Inc. 5000

#5000Strong

2020 Inc. 5000 Vision Conference
Virtual Event & Celebration
October 19-23, 2020
had a wild idea, shared that idea with others, took the initial steps, started with nothing, grew that nothing into something, scribbled ideas on napkins, hired fellow believers, shared your vision, built partnerships, made connections, hopped on calls, embraced new technology, connected with customers, supported others, took the very first steps, took the community, took the first steps, started with nothing, stayed late at the office, came in early to do it all over again. Because you always do what it takes... we’d like to say congratulations. Hats off to this year’s Inc. 5000 fastest-growing companies.
When I took the role of Inc. editor-in-chief at the beginning of 2020, I certainly didn't imagine what the Fates would deal us in the months that lay ahead. I suspect you didn't either. But then you likely did not expect much of what you faced between that day you first had the idea for your business and this year, when you achieved the rare distinction of being named to the Inc. 5000. If you're like most of the 5000 Strong, you got to stare down self-doubt, loneliness, exhaustion, the skepticism of others, indifferent vendors, high-demand clients, and cash-flow challenges, all the while carrying a whole lot of concern for your ultimate success and for your team, not to mention the well-being of your family. Not exactly a 9-to-5 job, huh? And yet, here you are. Strong indeed.

In a more normal year, I'd get to shake your hand and offer congratulations, in person, at the Inc. 5000 Conference & Gala. That's a privilege the Fates have deferred, of course. But one privilege that I—and all the Inc. editors—still have is being able to highlight your success. You, after all, are why we tell the stories we do—in Inc. magazine and on Inc.com, and, of course, in this Inc. 5000 Yearbook. Likewise, it's why we see it as our mission to provide you with the very best information and advice we can source. You'll find both in this yearbook, in the form of profiles of successful companies like Kabir Barday's OneTrust (page 8), and the wisdom of successful people like General Stanley McChrystal (page 14), and all the many stories in between. I hope you enjoy what follows. I hope you can take a moment to celebrate. I think you can, you know, let your guard down and relax to pat yourself on the back for a happy minute. Sure, next year and those damn Fates may bring new challenges, but I can't imagine anyone better equipped than the 5000 Strong to beat them back—and win again.
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For more information on company spotlights and other advertising opportunities, contact Pete Franco: pfranco@inc.com
they are leaders

WASHINGTON POSTED A WORK-FROM-HOME POLICY FOR MANY. AFTER THINGS SETTLE TO NORMAL, FOR THE INC. 5000, THEY:

- Will change most staff to work onsite.
- Will match to a mostly virtual model.
- Will slowly increase employee ability to work from home.
- Will need what processes allow employees to work from home.

ACTIVELY MENTOR TEAM MEMBERS

- 59% Indentify recommend candidate to mentor.
- 41% Indentify recommend candidate to mentor.

Cite difficulty finding and retaining good staff as a top obstacle to growth.

Intend to take advantage of high unemployment rates to load up on talent.

59% of Inc. 5000 hired new employees.

they are survivors

Applied for government assistance, virtually all of it through the PPP.

they are builders

VC funding isn’t rare just because it’s tough to land. 41% have turned it down.

COMPANIES STRUGGLE WITH:

- Applicants who decline offers.
- Applicants who don’t fit the culture.
- Applicants with insufficient experience.
- Not enough job applicants.

they are leaders

INC. 5000

2020 YEARBOOK

88%

17%

87%

17% OF CAPITAL RAISES WERE AFFECTED JUST 17% OF

43% of Inc. 5000 used government assistance.

42% of Inc. 5000 are builders.

12% of Inc. 5000 are survivors.

Who Are the Inc. 5000?

41% of Inc. 5000 are leaders.

34% of Inc. 5000 are builders.

33% of Inc. 5000 are survivors.

COMPANIES PREFER ORGANIC GROWTH, CHRISTIAN INVESTORS THEY’VE FONDED IN THE PAST.

IN RESPONSE TO THE PANDEMIC AND RECESSION:

- Reduced head count.
- Cut expenses unrelated to salaries or hours.
- Delayed or reduced executive pay.
- Reduced employee hours or benefits.

- 32% will greatly increase employees’ ability to work from home.
- 17% will somewhat increase employees’ ability to work from home.
- 17% will switch to a wholly virtual model.
- 8% will change nothing—most staff will continue to work onsite.
- 76% will change most staff to work onsite.
- 23% will match to a mostly virtual model.
- 10% will slowly increase employee ability to work from home.
- 9% will need what processes allow employees to work from home.
- 4% will need what processes allow employees to work from home.

INC. 5000?
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** STARTING AT $34,495**

Mercedes-Benz Vans

**360 SOLUTIONS**
Chuck McDowell had an “aha” moment when trying to make amends to his timeshare sales clients in 2009. He called his previous customers, telling them he didn’t realize that his sales tactics used to sell them timeshares were deceptive and gave them advice on how to cancel their purchases. One customer told another, and soon timeshare purchasers were begging McDowell to help them too. “That’s when I knew I had a business,” he says.

Since McDowell founded Wesley Financial Group, LLC in 2011, the CEO and his company successfully helped reverse more than 15,000 timeshare purchases. The firm doesn’t accept clients who just want out of their purchase. Instead, they focus on people who feel they were misled during the sales process. Employees screen and vet prospective customers’ stories. “We know what each location says to sell their product,” and Wesley Financial Group employees track what the sales reps say, looking for patterns, he says.

A HAPPY ACCIDENT

Early in his career, McDowell owned an insurance and mortgage business. After a two-year hiatus from work following the unexpected death of his wife, he began a career selling timeshares to support himself and his two young sons. Less than a year in, though, he was disillusioned with the sales practices, resigning without having another job lined up. What began as McDowell calling former customers to give advice on getting out of their timeshares, turned into his next business. His former employer sued him, alleging that he had shared trade secrets. The lawsuit was resolved in his favor, and his business continued.

Wesley Financial Group takes its name and philosophy from Methodist founder and minister John Wesley, who urged followers to do all the good they can. “When our clients have gone through our process at Wesley Financial Group and we’ve cancelled their timeshare, if that client says they got great customer service, then our business can’t fail,” he says. One client was so happy with her results that she asked to work for the company, spreading their message and supporting clients who feel embarrassed about their timeshare situation.

There’s no shortage of potential customers. With an estimated nearly 10 million timeshare owners in the U.S., McDowell believes that roughly 8 percent have been sold timeshares with inaccurate information. Building off advice from marketing expert Jay Abraham, Wesley Financial Group tripled their Facebook ad spend, and ran TV and radio advertisements. “He convinced me to build a brand, not simply market a service,” McDowell says.

BUCKING THE PANDEMIC TRENDS

During the pandemic, companies in the travel realm are getting pummeled, but Wesley Financial Group is growing, increasing staff this year from 330 to 383. “On March 10, I told employees in our Tennessee office, ‘you’ll see companies cut marketing expenses and start laying people off.’” Wesley Financial Group did the opposite. They added $100,000 a week to their marketing budget and began a hiring spree.

While this was not what McDowell envisioned as a career, it’s rewarding. “I would prefer to not be in the timeshare cancellation business. It’s not fun. I’m at war with massive multi-billion-dollar companies,” he says. “But I’m a businessman who also has the need to help people.”

WESLEYFINANCIALGROUP.COM
Cookie Monster

Kabir Barday, founder of OneTrust, is a first-generation American entrepreneur—and was early to realize that online privacy laws are creating a massive new market.
—By Tom Foster

from the September 2020 issue

The cost of noncompliance is increasing dramatically.
That’s why OneTrust is the solution for nearly half of the Fortune 500. The company has some 6,000 clients—including Aetna, Oracle, Raytheon, Bertelsmann, and Maersk—spanning virtually every industry in the world and every size business.

There may be several tech companies out there that generate more headlines than OneTrust. But in pure business terms, there’s nothing sexier than quietly amassing control of a deep niche that just keeps getting deeper.

Barday’s parents, Indian immigrants, landed in Atlanta in 1983 with a vision of achieving the classic American dream—“You can do anything,” Kabir says. His dad was a software developer who enrolled Kabir, when he was 10, in community-college computer classes. After the elder Barday quit his software job and turned to entrepreneurship—he opened several gas stations and restaurants—he helped his son start a small web-development company. It was a tidy little profit center that certainly beat mowing lawns. “I would go to all the small businesses in my area and build them websites for $5, $7,000 a pop,” Kabir remembers.

Barday’s parents always taught him to dream big. When he joined the Boy Scouts, they urged him to earn the top rank, Eagle Scout. “You don’t do anything unless you’re going to be committed to being the best at it,” he recalls their telling him.

After attending Georgia Tech, Barday landed a job at a fast-growing Atlanta company called AirWatch, which helped companies secure their employees’ mobile devices. It was 2010. The mobile-computing revolution was taking over, and BYOD—bring your own device—was a trend that employers were having to reckon with.

Throughout much of the aughts, corporate IT departments owned and controlled the mobile phones that they doled out to employees. But once ownership costs fell and networks improved, people began carrying their own powerful pocket computers—and they needed constant work connectivity. In 2012, AirWatch landed at No. 467 on the Inc. 500.

Barday was moving up quickly too, working closely with some of the firm’s big, multinational clients to implement the software. By 2014, when AirWatch was acquired by VMware for more than $1.5 billion, Barday was conceiving and directing the launch of new products.

Like his father, he felt that he’d paid his corporate dues and that his next move would be entrepreneurial. He even thought about partnering with his dad in a pizza franchise, but figured: “Anyone out of college can go open a franchise. What am I uniquely positioned for?”

Around the same time, Barday had begun to think about the flip side of AirWatch’s technology, which was protecting the privacy of employees’ data on their personal devices. As he explains it, the company’s software would monitor what apps a person installed on their devices to snag any potential security threats that could expose the company’s data. But that monitoring itself could be a problem, because a person’s choice in apps could reveal sensitive information, such as religion, sexual orientation, and financial standing. Who wants the boss to know what hookup app or addiction-counseling service they use?

Barday persuaded his bosses to let him lead the development of “a set of features and capabilities that put privacy for employees first,” he says. The result, which won an award from the International Association of Privacy Professionals (IAPP), landed Barday at a large privacy-industry conference, where he spotted the opportunity for OneTrust.

As he sat in on panel after panel about privacy management, he realized the industry was ill-prepared for the GDPR.

Despite the tech industry’s aggressive lobbying to prevent laws like the GDPR, Barday became convinced that they were inevitable—and that businesses everywhere didn’t have the technology to deliver the protections that would be needed. “It was a growth industry like I’ve never seen,” he says. “And I saw a mismatch. A lot of the solution providers were legal–consulting-type companies, but if you read the draft of the GDPR, it was going to require fundamental architecture changes—not just policy changes—to allow for data to be deleted or masked.”

By the time Barday was ready to formally launch OneTrust about two years later, his lump-sum period from the VMware acquisition had expired, so he brought on most of AirWatch’s former executive team, including the founders. Barday had self-funded the company’s incubation period, but now the AirWatch founders—Alan Dabbiere and John Marshall, who had built another billion-dollar company before AirWatch and led it to an IPO—were able to fund an aggressive public launch with essentially a line of credit. “I had business partners who understood enterprise software, trusted me, and knew that to win a market you’ve got to go big,” says Barday.

With many other states and countries now at various stages of developing their own consumer-privacy regulations, the patchwork of requirements companies must adhere to is growing ever more intricate, and the need for an agile technology is growing ever greater.

The research firm Gartner predicts that by...
2023, 65 percent of the world’s population will be subject to national privacy laws, compared with 10 percent today. Which translates to an expanding industry. Market Study Report estimates the privacy-management-software market will exceed $3 billion a year by 2025.

Today, Barday’s startup has more than 100 technology patents and powers more cookie banners (and the privacy operations behind them) than any other company on the planet. Competitors include legacy companies in the space that have adapted, such as TrustArc; venture-backed startups including London-based Privitar; and established global giants like SAP and IBM.

But OneTrust has so far maintained its lead. That’s why when you tell a website not to sell your information, or ask to see your personal data or delete it, there’s a good chance it’s OneTrust’s technology that will follow through. And if you’re an executive wondering whether your company has privacy-law compliance issues, OneTrust’s technology will tell you.

“We’re like a giant magnet floating over the haystack, sucking out all the needles to find all the hidden issues,” Barday explains. “Look, you have people who have downloaded spreadsheets from the CRM and emailed it around. You have Facebook, Google, and all these different tools your developers use to build their apps—and which can start collecting information from your company before you know it. Maybe you simply hosted an event, and your event team collected dietary restrictions from attendees and now knows who’s kosher versus who’s halal. Now you’re collecting religious information.” You can see how he kills it in a pitch meeting.

OneTrust’s 1,500 employees, spread among offices in eight cities worldwide, have had to push themselves hard to handle large spikes in demand around the introduction of new privacy laws. “With GDPR and CCPA, you had an entire market moving to buy software on a deadline—and we have to deliver, because if we miss an opportunity, it’s over.”

So far, it’s working. After three years of growth funded by the AirWatch founders, OneTrust raised $410 million in venture capital, in two rounds led by Insight Partners over the past year, yielding a valuation of $2.7 billion. And Barday, true to his parents’ American-dream ambition, has only expanded what he envisions for the company, which he describes as “an entire infrastructure that becomes part of the fabric of business”—a Salesforce-like platform for privacy management and consumer trust.

As if that weren’t enough to tackle, OneTrust’s work has only intensified in the past few months as the Covid-19 pandemic has made global business more digital than ever.

Four years of hypergrowth and constant global travel—half of the company’s revenue is international, and Barday has logged more than a million flight miles visiting customers—have taken a personal toll on the founder. “I underestimated what it would do to my stress level and health,” he says, declining to get specific. “I’ve made irreversible decisions that compromised my health and that I’m going to have to live with for the rest of my life. Was it worth it?”

That’s a question many founders have asked themselves as their companies finally reach cruising altitude, and Barday will have to answer on his own account. But he doesn’t show signs of slowing down yet. And the market has certainly spoken.
This Boutique Firm Helps Clients Mine Their Intellectual Property Gold

Spotting a void in law firms’ traditional approach to patent clients, this legal entrepreneur jumped in to fill it.

The word “can’t” is rarely heard at Caldwell Intellectual Property Law. When technology leaders and startups need to develop IP to accomplish business objectives, they turn to Caldwell as their trusted partner. Caldwell has garnered a reputation as battlefield experts. Team members are encouraged to pursue every possible avenue to achieve the desired outcome. However, founder and managing partner Keegan Caldwell asks that they never use what he calls the “A” word.

“A” signifies “abandonment” of a patent application. The blanket ban on its use reflects Caldwell’s commitment to helping clients maximize IP portfolio value through monetization that delivers measurable ROI. In an industry with an average success rate of 74 percent, Caldwell boasts a 98.6 percent allowance (approval) rate on patent applications for its clients.

FILLING A COLLABORATIVE VACUUM
Caldwell launched the firm in Burlington, Vermont, in 2016, after spotting an unmet need in the marketplace. “I noticed many businesses were not getting the IP advice they really needed,” he says. “IP law firms were insufficiently collaborative. They might get patent allowances for their clients, but that’s just one piece of the puzzle. Patents must be strategic business assets if holders are going to realize a return on their investment.”

Caldwell’s firm takes a collaborative approach with clients, educating them about how their IP fits in with their overall business strategy and helping them tailor and monetize their IP portfolios. Proof of concept came with the very first client, a company looking to develop a patent portfolio that would be sold as part of a larger business deal. Within six months, Caldwell put together a portfolio that helped drive a nine-figure deal for the client.

“That was a big win for us right out of the box,” Caldwell says. “More importantly, it solidified our mindset that we always need to have a targeted value for every patent we procure for a client. There are many paths to monetization—licensing, litigation, asset sales, and more. We educate our clients about them and why it’s important to preserve all options for monetization of their patents down the road.”

WINNING WITH A TEAM-FIRST CULTURE
Over the past four years, Caldwell Intellectual Property Law has grown into a boutique firm with a team of dedicated attorneys, patent agents, technical specialists, and support staff in three U.S. offices. It fosters a team-first culture that reflects the collaborative transparency with clients that underlies its core strategy. Its first international office will open in London next year.

“Winning is what it’s all about—for us and for our clients,” Caldwell says. “We’ve come up with a way to convert innovation to success for our clients, and our approach is clearly working. Really, we are just grateful to get to do what we love.”

CaldwellIP.com
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Repairing America’s Roofs

Smart pivots, a proven track record, and a strong partnership help this commercial roofing and restoration company drive four-digit growth

Roofing runs in the family for Matt Irvin, owner of RestoreMasters Contracting, a national roofing and restoration company. Irvin started roofing with his father and brother when he was 12 years old. He founded RestoreMasters in Florida, in 2006, at age 18. Today, the company grosses more than $100 million—up from $41 million last year—and specializes in emergency response for commercial businesses.

RestoreMasters ranks No. 238 on the Inc. 5000 list. Irvin credits success, including his company’s four-digit growth rate, to several factors, including the company’s longevity, his team’s passion and talent, and a supportive yet competitive culture. Another driver was joining forces with business partner Justin Reichl and deciding, together, to focus on commercial projects.

SMART PIVOTS, STRATEGIC EXPANSION
In 2011, after a big tornado touched down in Tennessee, Irvin drove down to bid on work. He figured he could use his passion and talent to help people who needed it most. But he didn’t win many projects at first, because he didn’t have experience working with insurance companies. He committed to learning that side of the business and to helping people entitled to insurance claims. Once he had this knowledge, he was able to land more projects, and business took off.

RestoreMasters started opening offices across the country, so it could assist even more customers. Meeting Reichl in 2017 ushered in the next phase of growth. At the time, Reichl owned a roof tiling company, and Irvin was helping him with some projects. They worked well together, so when Hurricane Michael hit Florida in 2018, they decided to merge their two teams of 20-plus salespeople and focus on commercial projects. “We had done all these complicated projects. We had taught insurance classes and trained salespeople. We realized we were ready to handle big projects, too,” Irvin says.

PASSION AND A COMPETITIVE SPIRIT
Today, Irvin and Reichl lead more than 120 salespeople across 11 offices. But they aren’t the kind of business owners who sit behind desks. They are out “chasing storms” with the team. Earning a stranger’s trust in restoring their home or business is challenging, but satisfying, Irvin says. It helps that RestoreMasters has a long list of awards and certifications and professional marketing material. “When you see our stuff on the table next to another roofer’s, ours just looks better,” he says.

A competitive spirit also contributes to sales. The whole team meets virtually at least twice a week to share and celebrate deals. “Every time someone does something good, it motivates the rest of our guys. They are thinking, ‘That should have been me.’” The team also shares a commitment to helping others. The company has donated roofs to people in need, and that contributes to employee satisfaction.

Irvin believes RestoreMasters will be one of the country’s top 10 roofing companies within the next five years. He is confident they have the experience to support jobs of all sizes, and he feels fortunate that expanding his business allows them to help more people. Customers can probably sense that Irvin is as passionate today as he was when he first started. “I have loved roofing since I was little,” he explains. “I love this business. Growing it allows me to work with endless amounts of customers who need our help.”

RestoreMastersLLC.com
Engagement for a Complex World

Team of Teams: New Rules of consultancy, McChrystal Group, with his military acumen to building a business in Iraq after 9/11, had orchestrated the as commander of U.S. special operations demand. Since 2011, McChrystal—who, abroad, retired four-star general Stanley intensified its assault at home and

Lead With Purpose
Insight on leadership in good times and bad from Stanley McChrystal, four-star general, former commander of the Joint Special Operations Command, and founder of McChrystal Group.—By Joe Bargmann

from the May/June 2020 issue

As the Covid-19 pandemic intensified its assault at home and abroad, retired four-star general Stanley McChrystal found himself in pressing demand. Since 2011, McChrystal—who, as commander of U.S. special operations in Iraq after 9/11, had orchestrated the capture of Saddam Hussein—has applied his military acumen to building a business consultancy, McChrystal Group, with former Navy SEAL Chris Fussell. The pair codified their leadership insights in a bestselling book, Team of Teams: New Rules of Engagement for a Complex World.

When the country shifted, perhaps too gradually, to war footing against a new and unseen viral enemy, McChrystal emerged as an authority for the authorities, a motivator for the motivators—and wrote an impassioned call to arms for The New York Times. He’s provided advice to executives at companies such as Deutsche Bank and Verizon, and became manager of the Covid-19 response strategy for the city of Boston.

McChrystal also shared with Inc. his wisdom about motivating teams when the world seems on the verge of derailing.

He stresses empathy, authenticity, and leading by example. “Priority one is candor,” McChrystal explains. Challenges during a crisis can shift rapidly and unforeseeably. So, a leader needs latitude to improvise, which requires having the team’s faith. “You need to make a reasoned argument to support what you’re asking your team to do,” McChrystal says. The request can be unconventional, and even out of line with company policy, “but it can’t be something they won’t buy into.”

More businesslike than Patton-like, McChrystal defies military stereotypes. As a decorated general, he continued to take the same risks he was asking of his people. “If the personnel in the field think you aren’t willing to undergo the same hardship or danger or sacrifice that they are,” the general says, “you just don’t have a leg to stand on.” McChrystal accompanied his troops on an operational raid at least once a week when he was in war zones. “I went because my own psyche said I had to do it. So that they wouldn’t doubt my courage or my commitment.”

After McChrystal assumed leadership of Joint Special Operations Command in 2003, he took up a forward command for five years rather than work from JSOC’s headquarters at Fort Bragg in North Carolina. “This gave me an emotional advantage,” McChrystal says. “If I asked them to do something, they could look at me and say, ‘Well, the boss is legit. He’s with us.’ Leaders in a crisis must also act with integrity, the general says. Hours before McChrystal talked to Inc., he had spoken with a client who runs a major national retail chain selling products considered essential—which meant the client’s stores needed to remain open during the Covid-19 quarantine. This increased the risk that his employees would be exposed to the virus, even as the company board mandated that all executives stay at home.

“How does he handle that? He feels integrity, the general says. Hours before McChrystal reassured the leader that he was doing the right thing, and should not worry about a backlash from others in the field, a novel approach at the time.”

McChrystal also shared with Inc. the benefits accrued both to team members and leaders, McChrystal explains. “Everyone on the teleconference was getting pure information from all over the world—that’s where the real stuff is, out on the edges,” he says. This gave leaders the data they needed to strategize and prioritize, and it gave team members not just the facts, but also the comfort that fellow warfighters were having similar experiences, regardless of location. The videoconference was literally a lifesaver.

Now that Zoom or Webex meetings have become standard ops for companies, McChrystal cautions that a leader’s behavior must still resonate emotionally through these channels. “Whatever you do, it has to be genuine,” he says. “I’ve worked for a few leaders who sort of put on the act, but then pretty soon you realize it’s not true. That’s unsettling to me. I’d feel guilty or uncomfortable if I were to do that. Sometimes I wear my feelings on my sleeve too much, and I admit that. But again, I’ve always found that the people you lead are extraordinarily understanding. But you have to be honest with them.”

McChrystal punctuates the point by quoting a guest speaker at the leadership course he teaches at Yale. “She says, ‘People will forgive you for not being the leader you should be; but they won’t forgive you for not being the leader you claim to be.’”

KeVIN FRAYER / AP; ILLUSTRATION BY DANIEL HERTZBERG

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Employee-Centric Culture Drives Growth

Developing talent and empowering its engaged workforce keeps retention at 95 percent

From its start, Evolutyz Corp’s founding team has been focused on “how we delight our employees,” says Raghavendra Hunasgi, the company’s chief marketing officer. “Our success is defined by the happiness index of our employees across India and the U.S.”

Believing that finding, hiring, and retaining world-class team members was the key to the IT consulting firm’s growth, Evolutyz made onboarding top performers a top priority. It’s paid off, as the company has not only been named to Inc. Best Workplaces 2020, but to the Inc. 5000 list of the fastest-growing private companies for the fourth time.

SOLVING ENTERPRISE PROBLEMS

Hiring only the best talent has vaulted Evolutyz to an industry leader position on many fronts. The award-winning IT consulting firm delivers products, platforms, and services to enterprise clients around the world.

Guaranteeing business outcomes, providing a seamless customer experience, actionable insights, and IP-led digital transformation has been the company’s winning formula. Evolutyz’s talent applies its unparalleled knowledge of domains, markets, and technology platforms to achieve or exceed customer goals.

Michelle Kronner, vice president, sales and client services, says, “Client delight is the core operating principle at Evolutyz Corp. We measure our value index by the client services we add and not by the size of revenue. This has helped us gain repeat business from 100 percent of our clients, and I am happy to say that once an Evolutyz client, forever an Evolutyz client.”

At Evolutyz, the goal is to be a client advocate and to ensure its advice is significantly more valuable and more sophisticated than any other vendor in the client’s IT ecosystem.

“Over the course of the last five or six years, we kept raising the bar on delivery,” says Srinivas Arasada, chief technology adviser, “developing innovative solutions to optimize customer results.”

“We are pioneering in quality engineering and deep tech. Being on the client side for over 22 years, I understand all the pain points an enterprise goes through. We are building a delivery model to create ‘WOW’ experiences,” says Peter Jin, chief operating officer.

FOSTERING A CULTURE OF INNOVATION

Evolutyz understands how critical creative problem solving and innovation are to its customers, and it works hard to develop the employees’ skills using a framework of growth, innovation, transformation, and acceleration.

To help team members grow, Evolutyz invests in technical upskilling, to support the professional and personal growth of each contributor. Industry experts are frequently brought on-site to offer specialized training. The company provides opportunities for continuous education, to support ongoing innovation and transformation. And a monthly reward program gives every team the opportunity to receive financial bonuses for superior performance.

After identifying top talent, Evolutyz works hard to hold onto employees. Its employee turnover is among the lowest in the industry.

“We try to emulate what larger companies do for their employees,” Arasada says. “That includes setting up an on-site gym for workouts during the day, on-site massage appointments, and a wellness program that reimburses employees for gym fees and distributes fitness trackers for enhanced health. Financial perks include paid time off for community service or volunteer work, short-term, interest-free loans, tuition reimbursement, and a 401(K).”

Forging connections between team members is another goal at Evolutyz, both to create a family atmosphere and to build bonds that make work more meaningful. Activities such as quarterly team outings, monthly happy hours, and bring your family or pets to work, encourage employees to socialize and get to know each other.

ETHICS AT THE CORE

Along with a focus on employee development and continuous upskilling is a strong emphasis on ethical decision making. "Making choices that are in the best interests of customers and employees is much more important than profit, Hunasgi will tell you. And Evolutyz has numerous stories about engagements where the team was willing to lose money to ensure that its customer obtained the best results possible.

For example, Evolutyz was hired to complete a small piece of IT work on a project with a major airline. Recognizing that doing a little more than they had been asked to do would deliver 10 times the results for the customer, “we went overboard and delivered much more than what the customer hired us for,” says Arasada. They felt it was the right thing to do.

“The executive team was so impressed with the work that we were made a preferred technology partner,” Arasada says. Since then, Evolutyz has been given significantly more work.

Going above and beyond the official engagement is a hallmark of Evolutyz’s culture, which has only been possible because of Evolutyz’s skilled employees. Finding, hiring, and retaining “A players” is what has propelled the company to the head of the pack.

EVOLUTYZ.COM

2020 Ranking
4232

$11.3 million
2019 Revenue

80%
3-Year Growth

325 Employees

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Build a Brand With Purpose

Learn how great leaders respond to crisis, how Inc’s Best Workplaces are thriving without a “place,” and how you can make your brand not just good, but essential.

—By Leigh Buchanan

from the May/June 2020 issue

Question: Why did you become an entrepreneur?
Answer: I wanted to gain control over my life. [Cue the laugh track.]

Starting a business is an act of agency. Growing one, founders soon learn, is like juggling wet soap. (Antibacterial, of course.) If any CEOs still believed that their titles gave them power over events, the past few months have disabused them. Orders canceled. Offices emptied. Employees (friends) laid off.

Yet from chaos emerges clarity. When the Covid-19 crisis abates, business leaders at companies small and large, local and national, will have to grapple with tough questions about remote work and diversified supply chains, and whether to travel in the newly deep talent pool or keep their organizational BMIs as low as possible. But they will see those issues—and many others—with the fresh if pained perspective of survivors. The “why” of business, which in the daily grind we tend to forget, will stand out in greater relief. And all those dichotomies—Do we value employees more or customers? Innovation or execution? Principles or profit?—will lapse into irrelevance. Great companies value all those things. Always.

This issue of Inc. is dedicated to great companies and the people who run them. Despite all the verbiage spilled about leadership, only two things really matter: that it be effective and that it be kind. True leaders attract talented, dedicated people. They provide workplaces—physical or virtual—where those people feel stimulated, safe, rewarded. And they inspire them with purpose: that foundational “why” where every decision, no matter who makes it, begins and ends.

In the following pages you will find practical advice for managing teams, motivating performance, and leading with integrity—in good times and bad. You will also find, we hope, a reminder of why doing those things mattered in the first place, and why it matters now more than ever. Most likely, you are still fighting fires. But think about how, when it is time, you will light fires instead.

The new normal can be better than the old normal. Start here.
Almost half grew up around family businesses; 35 percent are the first entrepreneurs in their families. Despite the popular conception of 20-something tech moguls, these founders are at least flirting with middle age: Seventy-two percent are between 35 and 54. That partly explains their success: They've had time to develop networks and expertise (54 percent started their business after working in the same industry). You think it's hard running one company? Imagine running two or more. Fifty-eight percent have started earlier businesses, and almost half of those are still running at least one in addition to their Inc. 5000 achiever.

Politically, they lean right (44 percent) more than left (21 percent); and more than a quarter are proud independents. As the election approaches, their front-burner issues are rebuilding the economy (65 percent) and taxes (41 percent), which edges out ending the pandemic by 3 percent. (At least that was the case in late June, before the hot spots started multiplying.)
A Digital Marketing Pioneer Sees His Vision Come to Life

At the speed of bits and bytes, this agency owner saw the digital world coming 25 years ago

In one of his first careers, Andrew Eklund, founder and CEO of digital agency Cicerón, spent time in the Bay area in the early 1990s. While there, he had a vision of advertising and marketing’s future. And it was zeros and ones.

“It struck me that digital was the future for two reasons,” he recalls. One was accessibility. Digital technology would democratize marketing, creating a level playing field where any brand—even one that couldn’t afford traditional broadcast and print advertising—could now compete. The other was accountability. For the first time in the history of advertising, everything would be measurable.

Eklund jumped at the opportunity to create one of the first, pure digital agencies in the country, and to do it in his native Minneapolis, which at the time was the fifth-largest U.S. ad market. There was prescience, too, in the name he chose for the firm. “Cicerone” is an old term for a trusted and masterful guide. Eklund foresaw an agency that would function as a guide for clients on their journey through a rapidly changing digital world.

VIGILANCE AND AGILITY ARE CRITICAL

Accessibility and accountability still underpin digital advertising and marketing, but little else has remained static. Cicerón has been on the cutting edge as the industry evolved from websites and e-commerce to SEO and social marketing. Today, digital advertising, in particular, is a frenetic, hyper-personalized environment that demands constant monitoring and the agility to respond to changing conditions in near real time. Cicerón has thrived throughout that evolution because of its focus on aligning marketing with measurable business outcomes. “We are not afraid of financial spreadsheets,” Eklund says. “We want to get all the way into our clients’ business and understand what constitutes success in their eyes.”

Achieving that requires the ability to optimize campaigns quickly across all advertising channels—both traditional ones like TV and print and the proliferating array of new digital media. Cicerón shines here. It has extensive resources and deep expertise in data, media, and creative—the three-legged stool of modern marketing—all under one roof.

MARKETING BUDGETS MUST BE FLUID

“We know the consumer, sometimes better and oftentimes earlier, than our clients do,” Eklund says. “We’re very close to how they’re living their lives, what new technologies they’re using, what new social networks they’re embracing. With our data, media, and creative capabilities, we can quickly and efficiently reallocate marketing spend where it has the greatest impact.”

The COVID-19 pandemic has spotlighted the importance of Cicerón’s capabilities. The agency has helped clients in industries like retail and entertainment transition to entirely new business models very quickly as consumer lifestyles have undergone radical change. “In a very short period of time, we’ve seen digital’s penetration reach levels we believe it should have reached five or 10 years ago,” Eklund says. “I think the next three to five years are going to be Cicerón’s salad days.”

CICERON.COM
Building the Right Partnerships
Helping high-net-worth investors grow their wealth their own way

**Sunstone Management** was not the first company founded by John Shen, a serial financial entrepreneur, but it could easily be the most efficient he has built in a short period of time.

The best asset Shen brought to Sunstone in 2015 was a fast-growing network of high-net-worth investors from his other successful business venture, American Lending Center (ALC), a nationally recognized nonbank lending company. Knowing there was an incredible amount of undiscovered investment potential among these clients, Shen seized the opportunity to start another business journey. “Understanding the needs of my clients was the first and most important step,” Shen says. Such attention to client needs is why Sunstone took off so quickly.

**LISTENING TO HIS CLIENTS TO UNDERSTAND THEIR NEEDS**
“Identifying the gap between what the clients want and what is currently being offered gives me an opportunity to create truly advantageous services they love,” Shen says. This idea changed everything.

Every year since its inception, Sunstone has swiftly adapted to the needs of both client and market, whether by forming, refining, or developing new services and products.

Less than five years later, Sunstone qualified for inclusion on the Inc. 500 list of the fastest-growing private companies in America. Following in the footsteps of sister company ALC – a Los Angeles Business Journal “Best Places to Work” – Sunstone made the lists of “Best Places to Work,” “Best Small Companies to Work For,” and “Companies with the Best Benefits.”

**FORGING THE RIGHT PARTNERSHIPS**
As a diversified private capital management and investment firm focusing on U.S.-based small businesses and lower middle markets, Sunstone successfully developed valuable partnerships in the SBA lending industry. The firm has also established its expertise with regards to exclusive nationwide debt and private equity opportunities in lower middle markets.

Many of Sunstone’s clients favor venture capital (VC) investments. In response to his VC investors, Shen structured a strategic partnership with one of the most successful angel investment groups in the U.S. This partnership offered a series of top-line investment opportunities through select private funds specifically designed for Sunstone clients.

“We took a lot of time to figure out exactly what clients wanted, and then we developed the right partnerships producing the products that fit what they required,” Shen explains.

This is great news for small and midsize businesses (SMBs), which frequently lack access to the capital that could increase their growth and success. “With full access to financing, some of them would be on their way to becoming future Fortune 500 companies,” Shen says. His clients aspire to foster that type of business growth.

While Shen’s own expertise includes commercial lending, structural financing, private equity, and venture capital fund management, he credits his team with Sunstone’s considerable success.

“One person can’t build a strong company. You need strong partners. I’ve been very fortunate to have good partners join me through the years and great employees making tremendous contributions,” Shen says.

SUNSTONEINVESTMENT.COM

Sunstone team at the annual corporate banquet
One Company’s Approach to Liberating Greatness

A strengths-based approach to leadership and strategy consulting helps people and teams excel.

When many coaching and consulting firms evaluate a company or project, they start with a gap analysis. They look for what’s broken or what needs fixing, and identify the gap. The telos institute takes a different approach. “We appreciate what’s working and use that as a springboard for forward progress,” says CEO Rick Simmons.

People learn and grow the most during times of trial and tribulation—what cofounders Rick and Amy Simmons refer to as liminal spaces. They use these periods to help clients course correct. “We want to help people leverage liminal spaces—periods of discontinuity that create an openness to change,” Rick says. Sometimes they encourage clients to trigger these periods for their own benefit, not simply waiting for them to naturally occur.

Clients might hire the telos institute to ensure a new C-suite executive’s success, or they might work with a multi-national organization on larger scale initiatives.

FOUNDING PRINCIPLES

Husband-and-wife team Rick and Amy Simmons founded the telos institute in 2006. Before this, Rick was “the deal guy,” helping individuals buy or divest businesses. “I saw a gap in the ability to meaningfully merge elements of strategy, leadership, and change, and doing it in a way that liberates greatness,” he says. Amy's background in training and development led her to a strengths-based approach to transitions. “Rick and I are very different people. Early on, we were able to embrace our differences as strengths,” says Amy, chief experience officer. They encourage the same of team members and clients.

The use of lower case in the telos institute name is deliberate. “For us it is a tangible expression that when we walk in the room with our client, all the creativity, work ethic, and genius required for them to get where they want to go; it’s on that side of the table. Our job is to be a liberating component,” Rick says. The use of “institute” is deliberate as well. While the word can reference creation of a body of knowledge, it’s also a verb. Seeing the insight put to work is the ultimate goal.

DO GOOD WORK

The telos institute’s marketing approach is basic: “Do good work,” Rick says. “It may not sound groundbreaking, but doing good work never goes out of style.” The team uses a project to program to partnership approach, often starting with one project. After the organization or leader trusts the telos institute, they often ask them to create programs, ultimately leading to a retainer relationship and true partnership. “About 85 percent of our clients who have been with us more than five years have a partnership-level relationship,” Rick says.

Even if clients have a quarterly focus, “we adopt the long view, and clients appreciate that,” Amy says.

Every engagement is tailored for the client. While the telos institute has core philosophies and frameworks to address issues, the solutions align with the client’s uniqueness. “We’re not selling off-the-shelf programs,” Rick says.

THETELOSINSTITUTE.COM
A Bold Vision for a Better Health Care System

This fast-growing business is on a mission to transform health care with innovative solutions that improve care and lower costs for patients and providers alike.

The U.S. health care system is broken. SureCo wants to fix it. The Santa Ana, Calif.-based business is a collection of health care and technology companies that promote better health, lower health care costs, and improve quality of care. Its solutions reflect problems SureCo experienced firsthand when it started as a “typical” health care brokerage. “We were the number one agency in California. But, we realized, even if we helped people find a lower cost or better alternative, we would still be advocating the spread of a broken system,” says CEO Matthew Kim.

Instead, SureCo seized a chance to disrupt a business model and drive positive change by developing a more transparent, connected, and customer-centric approach. With products and services that help people and providers, coupled with a purpose-led culture, SureCo fuels jaw-dropping revenue growth, earning the No. 229 spot on the Inc. 5000 list of America’s fastest-growing companies.

THE BENEFITS OF ENGAGED HEALTH CARE

To create a more efficient health care ecosystem, SureCo is working to control every aspect of a customer’s health care journey. It doesn’t just sell plans. It builds them. It doesn’t work only with consumers or just with providers. It serves them both. SureCo’s services include consultants who match consumers with innovative care options: a third-party administrator (TPA) that delivers higher quality health benefits management at lower overall cost; technology solutions that save providers time and money on administrative tasks like medical billing and coding; and a telehealth program that emphasizes the patient experience.

Kim says telehealth programs are particularly valuable during COVID-19. They open up a host of efficiencies and opportunities, especially for people in rural areas who may not have access to a local provider. SureCo’s telehealth services are unique because they are integrated into the entire health care ecosystem. “When you call into some other telehealth systems, it is almost like a cold call. The doctor doesn’t know you, and they have to ask all of these questions,” Kim explains. “That’s not the case with SureCo. Doctors have the medical information they need to provide personalized, engaging experiences. And if someone is trying telemedicine for the first time, the doctor will walk them through the process.

Collectively, SureCo’s solutions pave the way for what the company calls “engaged health care.” In this model, people have access to personal health care data, the same way they do their credit score. “It is much easier, and cheaper, to keep a healthy person healthy than to cure a sick person,” Kim notes. He envisions a future in which insurance companies focus on preventive care by covering services like personal trainers, physical therapists, chiropractors, psychologists, and other proactive and rehabilitative services—tools people can use to improve well-being and avoid or better manage chronic conditions that contribute to the bulk of health care costs, such as diabetes, heart disease, and obesity.

BUILT WITH INTENTION

Reimagining the health care model is one thing; finding the people to execute it is another. Kim credits success to his smart, passionate, and gritty team lead by the purpose of making true change in our broken health care system. Working at SureCo is not just about a paycheck for most. It is about the opportunity to drive positive change. “Everyone has their own health care story. Everyone has that aunt or cousin faced with diabetes, a heart attack, or cancer. And everyone knows it is a broken system,” he explains.

SureCo balances passion and drive with intentional decision making. Without strategy and deliberation, things fall apart, Kim says. “Everything we try to do is with intention. We consider repercussions and take our time, but we also understand that you have to be fast, you have to execute, and you have to trust in the iterative process of innovation.”

The team is aligned in this approach and abides by clear values. Kim believes culture is more than snappy statements framed on the wall. It is code that guides your behavior. In fact, life within the company’s “four walls” reflects the health care system the team is working so hard to create: employees are engaged, high-performing, and “hyper transparent.”

The health care system may be broken, but SureCo is certain it has the model, and the people, to fix it. In doing so, it will change people’s lives, drive efficiencies for providers, and save companies money. It will also usher in the next phase of exponential company growth.
I went outside for the first time in six days,” said Everlywell founder and CEO Julia Cheek, via Zoom from her living room in Austin in late March. “I’ve been working 20 hours a day.” Cheek, 36, was three weeks removed from a decision she’d made for Everlywell to offer tests for Covid-19. Immediately afterward, the company was battered by conflicting and confusing guidance from the federal government, a national economic tailspin, and frantic pleas for help from the public.

Everlywell makes at-home diagnostic tests for common health issues, such as sexually transmitted diseases and vitamin deficiencies. After a health scare opened Cheek’s eyes to the frustrating costs and lack of transparency in lab testing, she left her role as Amazon’s VP of corporate strategy to found Everlywell in 2015. “You know, Julia, this virus in Wuhan, I’ve been watching it, and I believe it could become a global pandemic.”

Not many people were really saying that at that point, especially in the U.S. Americans were when the disease was starting to become a problem in China. Back in the third week of January, our chief medical officer, Frank Ong, and I were flying from Boston to Chicago. He and his wife are both doctors, and he said, “This is terrible for testing—a huge capacity shortfall.” Not because I thought that startups can’t be innovative and respond, but because our size versus the scope of the problem seemed like a David and Goliath situation. Everyone kind of assumed the government and the two dominant lab companies, LabCorp and Quest, had this.

A few days later, on February 29, the FDA issued its emergency use authorization for testing. It suddenly became very clear that the U.S. had not adequately prepared either the public or the private sector for what was going to be needed to respond. The numbers were starkly terrible for testing—a huge capacity shortage. The number of people getting tested in the U.S. was in the hundreds. It was a smart move to pull other labs in. But this testing takes time to validate. The number of people getting tested in the U.S. was in the hundreds.

For the next month, the disease spread around the world, and a level of hysteria set in, but I still didn’t realize we’d be getting involved. At the end of February, I was on a podcast, and the host asked why Everlywell wasn’t offering Covid-19 tests. I said, “We’re a startup. How could we ever get involved in that?” Not because I thought that startups can’t be innovative and respond, but because our size versus the scope of the problem seemed like a David and Goliath situation. Everyone kind of assumed the government and the two dominant lab companies, LabCorp and Quest, had this.

The next day, Friday, March 6, I called our board and asked for approval to give away a million dollars—which makes no sense, because we’re a startup that needs the money. The idea was to create an incentive for smaller labs around the country to focus on this problem. They would apply for development grants from us so they could ramp up test production. The board said, “This is bold leadership. You should do it.”

In about two hours, we created something like an XPrize challenge. We laid out very strict criteria. You have to file and meet all the FDA EUA requirements, you have to be able to process 5,000 samples a day or be able to ramp up to that, and so on. Qualifying labs would get cash grants of $100,000 to $250,000 from us, up to $1 million total. I wrote a Medium post to announce it, and it went up on Sunday.

Everyone kind of assumed the government and the two dominant lab companies had this.

I had no intention of our getting involved in Covid-19 testing. I was following the news to the same extent that I think most Americans were when the disease was starting to become a problem in China. Back in the third week of January, our chief medical officer, Frank Ong, and I were flying from Boston to Chicago. He and his wife are both doctors, and he said, “You know, Julia, this virus in Wuhan, I’ve been watching it, and I believe it could become a global pandemic.”

How I Got Covid-19 Tests to Market in Two Weeks

Everlywell founder Julia Cheek created a lab test game-changer. Then she took on the Covid-19 crisis—and found herself in the eye of a storm. —As told to Tom Foster

INC. 5000
2020 YEARBOOK

continued on page 32

THE RISK
As a venture capital-backed startup, Everlywell has invested heavily in its growth. The company is not currently profitable, but Cheek says it should be within two years. Everlywell has raised over $50 million from investors, most of it before Cheek made the decision to get into Covid-19 testing. That cash made it possible to put up $1 million for the challenge. But, as Cheek made clear, the economic downturn will pose stiff challenges to the company.

Ever since it became clear that the pandemic would create an economic crisis, all of my investors have been saying we need to plan to have no more capital for the next 18 months, and we need to be ready to cut 25 to 50 percent of our planned spending. It’s not about growth right now. It’s about survival.

So we found ourselves having these two very different conversations. “Hey, we have to be planning for doomsday and how we’re going to survive.” And then, “Hey, this is a million dollars in our bank account that we are going to give away!”

So why do it? One reason was that we had a responsibility. A second was that we believe our model—home health testing, telemedicine—has such importance to the future of health care. Being able to show its real public health value during a crisis would be very validating.

Lab testing is not sexy. I often talk about how expensive lab testing is for people—the lack of transparency in lab testing and the lack of pricing transparency is a public health crisis. People don’t always listen. It’s boring. I get it.

This is not how I wanted lab testing to become part of the consumer conversation. But it’s now here in this way. It’s our job to respond.

I think that no matter what happens in the future, there will never be a bigger moment for this company, full stop.
Celebrate Your SUCCESS!

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Tyler Melton was selling a million dollars of roofing jobs each year door-to-door before his employer went out of business in 2015. He took a few weeks off and decided to open his own company, starting from scratch. “I didn’t get a business book. I didn’t buy customers,” says Melton, Proclaim Roofing president and CEO. “I know how to do the hard part—selling and getting the jobs. I figured the rest out,” he says. In early 2016, Melton hit the streets, first in Garland, Texas, which was recovering from a tornado, and then in Plano, where a hail storm caused major roofing damage. In four months, he sold $2.5 million in residential roofing by knocking on doors. “That allowed me to kickstart the company,” he says, and he borrowed $20,000 from his father for initial supplies and labor costs. He hired a few salesmen, closing $4 million in business his first year.

In 2017, the company brought in $15 million, matching or increasing that figure every year since, opening offices throughout Texas and Oklahoma, and adding commercial roofing to the mix. He learned that commercial projects are quite different from residential, in that they can take several years before starting, the financial draws must be regular and scheduled, and expectations should be set for the scope of work and insurance claims process.

LEARNING LESSONS
Proclaim Roofing continues to grow, thanks to marketing and branding. Melton finds success showing photos of completed Proclaim Roofing projects and sharing testimonials on social media and in advertisements. “That’s allowed me to scale and get roofing crews coming to me,” he says.

Even with steady growth and millions in sales each year, Proclaim Roofing’s path hasn’t been smooth. The first year Melton says he had to scramble due to a shortage of roofing crews, and “a lot of jobs went on longer than they should have.” There were leftover nails and clean-up issues, and Melton had to babysit every job. “I was wearing seven hats in the company, including production manager, quality control manager, sales manager, and accountant,” he says.

Some employees stole money from him, and others peeled off to start competing roofing companies. While frustrating, “I focus on the end goal: to be the best I can be,” he says. To push through the difficulties, he credits his competitive sports background as a high school football player and college track athlete. “The athletic part is what really separated me, being able to break through obstacles,” he says.

A CULTURAL DIFFERENCE
For clients, Melton stresses high standards, work quality, and exceeding customer expectations. “The customer service experience means everything.” For his staff, Melton focuses on a positive growth culture with everyone helping each other and continual training opportunities. “It’s not just about roofing but also having a big family you can work with and chase your dreams with,” he says. “I give everyone a clear path to figure out what kind of person they are and to hit their goals.”

PROCLAIMROOF.COM

From Zero to $4 Million in One Year
This roofing entrepreneur believes that, if you can sell, you can run a business
The Agency Driving Sales Through Technology, Transparency, and Trust

What does it take to land on the Inc. 100? For this digital advertising agency, the answer is technology, mindset, and the guts to do things differently.

Most businesses aren’t sure if their advertising is working. For retailers, especially, it is hard to know if online clicks are translating into in-store sales. Eric Grindley, founder and CEO of Esquire Advertising, a digital agency with innovative solutions custom-built for retailers, is determined to change that.

Grindley founded Esquire as a full-service digital agency in 2012. As he leveraged advertising platforms on behalf of his clients, he was struck by the lack of visibility and transparency in the market. He set out to build an alternative. It took years, but when Esquire entered the furniture and mattress space in 2016 with proprietary technology that he wanted every customer, including a growing number of small businesses, to feel like the only one.

The technology is unique. So is Esquire’s mindset. Although it ranks #56 on the Inc. 5000 with a 5,485 percent three-year growth rate, Grindley treats each day like it could be the company’s last. “You have to be constantly fighting and grinding to strive for the next level,” he explains, adding that he wants every customer, including a growing number of small businesses, to feel like the only one. This hustle and service, combined with purposeful innovation, fuel the agency’s explosive growth.

TECH THAT SOLVES REAL PROBLEMS

Esquire uses device targeting and geolocation services to reach a specific audience with personalized ads. The approach ensures retailers are connecting with real consumers who are in-market, rather than bots or fraudsters. Esquire then matches the audience to in-store sales, so retailers, from hair salons to national chains, can tell if their advertising leads to authentic purchases.

Esquire also aggregates mobile device data to glean valuable customer insights. When a store owner has a slow week, they often assume their competitors are doing great, Grindley explains. With Esquire, the owner can log into a self-service platform and see how their store’s foot traffic stacks up against the market.

In 2019, Esquire rolled out a cooperative marketing solution that improves the partnership between manufacturers and retailers. Manufacturers often issue stores a rebate for marketing based on how much product each store has sold. Historically, manufacturers have little visibility into how that budget is spent. Esquire’s platform allows manufacturers and retailers to monitor ad performance, ad spend, and foot traffic and see the actual sales results from each dollar spent on advertising. The offering has been a huge growth driver for Esquire, with some big brands recently signing on to test the program.

A CLIENT-CENTRIC MINDSET

As the client base grows, so, too, does employee headcount. Esquire employs 15 people and plans to hire 50 more in the coming year, including data scientists and account managers. Investing in technology that automates routine tasks frees up account managers’ time so they can focus on delivering exceptional customer service. Grindley says quality of service has been an important differentiator for the agency. Grindley also exercises a healthy dose of paranoia. “I always say, as an entrepreneur, if you are not constantly paranoid that today might be your last day, or that the business you just won might be your last new client, you are not working hard enough,” he explains. This mindset has been critical to the company’s exponential growth.

SMALL BUSINESS PARTNERSHIPS

Today, more than 600 retail stores across the U.S. work with Esquire, including various Ashley Furniture Homestores and many Tempur Sealy International retailers, a company Grindley credits for taking a chance on them early on. But small businesses fuel the bulk of Esquire’s growth. While it may be exciting to get a seat at the table with big brands, Grindley says it is just as satisfying to help a small business grow. In a way, $500 means more to a mom-and-pop shop than a million-dollar investment does to a corporation, because it could be the difference between making a mortgage payment, or not, he explains. So, they treat their clients’ money like it was their own.

Retail is particularly challenging this year. Esquire is offering any retailer that is interested a free COVID retail market analysis. The agency uses its hyper-targeting technology and advanced data analysis to inform stores of what their marketplace looks like, so they can reopen smartly while advertising to the people most likely to visit and purchase. When appropriate, the agency helps clients set up or improve their e-commerce side of business—but this isn’t the answer for everyone.

Many clients are actually seeing record in-store sales, Grindley says. “We’re like a reverse disruptor, in that we’re helping to bring retail back bus and showing retailers they can survive, grow, and even open more stores.” Esquire’s client success leads to more referrals, and Grindley believes they will double—or even triple—revenue next year. The agency will continue to leverage technology to improve solutions and processes, and it may seek outside investment in the future so they can scale faster. Eventually, Grindley may go public or sell. But right now, he is focused on providing the best results and service possible for his clients—a focus that should lead to continued success for Esquire and its partners.
I started to receive hundreds of emails from people begging me for tests. This is in addition to all the emails going to the rest of the team, going to the customer care team. It was wonderful—and heartbreaking—but also frankly overwhelming, because we still had a lot of work to do.

Health care providers and frontline workers were desperately saying, “We can’t get access to testing, and we’re in a highly affected area, and we’re triaging people who are coming in, and I think I have myself, and I’m still working on the frontlines.” An ER doctor on the frontlines in San Francisco had no tests for her patients. A community hospital for the Cherokee Nation had not been allocated any testing and was dealing with community spread. Nursing homes. I’m getting texts from doctors, screenshots of texts from people who know doctors. I’m not a particularly emotional leader. I generally don’t cry a lot. I think I’m pretty calm in a crisis. But for me personally, it’s been a lot to process.

We were marching along with that plan when I started seeing several other private companies announce home tests. I was confused. We have great counsel and great compliance advisers, and we had been using the federal guidelines. But the guidelines were being updated every two to five days—as we’d regroup and review them again. On Wednesday, March 18, President Trump said the administration was looking at “self-swabbing” as a promising development. I finally decided there was too much inconsistency: We had planned for the possibility of rapid testing but never anywhere close to what we actually had. We beat up our partners enough and lowered the cost enough to where they’re not either. Still, I knew we’d get criticized for it.

When Congress passed its coronavirus relief bill, it promised that testing would be free for all Americans. But it didn’t make clear how businesses producing tests would get paid. We believe that testing in this situation should be free, but we can’t do it for free. Was the answer that we just shouldn’t offer the test? That really the solution? Just as I knew we’d get feedback about price, I also knew test accuracy would be a concern. Our partner labs would be testing samples that consumers self-collected. How would those samples compare with samples taken in a clinic? We’d been designing the process to have the lowest false-negative rates possible. We had plans for that.

The third piece of feedback we heard was, “Hey, there’s a scarcity of resources.” What’s your responsibility to allocate to the frontlines? That, coupled with the personal emails I was receiving, led us to decide soon after the launch announcement that we’d allocate a portion of our tests to health care providers.

We launched on Sunday, March 22 at 10 p.m. Two of our eight partner labs were up and running. So we had the capacity to send out 5,000 or 6,000 kits per day. We had, over the weekend, signed five contracts with health care providers. We prioritized as best we could on the basis of the highest need areas. In a day, over 500 organizations submitted requests for over a quarter of a million kits. Once all our labs are set up, we can get to about 200,000 to 250,000 tests per week.

We launched, I was sharing with the team, “You feel a weight of responsibility. I had to say to that request. And not just that one.” I do think this journey has given people at Everlywell a path to feel like they are helping in a time when it often feels hopeless. Does that mean they all want to be working nonzero while they’re homeschooling their children and dealing with family? No, of course not. I have an 8-month-old. My husband has been able to provide child care alongside our nanny. But I miss my son when he wakes up in the morning and when he goes down for bed.

Not that we are heroes in any way. I don’t want to overstate our role in this. The real heroes are the health care workers. We chose, as a company, to do this. I chose to do this. And I’m tremendously proud of the choice. But it’s still very, very hard to process all of this when you’re also burning the candle at both ends and trying to stay sane...
Drug Benefits Data, Uncovered

Harvesting health care data that clients wouldn’t otherwise see or derive benefit from is this tech company’s mission.

Remedy Analytics founder Scott Martin says the prescription benefits delivery system was designed to keep employers in the dark about information that could help them control costs and improve health outcomes.

“Whenever businesses try to hide something or charge more than they otherwise should be able to, that’s when you see the industry make itself overly complex,” says Martin, chairman and CEO of the health technology firm.

Remedy Analytics’ mission is to unlock the mystery of prescription drugs and make the process more transparent. The company’s proprietary data-based medication platform, PharmaLogic®, presents claims information in an in-depth, non-preferential manner. “Our agnostic approach allows the employer to make factual, data-driven decisions, instead of being pressured into ‘solutions’ that serve the seller and not the employer,” Martin says.

Six years after its founding, Remedy Analytics’ 2019 revenue topped $15 million. Its client list includes CBS Viacom, the Cincinnati Reds, and a host of other employers, large and small, public and private.

**USING ‘NO’ AS MOTIVATION**

Martin always believed his vision would turn into a successful business, but he met a brick wall when pitching investors. “I think I went through 11 venture capital firms and was told, ‘bad timing,’ ‘not the right idea,’ ‘the pharmacy benefits industry is too powerful’—endless negatives,” he says. “Luckily, it just motivated me to go all in on my own.”

Martin put the money he had saved from selling two previous businesses into the new venture. He networked his way into a group of five Milwaukee industry experts who had helped build a major PBM and who seemed so in sync with his proposal that he felt sure they were ready to join the Remedy Analytics startup team. They initially turned him down because he didn’t have the technology that they believed was necessary for success. Eventually, Martin was able to regroup and convince the team of his commitment to technology and proved it by hiring the best engineers possible to develop PharmaLogic.

**RECOVERING FROM BLINDSIDE HITS**

Martin sees himself as the quarterback of Remedy Analytics’ core team of pharmacists, clinicians, data scientists, and engineers—keeping everyone advancing toward the vision of delivering a clear, conflict-free drug benefits solution. In that quarterback role, he’s often had to adjust a play call or two in response to what he says are “unforeseen outside forces that can blindside you.”

One of those surprise hits came early on when Martin was forced to make the difficult decision to ask two key executives to leave because of their lack of commitment to the vision. The result was an immediate upturn in morale and productivity that continues to this day.

When COVID-19 came along and forced a shutdown of the company’s Milwaukee headquarters, the team figured out how to become even more productive and collaborative working from home. “I’ve tried to instill the idea with my team that all these challenges that you get hit with, COVID included, you need to find a way to turn them all into positives,” Martin says.
TheraEx Rehab Services launched in 2009 in Bakersfield, California, as a business providing contract rehabilitation therapy at hospitals and skilled nursing facilities. President and CEO Rey Rivera, a licensed occupational therapist, started the company when he was pursuing an MBA from the University of Phoenix. He and his wife, Joan Divinagracia, were initially the only two employees. “She was my secretary, my treasurer, and my banker,” Rivera says.

Later, Rivera’s sister, Sheila Lee, a physical therapist, joined him as a contract health care provider at TheraEx. When she moved to the San Francisco Bay Area, she became the company’s first traveling therapist, taking assignments in her new location that stretched several weeks. Meanwhile, Rivera recruited friends in rehabilitation therapy to work for him in their spare time.

MARKET DICTATES A PIVOT
By the time Rivera relocated to the Bay Area himself a few years later, he was rethinking his decision to concentrate his business solely on rehab contracting and staffing. “We didn’t see any growth there,” he says. “During that time, it was hard for a rehab company to penetrate new markets.” Divinagracia, who had a background in nursing, suggested expanding TheraEx’s services into nursing staffing. Rivera had almost decided to hang up the business altogether after going through a lawsuit to force one of his clients to pay. The company settled the case for about half the money owed, and Rivera used those funds to help revamp TheraEx Rehab Services into a broader enterprise doing business as TheraEx Staffing Services. While Rivera previously contracted with nursing homes to run their entire therapy departments, this time he opted to provide staffing only—a decision he says lowered his financial risk and enabled faster growth. The company has since branched out further to offer staffing of allied health positions such as medical assistant, nursing assistant, licensed vocational/practical nurse, surgical technologist, respiratory therapist, and medical transporter.

PERSISTENCE PAYS OFF
The financial challenges of entrepreneurship—especially getting access to capital—have required the Riveras to exercise patience and persistence as they build their business. The couple drained their savings in the process of getting TheraEx up and running. Reaching more than $3 million in 2019 revenue was a satisfying, if long-awaited, payoff for that sacrifice.

Rivera came to the United States from his native Philippines, settling in Visalia, part of California’s Central Valley, where a shortage of occupational therapists helped him qualify for a visa. Before launching TheraEx, he spent more than 17 years as an occupational therapist and health care executive. Like the expansion of his business, his entry into the profession also involved a pivot: leaving the seminary he attended during his high school years after realizing he wasn’t cut out to be a priest and going to college to earn his bachelor’s degree in occupational therapy.

Rivera’s father, who had his own furniture-making business in the Philippines, is the role model who showed him what it takes to succeed in business. “He always taught me that there’s nothing easy,” Rivera says. “You have to work hard to achieve what you want.”

THERAEXSTAFFING.COM
Steel Building Company Stabilizes Turnover, Increases Sales

Employees who love their work are more productive and make great recruiters

When Jeff Snell and Gordon Harton were looking for a business to buy, it had to meet two criteria: it had to manufacture its own products and have room for improvement. After three years searching, they found Worldwide Steel Buildings. The company started locally in 1983, changing hands several times and pivoting to national sales by the time Snell and Harton bought it in 2016. Though it was running at 100 percent capacity, the facility was run down and had high employee turnover.

So, they asked employees what they needed to improve the product and productivity. The employees weren’t shy, citing concerns like turnover, a leaky roof, bad lighting, and no break room. “They wanted a better place to work,” says Snell, president.

NEW INFRASTRUCTURE, BETTER MORALE

The company closed its doors for a week just to clean and remove trash. Then they began checking items off the employees’ list. They added new LED lighting and repaired the roof, and the crew designed, built, and furnished a 1,500-square-foot break room, used for lunch, breaks, and socializing. Later they expanded by 17,000-square-feet in additional manufacturing space stocked with new equipment. “We made it a shop that employees now take pride in,” Snell says.

The biggest improvement was eliminating the high turnover, Snell says. “You cannot have a well-run company when you have a revolving door of employees.” When they bought the company, they had a permanent “help wanted” sign hanging. Now, new employees come from referrals, and the voluntary turnover rate is zero. “People want to work here, and we hold them to a high standard,” Snell says. Employees have a vested interest in holding their referrals accountable as good co-workers, he adds.

“Once you create that culture, my job as a business leader is pretty simple,” Snell says. The company also empowers employees to make decisions without second-guessing them, as long as they were made with customer satisfaction in mind. The company also offers zero-interest loans to employees for emergency expenses. “All these little things create the culture that’s made us successful,” he says.

BUILD A BETTER WEBSITE AND THE CUSTOMERS WILL COME

As an e-commerce business, the company’s website upgrade made a big difference. They created a 3D design tool, which allows customers to envision what they want. Almost 60 percent of leads now come from that tool, and customer referrals are also a big lead source. Worldwide Steel Buildings doubled its staff to handle sales and manufacturing growth, opening sales offices in Colorado and Kansas.

They directly sell the customized steel buildings to the end users, providing everything but the interior finish. About 90 percent of sales are to individuals, for personal or business use, including homes, “barndominiums,” airplane hangars, garages, and equipment storage. Commercial sales focus on the middle market of light industrial buildings, not large-scale warehouses. “Literally anything the customer can envision, we can design and manufacture,” Snell says.

WORLDWIDESTEELBUILDINGS.COM

Jeff Snell (right) and his partner Gordon Harton
In the agency world, high customer churn is common. Companies often engage vendors on a project basis or a 90-day contract before seeking support from someone else. TLK Fusion, a marketing, advertising, and PR agency based in Valencia, California, is different. Many of their celebrity and small business clients have been with them for three, five, or even seven years.

Founder and CEO Ken Collis launched the business in October 2009 to facilitate licensing and branding endorsements for none other than the Kardashian family. His success working with “reality royalty” attracted other celebrity clients, as well as companies. Today, TLK Fusion is an Inc. 5000-ranking business, with a 211 percent three-year growth rate and more than a decade of experience helping celebs and startups blossom into brands.

Clients appreciate TLK Fusion’s breadth of capabilities. They offer a 360-degree program, “encompassing everything from digital marketing to celebrity and influencer alignment to public relations,” Collis says. The agency also has relationships with major retailers, including Dillard’s, Macy’s, Kohls, and Target, and a track record for getting brands placed in those stores for the first time. For example, they have helped KERACEILL, a skin care line with stem cell technology, improve their branding and break into the retail market to drive impressive sales growth.

With retail business down due to COVID-19, TLK Fusion and its clients have had to double down on digital marketing. While some companies, such as EcoReco Scooters, had already worked with TLK Fusion to build thriving e-commerce businesses, others didn’t even have an online presence when the pandemic hit. These business owners were looking for guidance, but also a confidant. “It is lonely at the top. They want a friend, and we offer that,” Collis explains.

CLOSE-KNIT TEAM
As an entrepreneur himself, Collis relates to his clients’ struggles and triumphs. Overcoming a business challenge, or working with a team to build something successful, “is the biggest adrenaline rush you can have, other than having your children or jumping out of a plane,” he says.

Challenges abound, and it is tempting for entrepreneurs to “hibernate.” But you have to invest in your business and find the partners you need to solve the problems at hand, Collis cautions. TLK Fusion is unique because it doesn’t pass off clients to low-level account people, as sometimes happens at large agencies. Customers always work side-by-side with seasoned professionals. Collis says his 17 employees are stellar—a creative and close-knit group. His wife and two young adult children also work for the company, creating a unique family feel. “We put our employees before everybody, because if our team isn’t happy, no one else will be happy,” he explains.

The agency has plans to grow in both head count and revenue, but not so fast that it hurts. TLK Fusion will maintain their boutique feel and family-like culture—factors that contribute to client retention. They will also stay results focused. “When you help build a brand – whether you are putting them in Macy’s or helping them grow from five figures to seven on a monthly basis – why would they leave you?”

TLKFUSION.COM
Your Team Can Thrive in Crisis

Rak Kumar, the founder and editor-in-chief of Devex, manages in a world where crisis is the status quo. You can too. —By Joe Bargmann

from the May/June 2020 issue

It’s late in the afternoon on March 24, 2020. By this time, Covid-19 has disrupted, oh, just about everything. Raj Kumar and his team are unfazed. They’d been planning for Covid-19 since January—and for pandemics since forever.

“Most people want to say, ‘This crisis, it’s a black swan event,’” says Kumar, who is the founding president and editor-in-chief of Devex, the Bloomberg-ish hub for information on events in developing nations. “In the world of Devex, we did not view it that way. Crisis is the new normal. Disruption is the new normal.”

For 20 years, Kumar and his team of 120 globally positioned employees have been providing on-the-ground reports and risk assessments on famines, floods, pandemics, and every other imaginable calamity. Devex’s audience includes well over a million development managers, aid workers, and global business leaders, who rely on Kumar’s team to run headlong into disaster zones, gather up information, and report it quickly and clearly.

“I try to model authentic optimism,” Kumar says. “But I don’t sugarcoat. In dire situations, you need to find one or two things people can look forward to—a solution, an innovation or technology, something exciting.

Armed with information about the coronavirus since early January, Devex was ready when it exploded worldwide. All employees were required to work remotely and meet via Slack, which, in any case, was already the norm for most Devexers. Kumar also called a global all-hands meeting to test team readiness, and managers recorded each employee’s tasks, from the bottom to the top, to create redundancy for all operations.

“Redundancy seems inefficient on a sunny day, but in a crisis you’re happy you have people who can keep the business running,” Kumar says. Even before the virus hit, a member of each internal team had routinely shared access to all platforms with at least two other co-workers.

“Humanitarian response means going from one crisis to another,” says Kumar, who practices stress-testing as a part of standard operations. “You need to be overprepared.”

The best time to prepare, of course, is before a critical event, when your team is operating as usual. You dismiss long-shot events at your own peril. “Looking at worst-case scenarios makes businesses build in flexibility and options,” he says.

Leaders must also adapt to maintain the team culture in a crisis, as the desire for comfort morphs into an emphasis on safety. If people get ill, do they feel able to get the care they need and prioritize health over work? Faced with a blockage of something team members need, like internet access, are they in a place, mentally and physically, where they can find a workaround? “You have to answer the question, ‘How would you keep people in communication and functioning?’” Kumar says. Frequent check-ins are important.

And, if a crisis persists and grows, likewise, so should a leader’s empathy for the team. “It comes back to ‘authentic and direct,’” Kumar says. “Show that you get the scale of the challenge, and you care, but don’t overpromise.”

In the midst of social upheaval, consistency becomes conspicuous. It demonstrates reliability. “Global health leaders knew this was coming,” Kumar says of the coronavirus, “and there are many more things like it coming, not fewer.”
Cloud-based Compliance Management

Enabling scope-based access, not per-seat licenses, exponentially increases global user base

Global organizations across all industries often require assistance to assure compliance with the complex national, state, and local environmental, health, safety (EHS), and new sustainability regulations and requirements. Today, the role of technology is transforming how that work is done and by whom. Organizations can improve the safety and security of their environments efficiently and effectively.

Gensuite specializes in helping EHS leaders work together. The easy-to-use platform allows everyone within the organization—from operational managers to senior management to line workers and other employees—to collaborate effectively.

“Our mission from the outset was driving safety and environmental process improvements in our customers’ enterprises,” says R. Mukund, CEO and founder of Gensuite.

CONFIGURING BEST-PRACTICE DIGITAL EHS SOLUTIONS

Gensuite began within a global conglomerate, operating as an extension of the internal EHS team responsible for company-wide programs and management systems. The EHS unit collaborated with individual business organizations to identify their unique challenges and needs and then developed solutions to meet each organization’s requirements.

That platform is now fully cloud-based and configured to each subscriber but with a common code base making it easy to adapt and evolve with new technologies. “Every new product, such as our new Pandemic Risk Management suite of solutions, is based on collaboration and responding to specific customer requests and needs,” Mukund says.

Where only major corporations could previously afford robust safety and compliance programs, today, effective, cloud-based digital solutions are available to virtually any company. And because Gensuite licenses its solutions by product and business unit, rather than by individual users, everyone in the organization can become responsible for EHS and sustainability.

“You can’t tell every employee they’re responsible for safety (or any other critical function) and not give them access to the platform that makes it possible,” Mukund says. “Our scope-based access licensing solves that dichotomy and enables enterprise-wide employee engagement.”

Part of the power behind Gensuite’s solution is its solid customer base, which has grown from a core group of charter organizations to nearly 300 companies globally. Customers are so enthusiastic about the platform that they actively promote it, by providing referrals and co-presenting at conferences or on webinars, among other things. They become champions of the solutions.

A CULTURE OF COLLABORATION

“We’re responsible for assisting customers in achieving a better, safer work environment,” Mukund says. Because of that mission, Gensuite’s employees know they’re having an impact within organizations worldwide.

“One of our hallmarks is the speed with which customers can deploy our solution,” Mukund says. While comparable solutions take anywhere from 12 to 24 months to roll out, Gensuite can get its solution up and running within three to six months.

According to Mukund, “Speed is our biggest differentiator, allowing us to start delivering value in just three months.”

“Our other hallmark is the spirit of collaborative innovation,” he says. “What it means to be best practice and state-of-the-art is always changing, which means we’re constantly innovating, too.”

Gensuite.com

R. Mukund, CEO and founder of Gensuite
Building Visions into Reality

This comprehensive real property services company fuels fast growth with passion, values, and a “say yes” approach to serving clients.

By offering distinct, yet complementary, real property services, BHRS Companies creates a solution greater than the sum of its parts. The Jacksonville, Florida-based business provides comprehensive commercial real estate, construction management, and traditional and nontraditional contracting services throughout the Southeast U.S. and, increasingly, nationwide and beyond.

Founder and Managing Director Brandon Hurd believes in doing whatever it takes to make clients visions become reality. Sometimes that means using nontraditional, prefabricated and modular construction techniques for meeting speed-to-market demands. Whether they are helping a retailer expand into new cities or an investor build a new office complex, his team oversees every aspect of a project, from conceptual planning, through execution, and even post-construction maintenance. This client-first mindset shapes the company culture and drives continual expansion and exponential growth.

STARTING OVER, ON FAMILIAR GROUND

People who work in construction joke they must be gluttons for pain. But Hurd says it is rewarding, too. He “grew up swinging a hammer during the summer months,” because his family has been in the industry for 70 years. He “tried to avoid it,” but after a stint in real estate, he found himself on familiar ground—the business development team of a leading construction enterprise. He did well there, but the red tape made it hard to deliver for his clients.

Hurd made “the leap of faith” to start his own business in 2014, figuring his institutional clients would come with him. “I quickly realized they could do business with me while I worked at a large enterprise, but not as a self-employed startup. I liken it to walking off the bridge of an aircraft carrier, but not quite realizing how far down the fall was.”

ORGANIC EXPANSION, AUTHENTIC CULTURE

But Hurd worked his way up. Clients responded to his real estate background, enterprise experience, and family ties. His gift of gab and competitive spirit didn’t hurt either. Year one, BHRS completed three projects. Last year, they did 36, including their first international engagement—a modular construction project. Hurd says the company expands organically, by answering client asks. “I don’t like to say no. If our customers want it, we will give it to them.”

The willingness to do whatever it takes defines BHRS’s company culture. So do four core values—excellence, empowerment, accountability, and collaboration. These pillars guide the team’s decision-making and help them work together to solve complicated challenges. As the company grows, the challenges will only get harder. Hurd knows a strong culture will help solve them. So will their breadth of experience and national network of 790 vendors and contracting partners. With this combination, they can meet almost any client demand.

By now, the team collectively has hundreds of years of experience overseeing billions of dollars in transactions. And yet, turning napkin sketches into buildings never gets old. Hurd forecasts continued growth for all three divisions and more complementary services and products. But it has never been just about the growth. “No matter how challenging it gets, when you drive by a year later and what you built is there, it is inherently satisfying.”

BHRSCOMPANIES.COM
HONOREE SPOTLIGHT ● OWEN JONES

The “Show, Don’t Tell” Brand Agency

Beautiful work and an intentional culture help this integrated brand experience agency fuel continual growth and profitability

**Owen Jones’s growth** is more like a snowball rolling down a steep hill than a rocket ship blasting into space. The Portland, Oregon-based integrated brand experience agency has grown steadily since its launch in 2002, by helping brands with strategy and execution across virtually any project type. Now the snowball is bigger, picking up speed and more snow, explains CEO and Co-Founder Rusty Grim.

From 2016 to 2019, Owen Jones increased revenue by almost threefold and doubled employee head count, landing on the Inc. 5000 list. But Grim cares more about the long view than overnight increases and cares more about creating beautiful work and an intentional culture than watching the company’s margin in small ways.

**AHEAD OF ITS TIME**

When Grim launched Owen Jones with his then partner, Maran Sheils, it was “one of the earliest versions of a brand experience agency on the West Coast,” he explains. They believed, and still do, that brands must consider virtual experiences, such as a company website, and real-world customer interactions when building an identity; and that smart storytelling, or content, is the thread that ties it all together. Grim says they knew nothing about running a business at first, but they always produced quality work. In 2004, their first project for Adobe helped nudge the snowball down the mountain. Clients, projects, and head count grew steadily year after year.

Now Owen Jones has completed roughly 1,500 projects with Adobe. Brands keep coming back for a reason. But Grim believes in showing, not telling. To understand the agency’s strengths, one’s best bet is to peruse its portfolio. Past projects include transforming trees that lined a city street into giant carrots to promote a local network of farmer’s markets; supporting a new sneaker launch for the Jordan brand; designing multiple websites for Nike; and rebuilding a media player for the Adobe website. “We live, die, and succeed by the quality of our portfolio, which is to say the product we deliver to our clients,” Grim says.

**WHAT WOULD OWEN JONES DO?**

They also live, die, and succeed by their values. Owen Jones isn’t named for a real person—he’s a fictional persona the founders cooked up that embodies their approach and ideals. When facing challenges, or opportunities, the team asks themselves, “What would Owen Jones do?”

Jones would express gratitude daily and put intellectual rigor into every problem he solved. He would also use empathy to make every relationship, and project, better and strive to build collaborative partnerships. Grim thinks it’s a mistake to see an agency as a service business: great results are a byproduct of collaboration. He likens their ideal client relationship to two people in a boat, each with an oar. “The wind comes up. The waves get big. It gets really difficult. But instead of freaking out, we look at one another, laugh, and start pulling on the oars again,” he says.

Grim has been in business long enough to know waves and wind always lie ahead. But Owen Jones is built to last and will grow by building on momentum 20 years in the making.

WHOISOWENJONES.COM
What the Founders Project Has Meant to These Mentees

Great advice on handling big brand partnerships, pushy VCs, and chaotic hiring strategies.

from the November 2019 issue

ELIZA BLANK is the founder of hipster-chic houseplant startup the Sill. Her mentor was Tina Sharkey, co-founder of values-driven D2C site Brandless.

I wanted Tina’s advice on strategic partnerships with large retailers. We’ve been getting more inbound interest, and I thought we should go after our dream match. She explained that big-box retailers are becoming more inclined to create their own brands and that it would be better to partner with specialty home-goods retailers like West Elm and Crate & Barrel.

I asked whether I should try to form relationships with those retailers’ executives. She said yes, but added that it’s at least as important to talk to the merchants and the buyers and develop small programs with them that are really big hits. She said if you just go in top-down, there will be less natural support and enthusiasm, which I thought was incredibly wise advice. She challenges me to think bigger in terms of what I’m capable of.
—As told to Leigh Buchanan

SHEENA ALLEN is the founder and CEO of fintech company CapWay. Her mentor was Jennifer Fitzgerald, co-founder and CEO of Policygenius.

Jennifer knows what it’s like to navigate a new space and some of the hiccups there. In particular, I appreciated her advice on how to handle investors who don’t know my business but still want to challenge me on it—investors who goad me into spending our entire meeting teaching them.

The first thing she said was to stand my ground—to know that I know my space and that I know my company—but be mindful of what types of insights I’m giving away. Some VCs will pump you for information to take back to one of their portfolio companies. She encouraged me to trust my gut in those situations—and to politely and professionally end those meetings.
—As told to Maria Aspan

STEPHEN LEASE is a serial entrepreneur whose Goodr sunglasses are in more than 1,500 stores worldwide. His mentor was Morris Miller, CEO of Xenex Disinfection Systems and managing partner at Tectonic Ventures.

One thing I struggled with during our rapid growth at Goodr was finding someone I could trust who knows what I’m going through. Enter Morris Miller.

We officially teamed up for the Founders Project this year, but I’ve been using Morris’s advice since we hit it off at an Inc. event in 2018. Morris comes from a different industry and background, so when I’m stuck in a loop, he advises me from a totally different vantage point.

For example, Morris recommended we use a revenue-per-employee model to gauge if we can afford new staff. It’s made budgeting and hiring easy and actually fun, especially considering we’re hiring 40-plus roles in 2020. Before Morris, we pretty much just licked a finger and stuck it in the wind to gauge hiring. The mentorship has been invaluable.
—As told to James Ledbetter
Mistakes and Reinvention: How One Company Rose from the Ashes

With a top hat and truck, this chimney sweeper went from one-man business to $8.2 million

Few grow up wanting to be a chimney sweep. But in a 1985 college class, Mark Stoner developed a marketing plan for a chimney-sweeping business after reading that they make $55 an hour. “I thought, ‘I can do that.’” And so, he did. With an old truck and a new chimney-sweeping kit and top hat, he started knocking on doors. He ran his business for 17 years, until he fell off a roof and couldn’t walk for several months. Stoner decided to sell his company, figuring a good reputation and long customer list was worth something. “But no one wanted to buy a one-person chimney-sweeping company,” he says.

MISTAKES LEAD TO BUSINESS GROWTH
Stoner read about a successful company with 10 trucks in the same line of business, inspiring him in 2003 to think big. Within a few years, he had 17 employees and $1.1 million in annual revenue. The business crashed in 2008, and he had to lay everyone off. The problem? He ran the business based on his checking account balance. “I like doing blue-collar work and getting dirty. I don’t want to sit in front of a profit-and-loss statement,” he says.

After that, he learned the importance of culture, leadership, and knowing his numbers. The learning process included books on leadership and finance, mentors, and taking accountability. “I had to look in the mirror and say ‘you built the crappiest chimney company in the country, and it’s your fault,’” he says.

He’s now founder and CEO of Ashbusters Chimney Service, with 60 employees and $8.2 million in annual revenue. He hires experts to quantify direct labor costs and every job’s profitability. “When you hire the right people, they don’t cost you money; they make you money,” he says.

OLD CONCEPT, NEW MARKETING
Most people don’t know chimney-sweeping services exist, he says. To spread the word, Stoner ran 15-second commercials during the evening news in Nashville. Problem: houses catch on fire. Solution: chimney cleaning. It worked. A second campaign expanded Ashbusters’ market from two seasons to four. Problem: Rain leaking through the chimney. Solution: Call Ashbusters, not the roofer. “With that marketing twist, we now have a year-round business,” he says.

Stoner credits much of the company’s growth over the past couple of years to company COO Kent Wessley. “Kent has run companies that were much larger than mine, so he could point to and fix areas that I wasn’t even looking at,” he says.

Ashbusters changed its employment ads as well. Repositioning job openings to “paid apprenticeships,” not mentioning chimneys, and highlighting awards like “fourth-best place to work in Nashville,” worked. The apprenticeship pays higher wages and rotates new hires through chimney sweeping; heating, ventilation, air conditioning (HVAC), and gas; masonry; metal fabrication; and installation.

Each morning starts with a team meeting and informal social time. On Motivational Mondays, employees call out others who did something helpful that week, winning prizes and cementing the culture of being a good person to work with. “I’m passionate about being of service, and it’s fun to be an expert in something very few people are expert in,” he says.

ASHBUSTERS.COM
At the height of the Great Recession, entrepreneur John Shen had all of $7 in his bank account and a family of four to feed. Income from his thriving Florida real estate businesses, which had been growing steadily, was suddenly gone. By 2009, Shen had lost his company and struggled with seemingly insurmountable personal debts.

Having faced hard times before, “I knew I had the ability to come back,” Shen says. He grew up in China, attended graduate school in the U.S., then spent eight years as a successful pharmaceutical professional before deciding that starting his own business was his best strategy for prosperity.

SPOTTING OPPORTUNITY
A new entrepreneurial opportunity surfaced that same year, in 2009, when President Barack Obama signed legislation to jumpstart the faltering economy. Shen studied the legislation and found opportunities to help small businesses.

He was already familiar with the federal EB-5 capital program, which was started in 1990 to attract investment in U.S. companies. EB-5 was established to allow up to 10,000 foreign citizens annually to receive a green card and permanent resident status in exchange for an investment of $900,000 in U.S. companies.

Those investment funds help fuel growth in U.S. businesses and create new American jobs. A 2019 report found that EB-5 investment programs, in total, contributed more than $55 billion to the U.S. economy between 2014 and 2015, through more than 75,000 construction jobs.

In July 2009, Shen submitted his first regional center business proposal to the U.S. Citizenship and Immigration Services (USCIS) under Homeland Security. This unique business model injected the EB-5 capital into U.S. small businesses through SBA 504 loans. In April 2010, his proposal was approved.

NAVIGATING IMMIGRATION REGULATIONS
“I saw that EB-5 had great potential for residents of countries like China, which had many wealthy families who were interested in having their children be educated in the U.S.,” Shen explains. However, there were many complicated immigration rules to learn. He became an expert.

To connect high-net-worth Chinese citizens with the opportunity to invest in U.S. businesses, Shen established Regional Centers Holding Group (RCH) in 2012. Since its founding, RCH has grown to include 12 regional centers designated by the USCIS to facilitate EB-5 investments.

“It took three or four years to build the infrastructure, and then the market took off in 2015,” Shen says.

Many of the investments were made through the SBA 504 loan program in the hospitality industry, with new hotel construction, assisted living facilities, medical offices, cinemas, and manufacturing, he says.

RCH was so successful that Shen was named “SBA 504 Lender of the Year” by Coleman Report in 2017.

The market has recently cooled, due to the global pandemic and changing government policies, he says, so RCH pivoted. The company is one of only two nonbanks to provide Paycheck Protection Program (PPP) loans, “which says a lot about our credibility,” Shen says. “We’re changing strategies to continue to serve the U.S. small business community.”
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