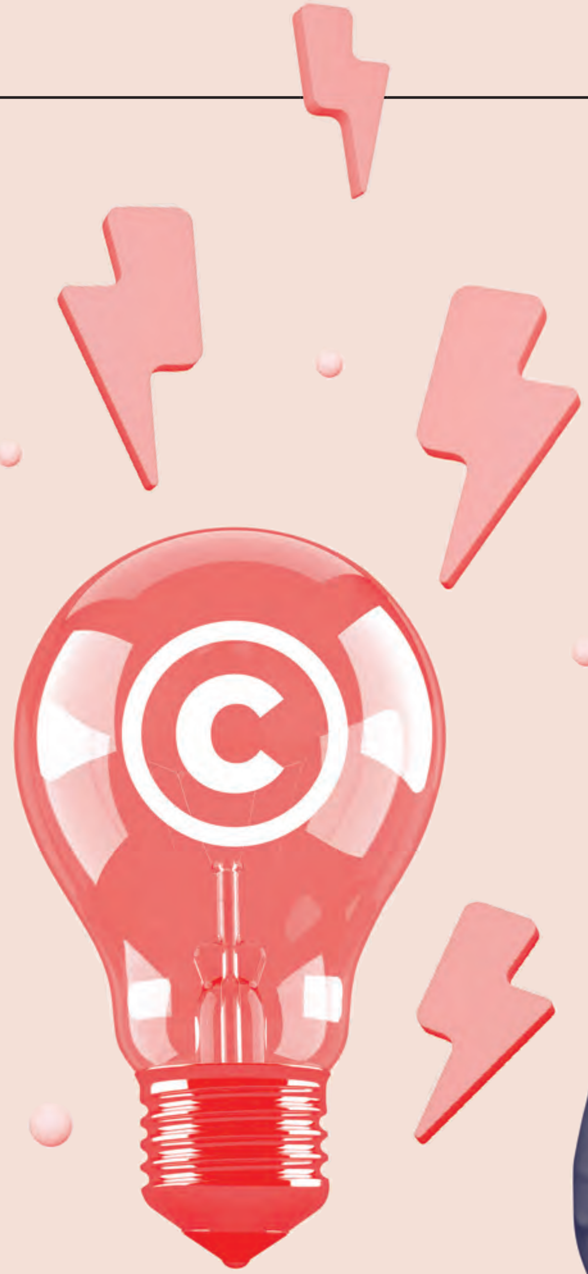
CONSIDER A TECH UPGRADE

Odd as it might sound, a recession is a good time to consider upgrading your tech systems. When the economy is strong, companies are less likely to make a change, as they're focused on producing as much as possible to build revenue. New tech can make your company more agile, and better able to adapt to change, while automating certain tasks can save money.
—Chris Morris

GETTY IMAGES (BUFFETT, BASKET, HANDSHAKE)

EXPEDITE YOUR PATENT

Getting a patent is often a years-long process. But what if you could secure one in just a few months? There are good reasons to fast-track your application, including protection against copycats (see "Operators Are Standing By," page 72), stronger positioning in licensing deals, and international IP protection. Patent agent and inventor Steve Katsaros, founder of Patent Engineering, has successfully expedited 68 patents for his clients—at an average of just six months until allowance. That's fast. His insights:



THE FAST LANE

The U.S. Patent and Trademark Office offers multiple programs for fast-tracking. The most widely used is a petition submitted through Track One Prioritized Examination. To participate in Track One, the applicant must file the petition when they file their application, include fewer than 30 total patent claims and no more than four independent claims, and pay an additional fee of $903 for micro-entities and $1,806 for small entities, Katsaros says. There is also Accelerated Examination, which has more stringent requirements, including a detailed pre-examination search report and statement, he says. In nearly all cases, his preference is to use Track One.

A FAST-PASS FOR SENIORS

If you are over the age of 65, you may be able to skip to the head of the line for free through the USPTO's Petition to Make Special Based on Age. It is also possible to fast-track a design patent application through the USPTO's Rocket Docket program.

FOREIGN EXCHANGE

The Patent Prosecution Highway allows applicants with a granted patent in a participating country to qualify for Accelerated Examination in the United States and the other IP5 participants—Japan, Europe, China, and South Korea.

COMMON MISTAKES

Mistakes in your application will derail the process. Inventors should triple-check everything to avoid unnecessary delays. Common issues in "incomplete" applications include exceeding the claim limits, failing to include the proper declaration, or paying the incorrect amount of fees. Any delay in the prosecution of your application—for example, if your attorney files for an extension—will terminate the "special" status of your application.
—Stephen Key

> Build the systems that get you to the data fast. Innovate quickly. Have your team train."

Sheila Lirio Marcelo
Founder and CEO of AI personal assistant company Ohai.ai, who encourages founders to embrace being constant learners

GETTY IMAGES (MARCELO, LIGHTBULB)

Inc. Regionals
MIDWEST

STEVENS CAPITAL PARTNERS	NO 40	2020	151%	6X
	2025 Inc. Regionals Ranking	Year Founded	2-Year Growth	Total Revenue Increase

This Investment Advisor Is Redefining Success

By helping clients find meaning in addition to increasing wealth, Stevens Capital Partners is making an impact while driving exponential business growth.

STEVENSCAPITALPARTNERS.COM

Wealth is not the only measure of success. Rarely does money alone create happiness. David Stevens, founder and president of Stevens Capital Partners, saw this firsthand during his nearly two-decade career as an advisor at a national financial services company "Six months after retiring, many clients weren't excited about life anymore. They'd spent decades building something meaningful. But once that was gone, they felt lost. I started introducing them to nonprofits and mentorship opportunities, and I saw how having a purpose beyond wealth started to transform them," Stevens says.

He founded Stevens Capital Partners, an SEC registered investment advisor (RIA) providing wealth management, estate planning, retirement planning, financial planning, and tax planning services to high-net-worth individuals, executives, and business owners. The firm delivers a dynamic, relationship-driven approach that blends technical expertise with personal guidance, helping families create lasting impact as they navigate life's transitions.

Structured with purpose

Stevens Capital Partners helps clients align their wealth with their values and goals. For business owners, that might mean structuring their business to maximize generational wealth or increasing the company's value so it may acquire other companies or allow the owner to exit at a premium price. If philanthropy is important to the family, the firm ensures that giving is a strategic part of the portfolio. "Our financial and retirement planning ensure that high-income earners and business owners aren't overpaying in taxes and are preserving more of their wealth over time," says Stevens, who is both a certified exit planning advisor (CEPA) and a certified financial planner (CFP).

Stevens sees financial success as a tool for impact and has committed 10 percent of profits to charitable giving. The firm's fee-only structure ensures advisors are not influenced by outside incentives and are solely focused on clients' interests.

Here to serve

Initially, Stevens didn't realize his approach to customer service was unique. "Every call and email are returned the same day, no exceptions," he says. Responsiveness proved a signature part of the firm's DNA. He believes this is part of the reason why an estimated 95 percent of prospects become customers. Thoughtful touchpoints lay the groundwork for deep relationships. Advisors understand clients' needs. The team saves clients time by working directly with their attorneys, accountants, and other partners.

Stellar service and a unique structure and mission have enabled the firm to increase revenue sixfold since its launch in 2020 and earn a 2025 Inc. 5000 Regionals honor. But financial success is just the beginning for the firm as well as the individuals, families, and business owners it serves. "We're helping clients structure their wealth, so it works for them, not just in terms of investments, but also really creating a life that is meaningful, impactful, and aligns with their values," Stevens says.

→ **David Stevens, founder and president, Stevens Capital Partners**

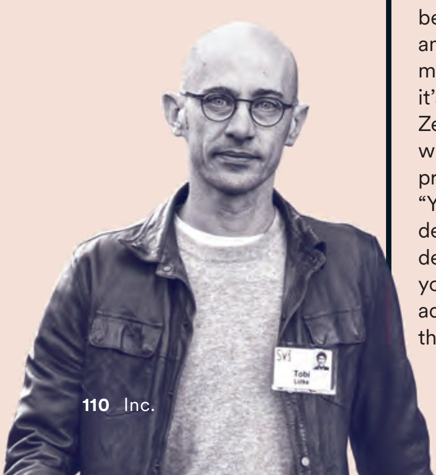
Avoid These 5 Startup Mistakes

To grow fast and scale on a reasonable timeline, avoid these mistakes that cause many otherwise brilliant, intuitive consumer innovations to underperform or fail. *—James Richardson*

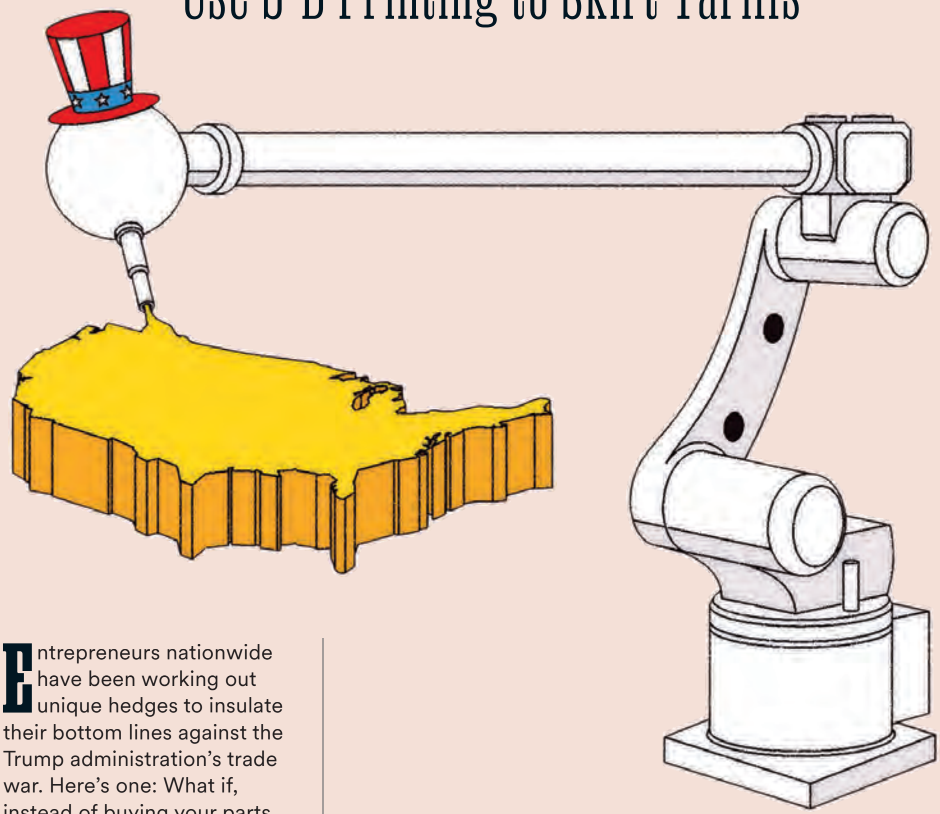
1. Not having enough cash
2. Not setting annual revenue targets
3. Not setting competitive pricing
4. Avoiding your fans
5. Not asking fans why they keep buying your product

> Before asking for more head count and resources, teams must demonstrate why they cannot get what they want done using AI."

Tobi Lütke
CEO, Shopify



Use 3-D Printing to Skirt Tariffs



Entrepreneurs nationwide have been working out unique hedges to insulate their bottom lines against the Trump administration's trade war. Here's one: What if, instead of buying your parts from abroad, there was a simpler way to manufacture at home without building a factory? That's the solution seen by advocates of additive manufacturing, more colloquially known as 3-D printing. Why not print your parts in the U.S.? Some considerations:

DO YOU NEED FLEXIBILITY?
Startups need to be scrappy, and 3-D printing offers a way to be more flexible. "Many small and medium-size businesses may shift to additive because it's more versatile," says Yoav Zeif, the CEO of Stratasys, which manufactures 3-D printers in America and Israel. "You are taking control of your destiny, and you are less dependent on your supply chain, and you are less sensitive to any additional deviation or trade war that will happen in the future."

ARE YOU IN THE RIGHT INDUSTRY?
Additive manufacturing isn't new, but it has made significant strides since the first 3-D printer was rolled out in the 1980s. Over the years, the technology has expanded to different fields, becoming more commonly seen within aerospace, defense, construction, and the medical field—especially dentistry. "The first barrier you have to clear is you need to prove to yourself that the additive manufacturing technology can make what you want to make," says John Kawola, the CEO of Boston Micro Fabrication, a 3-D printing service based in Maynard, Massachusetts. "Is it strong enough? Smooth enough? Accurate enough? Will it last long enough?"

DO YOU HAVE THE BUDGET?
Stratasys sells printers that range from $50,000 to $500,000. While most small-business owners may not be inclined to buy a machine for themselves, they can still partner with those that offer them.

In general, though, it's key to remember that 3-D printing is more cost-competitive with low-to-mid volumes, or thousands of parts, Kawola says. When it comes to mass production, 3-D printing does not benefit from traditional manufacturing's economies of scale that can lower unit costs. In 3-D printing, costs are more constant, but tariffs can still make an impact if it costs founders a significant multiple to use 3-D printing, Kawola admits. *—Melissa Angell*

GETTY IMAGES (LÜTKE)

Inc.
Regionals
SOUTHWEST

Vivant Simplified. Powerful. Technology.	75 Employees	$6.2M 2024 Revenue	30% YOY Growth	HQ Dallas, TX

Word of Mouth Created This Multimillion-Dollar Business

Tech company Vivant quietly grew after people started talking about its solution to one of the internet's biggest problems.

VIVANTCORP.COM

Two decades ago, Hamed Mazrouei was fired from Best Buy, where he worked in computer sales. It felt like the end of the world, he recalls. But looking back now, it was a blessing in disguise. "That's when I started my entrepreneurship journey," he says.

Ever since he lost that job, the founder, owner, and CEO of Dallas-based Vivant, has embraced innovation and the idea that a great business helps solve people's problems. When he launched the company in 2012, the challenge was simple: help businesses stay online even when their primary internet goes down. To do that, he repurposed an existing router designed to connect computers to mobile data signals, such as cellular technology long term evolution (LTE). He made that device automatically switch to LTE the moment the primary internet stopped working. "It just worked instantly," Mazrouei says. "There was nothing else around that could do that."

Soon, businesses, frustrated with regular internet outages, came calling. Vivant's SmartCONNECT device works by monitoring a client's primary internet connection every 15 seconds, switching instantly to LTE the moment an outage is detected. When the internet comes back up, the technology automatically switches the company and its computers, phones, and other connected devices back to the primary internet. Vivant has other products, too, including a tool that builds redundancies in firewalls to ensure a company's security is always running even if the firewall goes down.

Incredibly, Vivant earned about $6.2 million in recurring revenue last year—around 30 percent year-over-year growth—simply from word of mouth. "We've never published our success publicly," Mazrouei says. "We're changing that now and hope to bring attention to how we can help more businesses."

Other problems to solve

To achieve its growth targets, Vivant will need to continue solving problems. That mission is rooted in its core values: products, people, processes, and training. "If the products aren't good, nothing else matters," he explains. "You need amazing products and amazing people before you implement processes that help you scale up. That's what we're doing today."

The solutions Vivant develops often end up as new products. For instance, one of its clients needed a way to make it easy for customers to leave positive reviews on Google. Vivant built a tool that instantly texts customers a link to review the product or service, then automatically follows up to be sure it's done. The company plans on using the solution itself and selling it to others. "Nobody likes to deal with problems." Mazrouei says. "When somebody doesn't do something well, it creates this massive opportunity to make something so much better."

Photography by Atali Samuel

→ **Hamed Mazrouei, founder and CEO, Vivant**

HEDGE AGAINST CHAOS

Amid an uncertain economy, entrepreneurs are doing what they do best: protecting their bottom lines. To do so, some are wading into derivatives markets to mitigate risk, lock in pricing for key commodities, and get some protection against tariffs.

Derivatives are financial instruments that draw their value from an underlying asset, and they can get complicated quickly. The investments are generally factored into four categories: forwards, futures, options, and swaps.

Business owners can use derivatives to hedge against a direct cost by buying into commodities that offer a complement, direct or otherwise. Think: buying natural gas futures to offset a cold snap affecting an orange crop, since the demand for heat increases as temperatures fall. Businesses might also use derivatives to offset future price hikes. Here's how.

OPTIONS

Gary Foster, 39, who owns Moment in Thyme Catering, based in Cedar Falls, Iowa, looks to maintain a negative delta in his portfolio, which occurs when the price of an investment, typically an options contract, moves inversely to that of its underlying asset. The goal? To protect himself from steep price movements, as having negative delta is a benefit when risky assets sell off.

FORWARDS AND FUTURES

Consider futures and forwards contracts for any commodity-exposed business—from coffee to electricity to fluctuations in the weather. If you're a chocolate manufacturer buying cocoa for $7 per kilogram, and you anticipate cocoa prices will climb six months from now, you could buy a futures contract that locks in your current price. This would insulate you against any loss if prices go up. But if the price of cocoa drops to $6, you'd miss out on added profit. Futures are listed on public exchanges, while forwards are over-the-counter—one party trading directly with another.

SWAPS

As a small-business owner, Foster looks to mitigate risk in shares he already owns. Foster says he'll always sell calls against his stock, a hedge known as a covered call.

"This is because I have no control over what the stock does—it could go up, down, or sideways," he says. "But what I can control is consistently collecting [a] premium to always [reduce] my cost basis in the stock." —*M.A.*

68%

The share of Gen-Zers who admit to being influenced by a financial trend they discovered online. *Source: H&R Block*

Teach Employees Financial Wellness

Almost 50 years ago, I, Ted Benna, birthed the first 401(k) plan from a new section of the IRS tax code called the Revenue Act of 1978. While the 401(k) has become the foundation of retirement savings, it is not without its flaws. One trend I've seen—particularly among hourly workers and younger employees—is the temptation to cash out their 401(k)s. Employers need to educate and encourage their workforce to save, even if it's a small weekly amount. Here are my tips to help employees with financial wellness.
—Ted Benna

Teach employees about budgeting, credit-building, emergency savings, the value of long-term investment, and the risks of cashing out early.

Give liquidity to employees who might need money now, to protect them from dipping into their savings or long-term investments.

Pair 401(k)s with short-term savings accounts to prevent employees from tapping into retirement funds during financial crises.

GETTY IMAGES (HANDSHAKE, COINS, ARROWS, GRAPH, BOOKS)

Inc. Regionals
PACIFIC

	NO24	2020	324%	HQ
HERS	2025 Inc. Regionals Ranking	Year Founded	2-Year Growth	Long Beach, CA

Refreshing Recruitment Solutions for Our Evolving Labor Market

HERS Advisors's mission-driven, consultative approach sets the recruitment firm apart and earned it a spot on the 2025 Inc. Regionals Pacific list.

HERSADVISORS.COM

→ **Deirdre Hudson (left) and Christy Moore, co-founders, HERS Advisors**

Recruitment is a challenge, and one Christy Moore and Deirdre Hudson have been solving for more than 20 years. In 2020, after thoroughly observing the staffing industry's strengths and weaknesses, they founded HERS Advisors (Honest, Ethical, Responsible, Solutions), a mission-driven recruitment firm specializing in the legal and information technology sectors.

To thrive during the pandemic required agility. The team navigated evolving safety guidelines, company vaccination requirements, and shifts to remote work to place qualified candidates with reputable organizations. Today's challenges include a changing labor market, employee expectations at odds with company policies, a turbulent economy, and stiff competition from industry competitors—many unafraid to make a quick placement knowing that a candidate isn't a good long-term fit for the role. By emphasizing honesty, agility, and a consultative approach, HERS Advisors achieved consistently fast growth, more than doubling its employee head count and client referrals since 2020 and doubling revenue year over year.

The answer is in the name

HERS's mission is to promote positive change in the corporate world through proactive, honest, and inclusive recruitment. "There are a lot of recruiters that hide the ball. They'll tell candidates and clients what they want to hear but not what's really the case.", Hudson explains.

The team assesses candidates to ensure a cultural and skills fit to serve the candidate's and client's best interests. "Deirdre and I have so much experience that when we get somebody on the phone, we're able to quickly assess their skill set and motivation in making a career move. Then, on the flip side, we partner with clients that we know are good employers," Moore says.

The advantages of "boutique"

HERS is a boutique operation and can customize its approach for clients and source talent quickly. The founders use their expansive professional networks to find hidden gems. "We're a partner, not a vendor. Our approach is more personalized and consultative for both the candidate and the client," Hudson explains. Companies and candidates are recognizing the value in HERS's approach, repeatedly working with the firm and referring it to others. "When we started this venture together, we had no idea it would grow so quickly," Moore says. Based on their performance thus far, they are comfortably predicting continued revenue growth and an even greater impact on the world of work.

A Point-of-Sale Finance Company Built on Trust

Private Client Leasing is trusted by leading companies because of a commitment to reliability and results.

PRIVATECLIENTLEASING.COM

Private Client Leasing's business relationship team at a trade show

Private Client Leasing is proud to be the leader in point-of-sale (POS) financing, dedicated to serving the merchant services industry with speed, integrity, and personalized care. With more than 17 years of industry experience, we understand that every deal matters—to you and to us. That's why we go above and beyond to understand every business's unique needs, ensuring your deals are approved and funded quickly and efficiently.

Trusted by leading companies worldwide, Private Client Leasing has built a reputation for reliability and results. The company's success is rooted in its unwavering commitment to honesty, transparency, and ethical business practices. We operate with a clear focus on fairness and integrity, treating every client with the respect they deserve.

When you partner with Private Client Leasing, you're not just getting a financing provider—you're gaining a dedicated team that genuinely cares about your success. Whether you're a small business or a major enterprise, we tailor our approach to help you grow, thrive, and close more deals with confidence.

Experience the Private Client Leasing difference—where your success is our priority, and every deal is treated like our most important one.

BRANDED CONTENT

Distribution Done Differently

Virtual Supply works with leading tech brands and retailers to provide exceptional service—with purpose.

VIRTUALSUPPLY.COM

For nearly a century, the Virtual Supply team has been behind the scenes of tech brand success stories ranging from Motorola Solutions to Starlink to Ring, while supporting retailers like Walmart, Costco, Target, and Best Buy. Specializing in direct-to-consumer (D2C) and business logistics, fulfillment, and strategic support, we manage every aspect of the relationship from in-store product launches to e-commerce and all aspects of omnichannel retail.

Supporting more than 7,500 retail locations in the U.S. market, one of Virtual Supply's key secrets to success is building long-term partnerships with clients by understanding their businesses. "We earn the opportunity when the mega distributors can't deliver," says Chuck Taylor, CEO of Virtual Supply. "Our focus is simple: we do all we can to take care of the customer first. Providing a signature level of service, we have developed in-house capabilities that include reverse technology logistics, custom reporting, and a dedicated goods-not-for-resale division, doing so across multiple consumer electronics categories like smart home, mobile communications, and electric micromobility products."

Guided by our five Ps: partnership, passion, progress, planet, and people—with people the foundation of everything we do—Virtual Supply creates a culture of curiosity, collaboration, and inclusion, and invests in our team through leadership training, mentorship, and recognition. Every order fulfilled and every partnership built reflects a long history and belief that distribution can be done differently—smarter, faster, and with purpose.

At Virtual Supply, we're not just delivering products; we're delivering solutions—and possibilities.

Virtual Supply headquarters in Beaverton, Oregon

CREATED BY INC. STUDIO

Pick the Right Customer Success Software

Customer success software enables businesses to track customer data, metrics, goals, and communications all in one place. It is usually integrated with other systems, including CRM and customer support tools. All of this requires some key setup, preparation, and expectation-setting. Here are some best practices.

CLEAN YOUR DATA
A lack of data cleanliness is the most common thing to slow down any software implementation, especially with multiple data sources. Your vendor may imply clean data is not required to get started, but it is. I once implemented customer success software in a multibrand company. Our go-live date was delayed months because data from different CRM tools wasn't matching. For months, we paid for a tool we were not yet using.

MAP YOUR INTEGRATIONS
Map out your plan, and inform and align with software owners. Gather the right resources to get the job done. Often they include developers, who will help tie your back-end data into your software. This helps you create playbooks based on user events. Don't skip this alignment, or you could be delayed.

ASSIGN A MANAGER
Ensure your software has an owner to hold subject matter expertise and drive strategy. This could be a senior person on the track to management. By managing the software, they learn how to manage the team's efforts in the future. Plus, a project manager ensures implementation happens on schedule.

REALLY TRAIN YOUR PEOPLE
Any new tool needs a training and adoption plan. Period. So plan this out, and set your expectations reasonably. There will be a lot to learn from health scores, customer campaigns, playbooks, and more. This should not be rushed. Even with the best-laid plans, add three to six months to what the vendor tells you for implementation timing (sorry, vendors, but it's true). —*Parul Bhandari*

500%

That's how much cult sock brand Doublesoul says it has grown since it began buzzy collaborations with creators like Chloe Cherry, Pete Davidson, and Ella Emhoff (pictured).

Use AI to Scale Personalized Marketing

Here are three ways retail businesses can use AI to tailor their marketing at scale. —*Joel Comm*

1. Use consumer location to generate engagement.

2. Analyze purchases to predict customers' future needs.

3. Suggest personalized sales during chatbot-customer conversations.

GETTY IMAGES (MARKETING, SHIELD); COURTESY DOUBLESOUL (EMHOFF)

4 WAYS TO IMPROVE YOUR DECISION-MAKING

Now more than ever, companies need to think about how they're being perceived, especially when their values are challenged. Companies that panic and flip-flop on their values when ordered by politicians—or that don't know what their values even are—will scratch a short-term itch and create long-term damage. As a crisis communications expert, I've been in the trenches with companies when their principles are put under the spotlight. The trick to navigating this situation is to have a decision framework in place that guides your response long before you find yourself under scrutiny. Here's how to create one.

DEFINE THE WHO

Too often, companies waste valuable time trying to figure out the basics, including who actually needs to be involved in making a decision versus who just needs to be informed. It's not uncommon for someone to be identified as needing to play a role and either a) they don't know they're supposed to be on point, or b) they don't know what their specific job is in this context. That's a problem.

A big part of the planning needs to be making sure you have the right people at the table and that they know what they're supposed to do. Who should these people be? That's going to depend on the individual company, but my usual partners in crime include people from public policy, legal, HR, finance, and strategy, for example.

DEFINE THE WHAT

To create the most appropriate context, companies should know the issues and ethical landscape not only for their business but also for their industry, partners, competitors, and communities where they're domiciled or doing business at the minimum. Then, ground the framework in the fundamentals of what the company does and what it wants to be known for.

If an issue falls outside of something that might impact your most important stakeholders, is a statement or an action from your company impactful or additive? If not, do you need to do anything? Sometimes, it's best not to get involved, but understand what staying out of it will cost you.

DEFINE THE HOW

I'm a fan of creating a short decision-making framework that lays out the general categories a company will deal with from an issues perspective and considerations for the business when addressing the categories. To accompany these conversation prompts, I usually recommend having drafts of external and internal engagement matrices, too.

This doesn't need to be an exhaustive plan or list. It also should not result in a really long document. It is meant to be a focusing exercise that gives you something to work with when things do start to pop so you're not starting from scratch. And don't forget to practice. Do tabletop exercises. Taking the time to work through some of the bumps when you're not actually working through an issue is a good use of time. Why? Inevitably, you'll discover some kinks in the system that could be fixed. It's often helpful to contract someone external to run the exercises too.

DEFINE THE WHEN

Don't respond to every query. Using the framework created, respond only to what matters most to your company and its stakeholders. This not only helps teams communicate quickly and efficiently, but also keeps companies out of unnecessary media cycles and creates a consistent reputation.

If you're not controlling the narrative, remember that someone else will. They'll assign their interpretation of the meaning to your choice. Particularly during these tumultuous times, it's the steady and authentic hand that will ultimately endure.

—Lauren Condoluci

GETTY IMAGES (BRIEFCASE, LIGHTBULB, CHECKLIST, BULLHORN, ARROW)

Inc. Regionals
NORTHEAST

MOUMITA RAHMAN IMMIGRATION ATTORNEYS

MOUMITA RAHMAN IMMIGRATION ATTORNEYS	NO22 2025 Inc. Regionals Ranking	NO418 2025 Inc. 5000	2010 Year Founded	HQ New York, NY

The Immigration Law Firm Built with Integrity, Purpose—and TikTok

The Law Firm of Moumita Rahman, PLLC stands out for its mission, engaging social media content, and emphasis on human connection.

RAHMANLAWPLLC.COM

Moumita Rahman did not intend to build a top-rated immigration law firm. When she started her career in 2010, she actually avoided immigration cases. "The main reason why I didn't want to do immigration law was because I had a negative impression of immigration lawyers based upon what I had seen in the community," says Rahman, who immigrated to the U.S. from Bangladesh at age five.

Because Rahman was part of the immigrant community, people kept referring her cases related to immigration law. Finally, she decided to try one, which changed the trajectory of her business.

↑ **Moumita Rahman, CEO, The Law Firm of Moumita Rahman, PLLC**

Winning her first bond motion, which resulted in a man who was seeking asylum being released from federal detention, was deeply satisfying. She realized the parallels between immigration law and human rights, which had been an interest of hers since her undergraduate days. Today, The Law Firm of Moumita Rahman, PLLC is a fast-growing national immigration law firm on a mission to change as many lives as possible.

TikTok as a tool for connection

While the company's biggest growth spurt occurred in 2020, Rahman laid the groundwork for that expansion in 2018, when two satisfied clients with social media expertise urged her to create weekly videos for Facebook, YouTube, and other social media platforms. In 2020, a TikTok video about immigration relief went viral, leading to 400 calls during one weekend and, ultimately, the growth of the firm.

Rahman continues to create content to inform and educate and frequently answers questions live on TikTok. "In this day and age, people are craving that connection. For anyone who's an immigrant, especially, it's very tough to not know what's going to happen. The mere ability to go on TikTok and just be a presence and give that reassurance means a lot," she says. Her social media presence allows her to explain complicated immigration concepts "in an easy and approachable manner, and that resonates with people," she adds.

Dignity and respect are human rights

At the company's core is a belief that everyone deserves dignity and respect. "We put the client on a pedestal. We are here to serve them. Within all legal fields, but particularly immigration, clients are not always treated like a guest," Rahman explains. Her team makes a point to be patient and answer questions kindly, and she believes her team's compassion and empathy set the firm apart. Focusing on client service—really taking the time to get to know a person and their case—also leads to better results.

"You can't help a person win their case if you don't care about what happens," she says. And Rahman cares deeply. To her, company growth allows her to provide refuge and community to immigrants worrying about their status or wondering what will happen next.

Inc. Regionals MIDWEST | ab DATA

From a Single List to a Legacy of Innovation and Impact

A.B. Data Group is improving lives with every claim, campaign, and communication.

ABDATA.COM

For more than four decades, A.B. Data has exhibited a commitment to integrity, creativity, transparency, and results. Our company executes best-in-class communication and administration strategies that connect our clients to their target audiences. A.B Data delivers a range of services, including class action settlement administration, grassroots fundraising for nonprofits and advocacy organizations, global direct marketing and data and list services, and innovative new reaches like data breach management and cybersecurity.

A.B. Data's class action team at its Milwaukee headquarters

From a single list to a global presence, A.B. Data's story is a testament to the enduring power of connection, innovation and shared purpose, not to mention our talented team's dedication to excellence and our clients' trust. Our co-managing directors Bruce Arbit and Chuck Pruitt lead the organization with excitement about the future and remain committed to growing our range of services, including a global reach with class action administration, expanding data incident response, growing our digital marketing footprint, and more.

Whether we are using our advanced solutions to reach individuals eligible for compensation in class action settlements or championing causes that help our nonprofit and advocacy partners change the world, A.B. Data strives with every claim, campaign, and communication to get it right every time and improve lives.

CREATED BY INC. STUDIO

ACTION *items*

Conduct Stay Interviews to Retain Talent

The principle behind stay interviews is simple: Identify the elements that drive motivation and contentment among your top employees and then consistently support those elements. Ask these 10 questions.
—*Peter Economy*

1. The last time you went home and said, "I had a great day. I love my job," what happened that day?
2. The last time you went home and said, "That's it. I can't take it anymore," what happened that day?
3. What is really different here that makes you proud to be an employee?
4. Is your manager effective? If so, what do they do that you value the most? If not, what do you wish they would do more of?
5. What do you like most or least about working here?
6. What might tempt you to leave?
7. What talents are not being used in your current role?
8. What would you like to learn here?
9. What motivates (or demotivates) you?
10. What can your manager do to best support you?

"Companies used to do longer-term planning—and they should—but those planning cycles have shrunk from a decade to five years. For the most part, it's quarter to quarter. And if that's the cycle you're stuck in, you are always going to be behind, always."

Amy Webb
Futurist and founder of Future Today Strategy Group

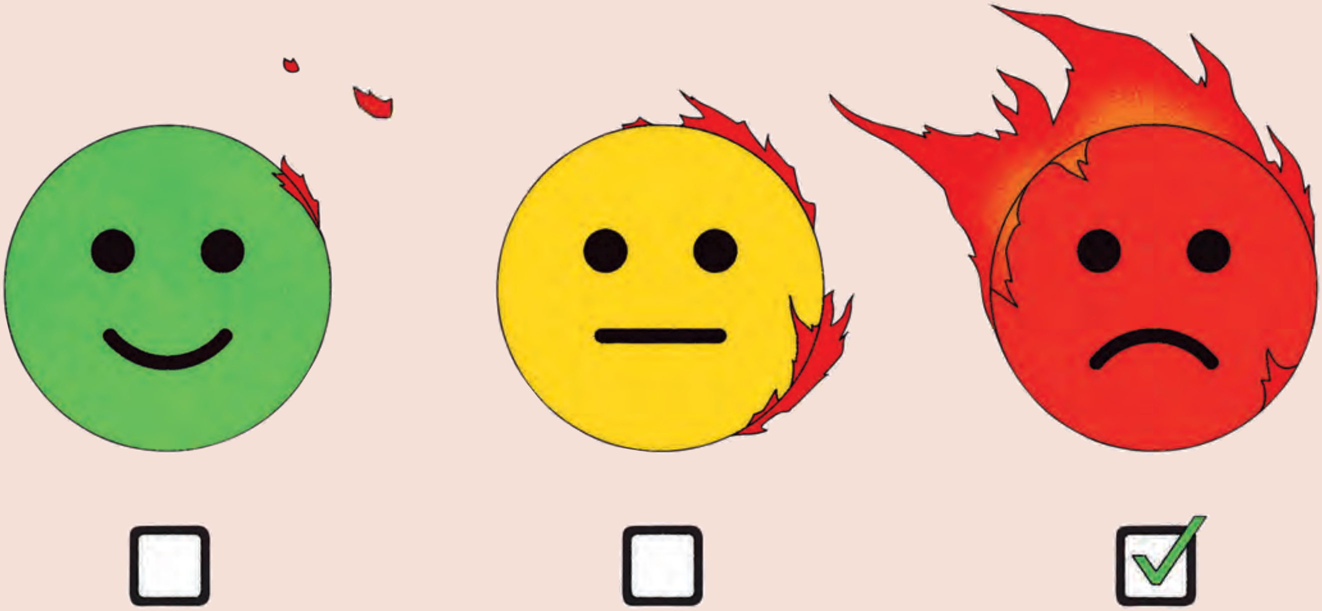
Say Thank You on a Budget

1. GET PERSONAL
A gift card is tempting. But try to personalize appreciation anytime you can to let the person know you value them.

2. ACTUALLY SAY THANKS
Money talks, but it can't say everything. With any gifts you choose, also use words of affirmation to show appreciation.

3. CELEBRATE MILESTONES
Celebrate non-work-related accomplishments in addition to work achievements.
—John Hall

BALANCE ENGAGEMENT WITH BURNOUT



A DHR Global Workforce Trends report found that 88 percent of workers felt enthusiastic about and engaged in their work—and that 82 percent feel burned out.

How to address this contradiction? Michael Nutter, whose unlikely job title is happyologist (his role includes company culture, engagement, and communications) at Impact Advisors, in Naperville, Illinois, and Celia Fleischaker, CMO at Isolved, in Charlotte, North Carolina, share three techniques to help workers thrive and be productive.

LOOK FOR PROBLEMS
Regularly ask employees about their satisfaction with their work-life balance, career development, team, and projects so you can pinpoint the main problems they encounter and how they might be solved, Nutter says. He adds that it's important for business leaders to be vulnerable and open with employees when asking what they need: "Don't ever be afraid to ask, 'How can we help you?' "

KNOW YOUR AUDIENCE
Having information on employee experience and satisfaction can also help you understand how to best communicate with members of your workforce who may be of varying age groups and at different points in their careers, Fleischaker says.

Nutter has a similar approach, saying he often writes a draft message that has all of the key information in it, and then has team leaders edit and customize it to match their workers' communication styles.

KEEP CHECKING IN
At Impact Advisors, Nutter and his team do a "happy check" with employees at the three- and nine-month marks, asking how satisfied they have been since joining, covering aspects like their team, projects, work-life balance, and career development. They also check in at the one-year mark for a "value interview process" to ensure people are engaged with the company mission and aligning it with personal and professional goals. *—Divya Bhardwaj*

GETTY IMAGES (WEBB, CHECKLIST)

“If you’re not listening to the people who are experiencing your product in real time, then you’re missing a really big opportunity.”

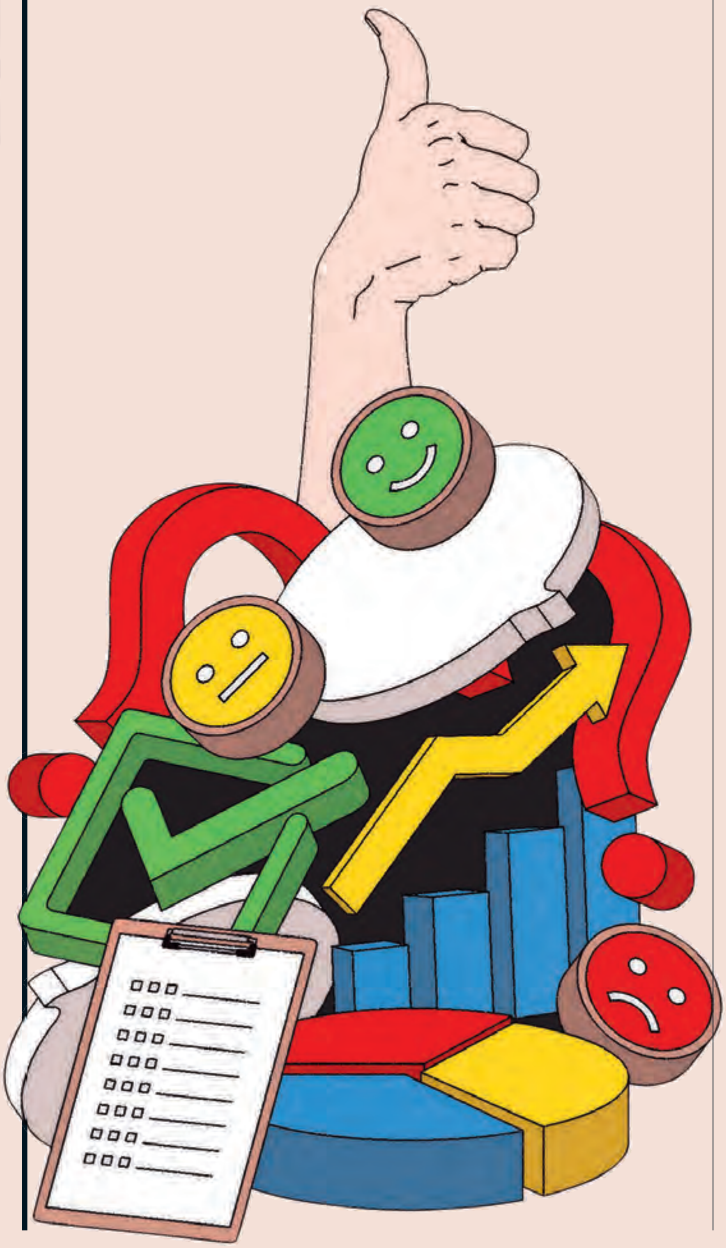
Melissa Ben-Ishay
Founder, Baked by Melissa

56%

The share of consumers who, instead of complaining, will quietly switch to a competitor after a negative customer service experience. *Source: Zendesk*

How to Get Truly Honest Customer Feedback

Many entrepreneurs are drowning in numbers—metrics, analytics, charts, you name it. They have all the data, but it isn’t enough, because numbers don’t tell stories. People do. In the quiet, unmeasurable moments when customers and employees speak their truths, we find what our competitors overlook—the raw insight that sparks innovation. Here’s how to make those conversations useful.



TALK TO COMPLAINERS
If you talk only to happy customers, you’ll get only a certain type of answer. You have to speak to everyone—the engaged ones, the frustrated ones, and the ones who left. Ask your frontline workers, too. They see what no one else does.

SHARPEN YOUR SURVEYS
Don’t rely on yes-or-no answers. You need to ask questions that invite deeper thinking, reveal motivations, and uncover the root cause of behavior. Start with open-ended questions like, “Can you tell me more about how you felt during that experience?” or “What was going through your mind when you made that decision?” These kinds of questions allow people to tell stories. You’re not looking for a quick response but for an insight that comes through careful reflection.

KEEP ASKING WHY
The five-whys technique, pioneered by the founder of Toyota, Kiichiro Toyoda, asks “why?” repeatedly—five times, if possible—to dig deeper into the motivations behind a behavior. The first answer might tell you what happened, but the fifth might tell you why it happened in the first place.

For example, if a customer says, “I abandoned my cart because the checkout process was too long,” ask them why they felt it was too long. They may say the checkout form required too many details, leading you to ask your team if those details are necessary and why—and so on. Follow the thread to uncover—and fix—deeper systemic issues.
—Andrea Belk Olson

GETTY IMAGES (BEN-ISHAY)

Inc. Regionals
SOUTHEAST

NEON16	$8.6M	44	54%	HQ
	2024 Revenue	Employees	Year-Over-Year Growth	Miami, FL

Giving Latin Talent a Global Stage

NEON16 is taking the fast lane to success by focusing on the big picture.

NEON16.COM

In 2019, after 22 years in the entertainment industry, Lex Borrero was ready to retire. But when the former music executive arrived in Miami to begin the next phase of his life, he spotted a business opportunity he couldn't resist. "I worked in Hip Hop for most of my career where I saw companies build culture-based businesses," he says. "There was nothing like that in Miami that could represent the coming wave of urban Latin music."

During the next six years, Borrero proceeded to fill that void. He partnered with prominent music producer Tainy to promote and elevate Latin culture and talent. The collaboration led to the creation of NEON16, an entertainment media company that has its hands in everything from music to film to television to brand partnerships.

The business grew revenue by 54 percent last year. "The key to success has been identifying opportunities and then being courageous enough to take the risk and creative enough to do something that really resonates," he says.

All gas, no brakes

NEON16's roster of big-name brands—including Red Bull, the National Football League, and Netflix—would no doubt agree. When Red Bull Racing wanted to engage the Latino community, Borrero had to take a particularly creative approach because Latinos weren't typically fans of auto racing.

To ramp up interest for the 2023 Miami Grand Prix, the company created a program featuring celebrities, influencers, and athletes. NEON16 hosted an E-sports gaming tournament where 20 renowned individuals competed in simulators, livestreaming on their Twitch channel to a global audience of millions. Participants then took the wheel of F4 cars on the Homestead Speedway. By leveraging social media to draw fans into these immersive experiences, the campaign successfully sparked widespread interest in the race, particularly within the Latino community. "We gave the client what they wanted, which was to be the place to be on a very big weekend," Borrero says.

→ Lex Borrero, cofounder and president, NEON16

The big picture

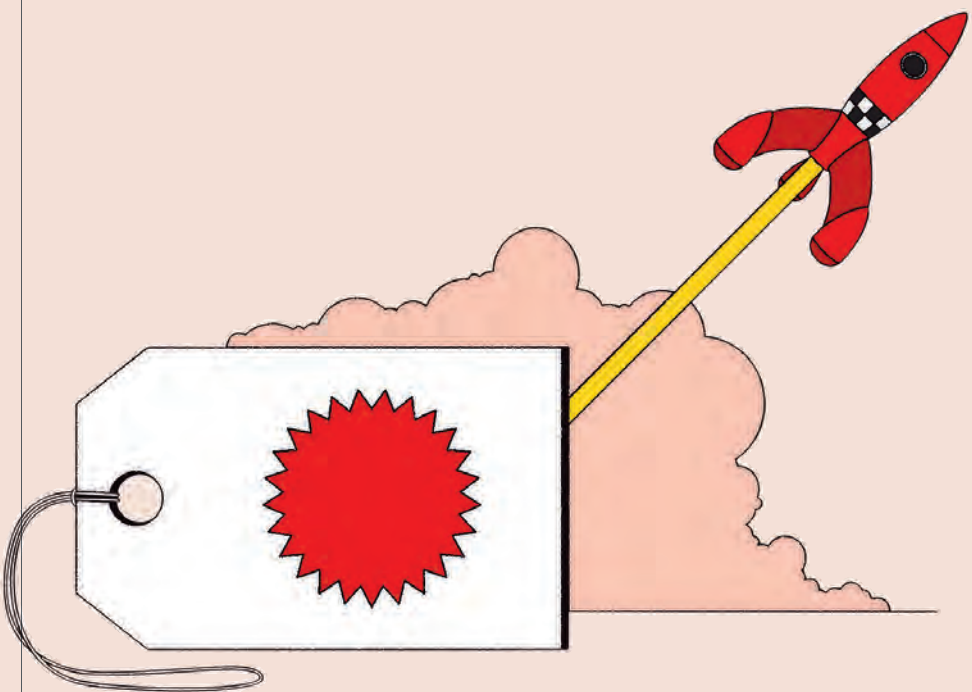
Borrero says it took time to understand the importance of hiring well and learning how to take his hands off the wheel—if only a little. As the company grew, he had to trust his team to handle the day-to-day, keeping his eye on the North Star. "That transition helped empower my team and turn the business into a well-oiled machine," he explains.

Now, NEON16 is turning its attention to helping Hollywood bring Latin culture to the big screen. "Whoever becomes the Tyler Perry for the Latino audience will have a multimillion-dollar business," Borrero says. "Our audience and our culture still haven't been spoken to in the right way."

$75,000

The average salary startup founders paid themselves in 2024, down 43 percent, from $132,000 in 2023. *Source: Pilot*

SET PRICES AS A STARTUP



Pricing strategies for early-stage companies are a unique problem. Most lack enough data about what will work for potential and future customers to make a sound data-based decision. But what you lack in data, you can make up for in understanding your value proposition and how your pricing can set the tone for potential customers. When you set the right tone, you set yourself up for better customer retention.

Here are some tips and best practices for setting prices as an early-stage company.

DEMONSTRATE VALUE

Customers are increasingly looking for products and services that provide a clear and tangible value proposition. This means that businesses need to focus on delivering a high-quality experience that meets or exceeds customer expectations.

Pricing should be set as a reflection of the value that customers will expect to receive—perceived value. For example, if you have a product that delivers results over a longer period of time, ensure that customers understand what to expect and how soon to expect it. Your pricing and contract terms should match that expectation.

CHECK YOUR MARGINS

Businesses need to find ways to optimize their margins while still delivering a high-quality customer experience. Margins are essential to profitability. Many companies choose free trials in the early stage, which is a way to engage early customers. But free trials can cost a vendor company a lot in margin. Consider what is offered in your free package, and ensure it occupies the least margin spend or delivers high returns, such as securing a long contract ahead.

Take, for example, a premium business development product vendor with high margins but also a high customer time-to-value ratio. After a consultative margin review, it was determined that the best option for their trial would be a short free trial period followed by a fixed-term contract at full price. This option maximized the margin for the vendor, while also delivering value for the customer.

TEST AND ITERATE

Your pricing model will change, likely more than once. To base initial pricing on things like the market, competition, and your perceived value is important. But more important to note is delivering quality at your early stage, to ensure repeat customers, renewals, and growth. Customers are willing to pay more for products and services that are well-made and durable.

In software, for example, if you are balancing product stability versus building new features, consider the impact to your brand identity if you do not deliver stability and quality first. While new features may help you in the sales marketplace, stability will help you build your brand and set the value of your price. —*P.B.*

GETTY IMAGES (COINS)

Inc. Regionals
PACIFIC

inHarmony	$2.4M	35%	28	HQ
	2024 Revenue	YOY Growth	Employees	San Diego, CA

The Founders Who Are Helping People Relax

inHarmony Interactive uses sound and vibration to bring its customers peace and help them relax.

IAMINHARMONY.COM

In 2016, Dominic Carnevale called Craig Goldberg to share something exciting—a new relaxation device he had just created. It was a piece of relaxation furniture fitted with custom tactile transducers designed to recreate the feeling of being in the front row at a concert. What Carnevale didn't know was just how perfect his timing would be.

Just months earlier, Goldberg had been lying on the floor between his surround-sound speakers, attempting to recreate the live sound-healing experience he had recently attended. "Talk about the universe knocking on your door with the right opportunity," he says.

After experiencing the device, called the Sound Lounge, Goldberg was all in. Carnevale and Goldberg joined forces to launch inHarmony Interactive, a Las Vegas-based company creating tech-assisted meditation furniture designed to help people relax. What began as one innovative product has since grown into a suite of six—including a patented meditation cushion—along with a line of accessories, a music label (inHarmony Media), and a companion app (inHarmony: Music Meditations). The app allows anyone to access original music meditations, whether or not they own the furniture.

→ **Craig Goldberg, co-founder, president, and certified vibroacoustic therapy practitioner, inHarmony Interactive**

The science behind the music

At the core of inHarmony's experience is vibroacoustic therapy (VAT), where the combination of sound and vibration is used to calm the nervous system and ease symptoms of stress and anxiety. Users recline on the relaxation furniture, slip on an eye mask, and select a track—either their own or one of 226 original music meditations available in the app. The music is played through an amplifier, speakers, and embedded tactile transducers, or headphones.

The deep bass pulses through the transducers, sending sound waves through the body. "I call it relaxation from the outside in," says Goldberg. "The vibrations literally send a message to every cell in your body, telling it to relax."

The sound of success

Sales quadrupled to $878,000 by the end of 2021, fueled in part by increased interest in at-home wellness during the pandemic. By 2025, the company projects revenue will grow to $4.2 million as it expands into Europe, Australia, and Canada.

inHarmony's success stems not only from its unique products, but also its broad and loyal customer base—including massage therapists, acupuncturists, wellness-focused companies, and individuals seeking relaxation at home. The founders have grown the business without outside funding, reinvesting their earnings back into the company.

Rather than hiring a traditional full-time team, inHarmony works with a network of agency partners, each contributing a fractional amount of time every week. This lean model allows Carnevale and Goldberg to focus on what they love: sharing their passion for sound, vibration, and wellness with the world. "I see myself as an evangelist," says Goldberg. "Not just for inHarmony, but for the entire industry—and for living a healthier, more balanced life."