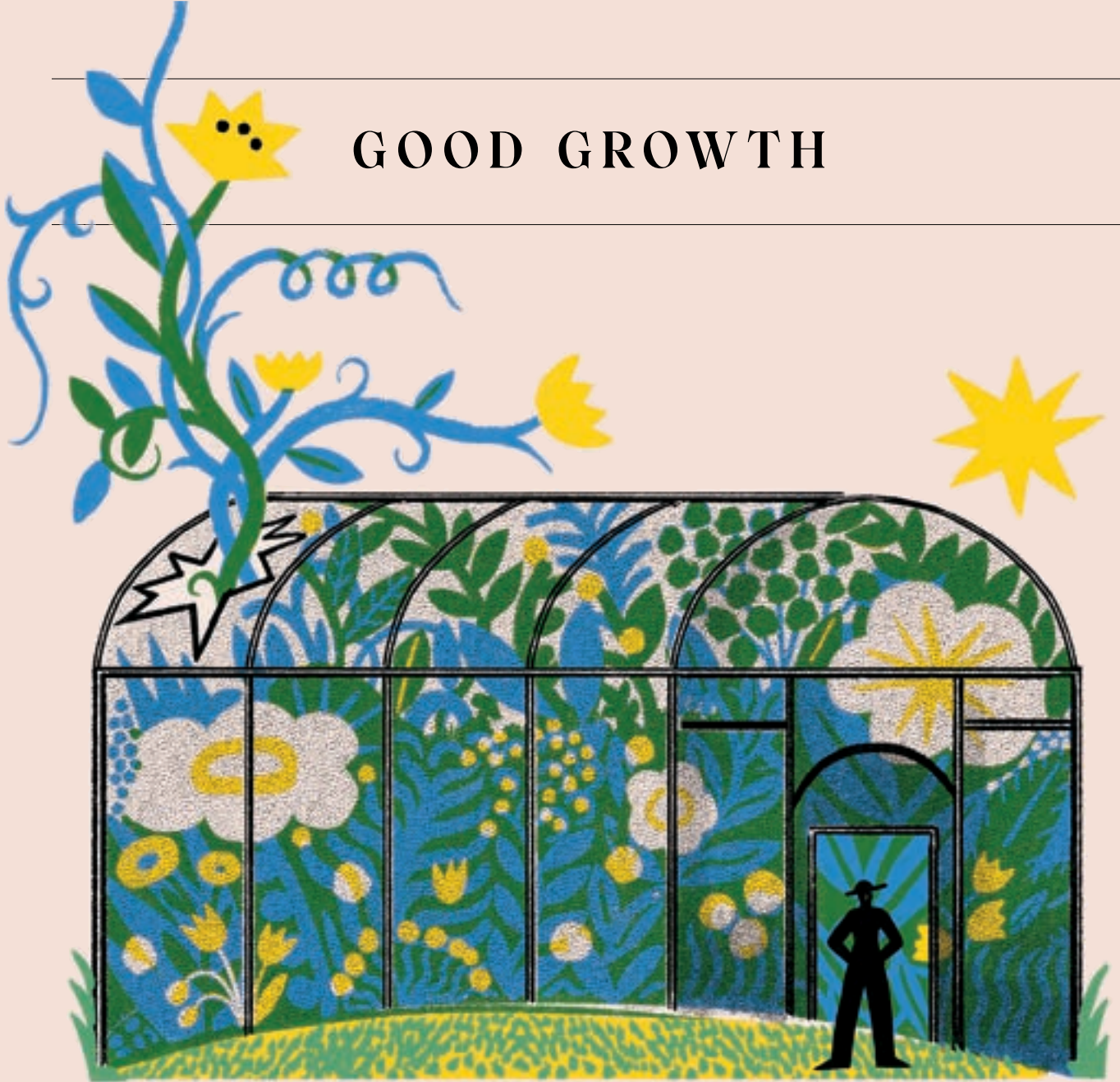


# GOOD GROWTH



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

As any gardener can tell you, not all growth is good. After all, sunlight and water—the conditions that yield beautiful flowers and ripe veggies—also foster weeds that choke out healthy plants. And the pests you were able to manage on one plant will overwhelm an entire greenhouse before you notice they’ve crept in.

That same dynamic exists in fast-growth companies: As revenue scales, so do problems. When order volume increases, the Excel sheet—the one you’ve used to track orders since launching—is going to crash. Now you need a new inventory management platform, but should it be out-of-the-box or custom-built? Either way, you’re going to need an engineer to implement it—make that three, actually. In fact, you’re going to need to hire a bunch of

new people to tend your particular garden. And are you spending enough on marketing to keep things growing after that first flush? You’re going to need new customers to keep scaling, right?

We get it—success is exhausting. The founders, business leaders, and growth experts on the following pages can certainly attest to that. Most of them helm companies that have repeatedly landed on the Inc. 5000, and their hard-earned insights into managing growing pains reveal some themes—like organization and the value of data-backed decisions. They learned that when it comes to hiring, less is often more, that simplified products and processes are always best, and that as your company grows, you have to grow with it. Read on for a bumper crop of advice.

## EXPANSION: YOU REAP WHAT YOU SOW



Hire ambitious people, never stop improving, be attentive to your customers, and mine their feedback for insights. These are just a few of the ways these leaders say you can cultivate loyalty and expand to new audiences without diluting your brand.

### 1 | **Stacy Spikes** Co-founder and CEO **MOVIEPASS**

“Becoming obsessed with the details—and the data—is what gives outsiders the hidden advantage. I call five

customers every week. Good or bad. They canceled; they quit. They love it; they don't love it. I learned that from Steve Jobs. He used to answer customer service emails himself.

What I get from doing that is amazing, and I've been doing it my whole career.”

*Spikes is a veteran of the film industry. He's the author of Black Founder: The Hidden Power of Being an Outsider.*

### 2 | **Heidi Yu** Co-founder and CEO **SOCIALBOOK**

“We have team meetings dedicated to always finding and brainstorming new ideas for business opportunities. This includes new products, new ways to market, new services, new UI design, etc.”

*Foster City, California-based SocialBook is an influencer marketing platform and two-time Inc. 5000 winner.*

### 3 | **Reid Hoffman** Co-founder **LINKEDIN**

“When you're asking people for advice and feedback, don't ask, ‘What do you think of my idea?’ Instead ask, ‘What do you think is wrong with my idea? Why do you think my idea won't work?’ Because the answers you get will force you to ask yourself, ‘What do I know that they don't know?’ That is your active theory. Being forced to grapple with it will strengthen it. People often think that someone who's questioning an idea just doesn't get it or isn't very smart. But that's wrong. It's the smart people who tell you when something isn't working.”

*Hoffman is a founding board member of PayPal and currently hosts the podcast Masters of Scale. He's also a partner at the investing firm Greylock.*

# 74%

**OF CONSUMERS SAY  
PRODUCT QUALITY IS  
THE DRIVING FACTOR  
BEHIND THEIR LOYALTY  
TO A BRAND.**

Source: KPMG

2.

4 | **Steven Weisbrot**  
*CEO*  
**ANGEION**

“If you can predict the question behind their question, you will have limitless new opportunities. Critically listen, thoughtfully respond, and overdeliver.”

*Weisbrot has more than 15 years of experience as a litigator and a consultant. His Miami-based settlement firm is a two-time Inc. 5000 winner.*

4.

1.

3.

# EXPANSION

## 1 | James Dyson

Founder and chief engineer  
**DYSON GROUP**

“We develop technologies rather than products. We pick on certain technologies—it might be motors, it might be audio, it might be airflow—and while we’re developing the technology, a product occurs. Many years ago, I decided to try to develop a very high-speed motor for our vacuums. Because if you go very fast, you can make the motor much lighter, much more powerful, and much smaller, and use fewer materials. It was 10 years before we even had a motor that we could put in the product. And actually, to be honest, the very first motor we did wasn’t that much better than the existing one. But we kept developing, and now it’s an incredibly advanced motor that’s tiny, and makes possible products that didn’t exist before, and has completely changed the format of products that already exist.”

*Dyson’s multinational consumer technology company, which he founded in Malmesbury, England, joined the ranks of Inc. 5000 Europe in 2018.*

## 2 | Michelle Longmire

Founder and CEO  
**MEDABLE**

“When we took \$300 million in venture capital, we thought it might be an opportunity to go after some of the things other companies in our

industry were doing. But that’s not really our strategic advantage. We’re good at making things that hadn’t existed before—not at making the next version of the best mousetrap. That was a big lesson, because you want to satisfy investors, you want to show them growth. But at the end of the day, you’ve really got to play your own game.”

*Longmire’s virtual clinical research platform became an Inc. 5000 honoree this year.*

# 63%

**OF GLOBAL CONSUMERS BUY DIRECTLY FROM A BRAND’S WEBSITE, AS OPPOSED TO TRADITIONAL MIDDLEMEN AND MARKETPLACES.**

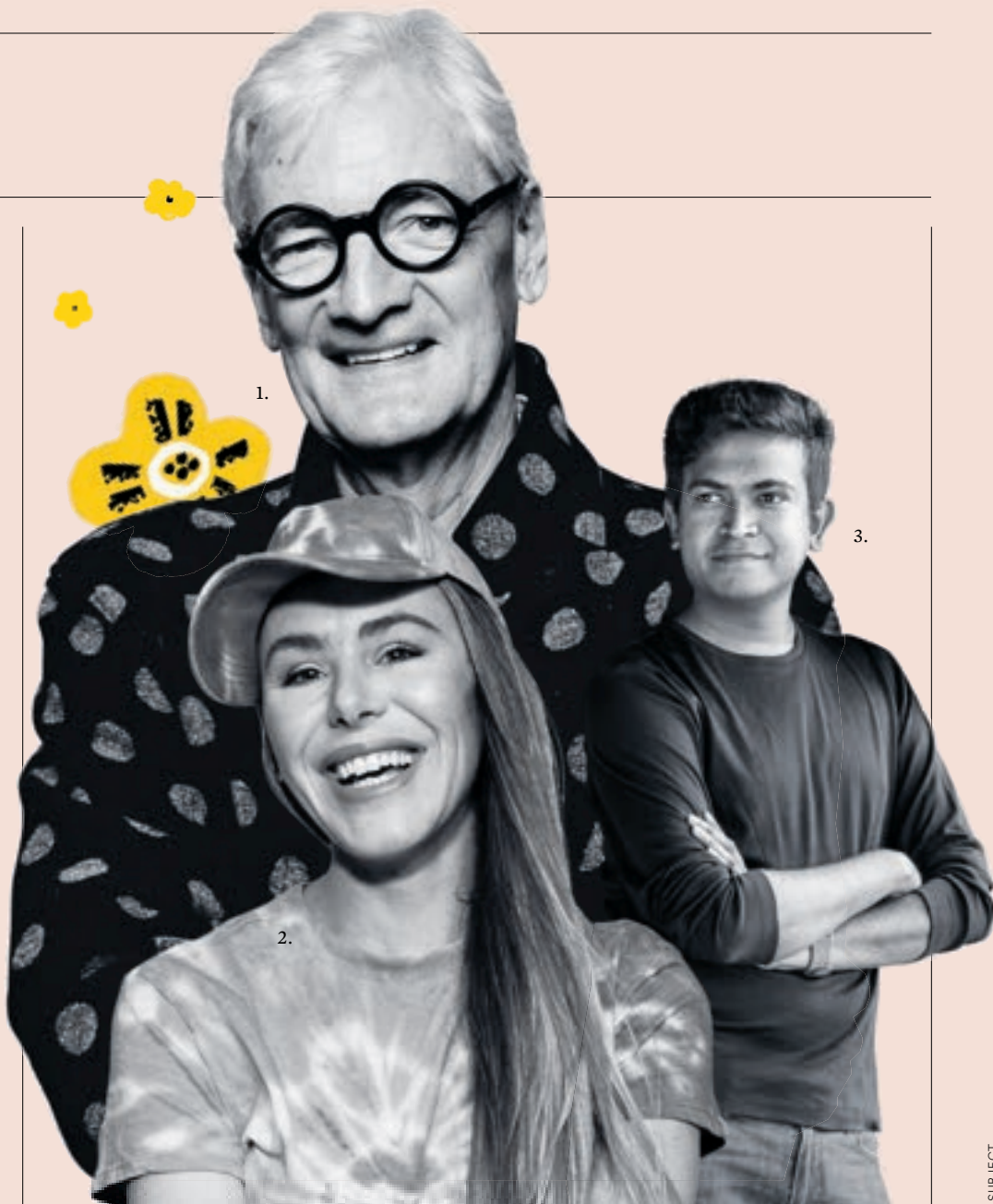
Source: PwC

## 3 | Jonathan Siddharth

Co-founder and CEO  
**TURING**

“In a company that’s growing very fast, it’s important that leaders scale their skills at least two years ahead of time. I have an app on my phone and each day I track how I’m working on the areas I want to improve in.”

*Siddharth’s A.I.-powered talent-matching platform service is used by household names like Disney and Volvo.*



ERIK TANNER (DYSON); GABRIELA HASBUN/REDUX (LONGMIRE); COURTESY SUBJECT

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°1809  
2023 Ranking309%  
3-Year GrowthN°75  
HR Industry  
Ranking\$63M+  
2022 Revenue

# A Smart Approach to Risk Management and Innovation

P.E.O.PayGo, a professional employer organization software firm for small businesses, credits its first Inc. 5000 honor to risk.

**A**s a software company offering professional employer organization (PEO) services such as workers' compensation coverage, payroll services, and HR management for small businesses, P.E.O.PayGo has a straightforward approach to acquiring clients. Its sister entity, OCMI Workers Comp, an insurance provider focused on workers' compensation within the construction industry, generates a surplus of leads. Nevertheless, P.E.O.PayGo uses a deliberate approach to selecting the number of clients it onboards to avoid a common pitfall in the industry: growing too fast.

"Hasty high-risk client expansions in PEOs often lead to business failures," explains Oscar Montenegro, founder and CEO of both P.E.O.PayGo and OCMI Workers Comp. Montenegro emphasizes that his company's success is rooted in adept risk management, driven by proprietary in-house technology. P.E.O.PayGo's deliberate approach to growth has culminated in a significant milestone: its debut appearance on the Inc. 5000. While Montenegro celebrates this achievement, his primary focus remains ensuring sustainability—crafting a technology-driven PEO that consistently delivers genuine value to both clients and employees.

## A CREDIT TO ITS LEADERS AND ENGINEERING DEPARTMENT

Montenegro, a seasoned entrepreneur with a Wall Street background, has always understood the importance of teamwork. The core leaders at P.E.O.PayGo, including President Melanie Montenegro, play a pivotal role in the company's success story. Jose Reyes, VP; Victor Quintero, CFO; Paul Georgiadis, COO; and Cristian Herrera, CIO, are also integral to the company's growth.

## PAVING THE PEO INNOVATION PATH

Since its founding in 2016, P.E.O.PayGo has primarily served customers in the construction industry. The company distinguishes itself by taking calculated risks on startups and owner-operators whom other insurance companies might decline. While some of these business owners may not possess strong digital skills,



→ Oscar Montenegro (far right), founder and CEO, P.E.O.PayGo, and his team

P.E.O.PayGo's user-friendly technology solutions ensure a seamless experience for everyone. By developing solutions with its core customer base in mind, P.E.O.PayGo ensures an excellent customer experience. Another thing that stands out, Montenegro explains, is the company's approach to managing the organization like an engineering firm. The team balances short-term achievements with long-term strategic planning, ensuring they are meeting immediate goals while preparing for the future.

P.E.O.PayGo's relentless dedication to pioneering proprietary technology that was previously nonexistent has fueled the remarkable growth that has landed the business on the 2023 Inc. 5000. Together, as a cohesive unit, Montenegro and his leadership team will continue to expand the business, with the aim of becoming a frontrunner in underserved markets. "If daily learning remains our focus," he says, "there's no obstacle we can't overcome."

PEOPAYGO.COM

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°2679  
2023 Ranking201%  
3-Year Growth55  
Laws Enacted7M  
Community  
Members**IRONLIGHT**

# The Marketing Agency That's Inspiring Social Movements

Iron Light, a purpose-driven marketing agency, moves hearts, inspires movements, and shapes laws with a neuroscience-based approach.

Iron Light, a full-service marketing agency with advocacy at its core, has had a big year. The agency earned inaugural spots on both the Inc. Regionals Midwest and the Inc. 5000. It also rolled out new divisions: Intelligence & Insights to improve data-driven audience targeting, and Impact Production to drive social change through filmmaking. For Iron Light, goals include getting an idea to trend online, activating advocates, and changing laws.

Co-Founder and President Austin Berg started Iron Light in 2018 with Co-founder and CEO Ryan Green to support purpose-driven brands and nonprofit organizations breaking barriers—often those imposed by government. Using neuroscience-based approaches, the agency creates persuasive content and builds engaged communities that advocate for change. Iron Light's work has reformed 55 laws, including medical marijuana legalization in Mississippi, universal school choice programs in Arkansas and West Virginia, and, in 2020, winning the most expensive ballot fight in Midwest history. "We work with people who share our vision of a world without limits on human potential," Berg says.

## "WE CAN DO THIS FOREVER"

Berg recalls the moment he knew he found his calling. He had been working to raise awareness about Lisa Creason, a single mother who went to prison more than 20 years ago for stealing money from a cash register to buy food for her daughter. Lisa had turned her life around, but the state had barred her from getting a nursing license. Berg and Green galvanized audiences to support Lisa, contributing to a law ending a categorical ban on certain ex-offenders working in health care. "I remember calling Ryan, and we were both crying. We felt the weight of the community fighting for this. And from that point on, we were like, 'We can do this forever.'" Iron Light was born.

## PUSHING IMPACT PRODUCTION FORWARD

The founders' passion has only grown and so have the successes. "Forbidden to See Us Scream in Tehran," a short film about a female lead singer of a death metal group in Tehran, earned international

praise. Iron Light collaborator Farbod Ardebili directed the film from the U.S. using WhatsApp. Following the death of Mahsa Amini, a 22-year-old killed by the Iranian Morality Police in September 2022 for not wearing her hijab, Iron Light worked with WhatsApp's parent company, Meta, to promote the film internally and on its platforms. After film advisors met with the United Nations (UN), the UN removed the Islamic Republic from its Commission on the Status of Women. Iron Light also inspired the U.S. Congress to advance the MAHSA Act, imposing sanctions on Iranian officials. The team is now working on a feature-length version of the film.

"Storytelling is at the core of what we do," Berg says. "When it comes to compelling action, there's nothing more powerful than the right messenger speaking to the right audience at the right time."

IRONLIGHT.COM



→ Co-founders Austin Berg (left), president, and Ryan Green, CEO, Iron Light

1 | **Vladislav Podolyako**  
*Founder and CEO*  
**BELKINS**

“We offer ongoing education through webinars, workshops, and resources, helping clients extract maximum value from our services. By consistently delivering tangible results and adapting to their evolving needs, we nurture long-term partnerships that drive customer loyalty and increase their lifetime value.”

*Belkins, a B2B lead generation agency, is a regional Inc. 5000 winner based in Dover, Delaware.*

31%

**OF CONSUMERS SAY THEY RELY ON REVIEWS FROM OTHER CUSTOMERS WHEN MAKING PURCHASE DECISIONS.**

Source: PwC

2 | **Keith Shields**  
*Co-founder and CEO*  
**DESIGNLI**

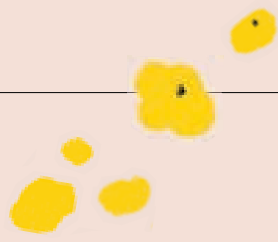
“It helps that our team brings diverse experience to their roles. Everyone is plugged into industry best practices for their own specific job functions, which keeps us in the know. We rally to discuss new opportunities, ideas, and process improvements. Once we decide on a direction, we’re able to adapt quickly without disrupting our services. Regular iteration prevents big disruptions.”

*Mobile-first software maker Designli, based in Greenville, South Carolina, became an Inc. 5000 honoree this year.*

3 | **Paul Goldman**  
*Founder and CEO*  
**MUSERK**

“We have found that customer retention is very personal. And it remains strong by being genuine and providing good old-fashioned customer service. You would be surprised what returning a customer’s email within 24 hours will do for retention.”

*Goldman’s New York City-based music rights management platform made the Inc. 5000 for the third time this year.*



**Inc. 5000**  
COMPANY  
SPOTLIGHTN°25  
2023 Ranking11,247%  
3-Year Growth\$12.1M+  
2022 Revenue55  
Employees**AWESTRUCK**

# How a Destination Marketing Company Soared to No. 25 on the Inc. 5000

Awestruck finds the keys to growth are authentic principles and a strong, invested team.

**W**hen Ryan Sprance, Dave Marcy, and Nat Collins met for dinner in late 2018, they had no idea breaking bread would lead to the creation of one of the country's fastest-growing businesses: Awestruck, a results-driven destination marketing agency with a jaw-dropping three-year growth rate of 11,247 percent.

At the time of their dinner meeting, Marcy and Collins were running a digital marketing agency whose clients included a large resort property. When the property announced it needed a social media partner, Marcy reached out to Sprance, whom he had worked with at World Wrestling Entertainment, Inc. Sprance was running a social media business and agreed to support Marcy and Collins' client. The engagement went so well, the client—one of the largest hotel and resort management companies in the world—hired the trio to support the launch of a new property. This, too, was a success. Sprance, Marcy, and Collins were onto something.

## SYNERGY FROM THE START

For Awestruck, client growth happened quickly and organically. When the pandemic struck less than two years after the company's founding, the co-founders were united in their commitment to the travel sector. The team increased communication with existing clients and focused on partnerships with resorts in states less impacted by pandemic-related restrictions. When the travel industry rebounded, the agency was ready.

During the last three years, Awestruck expanded existing relationships with entertainment companies and hotel management giants while fielding a steady stream of referrals from hotels, casinos, water-parks, ski mountains, and more. Without spending a dollar on marketing, the company's annual revenue



→ (Left to right) Dave Marcy, Ryan Sprance, and Nat Collins, co-founders, Awestruck

increased from \$106,000 in 2019 to a projected \$16.5 million in 2023.

### DEFINING THE AWESTRUCK ADVANTAGE

The co-founders wanted to define the factors that set the company apart. Rather than analyzing their competitive advantages internally, they asked clients for input. The responses informed Awestruck's core principles: fanatical client engagement, jaw-dropping expertise, and unyielding innovation. These values are authentic and embodied by every employee, at every level, the founders explain, noting that fanatical client engagement would not be possible without a strong, invested team. Awestruck becomes a true extension of a client's property marketing team, an approach that stands out in an industry where weekly reports and monthly calls are often the norm. Awestruck's level of engagement is possible because of its "jaw-dropping expertise." The company hires individuals with industry experience, including hospitality career professionals.

### INNOVATING WITH CONVICTION

The third value, unyielding innovation, includes the company's commitment to building upon its capabilities to stay ahead in the fast-paced marketing industry and deliver measurable results for clients. Innovation often includes inventive technology solutions that solve an internal need while benefiting

clients. For example, when they couldn't find an over-the-top (OTT) advertising provider that met their expectations, the Awestruck team built their own campaign management system called Ideal. Getting advertisers to test new channels can be challenging, but the co-founders had built enough trust with clients to convince them to give OTT a try.

"We had to have the strength of conviction to champion OTT in the face of the industry's resistance to change," Marcy explains. "We knew it would produce results." OTT's impact led to game-changing increases in client returns, prompting a once-hesitant industry to begin seeking out Awestruck's OTT solutions. The company now finds itself as the national authority on streaming media solutions within the hospitality and destination sector.

### FAITH IN THE TEAM

Additional product innovations should drive continued growth for the agency. The cofounders are adamant that none of these achievements are possible without their exceptional senior leadership team. These seven executives bring the founders' shared vision to life, in a way that exceeds what they had imagined five years ago at a table in Princeton. This is the precise team, the co-founders say, to continually deliver the service, expertise, and innovation that sets Awestruck apart.

AWESTRUCK.AGENCY

↓  
The Awestruck senior executive team at global headquarters in Bethlehem, Pennsylvania.



# EXPANSION

CONTINUED FROM PAGE 109

## 1 | Liviu Tanase Founder and CEO ZERBOUNCE

“The foundation of our brand, and our existence, is to ‘help you reach the inbox,’ and everything we do is rooted in that promise. While we’ve added many other services to the platform, they all converge on the same goal. That keeps existing customers happy and continues to bring in new ones.”

*Tanase’s Santa Barbara, California-based email validation service is a four-time Inc. 5000 honoree.*

# 93%

**OF HIGH-GROWTH BRANDS INDICATE THAT THEY’VE ESTABLISHED KEY PERFORMANCE METRICS RELATED TO THEIR PURPOSE STATEMENT.**

Source: Deloitte

1.

2.

3.

## 2 | Marya Khalil-Otto Founder and CEO VITALITY INSTITUTE

“To expand to new audiences, you should keep your existing audience in the know and get their feedback. But I don’t think we should ever be a brand for everyone.”

*Khalil-Otto’s L.A.-based skin care brand made the Inc. 5000 list for the first time this year.*

## 3 | Oz Konar Founder and CEO BUSINESS LENDING BLUEPRINT

“A free online community for prospects to understand our programs has been a huge help in expanding our audience without paid advertising campaigns.”

*Konar’s NYC-based business loan broker training program has made the Inc. 5000 in 2022 and 2023.*



**Inc.5000**  
COMPANY  
SPOTLIGHTN°640  
2023 Ranking915%  
3-Year Growth\$14M  
2022 Revenue85  
Employees

boardsi

# A Better Matchmaker Between Corporations and Executives

Boardsi defied the odds and overcame anonymity to build a reputable brand with a successful track record in recruiting business board members.

**T**he old-school way of assembling a board of executives, directors, or advisers would often start with a conversation at a golf course or social club. "It was kind of a 'who you know' network," says Martin Rowinski, who set out to modernize board recruitment when he co-founded Boardsi in November 2017.

Rowinski knew from his attempts to expand his own role from business consultant to board member how difficult it was for board recruiters and ideal candidates to find one another. Except for non-profits, organizations didn't usually list board openings publicly, and there was no major company offering a full-service specialty in board recruitment. So Rowinski and his business partners decided to start one. But when they launched Boardsi, they first had to overcome the fact that neither their would-be clients nor their potential recruits knew who they were.

"We knew right away that we needed some ridiculous branding, some PR—and a continuous flow of it—so we could become known," says Rowinski, who met the challenge by establishing himself as a thought leader—doing a string of podcasting interviews, writing a book called *The Corporate Matchmaker*, and contributing to several national business magazines. "I just went on a big campaign for two to three years, and all of a sudden everybody knew who Boardsi was."

## SPEEDING UP THE PROCESS

Rowinski says that while there were other online membership-based business networks where companies might find board candidates by chance, Boardsi was the first to supplement its private platform with white-glove service. Boardsi teams are constantly working behind the scenes, onboarding new members, creating their profiles, and searching for the best matches. And because every executive who joins the network is interested in board membership, companies don't have to spend a lot of time courting those who aren't available.

For companies looking to diversify the demographics and types of experience among their board members, Boardsi's large



Martin Rowinski,  
CEO, Boardsi

network provides an easier, faster way to reach beyond a small circle of colleagues with similar backgrounds.

## BUILDING A REPUTATION

Today, instead of doing cold outreach to people who answer, "Who are you?" Boardsi is getting inbound calls saying, "I've heard about you guys," Rowinski says. To further boost the brand, Rowinski can point to success stories like Tinybeans Group, the Australia-based family photo-sharing app maker that Boardsi helped to find a U.S. board member for after a lengthy search. Rowinski says it was gratifying to see that when her appointment was announced on October 28, 2020, the client's stock went up. In another case, Boardsi helped a MedTech company address the lack of diversity on its board before going public by recruiting two female doctors.

Boardsi's success and growth have defied the naysayers who told them it would be nearly impossible to do well in a crowded, more experienced field of headhunters.

"We just shut our ears and kind of stuck to it," Rowinski says.

BOARDSI.COM

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°3635  
2023 Ranking134%  
3-Year Growth400  
Employees25  
Locations

# Veteran-Owned Contracting Company Operates Without Debt

T47 International has doubled its size every year since its founding and is eyeing even more growth in the future.

**T**ina Wilson, founder and CEO of government contracting company T47 International, remembers winning her first federal contract in 2017. Until then, contracts tended to be less than \$1 million. But this one was big: T47 landed a \$7 million contract to provide housekeeping services to a part of the Tennessee Air National Guard.

Getting the contract was one matter—fulfilling it was another. Wilson needed to find the resources to pay additional employees. At the time, T47 didn't have a line of credit, and staffing up was creating a cash flow crunch. But a government contracting officer understood the challenge her small business faced and allowed her to invoice every two weeks instead of the standard once a month. She also learned the importance of banking relationships.

## BUILDING A STURDY STOOL

Since starting the company in 2014 with just \$500, Wilson has expanded the company exponentially, doubling growth every year. Wilson advises others to have the trifecta of experienced banking, accounting, and legal professionals advising their companies.

"If you have those three legs for the stool, you can make it in business," she says, emphasizing that this holds true even in the startup phase.

These days, T47 has all three of those stool legs. The company has banking relationships, a line of credit, and no long-term debt. The company's financial stability is based on managing cash flow, understanding government invoicing process, and paying its bills on time. After going through some litigation obstacles, including an arbitration lawsuit and bank garnishment, Wilson now has a trusted legal advisor who understands her business. The company also has accountants who keep the books and third-party HR and a payroll system to support the corporate staff.

Over the years, T47 has grown in ways she didn't expect. When Wilson started the company, she expected to do more strategy work because of her background in business development and strategic planning. Instead, T47 has a diversity of services ranging



Tina Wilson, CEO,  
T47 International

from armed and unarmed guards to janitorial and facility services.

"My journey has evolved, and I am thankful for the change," she says.

## PUSHING TO THE NEXT PHASE

T47 is now heading into another growth phase, going after more and larger contracts. This expansion means the staff and Wilson need to have a very solid understanding of the complicated government acquisition process. Growth also means potential teaming up with other companies to expand into new service areas. Wilson is currently considering purchasing other companies, a process that's quite different from partnering, as it means scrutinizing finances and contract backlogs. T47's first acquisition may be made within a year, which also might require the company to take on its first bank loan.

"You get resourceful," she says. "It'll grow from there if you are persistent; even though the struggle and the hustle is real, you get there. We're not done yet. We were just scratching the surface. Teamwork makes the dream work."

T47INTERNATIONAL.COM

1 | **Jon Picoult**  
*Founder and principal*  
**WATERMARK CONSULTING**

“Cultivating loyalty is as much about shaping people’s memories as it is about shaping their experiences in the moment. The last thing that happens in an interaction has a disproportionate influence on people’s overall impression and memory of the experience. To end on a high note, conclude calls, meetings, emails, and any other type of interaction with a specific recap of what you’re committing to do.”

*Picoult is the author of From Impressed to Obsessed: 12 Principles for Turning Customers and Employees Into Lifelong Fans.*

1.

2 | **Sandra Oh Lin**  
*Founder and CEO*  
**KIWICO**

“We encourage experimentation, so our people feel like it’s OK to put things out there and not be penalized for what doesn’t work, because we can build upon what they’ve learned.”

*In the decade since Lin founded KiwiCo, the edtech company has raised more than \$11 million in funding.*

2.

3.

3 | **James Eberhard**  
*Founder and CEO*  
**FLUID TRUCK**

“As you grow, processes and systems need to be simple. There will always be temptations to deviate or expand—understand what your limitations are and that you have simple and effective solutions that can be adapted easily.”

*Eberhard founded Denver-based Fluid Truck, a vehicle-sharing service and two-time Inc. 5000 winner, in 2016.*

KIMBERLY WHITE/GETTY IMAGES; COURTESY SUBJECTS



## DEMAND: BRINGING A BUMPER CROP TO MARKET

Generating a lot of buzz? These founders recommend having extra hands waiting in the wings. More demand also requires intimate knowledge of your inventory and supply chain, and necessitates over-communication with vendors, employees, and customers.



1 | **Roy Dekel**  
Co-founder and CEO  
**SETSCHEDULE**

“In a SaaS business like ours, demand often centers on feature requests that are not yet offered. As a team, it’s our responsibility to take our users’ requests, prioritize them on the basis of needs, and add them to our future updates. We see those requests as opportunities for us to get into the heads of our users and truly understand what they need.”

*SetSchedule is a real estate technology provider and a five-time Inc. 5000 honoree.*

2 | **Brooke Riley**  
Founder and CEO  
**RE-FABBED**

“We have really dialed in to the behind-the-scenes of our inventory management. If you do not understand what you have on hand, why you have it, what you have invested in, and what you need to do with it, your sales tactics can’t work properly. Without a full understanding of the entire process, you will





never reach your sales goals and be able to scale them.”

*Riley's Mayfield, Kentucky-based clothing boutique and online store is a 2023 Inc. 5000 honoree.*



3.

**3 | Amy Liu**  
Founder and CEO  
**TOWER 28**

“Demand planning is difficult for any new brand, but layer on Covid and TikTok virality plus longer lead times than ever, and you have a nearly impossible supply chain situation. Plus, our sales tripled year-over-year. So we’ve stocked up on items with the longest lead time and lowest complexity—for us that’s packaging and raw materials—to minimize cost but maximize time to react.”

*Los Angeles-based Tower 28 launched in 2019 and creates clean beauty products.*

**4 | Moira Vetter**  
Founder and CEO  
**MODO MODO AGENCY**

“Our business is about ideas, and so ‘supply’ depends on high-quality people. We do this by being continuous and committed rather than fast. You may not find people fast, but you may have strong, loyal, and qualified team members who have been looking for the right opportunity to shine. Entry level, early career, midcareer, and later career all working together is how you support growth.”

*Atlanta-based Modo Modo Agency, a four-time Inc. 5000 honoree, has provided marketing services since 2007.*

**5 | Yan Gleyzer**  
Founder and CEO  
**VGI BRANDS**

“We have been able to successfully establish a supply chain that can handle fast growth by making sure that we have a strong relationship with our suppliers and manufacturers. We are clear about what we need and when, and we do our best to be flexible about changes in the process. We’ve also invested in state-of-the-art inventory-tracking software and highly talented team members.”

*Five-time Inc. 5000 honoree VGI Brands, which makes alternative pharmaceutical products, is based in Colonial Heights, Virginia.*

4.

5.

ANGELINA MCEWEN (VETTER), COURTESY SUBJECTS



**Inc. 5000**  
COMPANY  
SPOTLIGHTN°549  
2023 Ranking1065%  
3-Year Growth1100+  
Businesses Use  
LinkSquaresHQ  
Boston,  
Mass.

# The Authority on Legal Technology Shares Universal Success Secrets

At LinkSquares—an AI-powered technology company obsessed with making work better for legal teams—innovation, culture, and commitment to customers fuel nonstop progress.



Every business department has access to game-changing technology these days, from CRM platforms for sales teams, to Jira for engineers. But what about legal teams? Where is their tech revolution? That's the question LinkSquares Co-Founder and CEO Vishal Sunak has been asking—and answering—since 2015. LinkSquares, a Boston-based provider of award-winning legal technology and a three-time Inc. 5000 honoree, continually expands its offerings for legal teams by drawing on the latest-and-greatest

artificial intelligence (AI) capabilities, while keeping customer needs front and center.

This year, the company surpassed the 1,000-customer milestone, and launched a new product and vision: the LinkSquares Cloud, a multi-solution platform designed to meet all the needs of a legal team. "The focus of our whole business is to help the legal team elevate their status inside the company," Sunak explains. "We're doing that through data, through reporting, and through more streamlined automation.

↑  
LinkSquares' 2023  
annual customer  
forum, Elevate.

No matter what task your legal team is trying to perform, LinkSquares Cloud is a more efficient, streamlined, awesome way for them to move your business forward faster.”

### **CUSTOMER-LED INNOVATION BRINGS THE CLOUD TO LIFE**

LinkSquares Cloud features the end-to-end contract lifecycle management the company is known for. Additionally, the platform features Prioritize, a new legal project management tool for streamlining collaboration with other departments, open APIs and pre-built integrations so users can collaborate with other business-critical tools and leverage LinkSquares capabilities more widely, and a dashboard that surfaces powerful metrics so legal can demonstrate its impact on the business.

“We believe strongly that the general counsel should be able to buy any sort of software offering in one platform. Our dream is that they will access anything they need—whether that’s better management of outside counsel; management of IP, governance, risk and compliance; or even just managing projects that the legal team has to do in the future—from the LinkSquares product,” Sunak says.

### **A PIONEER IN AI FOR LEGAL TEAMS**

LinkSquares understands that customers want a return on their technology investment quickly. The company prides itself on fast time to value. “Typically, we see success with customers in 30 to 60 days. That’s a huge reason why people continue to add LinkSquares, net new, and also keep renewing with us,” Sunak says. Part of the company’s secret to delivering value fast is AI deployment. “We pioneered artificial intelligence on contracts six years ago in our Analyze product,” he explains. Analyze uses AI to “read” contracts and extract more than 200 pieces of contract metadata in under 20 seconds.

AI innovation is one of the main reasons LinkSquares is on the Inc. 5000, Sunak says. But the company is careful not to deploy technology for technology’s sake. Innovation starts with the customer. In fact, Sunak describes the company as “customer obsessed.” “Our customers have their hands on the steering wheel. We’re in charge of the gas pedal,” he says. “We use AI if it’s appropriate, but we continue to anchor ourselves back to whatever it is that’s dragging our customers down, whatever they need help with.”

### **DELIGHTING CUSTOMERS AND EMPLOYEES ALIKE**

You can’t grow a company without people. From the top-down, the leadership team has built a culture around the tenets of community, taking a team- and customer-first mindset, which improves retention, engagement, and productivity—and ensures employees deliver delightful experiences for customers. Every new hire reflects the company’s value system, which includes, of course, being customer-driven. LinkSquares has earned an Inc. Best Workplace honor, as well as international, national, and local recognition for its strong leadership and culture.

To build relationships across the hybrid team, LinkSquares flies remote employees in for key events, like product and company kick-offs, seasonal gatherings, and its annual user conference, Elevate, which teaches legal teams how to maximize LinkSquares technology. More importantly, Sunak says, it teaches them how to advance their careers and raise their standing within the organization. LinkSquares also uses the event to engage and strengthen customer relationships—and surface feedback to ensure the company is delivering true value to legal teams.

“Our ultimate mission is to help legal show up at the executive level and say, ‘I have data. I know what’s going on. I know how my team is most effective. I know how we’re helping us make money.’” Sunak reiterates. Which may just be LinkSquares’ secret.

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LINKSQUARES.COM

↓  
The LinkSquares executive team



# DEMAND

CONTINUED FROM PAGE 117

**1 | Jill Stelfox**  
CEO and executive chair  
**PANZURA**

“Three words: communication, communication, communication. Even if you’re not operating at 100 percent and you’re still trying to figure things out, you have to communicate. I’ve often found that if you communicate supply issues too late, it seems like you’re justifying, rather than proactively engaging with, the problem.”

*Stelfox’s cloud data management company, based in San Jose, California, is a four-time Inc. 5000 honoree.*

**2 | Donie Yamamoto**  
Founder and CEO  
**VITAL PET LIFE**

“Establishing a successful supply chain for rapid growth is a long-term journey where both partners are transparent about fulfillment capabilities and growth goals, and have an aligned scaling vision.”

*Based in Los Angeles, Vital Pet Life provides pet wellness services and is a three-time Inc. 5000 honoree.*

**3 | Jason Hennessey**  
Founder and CEO  
**HENNESSEY DIGITAL**

“We have designed teams we call fire squads whose sole job is to deal with pressing client needs. These teams keep the pressure of immediate demands off the regular teammates in their departments, so that ongoing client work does not get backed up because of fast growth or unexpected projects.”

*Los Angeles-based Hennessey Digital has been on the Inc. 5000 for the past five years and is an Inc. Best Workplaces honoree.*

# 86%

**OF BUSINESS LEADERS AGREE THEIR COMPANY SHOULD INVEST MORE IN TECHNOLOGY TO IDENTIFY, TRACK, AND MEASURE SUPPLY CHAIN RISK.**

Source: PwC



2.

1.

3.



COURTESY SUBJECTS

**Inc. 5000**  
COMPANY  
SPOTLIGHT**N°3109**  
2023 Ranking**166%**  
3-Year  
Growth**\$170M+**  
2022 Revenue**5x**  
Inc. 5000  
Honoree

# The Auto Transport Leader That's Built on Customer Service

Montway Auto Transport drives healthy growth by focusing on service, technology, and, above all else, people.

**T**he automobile is most people's second-largest expenditure after housing. As such, shipping your car from point A to point B is nerve-racking. You want to feel confident the process will go smoothly. Montway Auto Transport—a leading auto transport company that serves individuals and corporate clients—understands this.

"When you're managing that level of value, that level of an asset, it's how you handle the experience that matters most," says Montway Auto Transport Chairman and CEO Thomas Gartland. A customer-centric philosophy has allowed the company to differentiate itself from competitors, achieve steady growth, and reach two new milestones in 2023: more than 1 million vehicles shipped and five consecutive years on the Inc. 5000 list of America's fastest-growing private companies.

## BUILDING A BRAND ON SERVICE

To deliver exceptional service, you need exceptional people. "It always starts with people," Gartland says. "If you take care of your people, the profits will follow." Montway employs 450 people across the U.S. and Europe. Gartland describes these teams as going above and beyond to make customers happy and solve challenges when they arise. As a result, Montway averages a 4.7/5-star customer rating, based on nearly 100,000 reviews across 21 platforms. Its Net Promoter Score (NPS) is 78.7 on a scale of -100 to +100, an indicator of world-class service for Montway's logistics customers. As the industry average NPS is 38, Gartland says, the company's focus on service stands out.

Repeat customers, referrals, and increased brand awareness all drive organic growth. Acquisitions and partnerships are part of Montway's success story, too. Most recently, the company acquired Auction Direct Transport to strengthen its dealer and auction transportation capabilities. While new growth strategies are on the horizon, Montway will never move forward with a transaction unless the acquisition target shares its obsession with five-star service.



Thomas Gartland, chairman and CEO,  
Montway Auto Transport

## READY FOR WHATEVER IS NEXT

Montway Auto Transport's strong balance sheet allows continuous investments in talent, as well as innovation. The company was first to market with a retail rate calculator and a transportation management system (TMS), Gartland says. "All of this technology is homegrown, developed internally in the U.S. or our European offices," he explains. Wherever the auto transport business is headed next, Montway will be there, in part because it listens to customers and employees and responds in kind. For example, in August 2022, Montway launched an automation portal to improve efficiency and visibility for shippers and carriers as a result of client and partner feedback.

Between its service, technology, strong balance sheet, and, most importantly, people, Gartland believes Montway is on track to achieve its strategic plan for tripling revenue by 2028. "Our business will continue to grow because of the 450 people who want to do the right thing every day. It's that simple," he says. "We just do the right thing for each other and for our customers."

[MONTWAY.COM](https://www.montway.com)

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°2366  
2023 Ranking233%  
3-Year Growth\$2.5M+  
2022 Revenue14  
Employees

# How an Accidental Entrepreneur Built an Inc. 5000 Company

The president and CEO of Impact Marketing + Communications never imagined she'd own one of the fastest-growing private companies in America.

**W**hen Sarah Cook-Raymond's boss asked if she would like to buy his company, she surprised herself by saying, "Yes." A writer by trade, she had been working at Impact Marketing + Communications, a Washington, D.C.-based agency, since 2005. When the company lost its biggest federal contract in 2016, her boss contemplated closing the company altogether. Instead, he asked Cook-Raymond to take over.

"I joke that I'm the accidental entrepreneur," she says. "I never thought that I would be a business owner." At the time her boss approached her, she and her husband were in the process of adopting their first child. "So, it was this big life moment of becoming a first-time entrepreneur and a first-time mom at the same time," she adds.

## TAKING CHANCES

As a new mother, Cook-Raymond says her "why" and "for whom" were crystal-clear. "It was a lot of tireless nights that felt equal parts baby and business development, but I knew failure wasn't an option," she says.

Re-imagining the business meant going full throttle with business development and pushing herself beyond her comfort zone. "When your job entails being behind the scenes and making others look good, it's a different prospect to turn around and market yourself, but that's how you grow," she says. The more people she met, the more often she was invited to "new spaces," approached for new opportunities—and the more she learned.

## THE MULTIDISCIPLINARY ADVANTAGE

As part of her growth strategy, Cook-Raymond forged partnerships with complementary agencies and teamed up to win business together. She also assembled an impressive, multi-disciplinary team so the firm could offer the design services of a creative agency, the strategy of a marketing agency, and the editorial services of a communications shop, as well as complicated research translation and training and technical assistance services that require domain and subject matter expertise. The company's vast



Sarah Cook-Raymond, president and CEO,  
Impact Marketing + Communications

experience in public health supports a range of mission-driven work—including projects on maternal and child health, infectious diseases, substance use disorders, mental health and suicide prevention, and clinical cancer research—that attracts talent. "It feels good that most of the clients we work with are trying to make the world a better place," she explains.

With determination and strategy, Cook-Raymond has shepherded Impact Marketing + Communications from a flailing business to a full-service, integrated marketing and communications firm. Her team has earned seven international creative awards, a Digital Agency Elite award, a PRNews Top Place to Work honor, and, of course, an Inc. 5000 honor.

"I can say this now that I'm on the other side, but losing that big client showed me that sometimes failure—so long as we learn from it—can be a blessing," she says. "It forced our company to diversify and evolve into something even better."

IMPACTMARKETING.COM

1.



1 | **Sarah Williams**

*Founder and CEO*  
**FRAMED!**

“As a new business experiencing fast growth, it’s important to partner with people who already have an established supply chain. It’s much easier to partner with someone who has those relationships than to try to build them yourself during a time of fast growth.”

*Williams’s Wichita Falls, Texas-based e-commerce store and subscription box service is a 2023 Inc. 5000 honoree.*



2 | **Alex Tuck**

*Founder and managing principal*

**TUCK CONSULTING GROUP**

“We have a deep bench of subcontractor consultants whom we call on when the need arises. The key is to have a strong database with key information—in our case, a HubSpot CRM—to be able to quickly survey for talent on the basis of skills, geography, industry experience, etc.”

*TCG, a 2023 Inc. 5000 honoree, is a product consultant for fast-growth companies.*

60%

**OF LEADERS EXPECT THAT GEOPOLITICAL INSTABILITY MAY HAVE A DETRIMENTAL IMPACT ON THEIR SUPPLY CHAINS IN THE NEXT THREE YEARS.**

Source: KPMG



2.





1 | **Jason Paez**  
Co-founder and CEO  
**HVN TRAVEL GROUP**

“In the end, transparency with context creates trust, and trust is absolutely vital when growth exceeds infrastructure in a way that only time and investment can resolve.”

*Founded in 2018, Atlanta-based HVN Travel Group, a home and villa rental platform, made the Inc. 5000 list for the first time this year.*

2 | **Melea McRae**  
Founder and CEO  
**CRUX KC**

“In the past few years, we’ve focused on hiring the right people, creating structure, and developing standardized processes.”

*Kansas City, Missouri-based marketing firm Crux KC is on the Inc. 5000 list for the second year in a row in 2023.*

3 | **Paul L. Gunn Jr.**  
Founder and CEO  
**KUOG CORPORATION**

“Communicating to customers the value they bring and your appreciation of them goes a long way. Leverage both logic and emotion to share your commitment to delivering results, and present a timeline for delivery.”

*Gunn is a logistics, space, and defense expert. He founded Huntsville, Alabama-based logistics firm Kuog Corporation in 2016.*

90%

**OF COMPANIES DON'T LEARN ABOUT DISRUPTIONS TO THEIR SUPPLY CHAIN UNTIL 48 HOURS AFTER THEIR OCCURRENCE.**

Source: Interos

1.



COURTESY SUBJECTS

2.

3.



**Inc. 5000**  
COMPANY  
SPOTLIGHTN°488  
2023 Ranking1199%  
3-Year Growth35  
Employees37  
States

# Technology Fuels Growth for Propane Provider

Tech-enabled propane-distribution platform Tankfarm is changing how consumers buy and use this useful fuel.

**A**fter Tankfarm founder and CEO Andrew Heaney ended a grueling and ultimately unsuccessful congressional campaign in Upstate New York during the 2016 election cycle, he was thinking about his next act. Still bound by a non-compete agreement after selling his heating oil distribution company a few years prior, Heaney looked to the propane industry.

"I call it the working-class hero of the energy business, because it's such a useful fuel and can do everything from heating your home to powering your car," Heaney says. "It's also clean burning and plentiful, so it's sold in every zip code of the U.S. and every country in the world."

Those factors have made the propane industry a \$34 billion business in the U.S. alone. But despite its enormous size, Heaney marveled at how fragmented and old-fashioned the market seemed. "Most of the companies in the propane business seemed to view technology as a line-item cost, not a source of competitive advantage or differentiation. And that was kind of my a-ha moment. If I were going to invest a dollar in this industry, I thought it would make more sense to invest in software than in trucks and tanks," he says.

Heaney's next step was to talk directly to residential propane users. He estimates he held 2,000 conversations and began to hear the same complaints over and over. High prices, excessive fees, penalties for cancellation, and surprisingly, running out of propane. "I decided I would just solve each of these pain points for people, and I'd do it using our own technology platform," he says.

## FRAGMENTATION FUELS INNOVATION

His innovative solution was Tankfarm, a propane-distribution service offering transparent pricing, no fees or contract lock-ins, and a free tank monitor. The monitor helps guarantee that customers will never run out of propane.

To do that, the company partners with "best-of-breed propane-distribution companies," he says. Partners supply trucks, tanks, and propane; Tankfarm provides the technology. "We build technology to make delivering propane much more efficient," says



Heaney. Tankfarm's software monitors customer propane tanks in order to provide fuel delivery before the tank is empty. That efficiency allows the company to offer better pricing to its customers.

## FOCUSED ON CUSTOMER DELIGHT

Launched in 2017, the company's services were an immediate hit. "The minute we came into the market, customers started coming in the door," Heaney says.

Although technology is powering the company's rapid growth, Tankfarm's focus is on "customer delight." Customers expect propane distributors to provide the same level of "Uber-like convenience" that they enjoy in other industries, he says. Providing the means to empower, inform, and manage their propane usage gives customers better control over their propane costs and supply.

Tankfarm is relying on innovation to fuel its growth. Heaney says the company will continue to invest in software, aiming to be a top-10 propane supplier in the next five to seven years.

TANKFARM.IO

**Inc. 5000**  
COMPANY  
SPOTLIGHT**N°405**  
2023 Ranking**1438%**  
3-Year Growth**\$16.7M**  
2022 Revenue**25**  
Employees

# A Growth Odyssey: Navigating Digital's Uncharted Territories

Bridging the gap between traditional digital agencies and brands, Strand delivers customer acquisition and retention beyond big tech companies.

**W**hen Matt Linder, Jocelyn Uhls, and Ethan Wright started working and sharing an office together more than 10 years ago, they knew they wanted to become business partners. If three people can thrive working in an 8-by-8 office together, they reasoned, there's a good chance they can build a successful company together, too.

The trio went on to create Strand Marketing in 2019. Each had a specific area of expertise and brought different perspectives to their firm. Linder specializes in media strategy, Uhls in customer experience, and Wright in marketing operations.

Relationships brought them together to start Strand, and relationships have been essential to growing their company. "Relationships and high-quality work are paramount for us," says Linder, a managing partner. "We are not a pushy, salesy organization. We let the quality of our work do the talking and sell itself."

## A DIFFERENT DIRECTION

The three founders came from a traditional digital and product marketing background. However, they changed course with Strand, focusing on partnership marketing, the one-on-one connections between brands and customers. "We've found enormous scalability by focusing on everything digital outside of Google, Facebook, and Amazon," Linder says.

Strand offers its expertise and forges alliances to billion-dollar giants and ambitious startups hungry for rapid customer expansion. They guide these enterprises through the booming marketplace, which now comprises more than 35 percent of U.S. digital ad spending.

One of their early clients, a national membership association, wanted new marketing opportunities. Strand helped them not only vastly grow their digital membership base but also found new ways to show that base the value and benefits of membership. Ultimately, their work also improved customer retention. Strand's expertise in strategy and execution extends their capabilities well beyond a typical agency, Linder says. Strand started with one contract with this association, expanding to seven contracts supporting multiple departments.

## GO AGAINST THE GRAIN

Instead of increasing the quantity of clients, Strand focuses on knowing its clients and growing inside those companies. "We'd rather have five to 10 clients, acting as an extension of their team, knowing what makes them tick, including their business goals and objectives," he says.

The Strand founders did not envision the company growing so quickly, as it now has 25 employees. They may increase the staff to 50, but no higher. "The three of us want to continue our direct involvement in the valuable parts of business. The larger we get, the more disconnected we might be from providing true value," he says.

While the space they share is no longer 8 by 8, Linder, Uhls, and Wright choose to still sit together in one office. They do not have a true CEO, he says, but their team has direction, and in spite of—or because of—their different perspectives, they make it work. "It works because we have a lot of respect for each other," he says.

STRANDMC.COM



→ Strand Marketing co-owners (left to right) Matt Linder, Jocelyn Uhls, and Ethan Wright say their friendship led to their success.

**Inc.5000**  
COMPANY  
SPOTLIGHTN°229  
2023 Ranking2441%  
3-Year Growth4.9/5  
Google Rating97  
Employees

# A Vision to Modernize Insurance

Orion180 uses technology to streamline the insurance process for retail brokers and customers.

**T**he Orion180 team was always confident they were onto something big. This belief was confirmed at a major insurance industry conference in 2022 when hundreds of attendees took the time to stop by the booth to tell employees how much they loved the company's system.

Orion180 had done something few other companies had—made the process of quoting, binding (meaning selling), and managing customer insurance policies fast and simple. As a result, retail brokers were making more money by leveraging real-time business intelligence, while providing unparalleled customer support. Orion180's policy management platform MY180 made it possible.

"Technology has been lagging in the business-to-business (B2B) insurance space forever," says Kenneth Gregg, founder and CEO of insurance carrier Orion180. He would know, having spent 26 years in the industry, including at some of the largest insurance companies in the world, Allianz and AXA. Those years of experience helped Gregg see the industry's major pain point: technology. In response, he built a proprietary technology platform from scratch to address that bottleneck.

"Technology and people are the focus of our business. When I created the company, my vision was to use technology as the difference-maker to enhance the lives of individuals," Gregg explains. He wanted to make the process of selling and managing insurance policies as easy as possible, intuitive even, for both broker and consumer.

## TIME IS MONEY

Retail brokers make their living by quoting and binding consumer insurance policies. Using MY180, "In as little as four minutes, brokers can quote, bind, and issue an insurance policy," Gregg confirms, "where at other companies, it's going to take multiples of that."

However, a secondary goal for Orion180 was building a tool that would provide better insights. "It provides us all real-time information regarding every aspect of the business."

The positive response to the system was immediate, and at the 12-month mark, the company was cash flow positive. "We've been profitable ever since," Gregg says. Not that it was easy.



Kenneth Gregg, founder and CEO, Orion180

## BOOTSTRAPPED FROM THE BEGINNING

Although Orion180 has achieved exponential growth since its founding in 2018, that progress was achieved "one policy at a time," according to Gregg. The many hurdles the team faced along the way included lack of institutional capital and cancellation of the company's front-end service provider on day one. Gregg's solution was to turn to individual investors, who put up less than \$450,000—just enough to help pay the first year's burn rate.

Less than two years later, the pandemic hit, requiring the company to adapt again. The reinsurance market has become challenging, the cost of capital has risen, and interest rate hikes have chilled the home-buying market, but Orion180 continues to grow at breakneck speed.

That growth has only been possible because of the company's culture, says Gregg, which tries to provide the best experience for its customers and team members.

Clearly, it's working, since Orion180 was named a Top Insurance Employer of the Year for 2023 by Insurance Business America (IBA).

ORION180.COM

## FIXES: PUTTING THE BLOOM BACK ON THE ROSE

CONTINUED FROM PAGE 124

These leaders moved fast and broke things. Their fixes include listening to critics, investing in people, and embracing transparency—cracks and all.



### 1 | **Julissa Prado**

*Founder and CEO*

**RIZOS CURLS**

“People you might rely on for certain day-to-day needs, but do not have a willingness to grow, will ultimately cause stagnation for the brand. The best solution for this is a leader who actively motivates the team, and key hires that foster a culture of growth.”

*A celebrity hairstylist, Prado founded Rizo's Curls hair care in Los Angeles in 2017.*

### 2 | **Ryan Shore**

*Founder and CEO*

**CARBOK CARBON SOLUTIONS**

“You need to listen to your critics, and carefully filter and analyze the validity of their words. This is sort of the opposite of what made a lot of us entrepreneurs—we've learned to shut down the doubters, and we still have to keep doing that. But we have to also listen and try to be technical about what we're hearing, because sometimes those doubters are telling us the warnings that we need to hear.”

*A serial entrepreneur, Shore founded Carbok in Las Vegas last year. His other company, Big Sky Scientific, is a 2023 Inc. 5000 honoree.*



COURTESY SUBJECTS

**3 | Nick Ron**  
*Founder and CEO*  
**HOUSE BUYERS OF AMERICA**

“The key hires that helped us the most during times of growth are the positions that come under the most strain when we are at the peak in our production cycle. Now, we overstaff in those key positions so that we can handle the volume.”

*Ron’s Chantilly, Virginia-based House Buyers of America landed on the Inc. 5000 in 2021.*

**4 | Tigran Sloyan**  
*Co-founder and CEO*  
**CODESIGNAL**

“Human language is naturally prone to distortion, and when you’re scaling fast, it’s like playing a massive game of telephone. The lesson? Simplify your message. Always share ideas verbally, but also write things down and engage team members by asking for feedback.”

*CodeSignal has raised \$88 million to date. Among the technical recruiting platform’s clients are Facebook and Zoom.*





3.

**1 | Allen Falcon**  
*Co-founder and CEO*  
**CUMULUS GLOBAL**

“We allowed growth to stress the limits of our cash flow and placed ourselves in a position where a minor business or revenue disruption could leave us short of funds. So, to mitigate, we throttled growth and actively tracked and managed cash flow. We secured an SBA 7(a) loan to quickly reduce our payables and provide an operating line of credit in case of emergency.”

*Boston-based Cumulus Global provides cloud computing services and is a two-time Inc. 5000 honoree.*

**2 | Pete Maldonado**  
*Co-founder and CEO*  
**CHOMPS**

“We learned very quickly that periods of extreme growth require a massive investment in inventory. There’s usually a lag between when the inventory is needed and when you can get paid by your customers—and that’s when you’ll need

more flexible borrowing arrangements. Traditional banks typically have strict covenants that you need to be aware of, and if you violate them, the bank can make life very difficult for you. We realized, given the demand projections in our model, that we needed a new lender to give us that flexibility.”

*Chomps, a snack company, is a five-time Inc. 5000 honoree.*

**3 | Lisa Rehurek**  
*Founder and CEO*  
**THE RFP SUCCESS COMPANY**

“We’ve made the mistake of hiring too fast. Now, we use pre-vetted bench contractors that don’t require a commitment. This allows us to have experienced ‘staff’ without onboarding full-time employees.”

*Rehurek’s Tempe, Arizona-based contract bidding firm became an Inc. 5000 honoree this year.*

**31%**

**OF BUSINESS LEADERS SAY THEY INTEND TO RETRAIN EMPLOYEES OCCUPYING ROLES THAT HAVE BECOME OBSOLETE.**

Source: PwC



COURTESY SUBJECTS

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°810  
2023 Ranking729%  
3-Year Growth721  
Members670  
Caregivers

# Outside Perspective Helps Direct Support Agency Thrive

KIDS NW supports families and individuals with intellectual and developmental disabilities, while providing higher wages, training, and career paths to caregivers.

**W**hen Kathy Lehmeyer's friend told her that individuals with intellectual and development disabilities "really need your heart," the comment gave her pause. With a decade of experience in senior housing, Lehmeyer was no stranger to social services and knew the impact of empathy and care. However, the concept became more personal after her nephew was diagnosed with Asperger's Syndrome, and her sister struggled to find proper resources.

Driven by her research, Lehmeyer saw a support gap for these families, so she launched Kids Individual Developmental Services NW (KIDS NW), a direct support agency in Corvallis, Oregon, to help with activities of daily living, behavioral management, transportation coordination, family support, and other services.

What started as a passion project in November 2018 became a full-time commitment, as Lehmeyer left her senior housing position a few months later to dedicate herself to KIDS' success.

The agency's significance to the community, exceeded Lehmeyer's expectations. Five years later, KIDS employs 670 caregivers and 46 internal staff, serving more than 720 members.

## AN OUTSIDE VIEW

Lehmeyer says KIDS is different on purpose. "We came in with expectations for ourselves and what we could produce, and that has challenged the status quo in the community," she says.

For example, clients can access KIDS' behavioral specialists without charge and without wait lists. Families can share their struggles, brainstorm solutions, or get advice from these specialists.

"While we don't do a full behavioral plan at this time, our hope is that if we offer resources and educate parents on how to prevent behaviors, they may not ever need a behavioral plan." KIDS also quickly hires more staff if needed, rather than starting a waitlist for services.

## FOCUS ON EMPLOYEES

Many agencies struggle to find caregivers—KIDS does not, Lehmeyer says. The national turnover rate for caregivers is around 65 percent,

which is difficult for families and employees. Without a stable caregiver, family problems can escalate, sometimes including parental job loss, financial difficulties, marital issues, and child abuse.

But KIDS' caregiver attrition is 5 percent, which Lehmeyer attained by paying caregivers more, providing a career path, and working to ensure caregivers get enough hours. Though KIDS' income is mostly from Medicaid, which pays standardized rates, the organization's overhead is lower than other agencies, as its workforce is home-based. She uses that savings to increase hourly rates, and she provides paid caregiver training in topics like crisis prevention and behavior prevention. After completing certain courses and gaining experience, caregivers can advance to higher-paying roles, such as care coordinators or behavior specialists or move to internal positions within the company.

Lehmeyer also believes strongly in coaching, for herself and her internal staff. "We've seen our team grow leaps and bounds from this," she says. "The honor of making the Inc. 5000 list shows that our model is working."

KIDSNW.ORG



→ With KIDS NW, Kathy Lehmeyer created a new model for supporting families with intellectual and developmental disabilities.

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°242  
2023 Ranking2290%  
3-Year Growth63K  
Orders to Date42  
Employees

HAVERHILL

# Fine Jewelry Dynamamos Master Made To Order and Speed to Market

HAVERHILL designs and produces high-end personalized jewelry, satisfying a growing demand for bespoke accessories delivered fast.

**O**n the heels of a successful career as a product designer for Kate Spade, Mayle, Waterworks, and her own swimwear collection, Haverhill Leach returned to her roots designing jewelry. As a fifth-generation New England jeweler, she had grown up in the industry, but she felt it hadn't grown with the times. Leach applied the lessons she learned working for leading fashion brands and set out to create a direct-to-consumer business with deep personal connections to her customers.

In 2013 Leach took her collection on the road, holding 160 trunk shows. At shows, she began hearing requests for pieces with birthstones, as a way to personalize them. When her husband, management consultant Andrej Strojín, came on board as her business partner and CEO of HAVERHILL, the two set out to introduce a way for shoppers to customize their necklaces, bracelets, rings, and earrings.

## JUST-IN-TIME FOR SPECIAL OCCASIONS

Strojín proceeded to build a web store that offered personalization, as well as bringing "a fresh perspective on the jewelry business."

When the world shut down just before Mother's Day 2020 due to Covid, HAVERHILL had already been warned by its local manufacturers that they might have to close their doors. In preparation, Strojín and Leach purchased stones and metal from them to ensure they would have inventory. Then they invested in production equipment and set up an assembly line in their garage. With help from Leach's parents, the foursome turned orders around in record time, right up to the day before Mother's Day.

Where previous manufacturers had taken seven days to deliver finished pieces, the in-house team was able to finish orders in one to three days. Then they went all-in on paid online ads to drive traffic to the website. It paid off.

"We made more sales in one week before Mother's Day 2020 than the whole previous year," Strojín says.

## SCALING FOR TOMORROW'S JEWELRY CONSUMER

Having mastered the ability to turn personalized pieces around



→ Andrej Strojín, cofounder and CEO (left), and Haverhill Leach, cofounder and creative director, HAVERHILL

in as little as one day, HAVERHILL is now focused on scaling. In 2021, Leach and Strojín opened the company's headquarters in Warren, Rhode Island. The fully integrated studio houses research and development, production, fulfillment, customer experience, and operations. HAVERHILL's team of 42 employees and a flexible cadre of master jewelers manages the product cycle and consumer experience with speed, agility, and a personal touch.

"There are few competitors that can make something that's really high quality, specially made for a customer, and delivered the next day," Strojín explains.

And the world is noticing: HAVERHILL's timeless, made-to-order birthstone bracelets, necklaces, rings, and earrings have been featured in *Vogue*, can be spotted on celebrity fans, and are vouched for by tens of thousands of customers.

"We are all looking for deeper connections, and our collection of personalized jewelry helps you show your love for your most dear, and celebrate their milestones," says Leach.

HAVERHILL.COM

61%

**OF WORKERS SAY THE OPPORTUNITY TO LEARN NEW SKILLS IS A KEY FACTOR THEY CONSIDER WHEN DECIDING WHETHER TO REMAIN IN A ROLE.**

Source: Gallup

**1 | Susan LaMotte**

*Founder and CEO  
EXAQUEO*

“Employment is a relationship. You have to be clear and communicative. Silence is deadly when you’re growing. We created ‘The Weekly Seek’—a nod to our value ‘seek to understand’—to communicate to our team what’s happening and why, along with where we don’t have updates.”

*LaMotte’s Charleston, South Carolina-based employer brand solutions firm has made the Inc. 5000 twice.*



1.

2.

**2 | Kabir Barday**

*Founder, CEO, and chairman  
ONETRUST*

“When you’re growing as fast as we are, you’re a fundamentally different company every six months, which means you should have a much more diverse set of perspectives. So the place I get the best advice is from my own management team. When they are teaching you more every day, and helping you see around the corner, that’s when you know you’ve got the right team.”

*A two-time Inc. 5000 winner, Barday’s Atlanta-based data security firm ranked No. 1 on the 2021 Inc. 5000.*

**3 | Daniel Chait**

*Co-founder and CEO  
GREENHOUSE  
SOFTWARE*

“There was a year when we were hypergrowth, but we didn’t really understand the business. We didn’t know why we

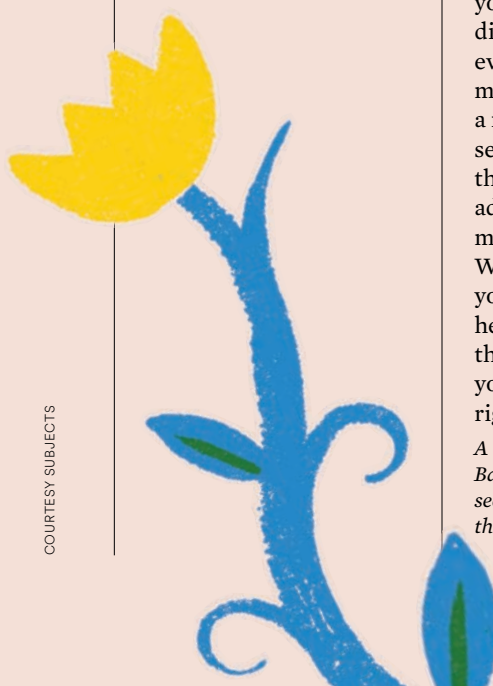
were hypergrowth. And so we started pouring more and more money into growth and not seeing any results. So we had to sort of pause and slow down and pull back on a lot of that and ask ourselves, ‘How are we getting customers? How do we get more? What are the things that work?’ And then we retooled.”

*Chait’s recruiting software platform is a six-time Inc. 5000 honoree.*

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3.



**Inc. 5000**  
COMPANY  
SPOTLIGHTN°4766  
2023 Ranking83%  
3-Year Growth\$25.9M  
2022 Revenue211  
Employees

# A Family that Acts Like a Business From Time to Time

With a steady adherence to its culture and credo, Cogent Analytics has built the relationships that fuel its soaring growth.

**B**y its fifth year of operation, Greensboro, North Carolina, business management consulting firm Cogent Analytics had grown 20-fold, from a staff of six to nearly 120. “Then we ran into the Covid wall, as many businesses did,” says Rob Braiman, senior partner and president of the firm, which is marking its fifth appearance on the Inc. 5000. “We went to a fully remote company for almost a year and had to completely reimagine our business model.”

Caleb Connerty, Cogent Analytics partner and vice president of operations, adds: “Covid really forced us to reflect on what went well and what didn’t and to innovate at the same time.”

Those adjustments helped Cogent Analytics increase its revenue from \$15 million to \$25 million and add nearly 100 employees between 2021 and 2022. The current staff now stands at 211 employees, including representatives in 36 states.

The employees’ embrace of Cogent Analytics’s mission and its ability to excel in the corporate culture the company’s leaders have created are the biggest forces behind the firm’s accelerated growth, Braiman and Connerty say.

## VALUES ALIGNMENT

When Braiman and Connerty drew up the Venn diagram that represented their vision for Cogent Analytics, they decided the company’s motto would be “raise others up and you will rise” and that its single mission to do well by helping their clients first would be driven by six internal values: honor, courage, wisdom, faith, perseverance, and loyalty.

From the beginning, Cogent Analytics has sought out employees whose own values align with the firm’s. Braiman observes that 21st-century workers expect that type of matchup with their employers. “They are looking for that place where they are vested in the mission,” he says.

## FAMILY ENVIRONMENT

Cogent Analytics provides employees with a robust training and continuing education program. Most new hires go through a

two- to six-week training period, depending on their role. That orientation often includes attending lunch-and-learn sessions and partnering with more experienced staffers who show them how to work face-to-face with clients before they go solo.

Cogent Analytics leaders also support their employees’ interests outside of work. A wedding, a new family addition, or the purchase of a home is as much a cause for celebration as the acquisition of a new client. Through the firm’s charitable program, Cogent Cares, employees can raise and direct funds to support the causes they care about. With the company matching whatever employees generate from fundraising projects, the soon-to-be 501(c)(3) non-profit has helped organizations like the American Heart Association, the Make-a-Wish Foundation, and the American Cancer Society.

“Cogent Analytics is a family that acts like a business from time to time,” says Braiman, using his favorite distillation of the workplace environment. “Our superpower—our ability to continue to scale at the rate we’ve been able to scale—is definitely based on people who have embraced the culture.”

COGENTANALYTICS.COM



→ Rob Braiman, principal, managing member, and CEO (seated) and Caleb Connerty, vice president of operations, Cogent Analytics

**Inc.5000**  
COMPANY  
SPOTLIGHT**N°187**  
2023 Ranking**2868%**  
3-Year Growth**\$41M**  
2022 Revenue**125K**  
Subscriptions  
Per Month

  
CYMBIOTIKA

# Feed the Body, Nurture the Community

With a focus on high-quality ingredients and thoroughly trained in-house staff, Cymbiotika creates innovative supplements to bolster health.

The supplement market in 2018 was disappointing. At least, that's what the co-founders of Cymbiotika found. They were seeking products to support their health and didn't want the artificial ingredients or preservatives found in so many. Shahab Elmi and his wife, Durana Elmi, and their colleague Chervin Jafarieh knew they could do better. Together, they created Cymbiotika, a supplement company that combines scientific innovation with traditional Eastern medicine to produce high-quality, plant-based health supplements with no artificial ingredients.

The team found a distinct need in a crowded market. By 2019, Cymbiotika produced its first million-dollar product. Today, the company has 38 supplements and grew to \$41 million in 2022 revenue. Shahab, who is CEO, anticipates that the company's products, including 125,000 monthly subscriptions will generate more than \$100 million in sales this year.

While those figures are impressive, Shahab instead points out the company's core values. "What I'm most proud of isn't the revenue stats. It's the impact we've made in the world and our community," he says. In the past year, the company has helped feed more than 50,000 people and planted 30,000 trees, mostly through employee-led volunteer days. Cymbiotika has also saved more than 10 million fish by using algae-based instead of fish-based DHA.

## SECRET TO SUCCESS

Cymbiotika isn't Shahab's first successful venture. He and Durana, the company's chief operating officer, are serial entrepreneurs with an impressive track record. In less than four years, they grew KNK Group to operate 173 Cricket Wireless stores in six states. They also founded DASH Radio, a digital audio platform, and Day Group, which made customizable phone cases.

From the beginning, Cymbiotika's team were committed to an unwavering commitment to quality—in both ingredients and personnel. To promote and maintain product and service quality, Cymbiotika keeps all functions internal, including tech developers, digital marketers, customer service representatives, and product fulfillment roles, which are often outsourced to save money.

Shahab also believes that by keeping everyone in house,



Shahab Elmi, CEO,  
Cymbiotika

Cymbiotika can better control training and quality. "We never cut corners, and we're steadfast in our refusal to take shortcuts," he says. "We firmly believe in the added value of nurturing an in-house team." The collaborative approach also results in innovative product development and ideas, he says.

## A PLACE PEOPLE LOVE TO WORK

Cymbiotika was ahead of its time when designing offices where people love to come to work. Durana thoughtfully designed the office space to facilitate collaboration, creativity, and innovation. The inviting environment promotes mental health with a soothing meditation room. The company also provides catered meals and monthly on-site car washes for employees. The attention to staff has paid off, with an attrition rate of less than 5 percent.

"Inspiration comes from the greatness of those around you," Shahab says, "and by cultivating an environment where people can show up and thrive, we can continue to help others live healthier, happier lives."

CYMBIOTIKA.COM

# FIXES

CONTINUED FROM PAGE 133

## 1 | **Brian Youngblood**

*President*  
**GEORGETOWN BUILDING SOLUTIONS**

“Get help sooner. Delegate the menial tasks so you can pursue high-level strategy and lead the company.”

*Youngblood, who has more than 20 years of executive leadership experience, helped land Dallas-based Georgetown Building Solutions on the 2022 Inc. 5000.*

## 2 | **Natasha Miller**

*President and CEO*  
**ENTIRE PRODUCTIONS**

“I am now working on the business day-to-day—rather than in it—with strategy, vision, and growth planning.”

*Miller’s San Francisco-based entertainment and production business is a three-time Inc. 5000 honoree.*

## 3 | **Nadya Okamoto**

*Co-founder and CEO*  
**AUGUST**

“Make sure your team knows that you’ll listen to their feedback and act on it as you build together.”

*Author and award-winning entrepreneur Okamoto co-founded New York City-based August, which makes menstrual products, in 2020—while she was still in college.*



LUCY McDONALD (OKAMOTO); COURTESY SUBJECTS

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°1442  
2023 Ranking401%  
3-Year Growth\$10M  
2022 Revenue74  
Employees

# Tech Consultancy's High-Touch Approach Creates Customer Value

Artisan Studios lives by its culture of having fun and exceeding client expectations, confidently sharing the right advice—with empathy.

**A**rtisan is not a word typically associated with technology. It's more common with high-quality, hand-crafted products like bread. Some bakers get the job done but aren't high touch; the same is true with tech. When founding Artisan Studios in 2019, Tim Mitrovich envisioned a full-service tech strategy and solutions company that provided deep expertise and guidance—an “artisanal” consultancy. At its foundation was Mitrovich's quarter century of hard-earned software, technology, and leadership experience.

The Artisan team thrives on solving problems in multiple industries. “We do a lot of product development, identifying antiquated practices and coming up with better ways of working,” says Mitrovich, Artisan's CEO. One solution was a mobile app to simplify a distribution company's process for drivers. Another was developing a portal for the life sciences industry to share and consume research content.

## THE SERVANT LEADERSHIP MODEL

Mitrovich puts culture at the forefront, with a servant leadership philosophy: Each person is more important than a project or the business. “As long as you have that mindset, everything else follows,” he says. That includes acknowledging people have a life outside of work. Mitrovich says he leads by example, as his daughter sometimes comes into his office for a hug during conference calls.

Even with more than 70 employees, Mitrovich likes to stay involved with the interview process, talking briefly with potential hires to ensure they are a culture fit and can carry on an interesting conversation. “If they're missing a hard skill or don't know a programming language, we can work on that,” he says. “If you're not careful about who you bring in, you risk diluting the culture,” he says.

Culture is key because Artisan has been remote from the start. The company holds an annual event, Artisan Connect, where employees enjoy connection, social time, and workshops. He also ensures that project teams travel to client sites to connect with each other and the client.

## RADICAL CANDOR

Mitrovich practices radical candor, encouraging others to do as well. “It's all about delivering messages from a place of empathy—not just saying you care, but demonstrating when you deliver a tough message that you care.”

Sometimes these messages aren't what someone wants to hear, but ultimately clients realize the advice is in their best interest. He took over a project where another consultancy assigned five people. Mitrovich recommended just two from Artisan; he knew that additional staffing would cost the client more without improving results.

Mitrovich believes that “if you take care of your people, they'll take care of you. If you take care of your customers, they'll take care of you. If you do both, you have a business.” His philosophy is working. He set out to solve interesting problems and work with people he genuinely values. “We enjoy what we do and who we do it with, and we enjoy interactions with our customers. Do that, and growth will follow.”

ARTISAN-STUDIOS.COM



→ Tim Mitrovich, CEO, Artisan Studios, addressing the team during Artisan Connect, in Miami, Florida, last April.

**Inc. 5000**  
COMPANY  
SPOTLIGHTN°75  
2023 Ranking6268%  
3-Year Growth200  
EmployeesHQ  
Irvine, Calif.

# Tax Credit Expertise Drives Growth for Accounting Firm

A new focus area and marketing strategy landed Omega Accounting Solutions the No. 75 spot on the Inc. 5000 list, but success was 17 years in the making.

**O**mega Accounting Solutions, an Irvine, California-based accounting, finance, and tax credit company for small and midsize businesses (SMBs), entered 2020 with 80 regional clients and 20 employees. By the end of 2022, the firm served 5,000 clients across the U.S. with a workforce of 200. Primary growth drivers were focusing on pandemic-related tax credits, smart marketing plays, and strong leadership.

Founder and president Jay Woods started the firm in 2007 and was “personally ready” for the growth spurt. “It was never ‘Jay’s Accounting Shop’ for a reason,” he explains. “I didn’t build it around me. This is why it was easy for me to scale so quickly. I didn’t need to be in every conversation. I needed to cast a vision and put the right people in the right seats and let them be successful,” he explains.

## ACCOUNTING AS A TOOL OF EMPOWERMENT

Omega provides fractional accounting and business intelligence services, in addition to tax credit support. Clients appreciate the firm’s straightforward, collaborative approach and the philosophy that accounting is a tool for growth, not just a matter of compliance. “Business owners oftentimes don’t know what they don’t know. We show them what being informed looks like and how that can empower you to make good decisions for your business,” Woods says.

When the government announced the Employee Retention Credit (ERC), a pandemic tax credit for small businesses that retained employees during the Covid crisis, Woods drew on previous experience with Research and Development Tax Credits. He created a simple, systematic process and hired more employees to help SMBs obtain the money they were qualified to receive for the pandemic hardships they faced. Word got out, and Omega earned a steady stream of referrals from CPAs who lacked the expertise or bandwidth to support clients’ tax credit needs. Woods also began investing in search engine marketing, bidding on keywords like “ERC” and regularly ranking in the top three search results.



→ Jay Woods, founder and president, Omega Accounting Solutions

## CREATIVE APPROACHES TO GROWTH

No one withstands rapid growth mistake-free. “I could write a book about all the things I wouldn’t do next time, and there’d be lots of good nuggets of wisdom,” Woods says with a smile. Of the many things he did right, though, is staying courageous and creative. Omega partnered with social media influencers, the media company Barstool, and professional sports teams to build its reputation and grow its reach. It also developed a lending product so small businesses could get their tax credit money faster.

Between their expanded experience and newfound relationships, Woods believes more growth is a given. He also thinks SMB demand for tax credit and government subsidy accounting support should increase as the government rolls out new programs and awareness increases. “If the government has these dollars out there and you’re not taking advantage of them, you’re not giving your business the best chance possible,” Woods explains. “Omega is here to help.”

OMEGA-ACCOUNTING.COM