
FUTURE-PROOF PLANNING



SPONSORED BY THE INC. HONOREES WHOSE BRAND PROFILES APPEAR IN THE FOLLOWING PAGES

Running a business is like caring for a seedling without any idea of what it is you're growing. Pivots being what they are, often the business you start isn't the one you end up raising over time. That doesn't mean you can't plan for growth. Indeed, you should—just more frequently than you might think. After all, today's crisis is gone tomorrow and you need to be ready for whatever might come the next day. And the next decade. Fail to prepare your company for the future, and it won't have one. Where to begin?

Take your pick. There's no shortage of thorny-but-vital issues to tackle. It starts by setting goals that are

both audacious and achievable; girding your finances ahead of a recession; grooming future leaders to help transition your business from one stage to the next; even figuring out who'll buy the farm (or run it) when you move on.

The good news? While daunting, this is a huge opportunity. Make the right moves now and Future You will be forever thanking Present You, probably from an Elizabethan garden or something. To help you in your efforts, we've enlisted dozens of successful entrepreneurs to offer guidance on crafting plans to get your business exactly where you want it to go. Let the growing season commence.

SETTING GOALS

Alexandra Cristin

Founder and CEO
GLAM SEAMLESS

“Set realistic goals that are scalable with action items clearly defined—for example, an increase in sales of 15 percent as opposed to 50 percent. I grew my business 100 percent year over year for seven years. It was very unsustainable, and you pay for it at some point. Attainable and steady wins the race.”

Cristin bootstrapped her New York City DTC hair-extension business starting with only \$1,500, building it into a \$25 million company within five years. It was acquired by Beauty Industry Group in 2019.

5%

OF SMALL-BUSINESS OWNERS SAY THEY HAD ACHIEVED ALL OF THEIR GOALS IN THE PREVIOUS 12 MONTHS. NEARLY 65 PERCENT SAY THEY HAD ACHIEVED MORE THAN HALF OF THEIR GOALS.

Source: Clutch

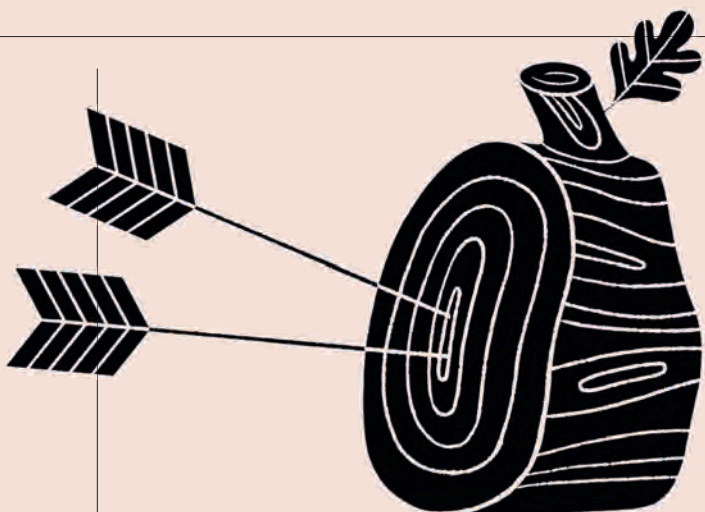
Paul Goldman

Founder and CEO
MUSERK

“We set small, easy-to-complete goals to give our team a sense of accomplishment and that we are moving forward. At the same time, there are your long-term goals and your ambitions. These will constantly shift and adjust, and it will take longer to see the fruits of your labor. One foot on the ground and one foot in the air—that’s the perfect balance.”

Muserk specializes in global rights management for music and video. It has made the Inc. 5000 list each of the past two years.





Allen Falcon
CEO
CUMULUS GLOBAL

“We involve the entire team in both setting the scope of and prioritizing our goals. Each area of the company identifies and scopes one to three supporting objectives for each goal. These are rated ‘already in place,’ ‘achievable,’ ‘assertive,’ or ‘aggressive.’ The result is a prioritized list of goals, with department or area-level objectives the teams have defined and scoped.”

Cumulus Global helps businesses manage their cloud computing services. The company, headquartered in Westborough, Massachusetts, is a two-time Inc. 5000 honoree.

Jeffrey Fidelman
CEO
FIDELMAN & COMPANY

“The most important thing to do when setting goals is to ensure that they’re SMART goals. By that, we mean that the goals should be specific, measurable, attainable, relevant, and time-bound. By making sure that your goals meet these criteria, you can ensure that they will be ambitious but achievable, motivating to your team, and aligned with your future vision for the company.”

Fidelman’s Greenwich, Connecticut-based management consultancy is on the 2022 Inc. 5000.



Sarah Smith

Founder

THE DYRT

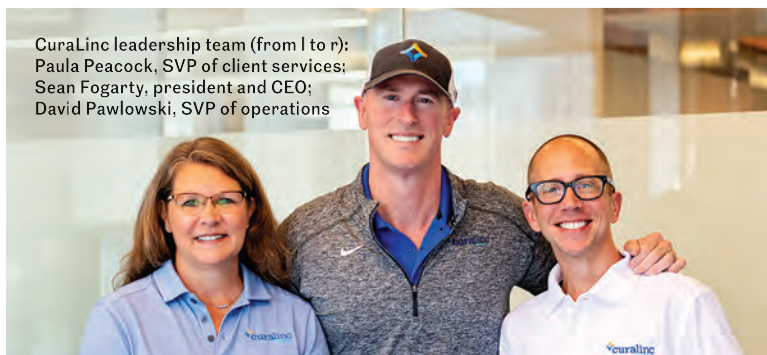
“We have a dashboard that any employee can view at any time to see how KPIs are tracking. But dashboards aren’t fun. June is a big month for us, because that’s when peak camping season starts, so we had a contest in January to name and vote on our set of goals for the first half of the year. The team picked “the June Landing.” (Other contenders included “Junami” and “a Juneiful of Sugar.”) Someone instantly made a graphic of the Dyrt logo being planted on the moon. The June Landing became a rallying cry and a great way to keep the pace on goals that were several months out.”

The Dyrt, a Portland, Oregon-based subscription software platform focused on camping, is a 2022 Inc. 5000 honoree.



A Transformative Approach to Workplace Mental Health

Fast-growing CuraLinc Healthcare marries technology and personalized advocacy to support employee mental health



CuraLinc leadership team (from l to r):
Paula Peacock, SVP of client services;
Sean Fogarty, president and CEO;
David Pawlowski, SVP of operations



First-Time
Inc. 5000 Honoree

200
countries
& territories
Offering CuraLinc
Products

225%
3-Year Growth

5+
million
Employees Using
CuraLinc Solutions

When Sean Fogarty founded CuraLinc Healthcare in 2008, many companies did not yet see employee mental health as a business imperative. That has changed since Covid-19. CuraLinc's client base has increased threefold since the start of the pandemic. "Our growth journey is directly correlated to the attention that employers are finally starting to pay to the mental health of their workforce," Fogarty explains.

More than rising tides account for the exponential revenue growth that earns CuraLinc its inaugural spot on the Inc. 5000 list of America's fastest-growing private companies. By combining personalized advocacy with technology, CuraLinc creates business advantages for more than 3,000 employers worldwide. These companies offer CuraLinc programs free of charge to their employees, a user base that includes more than five million people.

CHOICE CREATES POSITIVE IMPACT

"With nearly one in five adults in the U.S. living with a mental illness, yet only 43 percent of them actually seeking care, many folks are suffering in silence at work," explains Paula Peacock, senior vice president (SVP) of client services. Employers can increase engagement with mental health

programs by partnering with providers that offer a variety of ways to access care, she says.

Whereas many workforce mental health providers offer a "single channel user experience that forces every user to begin their care journey in the same way," CuraLinc's approach empowers participants to access care through a variety of channels, Fogarty explains. Options include in-person and telebehavioral therapy, text therapy, group therapy, and digital cognitive behavioral therapy (dCBT), as well as personalized coaching for mindfulness, sleep fitness, and meditation.

RESULTS YOU CAN MEASURE

Workforce mental health support is more than a box you check, Peacock notes. Companies expect their investment to make a meaningful difference for employees and also benefit the business. Increasingly, organizations are looking beyond utilization metrics to assess mental well-being programs, says David Pawlowski, SVP of operations. "Our program delivers positive and measurable clinical and workplace outcomes that impact not only job performance but the overall quality of life for employees who use our program," he says. These outcomes include reduction in symptoms of depression, lower absenteeism rates, and increased productivity and engagement.

CuraLinc will continue to drive results for companies and improve employees' lives by remaining "laser-focused on innovation," Fogarty says. That means building new programs and enhancing existing features so every employee can access the precise care they need, the moment they need it.

CURALINC.COM



Karen Crnkovich

Owner
DMC SERVICE

“We have an annual planning process established that starts with gathering information from each team member about our strengths, weaknesses, opportunities, and threats (SWOT). We brainstorm and discuss the SWOT at our November all-team meeting. With that information in hand, the management team identifies areas for improvement and establishes goals that are shared at our January all-team meeting. Because this process involves our entire team, there is acknowledgment and buy-in that we are focusing on the right areas to improve.”

Based in Olathe, Kansas, the HVAC and plumbing service contractor is a 2022 Inc. 5000 honoree.

Thomas Goetz

Co-founder and CEO
IODINE

“Make sure to get goals from the top before getting them from the bottom. And make sure people understand why some objectives were chosen and why others were not. Sometimes understanding what *not* to focus on in a quarter is more important than what to focus on.”

Goetz’s company, a San Francisco-based provider of information on medications, was acquired by GoodRx in 2016.



Alex Rodriguez

Founder, chairman, and CEO
A-ROD CORP

“When you think about business—and this same thing happens in baseball—people look at history to strategize the future. And I think that’s so silly. You want to look at what’s going to happen in 10 years, and where you want to be in 10 years. Then you reverse-engineer it and put a plan in place to move forward.”

Baseball great Rodriguez, who is also part owner of the NBA’s Minnesota Timberwolves, founded his Coral Gables, Florida-based investment firm in 1995.



91%

OF BUSINESSES THAT HAVE EFFECTIVE PERFORMANCE MANAGEMENT SYSTEMS SAY THEIR EMPLOYEES’ GOALS ARE LINKED TO THE COMPANY’S PRIORITIES.

Source: McKinsey

SETTING GOALS



Tisha Thompson

Founder

LYS BEAUTY

“I’m a huge proponent of rewarding teams when targets are met and keeping people feeling fulfilled with their contributions. While major wins are a no-brainer for celebration, I also like to share small wins that keep us going along the way. This could be high engagement on a particular social post, an awesome press hit, or a great presentation. Sharing both the good and bad helps motivate everyone to keep pushing toward the finish line.”

Thompson, a 15-year veteran of the beauty industry, launched LYS in 2021. In its first year, the Atlanta-based company became the first Black-owned clean beauty brand sold at Sephora stores.

Pete Maldonado

Co-founder and CEO
CHOMPS

“We conduct a SWOT analysis, whether on a specific part of the business or on the business at large. Holding up a mirror and being brutally honest about our company’s weaknesses, areas of opportunity, strengths, and potential threats is at the

foundation of how we set business goals that are ambitious, but not so aggressive that they have a negative impact on the team’s (or an individual’s) morale.”

Maldonado’s Naples, Florida-based meat snack brand is a five-time Inc. 5000 honoree, most recently in 2022.

Jeff Richards

Co-founder and interim CEO
SNAPNURSE

“The key is being flexible when conditions change. This doesn’t mean lowering the bar when the going gets tough. While it’s critical to maintain a steady vision and mission, it’s equally critical to adapt quickly to new and emerging opportunities consistent with your vision. In a fast-growth context, quarterly or six-month goals may make more sense than annual performance cycles, and real-time feedback is essential to driving exceptional performance on the team.”

SnapNurse, an Atlanta-based health care staffing app, is No. 2 on the 2022 Inc. 5000, with a three-year revenue growth rate of 146,319 percent.



COURTESY SUBJECTS

A Lifeline to Lifesaving Medical Equipment

From masks to surgical equipment, All States M.E.D. delivers vital supplies to health care providers.

Josino Ferreira dreamed of being a doctor. He studied biology in college and had a passion for the health care industry. But as a student working full time, he switched his major to business, which allowed him to better balance his work and studies. His mother, Liamar became ill with amyotrophic lateral sclerosis, more commonly known as ALS, or Lou Gehrig's disease, and he needed to care for her.

For years, Ferreira accompanied his mother to doctor appointments and helped her navigate the health care system. He eventually ended up in the medical field, selling medical equipment for more than a decade. Both his personal and professional experiences helped him found and build his company, All States Medical Equipment Distribution (M.E.D.), which provides new and refurbished, competitively priced equipment to health care facilities. In just six years, All States M.E.D. has been named to the Inc 5000 list of America's fastest-growing private companies twice, earning the No. 616 spot in 2021 and No. 631 spot this year.

PROVIDING A CRITICAL LIFELINE

All States M.E.D. serves hospitals, surgical centers, urgent care centers, and private practices, providing equipment ranging from cosmetic lasers and diagnostic ultrasound technology to surgical equipment and consumables like surgical gloves and masks. Unlike other medical equipment providers, All States M.E.D. also has built a custom biomedical department to perform equipment repairs and maintenance after purchase.

Ferreira, the Miami-area business's CEO, cared for his mother full-time as he grew the company. During the pandemic, All States M.E.D. experienced a surge in demand for products like masks and gloves. Ferreira saw



Josino Ferreira,
CEO, All States M.E.D.

the coming need and invested “nearly all of my resources” into those supplies.

Ferreira's foresight allowed his team to serve health care customers and provide critical personal protective equipment (PPE) when these items were scarce. While other providers scrambled to find inventory, All States M.E.D. had PPE items in stock.

A PERSONAL MISSION

Ferreira is proud that his work helped health care professionals save lives. And he also acknowledges that it's made a difference to those he loves. Throughout his mother's illness, Ferreira purchased equipment like patient lifts and hospital-grade beds to help her be more comfortable until she passed away in 2020. But the principles and values she taught him are embedded in All States M.E.D.'s culture.

“We are a believer business—a believer in a higher power, a believer in loving our neighbor, and a believer in only doing win-win business deals,” Ferreira says. Treating customers like family is a key tenet of All States M.E.D.'s business.

ALLSTATESMED.COM



1029%
3-Year Growth

989%
2022 Growth

3
Locations

2015
Year Founded

Culture, With Spirit Baked In

Piece of Cake Moving & Storage's focus on customer and employee satisfaction is its secret ingredient for success.



Nº104
2022 Ranking

4174%
3-Year Growth

35k+
Moves Completed
in 2021

65k+
2022 Projected
Moves

Voyo Popovic was a 24-year-old immigrant from Montenegro when he started his New York City-based moving company in 2017. He had a single truck and the vision to become the largest and most-loved mover in the country. Today, the business has a national fleet of more than 200 of its signature pink trucks, a 500-person workforce, and year-over-year revenue that has more than doubled annually since the company's inception.

Piece of Cake Moving & Storage has built its successful brand around the idea of turning one of life's most stressful events—moving—into a seamless experience. By prioritizing the happiness of both its customers and employees, it has grown to become No. 104 on the Inc. 5000 list of America's fastest-growing private companies.

SPIRIT OVER QUALIFICATIONS

"I really wanted to create a workplace where our people smiled—an environment that supported

our people and inspired them to think and act big," Popovic says. "A stress-free moving experience is more likely to happen when our people are happy and believe in the company's vision."

Roles and hierarchy at Piece of Cake don't necessarily matter. "Team chemistry and performance are prioritized over individual job roles and titles, and it's not unusual to have a member of the team start in one department and end up in another," Popovic says he makes hiring decisions "on spirit over qualifications."

PRIORITIZING CUSTOMER EXPERIENCE

The company gleans immense value from each customer experience and interaction and uses that feedback to adapt. "We are great at listening to our clients, and that gives us the opportunity to constantly improve," Popovic says.

Popovic's hands-on approach to his CEO role has him picking up a customer service call one minute and hopping on a truck to help out with a move the next. This enables him to observe the quality of the service being delivered. "If you don't constantly improve and innovate, someone else will," he says.

INTEGRITY FIRST

Integrity is one of the most important ingredients to Piece of Cake's values and long-term success. The company's integrity is essential to building trust with colleagues and employees. "I have had to let go of high performers who did not reflect company values to protect the bigger vision," he says.

"There is something in trusting each and every person on the team; it gives you confidence to make bold decisions, knowing that they really have your back," Popovic adds. "It is what has really fueled the business's growth."

MYPIECEOFCAKEMOVE.COM



Voyo Popovic, founder and CEO,
Piece of Cake Moving & Storage



Bill Fotsch
Founder and president
OPEN-BOOK COACHING

“Every employee’s focus should shift from the income statement to the balance sheet—or more precisely, from profit generation to cash. You want your entire team thinking of ways they can conserve or generate cash. Running out of cash is the most common way private businesses fail. The game is over when you don’t have enough cash to make payroll.”

Fotsch is an Inc. columnist whose Villa Hills, Kentucky-based company has provided performance management support and other services to clients including Capital One and Carlson Wagonlit.

Rachel Roff
Founder and CEO
URBAN SKIN RX

“After going viral on TikTok in 2020, we really learned about the impact of viral moments on future demand planning and growth projections. In general, it is a fine line to walk, and I recommend playing in the middle and not getting overly confident that these things can be repeated. Being a bit conservative and staying scrappy should always be a part of your company’s mentality, even if you are a Fortune 500 brand.”

Roff, a former medical aesthetician, founded the Charlotte, North Carolina-based clinical skin care product brand in 2010.

Ami Kassar
CEO
MULTIFUNDING.COM

“This idea is a bit out of the box, but now is not the time to cut back on marketing, advertising, or public relations. When the economy goes south, promotional efforts are usually the first things to be axed, in part because it’s hard to see tangible results from them. In tough times, you need to be courting new customers, which you can’t do if potential clients aren’t finding out about you. Now is the time to make hay, especially since many of your competitors will be cutting back. You might find you have more space in your field to make a name.”

Kassar is an Inc. columnist who also runs MultiFunding, an Ambler, Pennsylvania-based consulting firm that specializes in small-business financing.

Jamie Baxter
Co-founder and CEO
QWICK

“Have a plan for diversifying your business and client base. Think about new ways you could reach your market, or a new market, and additional products you can offer that would be attractive in the new atmosphere. When the pandemic hit and the hospitality industry essentially shut down, Qwick adapted to temporarily staff vaccine clinics as a way to keep serving communities and provide income opportunities for our professionals.”

Founded in 2018, the Scottsdale, Arizona-based staffing platform for food and beverage professionals has raised nearly \$20 million in funding.

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Stay Hungry in the Face of Uncertainty

The founder of Axiom Healthcare Strategies reveals how he maximizes impact despite economic turbulence.

Achieving goals during an economic downturn is not easy, but it is possible. “Just because events beyond your control are happening doesn’t mean that you shut down or stop growing,” explains Hafiz Sikder, founder and CEO of Axiom Healthcare Strategies, a think-tank style strategy consulting company that works with biotech and pharma companies to advance patient care in the fields of oncology and rare diseases.

Sikder urges clients to stay hungry and actively manage changes and challenges where clients operate. And he heeds his own advice. Team Axiom has artfully adjusted strategies and mitigated risk in light of market forces, without compromising its mission. In fact, Sikder is building Axiom 2.0: the next iteration of the business, poised to make an even greater impact on patient care and the industry at large.

FIND THE FIRE

Axiom’s focus and hunger earned the consultancy its second consecutive Inc. 5000 honor. While growth is nice, Sikder says it should never come at the expense of your “non-negotiables”—your core business objectives or principles. On top of that list for Axiom is maximizing “the GDH, or gross domestic happiness” of its people.

The company’s brainstorming sessions often occur around a custom-built table—a literal and figurative platform for teamwork and meaningful melding of the minds. Finding people to join the team is not easy in a tight labor market. A non-negotiable when hiring is passion. “I can teach you about rare diseases. I will work with you on how to pronounce a complicated name of a new oncology drug. But you have got to have that fire,” Sikder explains.



Hafiz Sikder, founder and CEO,
Axiom Healthcare Strategies



Nº3583
2022 Ranking

143.7%
3-Year Growth

53
Thinkers at the Table

\$350k
In A.R.G.O.S.
Scholarships

After six years of building the Axiom team, Sikder has gotten good at recognizing “that fire” and trusting his gut. Following his gut is part of what led Sikder to open an office in London this year, despite the warnings of well-meaning friends who thought the location too expensive. The decision has already paid off because of the city’s rich talent pool and proximity to exciting clients.

IMPACT OVER INCOME

New teammates, clients, and workspaces are nice, but impact matters most. That is the Axiom 2.0 vision. “We have proven to the world that we are a successful organization. Now we can continue to focus on making a positive impact,” he explains. The consultancy is growing its engagements with C-suite decision makers and playing a greater role in public policy to further its mission of improving patient care. “We have high-profile clients making very high-profile, strategic decisions that impact a lot of patients’ lives,” he explains.

The Axiom REACH Foundation, Axiom HCS’s

501(c)(3) nonprofit organization, remains a key part of the table. The nonprofit combats public health disparities by aiding underserved patients, families, and communities dealing with life-threatening illness. This fall, REACH launched a program in partnership with Rutgers. Axiom REACH Graduate Oncology Scholars (A.R.G.O.S.) provides \$350,000 in scholarships to students of color in nursing and physician assistant programs who will be trained to understand the challenges of access and equity in health care. REACH, in collaboration with the Dana-Farber Cancer Institute is also launching programs in Boston to continue its mission of having an impact in communities they work in.

By giving back, expanding the think-tank “table,” and growing its C-suite client roster, Sikder and his team are making Axiom 2.0 a reality. “For us, 2.0 equals remit over revenue, category impact over income, thought partnership over profit, and building a magical team over margins,” he says.

AXIOMHCS.COM



The Axiom Healthcare Strategies team at their office in Princeton, New Jersey, one of four global hubs that also include Boston, London, and Bangalore.

PREPARING FOR HARD TIMES

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John Hall
Co-founder and president
CALENDAR

“Before the you-know-what hits the fan, build your own recession survival kit. For example, you could begin diversifying revenue, strengthening current customer relationships, or speeding up cash flow, like collecting receivables or renegotiating contracts. Between being more budget-conscious and speeding

up or increasing your cash flow, you should build a surplus. Instead of burning through that extra income, stock some of it away in an emergency fund so you have capital in case the economy takes a turn for the worse. Even better, pay off as much of your existing debt as possible so it’s not carried over into the recession.”

In addition to founding the Draper, Utah-based scheduling software business, Hall is a best-selling author and keynote speaker.

Kelly Roach

Founder

KELLY ROACH CONSULTING

“It’s important that you make strategic hires during these times so that you have people in place who can remain agile and whose roles directly contribute to the company’s profitability. Additionally, you want to assess all expenses to determine what is truly going to move the needle versus what is simply a nice-to-have for the company that is not necessary.”

Roach’s West Chester, Pennsylvania-based company, a 2022 Inc. 5000 honoree, provides business consulting services for entrepreneurs.



SPREAD, FROM LEFT: COURTESY SUBJECTS (2); GETTY IMAGES; COURTESY SUBJECTS (2)

Mark Cuban

Investor and co-founder
COST PLUS DRUGS

“One of my favorite sayings is ‘Sales cures all.’ The best way to sell is to really educate your customers and make them happy. And the best way to find out what makes them happy is to ask them. That’s not to say you have to do everything they ask you to do, but just by communicating, your sales and your business are going to be better.”

The billionaire founder and Dallas Mavericks owner has been one of the star investors on Shark Tank for more than a decade.

43%

OF SALES ORGANIZATIONS DEVELOP PLANS FOR A RECESSION WELL IN ADVANCE.

Source: Bain & Company

Joshua Davidson

CEO
CHOP DAWG STUDIOS

“Conduct an audit of company resources regularly. For example, many software platforms necessary to running your business have different costs based on tier, available features, and usage. If your business does not actually need all the bells and whistles, don’t pay for them. This can amount to hundreds, if not thousands, of dollars saved each month.”

Davidson’s Philadelphia-based software development firm is on the 2022 Inc. 5000.



Wajid Mirza

Co-founder and managing partner

ARTHUR LAWRENCE

“Focus on relationship depth. With our clients and our other stakeholders, we have focused on clarity, transparency, and the highest quality quotient. Before the pandemic crisis completely unfurled, many of these relationships translated into additional cross-sell and upsell opportunities, as well as references for new business. Some of our biggest relationships in 2020 and 2021 were earned this way.”

Mirza’s management and technology consulting firm, based in Houston, has made the Inc. 5000 list twice.

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Performance-Based Advertising Spurs Growth

Spurrier Group succeeds while empowering women and supporting its community.



Nº3865
2022 Ranking

128%
3-Year Growth

15
Employees

\$4.2
million
2021 Revenue

More than a century ago, John Wanamaker famously complained that half the money he spent on advertising was wasted, but he just didn't know which half. Since then, devising a way to accurately measure advertising's impact on sales performance has been the holy grail of marketing. The thought leadership team at Spurrier Group, a boutique advertising agency based in Richmond, Virginia, has found it.

Founder and CEO Donna Spurrier started out in the music business, but advertising and entrepreneurship are in her blood. She landed a record contract in her early 20s, and while she loved writing music and singing, "I didn't much like the [music] industry," she recalls. She took a job at an agency owned by her father, advertising entrepreneur Jess Duboy, the brains behind the "sell-a-thon" concept that led to today's Toyota-thon.

INTEGRATING MEDIA AND CREATIVE

As she worked her way up to media director, Spurrier found herself increasingly focused on the consumer's perspective and finding ways to

have creative and media work collaboratively. She launched Spurrier Group in 1996 to explore her ideas for a more integrated approach. "Media is where the message connects to the people," she says. "The catalyst from the start was to have media be a more proactive element in the overall advertising ecosystem."

Spurrier Group is built on the premise that consumer experience with a brand is the key to successful advertising. Creating great advertising that consumers experience in a relevant and authentic manner requires deep knowledge of the brand's users and what influences them. While such information fell into the nice-to-know category 25 years ago, it is a must-have today.

The agency excels at such insight, which Spurrier credits to her highly motivated staff and a corporate culture that motivates and rewards enthusiasm. Another aspect that sets Spurrier Group apart is its five-step process that allows media recommendations to be completely performance-based.

TYING MEDIA TO PERFORMANCE

"Money spent equals tangible ROI, and this was a major game changer, not only in how we approach paid media, but in how we deliver results for our clients," Spurrier says. "Who doesn't want their paid media dollars to be tied to performance?"

As impressive as her agency's success may be, Spurrier is equally proud of providing a productive environment where women's voices are heard, and they have opportunities to be thought leaders. "Giving to your staff, to your clients, and to your community, as you are able, is where true success resides," she says.



Spurrier Group's leadership team (from left to right): Amy Venhuizen, Austin Bader, Donna Spurrier, Jennifer Walker

SPURRIERGROUP.COM

“Bringing Your Weird” Spurs Growth

Data management company Panzura solved the Great Resignation with culture.

The day California shut down for the Covid pandemic in March 2020 was the same day Jill Stelfox and her colleague Dan Waldschmidt signed the term sheet to buy Silicon Valley-based Panzura, the market leader in hybrid multi-cloud data management.

When Stelfox finally met her employees—about 100 faces on a videoconference during lockdown—she recognized the unique challenges ahead.

“Imagine meeting all these people on Zoom who don’t know if they’re coming back to work or if the company is surviving, and I’m like, ‘Hi! I’m your new CEO!’” says Stelfox, a former certified public accountant (CPA) who helped develop player tracking software for the National Football League (NFL).

GROWING DURING TURBULENT TIMES

Yet just two-and-a-half years after she took the helm, the company not only survived but grew revenue 485 percent—four times its nearest competitors, according to Stelfox. She also grew her team from 100 employees to 325 across five continents.

Stelfox says the pandemic’s sudden shift toward remote work caught chief information officers (CIOs) off guard, forcing them to think about where their employees—who were on their laptops and family computers at home—were storing data. She says the trend will continue, citing hybrid work and a 30 percent annual growth in file creation worldwide as factors.

But, beyond market demand, Panzura’s success is also related to its “Great Resignation-proof” corporate culture. The company encourages employees be their authentic selves at work, as reflected in the company’s corporate



value, “Bring your weird.” After a few years of seeing each other’s dining rooms, dogs, and deliveries thanks to remote work, “weird” might actually be the new normal.

PEOPLE-FIRST APPROACH PAYS OFF

The company’s culture also encourages cross-functional teams to solve problems together without barriers, which has paid off. The company currently holds 35 patents (and counting) related to cloud-based data management. This summer, Panzura also secured an \$80 million funding round.

One of the most important keys to Panzura’s success is treating each employee like a flower that needs watering, Stelfox says. The company’s rapid growth means that, no matter where they are on the organizational chart, you never know who will end up answering a client call. So, everyone needs to be engaged.

“Care about your employees, because they’ll care about your customers, and you’ll make more money,” Stelfox says.

PANZURA.COM



Nº1343
2021 Ranking

483%
3-Year Growth

42%
Women Board Members

97%
Customer Retention Rate

CHANGING THE RULES

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Tom Wheelwright
Founder
**WHEELWRIGHT
MANAHAN**

“The most innovative entrepreneurs understand that what worked yesterday and what works today are not guaranteed to work tomorrow. For some businesses, that may mean bringing remote team members back to the office to enhance collaboration and mentorship. For others, that may mean embracing a work-from-anywhere policy that widens the talent pool. For everyone, it means measuring results and adjusting accordingly.”

Wheelwright’s Tempe, Arizona-based firm provides accounting and other financial services for entrepreneurs. It is an Inc. 5000 honoree in 2022.



Shama Hyder
Founder and CEO
ZEN MEDIA

“Flexibility is paramount to employees’ performance and happiness in this next iteration of business. Leaders across industries cannot ignore employees’ need for more options—from home or in an office space. The future of work is flexible. The leaders who have a firm grasp on this now will do well as it unfolds.”

Zen Media has provided digital marketing and PR firm services for clients including NASA, McKinsey, and the U.S. Navy. The company is headquartered in Dallas.

Kristi Piehl
Founder and CEO
MEDIA MINEFIELD

“As business leaders, we must learn to ask different questions. Pre-pandemic thinking won’t produce pre-pandemic results, because our customers and teams have a post-pandemic mindset and expectations. Yes, it’s still important to recognize the importance of a legacy, but we must carry it with us loosely or we run the risk of crushing the very thing we are trying to protect.”

Media Minefield, a Minnetonka, Minnesota-based PR agency, has made the Inc. 5000 three times.

CONTINUED ON PAGE 102



COURTESY SUBJECTS

A People-First Mission Fuels Business Growth

Skymount Property Group provides face-to-face customer service to Ohio home sellers in need of fast and easy transactions.

Skymount Property Group's strategy of buying and rehabbing residential real estate has taken off post-pandemic. CEO Brandon Moherman explains that although the company's hard assets are property, the business is all about people—serving clients in person by hiring the best talent possible.

“We try to provide unique solutions for people who don't want to go through the typical channels to sell their property—that's our specialty,” he says.

Moherman credits his college physics coursework for his ability to take a complex situation and break it down into simpler components to find the best solution possible. Although he never imagined himself as a physicist, pairing the construction experience he gained in his teen years with that cognitive ability led him to amass a growing portfolio of Ohio real estate.

PERSONAL CONNECTIONS

On top of a solutions orientation, Skymount has differentiated itself by eschewing the typical real estate sales process of buying properties over the phone. “I learned very quickly that this is a people business,” Moherman says. “We're buying houses, yes, but we are solving someone's problem first. And you can't do that without sitting down with someone and really connecting with them.”

Face-to-face customer service is the company's hallmark. During those client discussions, Moherman and his team hear what sellers “are truly struggling with. They're not going to trust you by just talking over the phone. You have to go, meet them, and sit down with them,” he says.

As a result, the company's sales conversion rate is around 17 to 20 percent. For every six appointments or so, Skymount buys another house, Moherman says.

Although Skymount is practically obsessed

with providing the best customer experience, Moherman says the company's success is due to its team. “We're able to grow our business the way that we have because we have the right people in the right seats,” he says.

LEADING INDUSTRY CHANGE

Skymount currently serves nine counties in Northeast Ohio, but its expansion plans extend well beyond the state's borders. Long-term, the company aims to do for real estate what Tesla has done for the automotive industry, in terms of technology adoption and sustainability improvements, says Moherman. Skymount plans to be a leader in net-zero housing, through retrofitting and rehabs.

Already installing energy-efficient technologies, the next phase of the company's plans will involve building in energy-generation opportunities, through technology, to reach net-zero consumption, where a piece of real estate generates more energy than it consumes. Sharing its progress as a potential roadmap for other real estate ventures to follow is its ultimate goal.

SKYMOUNTPG.COM

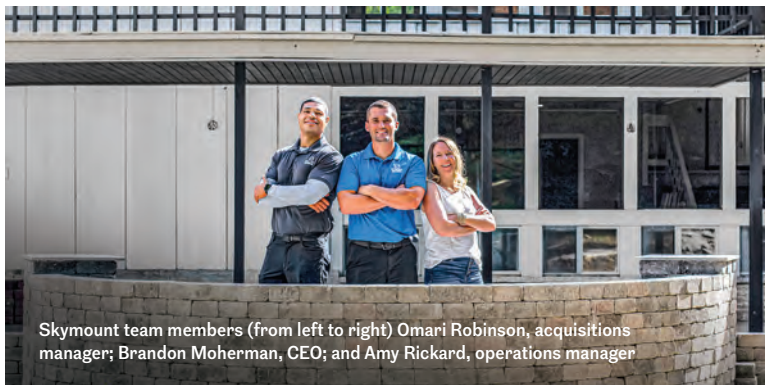


Nº826
2022 Ranking

764%
3-Year Growth

17
Employees

\$6.2
million
2021 Revenue



Skymount team members (from left to right) Omari Robinson, acquisitions manager; Brandon Moherman, CEO; and Amy Rickard, operations manager

A Digital Revolution for Legal Teams

LinkSquares is on a mission to become the global leader in contract management software and a pillar in its hometown.

Nearly every business department has reaped the benefits of game-changing technology. It is the legal team's turn to modernize, says Vishal Sunak, co-founder and CEO of LinkSquares. Since 2015, the Boston-based software company has been creating artificial intelligence (AI)-powered solutions for every aspect of the contract management process. "Our focus is enabling in-house legal teams to work more effectively and efficiently, collaborate better, and just have a better overall experience during the whole contracting process," he says.

By staying focused on the customer, the company has achieved jaw-dropping revenue growth and earned a second appearance on the Inc. 5000 list of America's fastest-growing companies, this time in spot No. 379. And this is just the beginning. With more products on the horizon, and a strong team and process in place, LinkSquares isn't just building a brand, it is building a legacy.

AI WITH PURPOSE

LinkSquares supports all phases of the contract lifecycle, with solutions for drafting agreements, streamlining contract execution, and managing signed documents. The last phase is what first put the company on the map. Before the LinkSquares Analyze product, retrieving and reviewing signed contracts was a manual, inefficient process, at best.

Sunak and co-founder Chris Combs dreamed up the Analyze concept after struggling to create a summary of contracts for a previous employer. Analyze uses AI to "read" contracts and extract metadata—key data points such as renewal terms and effective



Vishal Sunak (left), co-founder and CEO of LinkSquares and Chris Combs (right), co-founder and senior vice president of business development, LinkSquares

dates—that can then be sorted and analyzed to unlock insights. "I've always thought about the Analyze product as a little robot paralegal that works alongside you. It doesn't take a day off, doesn't take vacations, and just helps you be more efficient," Sunak explains.

The software is simple to implement and continually improving because new metadata is always being added to its library based on



Nº379
2022 Ranking

1582%
3-Year Growth

700
Businesses Use
LinkSquares

\$161
million
Total Funding
Raised

customer input. Staying close to customers has always been part of the “secret sauce” for the business. Before even building the solution, Sunak and Combs sought input from more than 100 in-house legal professionals. “You have got to put the customer right next to the problem and validate that you’re solving the right thing,” he explains. Because customer feedback is a top priority, LinkSquares created a subfunction of its customer success team called “Voice of the Customer.” These employees share customer feedback with the product side of the business. Additionally, the company works with its customer advisory board to ensure innovation is driven by true need.

WRITING THE FUTURE

Automating low-value tasks frees up the legal team’s time for more important tasks. Certainly, other areas exist where automation could add value. LinkSquares plans to explore

them, in turn, deepening relationships with existing clients. Another focus area is international expansion. These strategies should enable the company to continue to double revenue growth each year.

More important than strategy, though, are people. Sunak credits success to the support of investors, an amazing workforce, and a talented leadership team, many of whom have worked together before. The opportunity to create more jobs in Boston, and beyond, is a personal driver for Sunak. While employees work remotely from more than 20 states, the business has a strong connection to its hometown and hopes to become a Boston-area pillar. Thinking even bigger, Sunak intends to build a lasting company by being the go-to solution provider for legal team digital transformation.

LINKSQUARES.COM



The LinkSquares team comes together in person several times a year for all-hands meetings and celebrations.

CHANGING THE RULES

CONTINUED FROM PAGE 98



Heidi Yu

Co-founder and CEO
SOCIALBOOK

“The way we determine which policies to adopt permanently is through the KPI of happiness and empathy. When our workers are happiest, they are healthiest, most productive, and loyal. The things that make our employees happiest are the ones we will keep.”

SocialBook, a Foster City, California-based software platform for finding brand influencers, is a 2022 Inc. 5000 honoree.



Alex Kummerow

Founder
HERBIVORE BOTANICALS

“Listen to your team! The goal is to support the team’s well-being while also making the workplace an environment that allows everyone to shine. For instance, we’re 100 percent remote, and with Zoom fatigue, we limit times for meetings and do half-day Fridays. We had a few new parents on our team, so we updated paid family leave policies.”

The Seattle-based natural skin care brand, which Kummerow launched in a kitchen, has raised \$15 million in funding.

Jennifer Rotner

Founder and CEO
ELITE CREATIVE

“I believe *all* of the changes companies embraced as a result of the pandemic—remote work, flexible hours, expanded medical leave, Zoom meetings, online workplace forums—are worthy of permanent adoption. Companies brave enough to continue supporting remote workers can tap into a wealth of talent who have been underserved by the traditional 9-to-5, physical office, two-weeks-leave model. The trust you offer your employees by acknowledging and supporting their messy lives will be returned 10-fold with exemplary work and passionate loyalty.”

Rotner founded her Baltimore-based content and publishing services firm, a two-time Inc. 5000 honoree, in 2009.

CONTINUED ON PAGE 106



COURTESY SUBJECTS

A Smart Spin on 1031 Exchanges

Proprietary technology, customer service, and a family-first culture sets 1031 Crowdfunding apart.



Edward Fernandez,
president and CEO,
1031 Crowdfunding



Nº1348
2022 Ranking

482%
3-Year Growth

4.9
Average Customer
Rating on Google

1500+
Real Estate
Transactions
Completed

Some digital platforms make it near impossible to connect with a real person. Not 1031 Crowdfunding. The real estate investment platform for 1031 exchanges—a capital gains tax deferral strategy for real estate—turns off artificial intelligence (AI) capabilities on its website, requiring people to reach out and connect with a licensed financial professional. Most clients are high-net worth individuals ages 55 to 90 who appreciate the personal touch. “If you want true service, somebody to help give you direction, then you’re our customer,” explains President and CEO Edward Fernandez.

A growing pool of satisfied investors and a stream of referrals have led to remarkable revenue growth and a first-ever ranking on the Inc. 5000 for this family-run business. And more innovation and expansion are on the horizon.

CUSTOM CODE, CUSTOM SERVICE

1031 Crowdfunding provides investors an alternative to selling their real estate portfolios and taking a huge tax hit. Instead, they can open a fractional ownership of institutional quality real estate through a Delaware Statutory Trust

(DST) and “continue to depreciate, write off their expenses, and receive monthly cash flow,” he explains. “When the real estate gets sold, investors get 100 percent of the upside.”

The platform is built with proprietary code. The real differentiator, though, is customer experience, Fernandez says. 1031Crowdfunding.com sees 600 to 800 new registrations monthly. The company invests in digital marketing, and Fernandez makes regular media appearances. But more registrations are from referrals. “Our representatives spend time understanding each investor’s unique situation and customizing recommendations.”

FAMILY OWNED AND OPERATED

Building a culture of integrity is easy when you hire talented people who share your values.

Fernandez’s wife, son, daughter, nephew, and niece all work at 1031 Crowdfunding. “We also have brothers and sisters, husbands and wives, and cousins working here. It is all families.”

Every year, before Christmas, the whole team takes a paid trip to Cabo San Lucas to recharge.

They will need to rest up; next year should be busy. The company will introduce a real estate investment trust, the Covenant Diversified REIT, to serve investors who want to “diversify themselves away from the volatility of the stock market” while continuing to generate passive income. The company plans to offer additional REITs and roll them up into a public offering down the line. It will also open a location in Miami to serve the Latino market. Fernandez’s niece, who is fluent in Spanish, will run the division. This family feel and commitment to investors is what sets the company apart, Fernandez says, and what will fuel client satisfaction and steady business growth.

1031CROWDFUNDING.COM

From High School Dropout to E-Learning Entrepreneur

When the world began to shut down, Legendary Marketer showed people how to earn money from home.

Legendary Marketer CEO David Sharpe could be the poster child for resilience. As a ninth-grade high school dropout, teen father, and struggling heroin addict, the odds seemed to be stacked against him. Today, Sharpe runs Legendary Marketer, a thriving multi-million-dollar education company that has served hundreds of thousands of people around the world. “I figured out how to turn my struggles into my strengths,” he says.

When the pandemic hit in March 2020, the world was filled with fear and panic. However, Sharpe remembered Warren Buffett’s sage advice, “Be greedy when people are fearful, and be fearful when people are greedy.” Instead of retreating and cutting back, as many business owners elected to do during that uncertain time, Sharpe went all-in on growing Legendary Marketer.

His first step was to get in front of clients more regularly. To start, he began hosting the company’s daily live podcast, “Wake Up Legendary,” himself. He then continued to host the daily show for the next two years, interviewing clients—unprepped and unscripted—to talk about the results they were achieving. Sharpe admits that was a precarious move. “It’s a huge risk to talk to your clients out in public,” he says, especially not knowing what they would say. Fortunately, it paid off.

“It had 100 times the impact because I, the founder and CEO of the company, was willing to get on and risk my reputation by talking to a new client every day,” he says. The daily show gave him the opportunity to showcase “regular people” who had achieved success after enrolling in the Legendary Marketer program.

David Sharpe works and does his show from a home office.



LEGENDARY
MARKETER

No 3576

2022 Ranking

144%

3-Year Growth

\$18.6
million

2021 Revenue

63rd

Fastest-Growing
Edu Company

WORLD-CLASS TRAINING

The daily podcast introduces people to the company's entry-level paid program—the "15-Day Online Business Builder Challenge." For \$7, the training "essentially teaches somebody how to develop freelance digital marketing skills," Sharpe explains.

In just the last year, more than 122,000 individuals have joined the program, and they rave about their experiences. As one student explained on the podcast, "I learned more from the 15-Day Challenge than all four years of college." Some people have taken this knowledge and built businesses that supplement their full-time income, while others have quit their jobs, paid off debt, or taken their family on a much-needed vacation.

"If [students are] willing to put in the work, we'll show them what skills they need to develop and how to develop them until they can make money from them—specifically

online," Sharpe says.

After completing the challenge and mastering fundamental marketing skills, students are then qualified to enroll in more comprehensive courses and live events to learn how to monetize their own knowledge or someone else's as an affiliate. They may also join an intensive mastermind with like-minded entrepreneurs.

A COMMUNITY, NOT JUST A COURSE

Sharpe focuses on company culture, and he surrounds himself with a team of ordinary people, from all walks of life, who do extraordinary work together when empowered in healthy ways and incentivized correctly. The entire company works virtually, and they "have the same values, want the same things, and get our vision," Sharpe says. The company continues to grow exponentially.

LEGENDARYMARKETER.COM

Husband-and-wife team David and Erin Sharpe on a weekly "vision call" with their virtual employees.



CHANGING THE RULES

CONTINUED FROM PAGE 102

Heidi Zak

Co-founder and CEO
THIRDLOVE

“At the end of the day, you have to decide what sort of company you want to build. Pre-pandemic, we were not a work-from-home company. But post-pandemic, we will likely be a hybrid work-from-home/in-person company. And having clarity around this fact is going to be crucial—so that we can weigh new decisions and policies against this new ethos. Remember, the future of your business should not be in comparison with the way things once were. Instead, it’s better to think about the future in the context of the way the world is now, and the way the world will continue to evolve.”

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

Martin Schapira

Co-founder
PÄTSCH

“Ideally, if your team flourished in their pajamas from their kitchen tables, allow them to continue to work from home. It’s time to toss the irrelevant ‘best practices’ and offer continued flexibility and open communication flows to maintain talent. It’s about doing what makes for happy employees who want to excel in their jobs and ultimately will work in lockstep to drive success for a business.”

Schapira, who is also the founder of custom water-feature design firm Okeanos, started his Jalisco, Mexico-based tequila brand in 2021.



Christopher Hopper

Co-founder and CEO
AURORA SOLAR

“Just because something was done a certain way in the past, that doesn’t mean it needs to return to that standard. For instance, there are now individuals who entered the workforce and for nearly three years have never set foot in an office. If a company required those individuals to work five days a week in person, it would be a huge adjustment. A company’s culture should be constantly evolving to reflect changing employee needs.”

San Francisco-based Aurora Solar, a SaaS company that specializes in solar project design and sales, has raised well over \$500 million since its 2013 founding.

45%

OF EMPLOYERS HAVE REQUIRED SOME OF THEIR STAFF TO RETURN TO THE OFFICE FULL TIME. JUST 4 PERCENT HAVE REQUIRED ALL OF THEIR WORKERS TO DO SO.

Source: The Conference Board



When Others Pulled Back, This Founder Went Full Throttle

By taking risks and always putting clients first, Vape Guys, a wholesale vape distributor, achieved exponential growth amid a global crisis.

In 2020, travel came to a halt, the U.S. economy shrank, and Vape Guys, a global distributor of vape and hemp-derived products, experienced its first revenue drop since its founding in 2014. Rather than playing it safe and tightening spending as many competitors did, founder and CEO Yan Gleyzer took a gamble: he purchased an additional \$1 million-worth of inventory in a matter of weeks. “I realized everybody else was scaling back, so there was not enough supply. Somebody had to fill that void. I wanted to be that somebody.”

The risk paid off. In 2021, Vape Guys increased revenue by nearly 100 percent. This year, the company earns a place on the Inc. 5000 for the fourth time. Gleyzer credits the achievement to strategic risk, a steadfast focus on nurturing client relationships during challenging times, and a strong and resilient team.

THE PERSONAL TOUCH

Gleyzer’s clients are small business retailers, and he invests in their success. “Clients are more than a revenue line item,” he says. Each store owner is appointed a dedicated account rep. Gleyzer acts as a mentor, making product recommendations and advising on “how to operate their retail stores to drive revenue and profitability.” Before Covid-19, he traveled the world to meet clients and observe their operations. When the pandemic made travel impossible, he stayed connected through email, phone calls, and video chats, ensuring store owners still felt supported.

“A key factor in recovering from 2020 was staying in contact with clients experiencing state and country lockdowns, which essentially halted all their sales. I personally traveled to visit key clients once borders opened to revitalize and strengthen our personal relationships,” he says.

A STRONG TEAM MITIGATES RISK

Gleyzer felt comfortable increasing spending in a down market because he anticipated customer demand and believed in the strength of his client relationships. Another factor that mitigated the risk was the strength of his employees. “I owe everything to my team,” he says. “My employees are my greatest investment.” Vape Guys attracts and retains talented people by creating an exciting work environment that includes opportunities to attend industry events worldwide. These events allow employees to network and keep up with a heavily regulated, ever-evolving space. Vape Guys also participates in industry trade associations to ensure the company understands evolving guidelines and to work with other companies to impact regulations and lobby for consumer safety protections, particularly for the safety of children.

When you understand your space and believe in your employees and clients, betting on your business doesn’t seem so risky. Besides, without risk, there is no growth, Gleyzer says. “If you don’t take risks, your company is not going to grow. If you don’t try, you won’t ever succeed.”

VAPEGUYSINC.COM



Yan Gleyzer, CEO,
Vape Guys Inc.

VGI BRANDS
 VAPE GUYS VGI DISTRIBUTION

Nº4649
 2022 Ranking

4x
 Inc. 5000 Honoree

92.6%
 3-Year Growth

26.5%
 Increase in
 Clients in 2021



Michael Walters
Founder and president
STUDIO503

"I look for three skill sets, IQ, CQ, and EQ, blended with personal accountability, in future leaders. Conventional wisdom teaches us to value convergent thinking, to look for who can get the right answer to an exact question, which is where IQ, or base intelligence, is important. True problem-solving often comes from divergent thinking, or the ability to invent multiple solu-

tions to a given problem, which is where creativity, and CQ, is critical. Leaders must be able to deliver results and often need to work with other departments, individuals, and companies—and having a strong EQ is important to gain buy-in and participation."

Walters's strategic business development firm studio503 has been an Inc. 5000 honoree the past two years. In 2021, it ranked as the fastest-growing private business in Minnesota.

Fawn Weaver
Founder and CEO
UNCLE NEAREST

"If something were to tragically happen to my husband and me, it is important that this company not skip a beat. A founder would be crazy not to have a succession plan in place, notarized, in a safe, and also in the hands of the people who are going to need to be there to succeed."

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



Josh Miller
Co-founder and CEO
OWEN'S CRAFT MIXERS

"It may seem obvious, but we have found that great leaders admit they don't have all the answers, but will strategize to figure out a solution."

The New York City-based business, which sells cocktail mixers in national chains such as CVS and Publix, has raised more than \$10 million in funding.



A Mission to Transform Supply Chains

CDL 1000's growth lies in giving customers greater control over their shipments.

A surge in online shopping, labor shortages, manufacturing slowdowns, and port congestion continue to disrupt global supply chains. However, consumers still want their goods at lightning speed. Retailers, caught in the middle, are struggling to meet demand, making the right logistics partner more important than ever. For many companies, CDL 1000 is that partner, catapulting the company to No. 3 on the Inc. 5000 list of America's fastest-growing private companies.

Based in Chicago, the supply chain solutions company uses innovative tools to digitize archaic supply chain processes. This leads to greater efficiency, cost transparency, and supply chain visibility for its clients.

TRANSFORMING SUPPLY CHAINS

CDL 1000 digitally transforms drayage, or the transport of freight from an ocean port to a rail yard or inland destination. Drayage is called the "first mile" in the delivery process, but it's also the most complex. When there's a breakdown at this stage, it's unlikely the rest of the delivery process will go smoothly.

However, by matching import and export containers to reduce waste, CDL 1000 also helps streamline the process and can even help clients cut costs by nearly half, says CEO Andrew Sobko. Clients can use the company's digital pricing tool to reserve trucks at the biggest ports in seconds. A real-time tracking platform gives clients complete visibility into shipment location. CDL 1000 even has an in-house artificial intelligence (AI) and quantum computing team working on its algorithms.

ADVANCING INDUSTRY INNOVATION

CDL 1000 offers clients more control over their supply chain than many larger logistics

companies. The company sells shipments in bigger batches to fewer trucking companies, whereas larger logistics providers often divide shipments among dozens of trucking companies. CDL 1000 is also providing a new service offering called Demurrage as a Service (DaaS) that enables it to pay late fees for clients if it can't pull their containers from ports on time, potentially saving customers tens of millions of dollars each week.

The company is rolling out more intuitive, user-friendly digital tools, including Batch, a solution that lets customers list or bid on batches of shipments and move more than 1,000 containers simultaneously. And Ruby is an AI-enabled voice assistant that allows customers to book shipments easily based on their specific requirements. Sobko expects these innovations to continue to fuel growth.

"Solving logistics problems for some of the largest customers in the country has paid off," he says.

CDL1000.COM

CDL¹⁰⁰⁰

Nº3
2022 Ranking

56%
3-Year Growth

119
Employees

2018
Year Founded



Members of the CDL 1000 team at the company's Chicago headquarters.

It Takes a Dream Team to Build Long-Term Success

AdOutreach is counting on its culture and team to reach the billion-dollar mark.



No. 60

2022 Ranking

No. 1

Inc. 5000 Ranking
in Austin, Texas

6052%

3-Year Growth

10,120

Total Number of
Clients/Customers

AdOutreach founder and CEO Aleric Heck has always aimed high. Bootstrapping his digital marketing enterprise through a string of technology startups over the course of a dozen years, he hit the Inc. 5000 list at No. 87 last year. Heck's ultimate goal is to make AdOutreach a billion-dollar business. With a jump to No. 60 on the current list, it is on the right trajectory to get there.

AdOutreach, based in Austin, Texas, provides training and consulting to help other businesses integrate video marketing, namely, YouTube video ads, into their marketing strategies. It is Heck's brainchild, but he is quick to share credit for its success with members of what he calls his "Dream Team."

COMPLEMENTARY SKILL SETS

Heck started AdOutreach while still in college, and his first hire was fellow student Julia Gordy, now the company's chief operating officer (COO). "We have opposite but complementary skill sets and tremendous respect for each

other," she says. "I am an integrator who loves building out systems, and he is a visionary who comes up with things I could never conceive of." Both are fans of the book *Rocket Fuel*, which posits that an effective relationship between a visionary and an integrator can power any organization to new heights.

AdOutreach culture is built around four core values: lead with passion and excellence, empower successful clients, act with integrity, and dream and grow together. Every three months, staffers vote for a coworker who exemplifies those values to receive five nights for two people at an all-inclusive Caribbean resort.

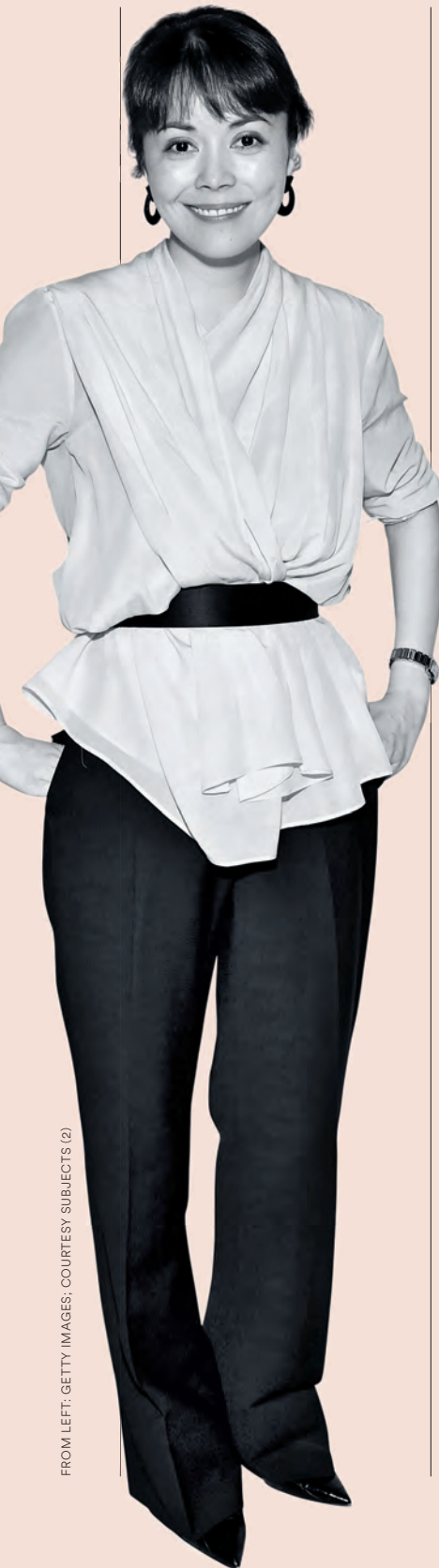
COLLABORATION AND ALIGNMENT

A unique approach to goal setting is part of AdOutreach's success formula. Between two and four objectives are assigned to each of its four main departments (sales, operations, client success, and marketing) every 90 days and shared at weekly all-hands meetings to promote collaboration.

AdOutreach team members share success stories on a Slack channel. The channel gets up to a dozen "win" posts every day, with the majority highlighting client wins.

The long-term plan to turn AdOutreach into a unicorn is well underway, with several new businesses launched during the past year. "While we continue to grow and scale AdOutreach, we will be modeling our proven video marketing strategies in other verticals," Heck says. "When we learn what we need to succeed, we will start going after bigger deals, either through creation or acquisition. I know we have the Dream Team to get there."

ADOUTREACH.COM



Sarah LaFleur

*Founder and CEO
M.M. LAFLEUR*

“Rather than thinking about who is the best person to lead that particular department, I’m thinking that I’ve got space for, let’s say, six people around the table. And when we all come together, are we making magic together, or are we all just individually very good at our own jobs? I never want the latter. I always want the former.”

LaFleur’s New York City-based women’s apparel company has made both the Inc. Best Workplaces list and the Inc. 5000.

64%

OF EMPLOYERS SAY THAT LEADERSHIP DEVELOPMENT IS EXTREMELY IMPORTANT OR VERY IMPORTANT TO THEIR STRATEGIC PLAN.

Source: Society for Human Resource Management (SHRM)



Paul L. Gunn Jr.

*CEO and president
KUOG CORPORATION*

“There is a quiet-storm quality of these team members. They are often the ones leaned on for advice or ideas for projects that collectively and independently are sought after. The intrinsic value they bring when a project is presented typically is not met with resistance, but rather with a quiet confidence that assists in being able to identify a path to execute. The greatest identifying factor of these team members is the ability to show empathy and kindness while still being accountable.”

Gunn’s Huntsville, Alabama-based company specializes in logistics and procurement for the U.S. Department of Defense. It is an Inc. 5000 honoree for 2022, the second year in a row it has made the list.

Mike Salguero

*Founder and CEO
BUTCHERBOX*

“It’s a completely different skill to be a manager versus being an individual contributor, and it’s not for everyone. I think companies often make the mistake of believing the only way employees can move up is to manage people. You need to be able to find avenues for individual contributors to remain individual contributors.”

Since its 2015 founding, ButcherBox, a meat subscription service based in Boston, has grown to more than \$550 million in revenue and landed on Inc.’s 2022 Best Workplaces list.

