

TRUESPACE

BUILDER SUMMIT 2022

WHAT ARE YOU
PACKING FOR THE
LONGER JOURNEY?

///
The A
Team!!

~~BEER
ON TAP!~~

|||||
CLEAR
GOALS
|||||

are pets
allowed?



Trust &
Transparency

DIVERSITY !

Purpose
Driven

how are our
benefits???

communication

clear vision
& values

★ SNACKS

CULTURE

Results

Adaptability

Respect

FLAT TIRE



TURN AROUND!!!



TOO DANGEROUS!



NEW PLAN!





We carefully chose the name of the operating condition – Endurance -- because we knew of its implication to a business builder; a trip to the middle market will not be simple, quick or painless. Creating the capability to lead a team through the never-ending challenges while staying true to the mission, builds businesses of lasting value and relationships that endure the test of time. The only way to do so is to surrender to the things we can't control and pack our bags for an extended journey.

"Don't pray for lighter burdens, but for stronger backs."
— Buddha





Welcome to the 2022 TrueSpace Builder Summit!

In the earth's northern hemisphere, the tilt toward the sun began a couple weeks ago, signaling the arrival of spring on March 20th. During this day known as the Spring Equinox, the sun rises precisely in the east, traverses the sky for 12 hours, and sets precisely in the west for each individual in the northern hemisphere. In balance, we see the long, cold and uncertain winter yielding to spring blossoms and a new beginning.

The intention for the 2022 Builder Summit is to come together as a community of leaders and assess our capability to endure the extended journey as we advance our firms in wildly uncertain times. The pandemic, a restless national workforce and the war in Ukraine all signal a daunting year ahead. Nonetheless, all we need in this tumultuous world is to remain unwaveringly committed to building something intentional and meaningful in spite of obstacles and challenges; this is the essence of endurance.

The Socratic question we use for the operating condition of Endurance is, "Can stakeholders endure the growth journey?" We will explore answers to this question during our time together. This magazine is filled with stories and insights from leaders, who, like you, are finding ways to build companies that provide great value in tough times. Our research at TrueSpace tells us that engagement of stakeholders, whether they are employees or teammates, investors or advisors or family members, is a complex leadership challenge. Therefore, leaders must be able to connect the emotional needs of the individual with the organizational requirements in order to become predictable.

Our time together will help us dive deeper into the condition of Endurance and its impact on building capability. By revisiting the two systems of Engagement and Benefits, we'll dig deep into:

- Maintaining your credibility in times of great uncertainty.
- The role of recognition for employee engagement.
- Building an inclusive community with DEI.
- Preparing the workforce for difficult times.
- New insights on benefits for today's workforce.

Over 70 members and mentors are attending this year's Builder Summit. Discover more about these leaders and their businesses in this magazine. Think about spring and the new beginnings it brings, and take the time to get to know your peers, discover potential opportunities and exchange ideas for growing predictably over the year to come.

We hope that you enjoy the summit and that it inspires you to keep building.

Respectfully,
Charles & Jamee

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Polydelta - Jay Finch

Quandary Consulting Group - Kevin

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ROI Institute - Patti Phillips

New Members



STRATEGIC SOLUTIONS INTERNATIONAL

BRANDON POTTER

Strategic Solutions International, based in Washington, D.C., provides its government and private sector clients with IT, management consulting, engineering, organizational development, and value-added reseller services. As a Small Business Administration (SBA) 8(a) certified firm, SSI helps federal agencies and businesses formulate, implement and sustain solutions to complex problems. SSI's Founder and CEO, Brandon Potter, has extensive experience managing large projects and budgets for the U.S. government, most notably as the former chief of staff at USAID's Office of Afghanistan and Pakistan Affairs.



TOXNOT

PETE GIRARD

Toxnot is a supply chain software platform, based in Fort Collins, CO, that helps global manufacturers obtain accurate supplier material data to better control product compliance, sustainability and transparency. Toxnot's founders, Pete Girard and Bill Hoffman saw a need to develop software to help clean up and manage toxic chemicals found throughout the world's complex supply chains. Today Toxnot's platform is used by over 4,000 companies, including Google, Kohler, Superior Essex, and Assa Abloy, to automate and streamline their chemical compliance and reporting. Toxnot's CEO, Pete Girard has extensive strategic and leadership experience in product management, lifecycle assessment, product stewardship and corporate sustainability.



OFFICE INTERIORS



MIKE BUTLER

Office Interiors is a Denver-based full-service commercial office furniture solutions provider. Since 2010, Office Interiors has assisted companies throughout Colorado, and more recently in Arizona, with designing, building, and installing office spaces that enhance their brands, cultures, and productivity. Working with over 70 furniture manufacturers, Office Interiors designs and furnishes office spaces including workstations, lounges, conference rooms, and reception areas. Office Interiors' Founder and President, Mike Butler, has over 20 years' experience in the office furniture industry and is deeply committed to providing his customers with exceptional customer service.

6E TECHNOLOGIES

KOMAL GOYAL
Managing Partner



 FOUNDED 2017	 INDUSTRY Information Technology Consulting
 BUSINESS MODEL Direct to Government	 EMPLOYEES 32
 LOCATION Denver, CO	 LEGO Janitor

Playbook Work

WHAT ARE YOU BUILDING AT 6E TECHNOLOGIES?

Our mission is to analyze, implement and maintain systems using emerging technologies, business intelligence and automation platforms for our clients.

WHY DOES YOUR BUSINESS EXIST?

To create reliable and enduring systems for current and future generations.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Large organizations and governments are where we win and grow.

WHO IS YOUR HIGH-VALUE CUSTOMER?

An organization with revenue/appropriations over \$250M. They should have complex business processes that can be simplified using technology.

Lessons & Takeaways

TOUGHEST GRIT MOMENT FROM 2021?

Saying no to certain customers were the toughest moments of 2021. But we have realized that focus is the key. Continue to do what you can do with the least effort and repeat it to get better in the same areas.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME THIS YEAR AND WHY?

Focusing on growing in the government. Government contracting is all about partnerships, so creating great partnerships with large businesses.

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

Rallying the company through ISO certifications in 2021.



WHAT IS ONE OF THE BEST OR MOST WORTHWHILE INVESTMENTS YOU'VE EVER MADE? (COULD BE AN INVESTMENT OF MONEY, TIME, ENERGY, ETC.)

Time spent on my meditation practice. It does take over an hour a day, but it is worth it to get me centered and make me more productive.



HENRY SCHUELLER

Founder & CEO

 <p>FOUNDED 2015</p>	 <p>INDUSTRY Audio Visual</p>	 <p>BUSINESS MODEL B2B - Technology, Software, Professional Services</p>	 <p>EMPLOYEES 19</p>	 <p>LOCATION Denver, CO</p>	 <p>LEGO Harry Potter</p>
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Playbook Work

WHAT ARE YOU BUILDING AT AVLANCER?

AVLancer is leveraging our proprietary cloud-based platform to create beneficial long term connections in our industry. By connecting freelancers, audio visual providers and event producers we enable our community to succeed. Our platform facilitates connections to staffing, community, rapid payment solutions, insurance programs, technical support, training programs, stewardship opportunities and so much more.

WHY DOES YOUR BUSINESS EXIST?

AVLancer exists to give freelancers the confidence and stability to succeed in the Gig Economy.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

AVLancer currently services 20 major US markets with a focus on 7 extremely high value markets. Building upon the success we've experience here in the US, we plan to start expanding globally in the next few years, first in Canada, Mexico and Europe and then beyond.

WHO IS YOUR HIGH-VALUE CUSTOMER?

AVLancer's high value customers are professional high-quality companies. Our HVCs fully understand our value proposition, don't question our pricing and are experiencing rapid growth.

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Our goal in 2022 is to strengthen our roots nationwide. While we do service most of the country, our roots are currently strongest at home in Denver. In 2022 we will push to expand our base and stabilize our business nationwide. We've already made great progress on the west coast in Q1 and will begin pushing for more presence on the East Coast in the second half of the year.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

Truespace has definitely helped me to better prioritize my time. Our work in 2020 and 2021 has led to consistent expansion of revenue sources, predictable margins, consumer retention, brand awareness and access to a massive talent pool. Our IP is secure and our assets are providing their intended ROI. With all this in place, it's time to shift my focus to raising the capital needed to sustain our rapid growth trajectory.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Perseverance.







WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?

Our board of directors is both relentless and highly effective at keeping me pointed in the right direction. We've built a board of seasoned industry veterans that seem to be able to see around corners and won't hesitate to tell me what they really think. They have been completely invaluable in our strategic decision-making process.

BATTERY XCHANGE



DESMOND WIGGAN JR.
Co-Founder & CEO

 FOUNDED 2019	 INDUSTRY IoT, Cleantech
 BUSINESS MODEL B2B2C	 EMPLOYEES 7
 LOCATION Charlotte, NC	 LEGO Artist



Playbook Work

WHAT ARE YOU BUILDING AT BATTERYXCHANGE?

BatteryXchange is an ecosystem of battery rental kiosks leased to businesses that connect mobile users with FREE, convenient and reliable charging solutions while on-the-go. Unlike competitors, our kiosks feature full-color, digital displays that unlock the potential for third-party advertisers to target their core customers. Additionally, we're creating strategic partnerships with organizations in the communities we serve so that we can amplify the voices of black-owned businesses with affordable ad space.

WHY DOES YOUR BUSINESS EXIST?

BatteryXchange believes that everyone should have access to free, reliable charging solutions while on-the-go. We're on a mission to make that dream a reality by offering convenient kiosk locations where people spent their time.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

BatteryXchange is extensively active in the Charlotte, NC region, with kiosks deployed at small businesses and historically black colleges and universities (HBCU's) in the area.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our high value customers are healthcare systems because of the density we are able to have in a particular hospital. There is increased intentionality to creating better experiences for visitors, patients and staff. We are able to use the data we aggregate as real time analytics and opportunities to improve net promoter scores. Lastly, healthcare systems can use our screens to showcase information and resources to visitors.

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

Stepping away from constantly fundraising to focus efforts on sales cycle development and figuring out our high value customer.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

I will spend majority of my time continuing to build out our sales pipeline in the healthcare system space along with repeating processes to make the sales cycle more efficient.







WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

As of recently a few members of my team have spoken about how they admire the growth and focus I've shown especially over the last year. Another favorite win has been adding members to our board.

BELLE

ARMAND LAUZON
CEO



 FOUNDED 2014	 INDUSTRY Healthcare
 BUSINESS MODEL B2B2C	 EMPLOYEES 130
 LOCATION Nashville, TN	 LEGO Clark Kent



Lessons & Takeaways

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

Dramatically changing the lives and career trajectory of our 100+ nail technicians. Traditionally, nail techs work in brick-and-mortar salons. Transforming their unique skills into a new type of healthcare talent is a very critical capability we have developed. That capability provides them with upward mobility, compensation stability, benefits and, most importantly, purpose.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

I am trying to spend most of my time on team building and strategy and less time in operations, finance and most recently, sales. Maintaining our strong culture and keeping teammates aligned on our mission/strategy will be more and more critical as teammate volume grows.

WHAT KIND OF CULTURE EXISTS IN YOUR ORGANIZATION, AND HOW DID YOU ESTABLISH IT?

Our team's culture is fueled by our mission: to bring joy into the lives of those we serve. We've established a self-sustaining culture by:

- a.) educating every new hire on our mission,
- b.) infusing our mission into regular Playbook meetings across the organization,
- c.) sharing live customer feedback and testimonials that demonstrate success and
- d.) connecting the office staff with the field force (nail technicians) as much as possible.

HOW DO YOU HANDLE ADVERSITY AND DOUBT?

Dog walks and workouts.

Playbook Work

WHAT ARE YOU BUILDING AT BELLE?

Belle is building a network of Advanced Nail Technicians who provide a hybrid clinical-spa, in-home pedicure that protects the feet and lives of Medicare Advantage members.

WHY DOES YOUR BUSINESS EXIST?

To bring joy to healthcare.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

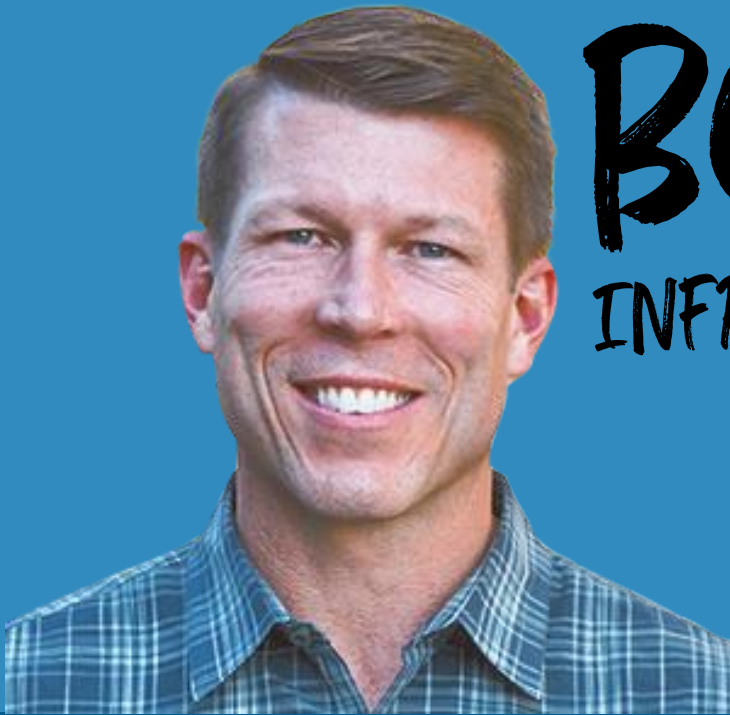
Belle provides in-home foot care to Medicare Advantage members who are at-risk for health complications.

WHO IS YOUR HIGH-VALUE CUSTOMER?







Medicare Advantage health plans.

BONFIRE

INFRASTRUCTURE GROUP



BRIAN HOLLISTER
CEO

 FOUNDED 2016	 INDUSTRY Broadband
 BUSINESS MODEL B2B	 EMPLOYEES 39
 LOCATION Denver, CO	 LEGO Strong Man & Janitor

WHAT ARE YOU BUILDING AT BONFIRE?

We deliver community wide broadband solutions through superior planning, engineering, construction and open access network operations services.

WHY DOES YOUR BUSINESS EXIST?

We believe all Americans should have access to affordable high-speed Internet because it makes their lives better. In providing it, we drive the economic health and vitality of communities by increasing job opportunities, improving education and enhancing healthcare.

DESCRIBE YOUR MARKET WHERE YOU WIN & GROW:

We partner with service providers, communities and governments that are driven like us to close the digital divide — we educate, collaborate and share insights into the development of broadband networks.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Service providers, communities and governments that share our mission to close the digital divide.

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

Recalibrating our business from working on small projects to being able to scale and support community/city wide broadband projects. Toughest moment was firing our largest customer because they were not a high-value customer. Greatest challenge was implementing so many new systems in our core business while starting a completely new business and raising money.

HOW HAVE YOU CHANGED THE MOST AS A LEADER OVER THE PAST YEAR?

I'm feeling more mature due to the journey and experiences that I've had now as a CEO.

IN THE LAST FIVE YEARS, WHAT NEW BELIEF, BEHAVIOR, OR HABIT HAS MOST IMPROVED YOUR LIFE?

Having work and life advisors around me. Being able to be vulnerable and connecting with peers to share stories about our experiences.

WHAT KIND OF CULTURE EXISTS IN YOUR ORGANIZATION, AND HOW DID YOU ESTABLISH IT?

Positive, always learning and improving. It's okay to fail as long as we learn and share our experiences with others. We're driven by our mission to connect all Americans with affordable broadband.

BRIEBUG

JESSE SANDERS

Founder & CEO



WHAT ARE YOU BUILDING AT BRIEBUG?

The United States' most trusted full-stack application development firm.

WHY DOES YOUR BUSINESS EXIST?







To create better lives. We strive to help our clients, employees, suppliers, partners, and the software development community as a whole create the success and quality of life they desire.

DESCRIBE YOUR MARKET WHERE YOU WIN & GROW:

High-growth companies in the mid-market within the Fortune 1000.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Busy, hands-off, previously failed, Fortune 1000 software executives who own the success of mission-critical applications and the teams that deliver them.

 FOUNDED 2009	 INDUSTRY Broadband
 BUSINESS MODEL B2B Technology, Software, Professional Services	 EMPLOYEES 75
 LOCATION Lakewood, CO	 LEGO Clint Eastwood

Lessons & Takeaways

WHERE DO YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

I will be spending most of my time coaching my team to help them achieve the company goals as well as meeting with private equity, investment banking and venture capital firms to create long-term relationships for a potential acquisition.

WHAT ARE BAD RECOMMENDATIONS YOU HEAR IN YOUR PROFESSION OR AREA OF EXPERTISE?

I often hear leaders of technical initiatives talk about doing it just good enough or how they don't need to follow best practices. Unfortunately, 70% of all software projects still fail to meet the needs of the business or outright fail due to poor planning, lowball budgets, cutting corners and not getting the right people in the right seats on the bus with the necessary experience for their project to be successful.

WHAT KIND OF CULTURE EXISTS IN YOUR ORGANIZATION AND HOW DID YOU ESTABLISH IT?

We have a culture of asking questions, helping others, advancing opportunities, providing autonomy and giving continual feedback. This culture is created through our core values of continually growing, being a team player, doing the right thing, enjoying the ride, and one community as well as our purpose of creating better lives and our vision to complete 300 successful projects by 2025. Our values, purpose, and vision create alignment in the company where we are all working together which creates alignment and ultimately our culture.

HOW DO YOU HANDLE ADVERSITY AND DOUBT?

We handle adversity and doubt by taking it head on and being transparent. When tough issues arise, we talk it out, we plan, and we communicate with the leadership teams so we can get the message out to everyone in the company. By being transparent, we all know where we stand, how we are going to get through the adversity, and how to remain in alignment as we move forward.



C1 PARTNERS

DAN SMINK
President

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

Letting revenue from the low-value customers go away.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

Creation of a staff development plan.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Evolutionary.

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

Watching us grow without me being involved in the sales funnel.

Playbook Work

WHAT ARE YOU BUILDING AT C1 PARTNERS?

Predictable growth revenue.

WHY DOES YOUR BUSINESS EXIST?

We exist to help our clients make marketing accountable for driving revenue.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Technology and industrial companies between \$10M – \$250M.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Companies between \$10M to \$250M in revenue that want to make marketing accountable for revenue generation, are engaged, have a digital marketing infrastructure that works and have a sufficient budget to be successful.



FOUNDED

2011



INDUSTRY

Digital Marketing



BUSINESS MODEL

B2B - Technology, Software, Professional Services



EMPLOYEES

9



LOCATION

Denver, CO









LEGO

Harry Potter

CAP MANAGEMENT

CHRIS CRIGLER
President



 FOUNDED 2003	 INDUSTRY HOA Management	 BUSINESS MODEL B2B2C	 EMPLOYEES 28	 LOCATION Denver, CO	 LEGO The Stylish One
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Playbook Work

WHAT ARE YOU BUILDING AT CAP MANAGEMENT?

Rebuilding.

WHY DOES YOUR BUSINESS EXIST?

We help homeowners create sustainable HOAs. Starting with the triple bottom line on fiscal, environmental and social sustainability, we help HOAs achieve it all. That could mean installing electric vehicle charging stations in communities or solar panels on properties as well as supporting water conservation, composting and recycling efforts.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

HOAs that want to virtue signal their sustainability.

WHO IS YOUR HIGH-VALUE CUSTOMER?

An HOA that is already implementing many aspects of sustainability and wants to be first in class.

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Predictability, repeatability, implementing processes and procedures to lay the groundwork for scalability.

WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?

I have an open style management with my leadership team who give me hard feedback. I also walk around and talk to all of our employees, including even those picking up trash, and I believe they will tell me the truth and ask me the right questions.

WHAT IMPORTANT TRUTH DO VERY FEW PEOPLE AGREE WITH YOU ON?

That we just might be able to save the planet one HOA at a time.

IN THE LAST FIVE YEARS, WHAT NEW BELIEF, BEHAVIOR, OR HABIT HAS MOST IMPROVED YOUR LIFE?

Thinking as a corporation rather than a small business - and building in that direction.

CASTLE ROCK MICROWAVE



**BRETT
BONOMO**
Owner & Founder

Playbook Work

WHAT ARE YOU BUILDING AT CASTLE ROCK MICROWAVE?

Turnkey wireless system integrators.

WHY DOES YOUR BUSINESS EXIST?







Castle Rock Microwave exists to provide peace of mind for the telecom and IT groups of the customers we serve who have a known communications problem but don't know the best way to solve the problem.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We thrive where our customers generally understand what we do and the value we add, but don't have the resources to manage and implement projects on their own. Our highest value to our customers is realized when we're involved in creating the entire solution, which spans design, equipment procurement, project management, implementation and maintenance.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our HVC is an identifiable person or team within the customer's organization that knows the problem and knows they don't know the solution. They are generally located in unserved or underserved communities or regional to Colorado and its surrounding states.

 FOUNDED 2014	 INDUSTRY Technology, Professional Services
 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 12
 LOCATION Castle Rock, CO	 LEGO Chief

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

I have three goals for 2022: staying calm, creating accountability within the team and focusing on the talent.

WHERE WILL YOU SPEND A MAJORITY OF YOUR TIME AND WHY?

I'll spend the majority of my time in 2022 ensuring that we're hiring the right people, continuing to form our culture and galvanizing our strategy (e.g. our why, HVC, point of view).

WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?

I depend on our Integrator, Sheila Howell, to tell me the unvarnished truth. She has risen from being a 10-hour per week bookkeeping resource three years ago to being a key executive, and truly integral to the success and stability of our organization.

WHAT ARE YOU ENJOYING THE MOST IN YOUR LIFE RIGHT NOW?







The ability to spend a little more time with my wife and three kids.

ENDURANCE AWARD WINNER

COMPASSOOM



BRANT HOWARD & KATE SCHLATTER

 <p>FOUNDED 1994</p>	 <p>INDUSTRY Telematic Software</p>	 <p>BUSINESS MODEL B2B - Technology, Software, Professional Services</p>	 <p>EMPLOYEES 15</p>	 <p>LOCATION Denver, CO</p>	 <p>LEGO Indiana Jones (Brant) Mrs. Incredible (Kate)</p>
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"It's the people and the culture that you set up. They count on us as a business for their families and their health and everything. We take that responsibility seriously."

What is CompassCom and why does it exist?

Brant: CompassCom was founded in 1994 to take GPS, GIS and wireless to market in the early days of GPS technology. It has since evolved into a telematics company providing state and local governments, federal agencies and international entities tracking on an ESRI-based GIS platform, which is the leader in GIS.

“ This business is really about our family and the people that work for it and their families. ”

What is GIS?

Brant: [GIS stands for] geographic information systems. It's essentially digital mapping. It's been around 50 years, but it's come into its own in the last 10 or 15 years. When you go to Google Earth, which has made GIS more publicly accessible, or you go see any mapping tool that's on the internet or what the police and fire use to dispatch people, it's all in GIS. And ESRI is the leader in GIS, and we've been their partner for 27 years.

What is ESRI?

Brant: ESRI is a digital mapping business and a strategic global partner of Microsoft. They're the company that 80 to 90% of all state and local governments, the federal government and utilities use for their digital mapping platform. Our software's written exclusively on top of ESRI, because they're where our high-value customers live and how they leverage that investment in their ESRI software. ESRI can be a bit disruptive, because sometimes they compete with you, through partnerships and arrangements. But then they don't want to compete with you, so they bring you into something. It's an interesting relationship, it's like being a Microsoft development partner where you have to be agile and adjust to it.

If I were to see CompassCom physically out in the in the in the world, where would I see it? And what would I see?

Brant: You would see it in Fort Collins, Colorado if you go to the city's website, you can see them tracking their snowplows. That's probably one of the most notable ones. The next one would be Illinois' DOT during their next snow season. It'll show on their website where their snowplows are and what activities are going on. We also track snowplows in Douglas County and in the city of Aurora, both here in Colorado.

For all of those entities, you'd see how we track plows up, plows down, location speed heading, spreader controller rates, which tracks the amount and location of material put down, air and road temperatures, allowing them to be more efficient in their snow fighting activities, and how they deploy the expensive de-icing materials and ensure that they are at the right place at the right time.

Kate, how did you get involved in CompassCom?

Kate: Oh, well, it's a small family-owned business. We had our business in our basement growing up. So I was very involved at a young age. I went to CSU got a business management degree and started running the backend operations. So Brant and I are a good team in that way, because as a CEO he's super visionary and has all the good ideas. I just try to make sure the backend allows for us to take his ideas and run with it. So I've been here for many, many years; they like to say I was three years old and started working with our secretary in the basement.

What can you share about your longevity in the business building community that you've gone through in your history? What are some of the big things that you've learned? How have you kept people engaged and moving forward? And how do you plan to continue doing that?



Kate: I think what's really unique about CompassCom is that we're a small family-owned business. When I say small, we all know what a small business is, but we're small in our industry, which is not a large industry to begin with. Although we're small, we're very well-known and have a great reputation. We've been around for many years. We have good partners and vendors that all play a part in our culture. From a talent perspective, those relationships go a long way. Brant spoke about ESRI being a big partner of ours and they're the biggest in the industry.

We know from our research that creating the condition of Endurance enables CompassCom to build a community of employees, stakeholders, partners and customers who can endure a longer journey. You've already been on the journey for a protracted time, why have you been able to hold that community together for such a long period of time?

Kate: It's tough, it's not an easy task. It's something we work on every single day. I would say probably the biggest, most important piece of that, for us is communication. I think being open and having good communication with our stakeholders and our team goes a long way. We have a lot of visions and plans and we know where we want to go. But if we're not communicating that to our team it causes friction. If they're not understanding where we're headed, they can't help be part of that journey. So communication is really, really important for us. We're also a small family-owned business and we believe family comes first. Our stakeholders see and know that and it encourages them to want to show up every day and be a part of our team. I would say that TrueSpace has allowed us to take that to the next level and showed our team how to start speaking the same language, even though we have so many different personalities on our team from software developers to business management degrees to geologists.

*"Change is hard.
You can get
burnout trying to
create change
within an
organization if
everyone doesn't
understand where
you're going."*

- KATE

I also think the scorecard and the data that we're providing allows us to review and make daily management changes and to track our progress. We've had a ton of puzzle pieces and experiences over 40 years and we've had our wins and our losses. This is helping us Brant and I to bring all those pieces together. We're like starting to see what the outcomes are going to be. If we can communicate that with our team and our leaders, it will succeed.

How are COVID, the "great resignation" and the current environment in general testing your community? How is it testing your ability to lead your business? And how are you responding to it? And what can you teach others relative to these changes?

Kate: This is a great resignation. I know there's plenty of different people are calling it different things. I'm kind of leaning towards the great reshuffle, I think. A lot of people are like, "oh, what did I do? Why did I quit my awesome job I had?" and they're in a different situation today than they were 18 months ago. We've been blessed that we haven't had a ton of turnover. But it cost us money. We had the people that we wanted to keep but we had to increase salaries and pay more for them. Talent is one of the hardest parts of our business; finding talent and the whole recruiting process that I've done for many years has completely changed. People have totally different expectations for what their workday looks like or what they want it to look. They're looking for more flexibility.

Whether you want them in the office or not, you must provide flexibility for people. We've done a good job with that, but it hasn't been easy. We took each employee, looked at their situation and helped put them in the best work environment to optimize their performance. If you have a high performer that works better from home, we're allowing that. Some people they just can't, they might want to, but they can't and it doesn't work that way. Therefore it's not a company-wide policy that you can work from home two days a week and be in the office three days a week. It depends on the individual, what their job duties are and what they're expected to do on a daily basis.

What is it that your business is doing in three years and what are you seeing in the business three years from now based on your current trajectory?

Brant: Consistent growth and recurring revenues.

Kate: That question would have been really hard for me two months ago to be honest. It's a lot easier now. And I'll tell you why it's units and service. Unit economics was mind blowing at first, but when you start really tracking it you see the data and increased units and service, it makes your business more predictable and reliable. And if we can do those things, we're going to be in a good position in three years.



What are the things that you could share to our general group relative to running a business for a longer period of time?

Brant: Well, I think it comes back to the story Kate alluded to where my 40 years' experience as an entrepreneur, where I've started businesses, sold businesses, and have had too many businesses at once. I have these puzzle pieces thrown out on the table in front of me of all these things I've been through, many times with Kate, Hayden and Maggie [Brant's wife] alongside me. What TrueSpace has helped me do is to put that puzzle together, get rid of the pieces that aren't even in the picture and helped me, Kate, Hayden and Maggie understand what we need to do. This allows us to actually grow the business instead of throwing stuff against the wall and seeing if it sticks. I think it's a very valid point for us as a family that TrueSpace gave us a common language that's helped center us. I think I've got another three years to get this where I want to sell it. I thought maybe in a year I could get it there. I woke up one day after grinding over this and said it's going to take at least another three to five years and I've got to be ready for that in my age. I've got to get to the end game for our family and what we want to do.

I'm blessed to have committed family in the business that are really good at it so that if something happened to me, they could continue with this process. So this business is really about our family and the people that work for it and their families. If I do my job right and our family does our job right, we'll get our business to a place where profit sharing is good, somebody acquires us, and we're sharing wealth with some of our key employees. If that happens, the business will be well positioned, not only for us and for the people who invest in it or buy it, but most importantly for our clients, since I have clients who depend on us, including critical infrastructure, the military, the defense, police departments, fire departments, and utility companies. That's one thing [about our business]; you've to be careful what you sign up for. You just can't say, "well, I'm going to do this another year and quit." If you quit, you're quitting the U.S. Capitol Police, U.S. Army, U.S. Air Force, and the Royal Canadian Mounted Police and leaving them with no replacement platform or solution. That's not an option.

Kate: Change is hard. I think people should be more open to change, but it's hard and people don't like it. And I think you can get burnout trying to create change within an organization if everyone doesn't understand where you're going. With that said, the alignment and structure portion of the Five Conditions has been super valuable for endurance and durability in our team. We have all worn many hats over the years and sat in every single seat that's possible, so it's really important to identify that structure and place leaders in leadership positions with specific accountability. And that really helps align our team in building durability amongst us.

I have these puzzle pieces thrown out on the table in front of me of all these things I've been through, many times with Kate, Hayden and Maggie [Brant's wife] alongside me. What TrueSpace has helped me do is to put that puzzle together, get rid of the pieces that aren't even in the picture and helped me, Kate, Hayden and Maggie understand what we need to do. This allows us to actually grow the business instead of throwing stuff against the wall and seeing if it sticks.

What else would you like to share about your work with TrueSpace and where you go from here?

Brant: It's been a blessing for us and our family. And I think it's going to help us to get us where we want to go. And it's good to have a partner there that we can count on to help us. And we're offering to help other people that are in the TrueSpace community if we can in any way.



COMPASSDATA



HAYDEN HOWARD
CEO

Playbook Work

WHAT ARE YOU BUILDING AT COMPASSDATA?

At CompassData we are providing foundation confidence to those who are designing, building and maintaining critical infrastructure. In doing the above, we are building a sustainable, profitable and growing business that provides good paying jobs and a great work environment for our staff to support their families and the community.

WHY DOES YOUR BUSINESS EXIST?

CompassData exists to expand the ease of access to accurate spatial content and provide foundational confidence to the engineers and innovators who are designing, building, and maintaining the future.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We win and grow in the remote sensing, geospatial tech, utilities, natural resources, A&E and construction markets. Specifically, we win and grow through working with a combination of partners and end customers who are typically innovative engineers that require confidence through accurate geospatial data.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our high value customers are good partners delivering high accuracy solutions to an end customer as well as innovative engineers who are searching for streamlined and accurate foundational data to build upon.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?







Working on the business and not in the business. Providing more focus and planning on why we do what we do and who we do it for results in a well-oiled machine working toward the same goals.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

Becoming more predictable by working with up-to-date and accurate metrics and KPI's.

WHAT IS ONE OF THE BEST OR MOST WORTHWHILE INVESTMENTS YOU'VE EVER MADE? (COULD BE AN INVESTMENT OF MONEY, TIME, ENERGY, ETC.)







Early morning workouts with my wife.

 FOUNDED 1994	 INDUSTRY Geospatial Software	 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 15	 LOCATION Denver, CO	 LEGO Superman & Indiana Jones
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CREATIVE ALIGNMENTS



PEGGY SHELL
Founder & CEO

 FOUNDED 2010	 INDUSTRY Recruiting	 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 29	 LOCATION Boulder, CO	 LEGO Superwoman
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Playbook Work



WHAT ARE YOU BUILDING AT CREATIVE ALIGNMENTS?

We're building perpetual goodness. If people enjoy their work, they are happier humans and they bring that positivity into the world to make the world a better place. So we are focused on not only making sure that Creative Alignments' employment proposition and culture are both exceptional, but that those of our clients are as well, such that we are placing people into companies that are equally awesome to work for.

WHY DOES YOUR BUSINESS EXIST?

We exist to perpetuate a cycle of good in people's lives starting with work that inspires a sense of purpose, belonging and positivity. We do this by being the trusted Time-Based Recruiting partner for scaling consumer products and technology companies that foster inclusive, people-focused cultures to use their business as a force for good.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Customer products and technology companies that are between \$10M – 100M in revenues and scaling.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our high-value customer is a scaling consumer product and/or technology company who is looking for a recruiting partnership and is dedicated to using their business as a force for good by fostering inclusive, people-focused cultures.

Lessons & Takeaways

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

My absolute favorite leadership win in 2021 was being able to increase our overall base pay by an average of over 18% PLUS improve other benefits to be even more "people-focused". I'm also incredibly proud of our nearly 100% year-over-year growth.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

This year, we want to be able to track and validate our vetting process for assessing whether prospects will turn out to be good partners in the end. We will also be spending the next few months reorganizing in such a way that can sustain the expected growth ahead.

WHAT ARE YOU ENJOYING MOST IN YOUR LIFE RIGHT NOW?

I have finally become less and less important to the everyday operation of Creative Alignments and it's awesome. Not only is my life better and my daily stress lower, but I can now put my creative energy and attention into continually improving the organization.

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?

The alignment phase – all the work I did to align my personal purpose/belief system with Creative Alignments vision has been invaluable.

DESTINY CAPITAL



TIFFANY CHARLES



JARROD MUSICK

Playbook Work

WHAT ARE YOU BUILDING AT DESTINY CAPITAL?

We are the shift in wealth management that has been needed for entrepreneurs. We are stepping outside the box and building an enduring enterprise that is innovative and here to serve entrepreneurial families for generations to come!

WHY DOES YOUR BUSINESS EXIST?







We exist to help entrepreneurs and their families live remarkable lives during their entrepreneurial journey and after it ends.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We do our best work with entrepreneurs who are willing to invest in themselves and their personal vision just as much as their business and business vision! They are in a sustainable and opportunistic place both in business and life. They have complexities and opportunities beyond most because they are willing or have approached growth and risk differently. They recognize that when they are healthy and whole humans with alignment across their core resources of time, capital, impact, and focus that their impact multiplier is greater than most! They are ready for extreme accountability in their personal success as that leads to the greater roads they envision ahead.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Entrepreneurs with \$1M or more in average annual owner benefit (total cash distributions from businesses and investments). They are passionate about living a remarkable life and delivering that remarkable life for their family as well. Their business is in existence to serve both others AND themselves (and family). They are willing to empower professionals to help them with key areas of their personal success (tax, legal, financial). They are self-funded or have patient capital. They typically are not venture backed.

 FOUNDED 1978	 INDUSTRY Wealth Management
 BUSINESS MODEL Direct to Consumer	 EMPLOYEES 12
 LOCATION Golden and Denver, CO	 LEGO Superman (Jared) Daenerys Targaryen (Tiffany)

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Our operational focus for 2022 is to hire a COO to oversee our operations and advice Economy. We recognize the importance of operational excellence and have spent the better part of the last three years building the team, processes and systems to build the company. We are ready for an integrator to oversee and lead our operations into the future as the both of us focus on innovation and growth.

WHAT ARE YOU COMMITTED TO IN YOUR LIFE RIGHT NOW?

We are both committed to elevating personal agency! We're also committed to being examples of our own mission of living remarkable lives as entrepreneurs and recognize that our commitment to personal agency is an important discipline to do so. With personal agency we are in command of our lives (not captive to other things) because we recognize we have ownership over our time, actions, feeling, and thoughts. We are disciplined with our practice of personal agency and we embrace extreme accountability on how we invest (or spend) our time, energy, and capital to achieve fulfillment and success.

WHAT ADVICE WOULD YOU GIVE TO SOMEONE NEW COMING INTO TRUESPACE?







Our best advice to someone new coming into TrueSpace is to get clear on your why with your mentor early, get clear on what 10X's your investment to TrueSpace in the next 12 months, and then lean into everything with the TrueSpace team, resources, and community to get there! Ask questions! Lots of question! Lean into the community and take advantage of the fact that something new to you is most likely not new to your peer community and they are willing to help and connect!

DEVIQ



DENTON CROFTS
Managing Partner

Playbook Work

 FOUNDED 2018	 INDUSTRY Software, Technology
 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 35
 LOCATION Denver, CO	 LEGO Spiderman

WHAT ARE YOU BUILDING AT DEVIQ?

DevIQ is building a team of the very best people, leveraging the best technology and processes...and bringing them all to bear so that our clients have the highest opportunity for success in their digital product development and innovation.

WHY DOES YOUR BUSINESS EXIST?

DevIQ exists to empower innovators in the successful execution of digital product development that improves life.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Although we have historically had a very diverse set of clients, our momentum continues to push us further into the markets of manufacturing, industrial services and life sciences.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our HVC is the lead innovator for our client's customer-facing data engines, digital platforms and products.

Lessons & Takeaways

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Growth.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?


Being the best version of myself.

WHAT ARE YOU COMMITTED TO IN YOUR LIFE RIGHT NOW?

Ongoing personal and professional development.

WHAT IS ONE OF THE BEST OR MOST WORTHWHILE INVESTMENTS YOU'VE EVER MADE? (COULD BE AN INVESTMENT OF MONEY, TIME, ENERGY, ETC.)

A personal coach and the associated time and money invested therein.

 **DID YOU KNOW....**







DevIQ built the **NEW TrueSpace** platform!



ELEVATE SERVICES GROUP

EVAN EAKIN

Co-Founder & CEO

 FOUNDED 2017	 INDUSTRY Technology Managed Services
 BUSINESS MODEL B2B Technology, Software, Professional Services	 EMPLOYEES 23
 LOCATION Greenwood Village, CO	 LEGO Clark Kent

Lessons & Takeaways

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

Leadership team development and supporting the leadership team because it will have the greatest impact in serving our customers well.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Humbling.

WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?

My leadership team.

WHAT ARE BAD RECOMMENDATIONS YOU HEAR IN YOUR PROFESSION OR AREA OF EXPERTISE?

That there's a perfect model for selling and serving customers in our industry.

Playbook Work

WHAT ARE YOU BUILDING AT ELEVATE SERVICES GROUP?

The Elevate Way.

WHY DOES YOUR BUSINESS EXIST?

Companies often don't know what they don't know about their IT until their business suffers. At Elevate, we give you command of your IT so you are protected and prosper - now and in the future.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

SME, growing professional services companies around Colorado; B2B between 20 and 200 employees. Most recently we have started a healthcare practice called "Elevate Health" for hospitals and clinics.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Companies that desire to protect and prosper their business while recognizing that a major factor in that is entrusting their IT strategy to a company that has the people, processes and technology necessary to achieve greater levels of productivity than the company itself possesses.



ENVISION









ELLIOTT LYONS

Founder & CEO



Lessons & Takeaways

 FOUNDED 2017	 INDUSTRY Health and Wellness, Mobile Apps, Personal Growth, Technology
 BUSINESS MODEL Direct to Consumer	 EMPLOYEES 6
 LOCATION Denver, CO	 LEGO Indiana Jones

Playbook Work

WHAT ARE YOU BUILDING AT ENVISION?

EnVision is building a company and product that will bring visualization to the wider world. Specifically, we are helping people get clear on what they want in their life and achieve their goals through the process of visualization. We are doing for visualization what Calm and Headspace did for meditation, using the same high-growth business model that helped them become billion-dollar companies. Our mobile app now makes visualization accessible, simple, and effective for anyone to do in about 10 minutes a day.

WHY DOES YOUR BUSINESS EXIST?

We exist to empower individuals to grow and fulfill their potential so they can achieve their goals and positively contribute to the world.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Our market is the personal growth market and more specifically the personal growth mobile app space. 59% of the US population over 18 are interested in improving themselves using personal growth tools & techniques. 41% of the US population over 18 are willing to pay for visualization over other techniques including meditation, sleep and journaling. For millennials and the generations that follow, there is a growing need to create their own path, especially in the last two years, evidenced by the great resignation. They view technology as an ordinary part of life and look specifically to mobile apps to find guidance in their lives. The personal growth app space lacks specialization and differentiation and we will win by providing a specialized product with tailored value.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our high value customer is 25-44 years old, slightly more male than female and are busy working professionals. They have heard of visualization but need to hear more about it. They want to be successful and their goals are most often around improving health and fitness, creating financial success and advancing their work and career. They consume other online personal growth content and share information with their friends about what they are learning.

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Securing the money we need to continue, then hitting 2:1 unit economics. This is the last piece needed to raise our final seed round so we can finish creating the full team we need to be a predictable business that can sustainably and consistently scale.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Endurance.







WHO DO YOU DEPEND UPON FOR THE UNVARNISHED TRUTH?

I have two investor mentors that will tell me how it is no matter how hard the truths are. Even though these conversations often are very difficult internally for me, this is the only way to know what is real and take the right actions that will get us to where we want to be.



EPIC RIVER

JEFF GROBASKI
CEO

 FOUNDED 2005	 INDUSTRY Fintech
 BUSINESS MODEL B2B	 EMPLOYEES 24
 LOCATION Fort Collins, CO	 LEGO Rocky Balboa

WHAT ARE YOU BUILDING AT EPIC RIVER?

A network of banks and credit unions connected through our platform that we can leverage to bring high-convenience and low-cost financing options to industries that need it.

WHY DOES YOUR BUSINESS EXIST?

We exist to equip community banks to get people the money they need, when they need it, wherever they are.

DESCRIBE YOUR MARKET WHERE YOU WIN & GROW:

Suburban and rural areas where a sense of community is either strongly ingrained or consciously being cultivated.

WHO IS YOUR HIGH VALUE CUSTOMER?

Forward-thinking community banks (with \$2B – \$20B in assets).

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

To activate channel relationships.

WHAT IMPORTANT TRUTH DO VERY FEW PEOPLE AGREE WITH YOU ON?

The only way for healthcare in the United States to become more affordable is for health insurance to go away.

IN THE LAST FIVE YEARS, WHAT NEW BELIEF, BEHAVIOR, OR HABIT HAS MOST IMPROVED YOUR LIFE?

I have been amazed at the impact a positive, healthy, personal relationship can have on my entire life. It has been eye-opening and energizing.

EPICENTER INNOVATION

CHRISTOPHER TARANTINO

Founder & CEO



WHAT ARE YOU BUILDING AT EPICENTER INNOVATION?

Epicenter Innovation is building a world filled with Resilience Innovators who are empowered to change the world and save lives before, during, and after major disaster incidents.

WHY DOES YOUR BUSINESS EXIST?


We exist to empower Resilience Innovators to realize their true potential and ultimately save lives.

DESCRIBE YOUR MARKET WHERE YOU WIN & GROW:

Our primary market includes both government and quasi-government organizations that have a responsibility for protecting the lives of their stakeholders.

WHO IS YOUR HIGH VALUE CUSTOMER?

Our high value customers are "Resilience Innovators" - individual change-makers that have a responsibility for keeping their community or workplace safe, while creating a culture of human-centered, resilience-focused innovation.

 FOUNDED 2013	 INDUSTRY PUBLIC SAFETY
 BUSINESS MODEL B2B, B2G	 EMPLOYEES 5 FTEs, 40 Contractors
 LOCATION Denver, CO	 LEGO Janitor

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Our biggest goal in 2022 is to create repeatable revenue; we're really looking forward to implementing things with TrueSpace to make this a reality!

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Acceptance. I've been working hard not to overengineer too much in my life as an entrepreneur and business-builder lately; I'm trusting my team more and trying not to sweat the small stuff.

WHAT IMPORTANT TRUTH DO VERY FEW PEOPLE AGREE WITH YOU ON?

That resilience is more important than, and is the precursor to, innovation. These two concepts are intrinsically tied, but one has to be prioritized over the other in order to create a truly amazing organization.

WHAT KIND OF CULTURE EXISTS IN YOUR ORGANIZATION, AND HOW DID YOU ESTABLISH IT?

We have a culture of "intrapreneurs." Every aspect of our organization has been designed around this concept, from how we hire people, to how we work together; we've been 100% remote since 2013, we have no set "office hours," we focus on and reward highly-autonomous individuals, we constantly enable our people with assessments and other tools to help them be more effective, and we invest heavily in our people. It took a lot of work and refinement to get where we are right now but developing our culture (we call it our "Epicenter DNA") and our core values (the "Four E's" - Engage, Explore, Elevate, Empower) has been a gamechanger for us.



FELT

**TOMER
ALPERT**
CEO

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

We have to spend and budget within our profitable range of customer acquisition cost.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

Product development and marketing because we have established a good repeatable flywheel and now we're looking for inflection points to accelerate growth by testing new high-value customer theories which we believe would increase our enterprise value by a magnitude of 10x.

HOW HAVE YOU CHANGED THE MOST AS A LEADER OVER THE PAST YEAR?

I try to listen and consider and then respond thoughtfully versus reacting to and shutting down ideas without giving them respectful consideration.

HOW DO YOU HANDLE ADVERSITY AND DOUBT?

I create plans and financial models to handle financial doubt and insecurities. Then I try to think critically about our road map, making sure I know why we're doing what we are. Then I try to minimize the investment in any new project down to an minimum viable product so we can test new ideas quickly.

Playbook Work

WHAT ARE YOU BUILDING AT FELT?

Ways for people to send cards with friends. Ways making it simpler to remember to send cards.

WHY DOES YOUR BUSINESS EXIST?

To help everyday people spread love around the world.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Customized greeting cards and gifts.

WHO IS YOUR HIGH-VALUE CUSTOMER?

People who are technically savvy, between the ages of 35 and 65 and have at least some disposable income, and who want to make their friends and family feel loved.



FOUNDED

2012



INDUSTRY

Greeting Cards



BUSINESS MODEL

Direct to Consumer



EMPLOYEES

5



LOCATION

Telluride,
CO









LEGO

MacGyver

FIREFLY PARTNERS

JEN FRAZIER
 Founder & CEO



 FOUNDED 2007	 INDUSTRY Digital Strategy, Marketing	 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 18	 LOCATION Boulder, CO	 LEGO Batgirl
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Playbook Work

WHAT ARE YOU BUILDING AT FIREFLY PARTNERS?

A social good digital marketing agency specializing in creating inclusive and accessible customer experiences.

WHY DOES YOUR BUSINESS EXIST?

To dismantle systemic inequalities by building inclusive and accessible digital ecosystems that are welcoming to all.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Social good organizations and businesses that prioritize building an open and accessible digital environment for their users and who have \$150-300k to spend annually on testing, iterating, and improving that ecosystem.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Vice president and C-suite level decision makers at progressive and socially minded organizations and businesses.

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

Turnover is a complete time suck. We had 7 people leave in 2021 (2 more in January/February of 2022) and hired 13 folks. It derails you from making progress, it keeps you constantly in teaching/learning mode and in the forming and storming stages of group dynamics. You never get to breathe. You never get to norming and performing. This amount of turnover in a bigger, growing company may rock the whole boat slightly less but when you are down to 10 because of COVID, starting to hire, and then experience this amount of turnover, it can rock a team to its core. Keeping the team moving forward on a stable, secure ground through this transitional period has been tough but a great test to my leadership and our ability to withstand, persevere, and come out the other side stronger and growing!

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

Finding my own focus. Creating the space to clear out the clutter. Eliminate the need for me to get pulled back in to solve all the problems. Train my team to get better at doing all the things without me. Settling in and finding joy in actually spending MUCH more time working ON the business rather than IN the business.

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?

Having to clearly articulate our why, high-value customer, and continually improve and refine our focus. Others have said to be narrower or to specialize, but going through the playbook process with TrueSpace has forced us to take nebulous concepts and pin them down and make them clear for our entire team. I am confident that focus will allow us to make clearer decisions around clients to hire (or not hire), work to do (or not do), and staff to hire (or not hire). And I know this will make all the difference for us and help us grow moving forward.



FOOTERS CATERING

ANTHONY LAMBATOS

Co-Owner



Playbook Work

WHAT ARE YOU BUILDING AT FOOTERS CATERING?

First and foremost, we are building a great place to work. That has been the primary driver since my wife, April, and I purchased Footers Catering from my father in 2010. We strive to create an environment where our team can come together to do meaningful work alongside people they love and trust. We want to continually look for opportunities that serve our mission and allow for our team to grow. While our primary business is off-premise catering, we also have an event center and a company that focuses on education for the hospitality industry around heart leadership and intentional culture building.

WHY DOES YOUR BUSINESS EXIST?







To create memorable experiences for our team, our clients and their guests in the planning and execution of life's celebrations - specifically large and logistically complex events which are inherently vulnerable to average and sub-par experiences. We want to leave everyone involved in these events feeling a sense of joy and an experience they will look back on fondly for the rest of their lives.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We are in the special events business, creating exceptional experience for our clients and their guests. We are a full-service caterer, providing food, service and other event needs for galas, parties, weddings and corporate events. We do not offer drop off services, so our team is really focused on events where our staff is on-site and we can provide a high level of service.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our market is broken down into four segments: corporate, wedding, non-profit and social. Within each of these segments there are nuances that separate them, however there are many similarities in the size and scope of what makes an HVC. Events between 150-500 people and spending between \$80-\$150 per person are ideal for us. While we also love and excel at events over 500 people, we believe there are not enough of them to provide consistent revenue.

 FOUNDED 1981	 INDUSTRY Hospitality
 BUSINESS MODEL Direct to Consumer	 EMPLOYEES 50
 LOCATION Arvada, CO	 LEGO Hiker

FUN FACT:

Footers' AMAZING food will be served at the Summit Event all day! Check them out at footerscatering.com

Lessons & Takeaways

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

Making it through covid was by far the toughest challenge of my professional career and to see where we are now is a pretty big win.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Optimistic.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

Being intentional about blocking out time to work on specific projects and starting earlier on them.

WHAT KIND OF CULTURE EXISTS IN YOUR ORGANIZATION, AND HOW DID YOU ESTABLISH IT?

We are intentional about building a great culture at Footers Catering. It's something we focus on every day and it goes well beyond perks and benefits. We focus on building relationships among our team, recognizing the work of our team, thinking about how we help people grow, creating fun at work and infusing purpose and meaning into the work we do.







FRONT RANGE EXCAVATING, INC.

SCOTT NANCE
President



Playbook Work

WHAT ARE YOU BUILDING AT FRONT RANGE EXCAVATING?	We are building a better model for subcontractor-to-general contractor relationships. We are engaging our customers at an earlier stage in the project to help drive savings in overall cost and project schedule by leveraging our unique level of experience and our expertise in earthwork.
WHY DOES YOUR BUSINESS EXIST?	We exist to improve project efficiencies for general contractors through our expertise in earthwork.
DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:	Retail, education, and industrial construction projects along the Front Range in Colorado from Longmont to Parker that have less than 30,000 cubic yards of Cut/Fill.
WHO IS YOUR HIGH-VALUE CUSTOMER?	General Contractors employing good people who value subcontractor expertise and build retail, education, and/or industrial projects along the Front Range from Longmont to Parker.

 FOUNDED 1988	 INDUSTRY Construction
 BUSINESS MODEL B2B - Construction	 EMPLOYEES 35
 LOCATION Arvada, CO	 LEGO Harry Potter

Lessons & Takeaways

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?
 The majority of my time will be spent on investing in my leadership team. Finding resources and developing tools that will help them succeed in the important work that I've entrusted them to do is a top priority for me.

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?
 My favorite win as a leader has been transferring responsibility to my leadership team for the roles and responsibilities they've been given. For many years our company has operated under the assertion that constant reminding and nagging is necessary to achieve results. I have taken the time to provide detailed expectations for each role, allowed for feedback, and stepped back in order to give them space to take ownership of those results. I have seen a big shift in the way they are approaching their responsibilities and it's been exciting to watch.

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?
 TrueSpace has helped to rally our leadership team together. The work we are doing with TrueSpace has sparked some much-needed motivation for our Team. We are now working together on transforming our business from a stagnate, 34-year-old, family-owned business into a revived growth-capable business focused on improving the lives of our employees, customers and our trade partners.

HOW DO YOU HANDLE ADVERSITY AND DOUBT?
 I handle adversity and doubt by keeping my focus on the things that will matter for eternity. I'm not perfect at it, but when I do it makes all the difference. The things we deal with day to day are temporary and fleeting. Starting my day in prayer and with wisdom from Scripture sets me up for whatever the day brings. Setting reminders to stop during the day and pray has made a big difference for me as well. There is no better source for wisdom and peace in the midst of adversity than Jesus.

HOTEDGE

**ANDREW
ELSON**
CEO



Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Implementing a certified training program (virtual) for outsourced installer workforce across the country and Canada.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

Preparing and structuring the company for our new HVC relationships assess and help to determine their KPI's, such as energy, safety, roof data, etc.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Change.

IN THE LAST FIVE YEARS, WHAT NEW BELIEF, BEHAVIOR, OR HABIT HAS MOST IMPROVED YOUR LIFE?

Digital tools for organization.

Playbook Work

WHAT ARE YOU BUILDING AT HOTEDGE?

We are one of the leading design and manufacturing companies of energy efficient ice melt systems for roofs of all business and residential structures.

WHY DOES YOUR BUSINESS EXIST?







To become leading authority that is providing education and information to the marketplace for ice mitigation on business and residential structures.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Large commercial structures that need to protect employees' equipment and the facility from damage created by ice dams, falling ice, bad melt paths and snow loads.

WHO IS YOUR HIGH-VALUE CUSTOMER?







Large commercial property owners with high value properties such as Amazon, Prologis, Federal Express, government buildings, homeowners' associations, etc.

 <p>FOUNDED 2014</p>	 <p>INDUSTRY Construction Manufacturing</p>	 <p>BUSINESS MODEL B2B2C</p>	 <p>EMPLOYEES 5</p>	 <p>LOCATION Greenwood Village, CO</p>	 <p>LEGO Axl Rose</p>
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HYGGE POWER



CALEB TRISTAN
Founder & CEO

 FOUNDED 2017	 INDUSTRY Energy, Cleantech	 BUSINESS MODEL B2B2C	 EMPLOYEES 10	 LOCATION Boulder, CO	 LEGO Indiana Jones
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Playbook Work

WHAT ARE YOU BUILDING AT HYGGE POWER?

Smart home backup power and a prediction energy platform.

WHY DOES YOUR BUSINESS EXIST?

We exist to ensure everyone stays comfortably and reliably powered with the cleanest energy.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Our products and services enhance utility and business operations through energy efficiency initiatives. Key to our growth is targeting energy consumers and their respective utility provider where grid edge vulnerabilities and inefficiencies are very prevalent, such as high frequency of power outages and high carbon emissions from electricity sources. This is often referred to as the last mile, environmental [in]justice zones, and disadvantaged communities within the energy industry.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Progressive utility providers and suppliers of smart home technologies.

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

Corporate restructuring! We've had multiple occurrences when clients shifted their employees to other divisions or downsized in the last two years, resulting in unforeseen setbacks to Hygge Power. Like any company plan of achieving key targets, the plan leads to a rewarding outcome that sets forward new strides and growth. Setbacks increase the already slim odds of startup success—delays require more time, money, and morale having to pull resources from other work. So, I challenged the team to lead, not manage, projects regardless of the corporate esteem and stigma. The result for us created a cultural shift to 'active' accountability, increased alignment, and asking better questions. The projects in focus finished on-time, led to additional scope, or in one case, a new patent.

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

In the next 3 months, we are releasing the next generation of energy storage across five utility-based projects and a new app for energy impact projects. The great news for me is that these projects don't require additional venture capital, yet they will entice investor excitement for our series raise in 2H2022. I can't share enough how happy I am to instill five years of research and client learnings into a new value stack, a product line called CO-Z (www.co-z.com).

IN THE LAST FIVE YEARS, WHAT NEW BELIEF, BEHAVIOR, OR HABIT HAS MOST IMPROVED YOUR LIFE?

Calm the f down! Crude? No, it's serious. I'm always under pressure to get more done than humanly possible. It's stressful and that can negatively impact everyone around me. The advice I usually receive after the normal praise —"You can handle so much," "Such grit," or "Great progress!"—is in the form of time management, work-life balance, and team strategy. Frankly, for me it doesn't solve the painful toll against stressless sleep, availability to others, and physically on my body. Isn't it said "It all catches up with you?" It has! As a joke from my better half, Santa left me a coloring book in my stocking. I still haven't colored a single page, although I really want to. However, the title left a memorable impression, "Calm the F Down," and it works! There's simply no need to stress over the zillion changes and situations that continue to show up.



KIRKPATRICK PARTNERS

WENDY KIRKPATRICK *President*

Playbook Work

WHAT ARE YOU BUILDING AT KIRKPATRICK PARTNERS?

We are updating, automating, and streamlining our train-the-trainer services.

WHY DOES YOUR BUSINESS EXIST?







We are the standard for leveraging and validating talent investments. We help training professionals to keep their budgets and their jobs by showing the value of their work to the business. We help companies run better.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Corporate, government, consulting, and military training departments.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Corporate, government, military, and consulting training professionals who typically have an annual professional development budget they can invest in our program.

 FOUNDED 2008	 INDUSTRY Professional Training
 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 2
 LOCATION Newnan, GA	 LEGO Convict

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Updating, automating, streamlining, and hiring only people who culturally fit.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

Creating a replicable business model so the business is not so dependent on people and creating something saleable.

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

Having the courage to off-board my business co-owner who didn't believe in my leadership and company direction.

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?

Having access to an expert who has walked this walk and can serve as a sounding board when I don't know which path to choose.

MELOQUEST INC.



GRAEME WINDER
Founder & CEO



 FOUNDED 2019	 INDUSTRY EdTech Gaming
 BUSINESS MODEL Direct to Consumer	 EMPLOYEES 10
 LOCATION Virtual	 LEGO Elvis & Rocky Balboa

Playbook Work

WHAT ARE YOU BUILDING AT MELOQUEST?

We've built Keys & Kingdoms which is the first ever role-playing game for kids (ages 6-15) that trains real musical skills and abilities in a whole new way.

WHY DOES YOUR BUSINESS EXIST?

We exist to unlock (liberate) the musical potential for current and future generations using an innovative new approach to learning that entertains, educates and ultimately improves lives and communities.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We have two markets: parents with children ages 6-15 and elementary and middle school music teachers.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our high value customers are parents with children ages 6-15 that already recognize the importance of music education and are seeking for better solutions for their kids.

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Operationally we seek to grow our existing team and put new processes in place to streamline and execute on current and new strategies.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

We really need to improve our messaging and market focus as well as optimizing the conversion funnel.



WHAT ARE YOU COMMITTED TO IN YOUR LIFE RIGHT NOW?

I'm fully committed to the calling on my life to bring more music education to the world.



MENU TRiNFO



 <p>FOUNDED 2010</p>	 <p>INDUSTRY Food Service, Training, Certification</p>	 <p>BUSINESS MODEL B2B - Technology, Software, Professional Services</p>	 <p>EMPLOYEES 14</p>	 <p>LOCATION Fort Collins, CO</p>	 <p>LEGO Indiana Jones</p>
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DISCIPLINE AWARD WINNER



**BETSY
CRAIG**

Founder & CEO

Every step I'm taking as the CEO of this business is measured against "is this going to help us grow?"

What is MenuTrinfo and why does it exist?

MenuTrinfo started out of my own personal experience with changing my diet and nutrition to improve my health after being told I would die in 2005 and only had 12 to 18 months left to live. In 2010, a friend told me that menu labeling was coming to restaurants, so nutrition was going to matter for the country. Between this and being married to a database engineer, it was the perfect storm to set up a company to start delivering nutrition information. I had zero experience in running a business; the closest I came was serving as the vice president of a junior high school PTA. We went from a Facebook idea to launching a business in three and a half days. I've been around foodservice my whole life and knew that nobody in the marketplace was doing what we were setting out to do, which was changing people's lives with nutrition and information. So MenuTrinfo was a mash up of the three words: menu, nutrition, information. I thought we were going to be forever putting calories on menus, taking away the public's joy when they go out to public places. However, we quickly realized that within the database we were building we could identify allergens. At first, I thought it was just a feature creep in our software but now identifying allergens is absolutely what we're built on.

While we do nutrition information for restaurants and food service, we also started the first allergy training in the country. We launched it and got it accredited. We're the number one trainer in colleges and universities, not just restaurants. I had to pivot because menu labeling was coming for restaurants; it took over eight years to go from being a part of Obamacare to being mandatory. So today, it's mandated that you provide nutrition information at restaurants. But the need to handle food allergies, far overtook the desire to provide information, protecting lives and health, my health was protected through nutrition, other people's health is protected through allergen tagging, and proper allergen management in food service. That's become our sweet spot and our main focus as a company.

You have been quite successful with defining why you exist as a company through the process of building the playbook. What is the reason that you exist?

MenuTrinfo exists to inform food service professionals and food service manufacturers about what they can safely serve to their customers.

We know from our research that creating the condition of Discipline is to enable MenuTrinfo to scale. However, at the core you must repeat each performance - and do a little better each day. How are you doing this at MenuTrinfo? What are you repeating? What have been the obstacles, triumphs etc.?

In two words I would say delivering confidence. What we repeat for our customers, which are food service providers of every kind, be it on a plate, in a bottle, or on a shelf in a grocery store, is the confidence that the consumer will be safe, and that your brand won't get splashed on the nightly news because an ingredient went bad and hurt or killed someone. From what's on the label, to who is trained to handle it correctly in the facility, what ingredients are in it, what is the recipe, what is the cookie style, or how it is prepared, every one of those things goes into delivering food to the consumer. A slogan we've used for years is "keep the hospital out of hospitality". For the hospitality industry, we keep people safe and they stay out of the ER. We have a bunch of little slogans to drive home the same message, which is we're here to help you keep everyone safe.

There are four things that you do relative to that repetition. What are the four things?

We have four different silos or funnels that are all interconnected and related to one another. First, we have nutrition information.

That's the numbers and percentages you see on nutrition labels about calories, carbs fats, things like that. The second is training. AllerTrain trains on the core of that information. The third is that we just achieved ANSI status and ISO 17065 accreditation for the first ever "certified free from allergens" label. The fourth thing we do is consulting. We're the ones that fly in and help when something has gone seriously wrong. We're also appointed by court systems to serve as subject matter experts for the food service and food allergies industries.

For MenuTrinfo, Aramark is one of your high-value customers. How are you serving them? Can you talk about how you're using TrueSpace's concept of unit economics and repetitive delivery to serve them?

Aramark came to us just over a year ago. Aramark is the leading food service company in the country. They're based in Philadelphia and have over 170,000 U.S. employees and 270,000 international employees. The company does contract food service for colleges and universities, sports, entertainment, business, prisons and K-12 schools. Their footprint is massive. So MenuTrinfo has been providing education as part of our service to the food service industry for years. As a result of that, somebody from Aramark came to an event we held a couple years ago and he walked me through the front door of Aramark, basically, on Zoom a year ago. He said they were ready to work with us. Since partnering with Aramark, we've been doing a massive number of programs across the country. We're doing AllerTrain and AllerCheck trainings on their LMS (learning management system) and ours. We're rolling out AllerCheck stations at over 100 colleges across the US. Everybody at Aramark's blown away at how fast we move. The cool part was MenuTrinfo had all this dialed in. So all we needed to do was retrofit it to fit a larger scale for Aramark and partner with some pretty cool people to get it delivered for them.

The nice part about you now moving a high value customer into the discipline phase is that you can see the margins that come out of that that effort as well. Let's now go to your team. So you've been building a team. How long have you been in business now?

We just started our 13th year.

Okay, great. You're in our data set, you're right where you need to be, but you've got a team that you've been building and developing. How have they taken to the discipline condition since you started at TrueSpace? How do they get to the discipline condition? What are the things that they do or don't embrace?

There's been plenty of both. One of the things you spoke about when I first met you, Charles, was about when the CEO is more focused, the business can be more focused too. If you took a direct look down at our company, our structure and the way we did business, everything was chaotic. It was as chaotic as the inside of my head. So the people on board with us for the first 10 years were used to not knowing what our focus was going to be on any given day. Instilling discipline in me and therefore instilling discipline in the business was a double-edged sword. There were people who loved and thrived in the chaos. I had to take away some of that chaos.

I had to take away some of that chaos. Most of our team members stayed and made it through, but some left. I can tell you now that over the last six to nine months, the people we have attracted to work on our team and who thrive in chaos, aren't surviving. The ones that are coming on board and staying with MenuTrinfo are the ones who don't need the chaos. They're taking to the discipline and teachings of TrueSpace that I'm learning and passing onto them. It's pretty cool to see. But not everybody has survived it, that's for sure.

We have we have three systems inside of discipline: accountability, governance and core metrics (which are unit economics for the most part). In that transition with your team on accountability, because I know you have measures now for people's roles relative to accountability, you said the people that don't like accountability probably aren't sticking around. But those that like it, are sticking around. So what have you learned in that process?

The evolution to become disciplined for MenuTrinfo and for me personally was easy because I had performance markers like P&L and satisfied customers. However, I couldn't apply the same yardstick to every employee's role at the company since they needed different ways to determine whether their performance met the team's needs. We also never had performance markers or measurements for roles; we were just thrilled if employees showed up. Well, we're past that now. We need people to show up and do their job that we've clearly defined so they're not confused when they come every day. As a result, they're much happier, I'm much happier and our consumer is so much happier. I think it comes it does come down to expectations and performance. Are you doing your job? This is what we expect from you. And it's really clear.

The last part of this is the structure of capture, keep and compete, which is also a muscle because it's not actually used very much. It's not something we normally think about. We think about titles and roles and things like who's at the vice president level versus what's the purpose of the role? I know that's not been simple for you. But you're close. Walk through what's been painful about moving to that structure.

MenuTrinfo came at it from a different perspective, in that we had over 98% retention, even throughout COVID. On the backside of COVID, everybody came back to us, people don't leave us. We capture them as new clients, we solve their problems. We onboard them to mostly their satisfaction, they stay and then they tell their friends. To get people to trust us, stay with us, and then for us to become the leader in this space happened naturally, almost by accident. Now it's purposeful. Has it been gracious? No. But now it's purposeful.

"I've learned a few things along the road that have served me very well with MenuTrinfo. The first is to be unstoppable."

Every step I'm taking as the CEO of this business is measured against "is this going to help us grow? Is this a high value client? Is this the kind of customer we want? Is this happy money? Are these happy people? Are these people going to bring the right folks into our world?" Because if not, we don't want them as clients. We're starting to refer out business when it doesn't match who our high value clients are or doesn't match what our company's purpose. We'd rather not have that business if it's ill-fitting. It takes discipline to say "thank you for your business, but we're not going to take you" or "thank you for being our customer, but you're mean and want to cheat the system, so goodbye." It's a whole different ballgame.

Let's talk about some nuggets, things that you can share with the group, relative to your learning, about where you're going as a business and what's changed the future of MenuTrinfo.

I've learned a few things along the road with that that have served me very well with MenuTrinfo. The first is to be unstoppable. I live by the principle of being unstoppable and in business that means never just taking no for an answer. Another principle or nugget that I use in business that's served me extremely well, especially during COVID, is that the answer is always no until you ask. So I turn around and ask for things that might sound insane. Or you might think from an outside observer, "I can't believe she's got the hutzpah to ask for that." What do I have to lose? A yardstick that I benefit from, given my history, is being told I only had 12-18 months [left to live] in 2005. Given all this stuff I've personally been through, I don't mind asking. It doesn't make me weak, it doesn't make me look less than, it makes me look like I'm going to give you the opportunity to be of service to me, because every human just wants to pass along what they can.

Let's assume we're having this interview five years from now. Where is where are you? Where is the company? And why did why did certain things happen? Just just paint it just this push us out into the future and just talk about where you think you're going to be?

In five years, I see our company serving and dealing with the Aramarks of the world in the same way we do today, but on an exponentially bigger scale. Right now, we're deep inside of one of their verticals but I see it spreading out across the whole company and brand. Because food allergies don't just happen at colleges, it happens in every place we serve food. I also see some of the stuff that we've done and started to do over the last six to 12 months, which is the way we deliver training on their platform, not ours, the way we let them be a little bit more self-sufficient, so that they can manage and track their learners. We don't need to be involved, we just need to keep the course up and make sure they're following the rules. This is scalable across other industries and large volumes of people. So, five years from now, we want 100,000 or more people at Aramark trained. There are some other big food service providers that we're starting to work with that never would talk to us before now but have to because their consumer needs us. So in five years, those barriers will have been broken with the big guys and we'll be the chosen vendor with those big guys. I don't know if five years from now I'm still at the helm of MenuTrinfo to be honest. There is some young, amazing talent within our organization coming up behind me and I can see them leading the pack. I'm working my way out of it a role and if I do it right, they can easily take over. I would love it if I wasn't relevant or necessary and they are. Because that's ultimately how MenuTrinfo continues protecting lives and health through allergens and nutrition.





MINDSIGHT

SHAWN EDWARDS
Executive Director



Playbook Work

WHAT ARE YOU BUILDING AT MINDISGHT?

A high growth consulting business dedicated to providing valuable experiences to its clients, employees, and communities.

WHY DOES YOUR BUSINESS EXIST?

To help inspire the confidence to move.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Emerging brands in need of the consumer understanding they need to grow their businesses.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Emerging brands with \$150-\$200MM in revenue within the consumer-packaged goods industry.

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Training and developing a large range of new employees, building and refining a proper capacity model and staffing appropriately, and developing a predictable sales and marketing capability.

WHAT ARE YOU COMMITTED TO IN YOUR LIFE RIGHT NOW?







Becoming better. Always.

HOW HAVE YOU CHANGED THE MOST AS A LEADER OVER THE PAST YEAR?

I've had to step out of operational processes that I used to do myself, some of which I love, (e.g. selling) and that has required me to be more trusting of other people and processes. That has been both unsettling and rewarding.

HOW DO YOU HANDLE ADVERSITY AND DOUBT?

With an enormous amount of persistence. I say never die. Ever.

 FOUNDED 2012	 INDUSTRY Market Research	 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 37	 LOCATION Broomfield, CO	 LEGO Clark Kent
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MOVEMENTX









JOSH D'ANGELO

CEO

KEATON RAY

Co-Founder

 <p>FOUNDED</p> <p>2016</p>	 <p>INDUSTRY</p> <p>Healthcare</p>	 <p>BUSINESS MODEL</p> <p>B2B2C</p>	 <p>EMPLOYEES</p> <p>42</p>	 <p>LOCATION</p> <p>Washington, DC & Portland, OR</p>	 <p>LEGO</p> <p>Doctor</p>
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Playbook Work

WHAT ARE YOU BUILDING AT MOVEMENTX?

A transformative movement health community.

WHY DOES YOUR BUSINESS EXIST?

To create an experience that helps people move their best, so they can live their best lives.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Active, urban areas that prioritize and value health, with an abundance of our high-value providers and patients.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Physical therapists with 5-15 years of experience, seeking to regain their autonomy, with strong community connections, who are ready to go all in with an innovative company.

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

The Paradox of focus: the more focused you are, the more you will grow.

WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?

My co-founder, Keaton Ray!

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?

The building of repeatable systems that are guided by well-informed data.

HOW DO YOU HANDLE ADVERSITY AND DOUBT?

A reliance upon our values and a focus on our mission.



NULASTIN

LEAH GARCIA *Founder & CEO*

Playbook Work

WHAT ARE YOU BUILDING AT NULASTIN?

A trusted brand that people can rely on, based on ethics and clinically proven science.

WHY DOES YOUR BUSINESS EXIST?







To empower people on their journey of healthy aging by providing scientifically proven, performance based, ethically derived elastin replenishment products and support that accentuate natural beauty, health and vitality.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Our market is the USA and Canada. We win and grow when we reach more high-value customers and find people who look like this individual. That said, we are open to diversifying the audience and introducing the product to broader age and gender demographics.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our HVC is a female, 50-59 years old with an income over \$100K and has a net worth over \$1M. She's a decisionmaker and lives in a major metro area. She purchases from premium brands and makes up 80% of our revenue.

 FOUNDED 2016	 INDUSTRY Skin & Hair Care, Personal Care
 BUSINESS MODEL Direct to Consumer	 EMPLOYEES 5
 LOCATION Boulder, CO	 LEGO Daenerys Targaryen

Lessons & Takeaways

WHAT IS ONE OF THE BEST OR MOST WORTHWHILE INVESTMENTS YOU'VE EVER MADE? (COULD BE AN INVESTMENT OF MONEY, TIME, ENERGY, ETC.)

The best investment I ever made was and has been consistency over time. Consistency in training, work ethic, goal setting, and surrounding myself with inspiring mentors.

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?

Surrounding myself with others who want me to succeed.

WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?







There's no tiptoeing around me. I'm blunt, honest, and transparent. My team is encouraged to be the same. I depend on Sarah April, our COO to tell me the unvarnished truth – and also Hailey, who's been with me since I shipped my first product in 2017. She calls herself my emotional support animal.

PACKAGE SOLUTIONS



JAMES D. GRADY
Founder & CEO

Playbook Work

 FOUNDED 2016	 INDUSTRY Technology
 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 30
 LOCATION Peachtree Corners (Atlanta) GA	 LEGO Businessman

WHAT ARE YOU BUILDING AT PACKAGING SOLUTIONS?

The name of our product is HelloPackage. We are a modern, high-tech, future-proof package management/delivery driver management solution to handle the massive influx of e-commerce packages coming into the last mile (last 100 yards) of the supply chain...think apartment communities, student housing, neighborhoods, etc.

WHY DOES YOUR BUSINESS EXIST?

Our focus is on enhancing our customers' experience in their 'personal supply chain'. Today, many people order virtually everything online and they cannot get too much speed and convenience. We seek to use a unique combination of software, hardware, and services to constantly delight our customers by greatly reducing the friction/complexity in the last mile (last 100 yards) of the supply chain.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Initially, we are focused on the multifamily apartment business and then we will move into student housing, neighborhoods, and events. Our marketing/sales efforts are in the U.S. and then we will move internationally.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Apartment owners, apartment managers, apartment developers, and architects focused on the multifamily apartment industry.

Lessons & Takeaways

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

I personally spend a lot of my time on product vision and product management. We have a strong emphasis on our product (software, hardware, and service). We think that a great product is a foundation for a great company. Next, I spend a great deal of time raising capital to carry out the product vision. Finally, I put a great deal of energy into our marketing and sales strategies/messaging/etc.

WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?

Our entire team speaks the truth on a daily basis. We attempt to create an environment where the truth is highly valued and people 'check their ego' at the door. The secret to getting at the truth is to ask tough questions that require deep thinking. Always get at the powerful seven...who, what, when, where, why, how, and how much.

WHAT IS ONE OF THE BEST OR MOST WORTHWHILE INVESTMENTS YOU'VE EVER MADE? (COULD BE AN INVESTMENT OF MONEY, TIME, ENERGY, ETC.)

Investment in my education and investment of time in people.

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?







The ongoing conversation about how to improve the business. Business growth is a journey and TrueSpace provides a forum for CEOs/teams to consistently evaluate their growth/performance.



POSTABLE

SCOTT POTASH

Co-Founder

 FOUNDED 2012	 INDUSTRY E-Commerce
 BUSINESS MODEL Direct to Consumer	 EMPLOYEES 11
 LOCATION New York City	 LEGO Obi Wan

Playbook Work

WHAT ARE YOU BUILDING AT POSTABLE?

We're building the best way to personally connect with the people you care about.

WHY DOES YOUR BUSINESS EXIST?

We exist to help people personally connect in a meaningful way.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We win with women aged 25-60 and with businesses of all sizes and stripes that want to build better relationships with their customers, employees and partners.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our HVCs are women aged 25-60 and businesses of all sizes that want to build and strengthen relationships among customers, employees and partners.

Lessons & Takeaways

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

Hiring the right people. Resetting the targets. Keeping us focused.

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT?/ GREATEST CHALLENGE?

Biggest learning: that we need the right structure and the right people to facilitate the growth we believe is possible.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

Spending more time where I add the most value.

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?

Working with Charles to answer the "why we exist" question.







SANA PACKAGING

**RON
BASAK-SMITH**
CEO



Lessons & Takeaways

 FOUNDED 2017	 INDUSTRY Cannabis Packaging
 BUSINESS MODEL B2B - Manufacturing, Product Delivery	 EMPLOYEES 6
 LOCATION Wheat Ridge, CO	 LEGO Han Solo

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

Don't hold on to an employee too long hoping it is going to get better when the writing is on the wall.

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Scale with efficiency and increase our gross margin.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Trusting.

Playbook Work

WHAT ARE YOU BUILDING AT SANA PACKAGING?

We're working to become a leader in sustainable cannabis packaging.

WHY DOES YOUR BUSINESS EXIST?

We exist because brands want to sell products to a growing number of consumers that care about the environmental impacts of their consumption.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Cannabis brands and retail locations.

WHO IS YOUR HIGH-VALUE CUSTOMER?







Multi-state cannabis brands and operators.



SERVOSITY

DAMIEN STEVENS

Founder & CEO

 FOUNDED 2005	 INDUSTRY SaaS
 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 10
 LOCATION Greenville, SC	 LEGO Indiana Jones

WHAT ARE YOU BUILDING AT SERVOSITY

Servosity exists to make the managed service provider (MSP) the hero in the fight against data loss and ransomware with tested backups, managed for you and guaranteed.

WHY DOES YOUR BUSINESS EXIST?

To defeat ransomware and downtime, make data immortal and position the MSP as the Superhero in the eyes of their client.

DESCRIBE YOUR MARKET WHERE YOU WIN & GROW:

We Serve MSPs that are focused on growth and differentiation in the United States and Canada.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our high value customer is a ranking decision-maker within an MSP that doesn't allow the customer to dictate tooling. These MSPs have a part-time or full-time person devoted to managing backups. They see DR as a differentiator, something in which their team is not an expert and a risk that needs to be managed. This customer also has a specific desire for our Ransomware Proof DR.

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

Our biggest lesson learned in 2021 is that our new offering - Servosity Safe is the future of the company. Within 90 days of launch, it was viewed as an immediate differentiator and became north of 30% of our total revenue.

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

My favorite leadership win has been the alignment of our entire team and not only our executive team. Recently we had an amazing business opportunity with an extremely short window of execution. The team stepped up and volunteered to do whatever it takes to accomplish our mission in that short time window!

WHAT ARE YOU COMMITTED TO IN YOUR LIFE RIGHT NOW?

We are committed to changing the experience that MSPs have with backups and turn the tables on ransomware and cyber attacks to position the MSP as the hero.

SIRIUS EDUCATION

**STACEY
ALEXANDER**
CEO



WHAT ARE YOU BUILDING AT SIRIUS EDUCATION?

A place where children can learn, grow and thrive.

WHY DOES YOUR BUSINESS EXIST?







To deliver the best and most trusted early education and care for children and families. And to create a foundation for children to build active minds, healthy bodies and happy hearts.

DESCRIBE YOUR MARKET WHERE YOU WIN & GROW:

Upper middle-class families who value education, generally with both parents in the workforce.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Parents seeking high quality childcare that is curriculum based and education driven. Families interested in forming trusted relationship and working cooperatively on their children's development.

 FOUNDED 2014	 INDUSTRY Early Childhood Education
 BUSINESS MODEL Direct to Consumer	 EMPLOYEES 33
 LOCATION Littleton, CO	 LEGO Rocky Balboa

Lessons & Takeaways

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Motivating.

WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?

My sister, Heather.

WHAT IS ONE OF THE BEST OR MOST WORTHWHILE INVESTMENTS YOU'VE EVER MADE? (COULD BE AN INVESTMENT OF MONEY, TIME, ENERGY, ETC.)

Hiring a marketing director when I couldn't afford one.







WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?

Collaboration with other CEOs.

SURGI REAL



**ANDREW
HENDRICKSON**
CEO

 FOUNDED 2012	 INDUSTRY Light Manufacturing	 BUSINESS MODEL B2B - Manufacturing, Product Delivery	 EMPLOYEES 12	 LOCATION Loveland, CO	 LEGO Frodo Baggins
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What is SurgiReal and why does it exist?

One of my favorite stories to introduce SurgiReal is from about 14 years ago when I sliced my finger with a bread knife. It was the first time I really had an injury like that and so I'm driving into the doctor holding it in a paper towel, I get there, and it turned out my doctor hadn't put sutures in a patient in I don't know how long. I've got more scarring from repairing the sutures she put in than I do from the actual cut itself. I think that at the end of the day we're all patients. And being able to work with practitioners who have put in the time to be proficient at their craft is something we should all hope for and look for. Really what we're doing at SurgiReal, is trying to give healthcare students the tools that they need to be able to achieve that. If it takes 10,000 hours to become an expert at something, then you need a tool to help you learn that's going to last just as long. So that's what we have put together at SurgiReal is a way to build student confidence through proficiency in health care. I think what really drives it home for everyone who works at SurgiReal is that we're all patients and we're all related to patients. We all love patients, and we want to be able to provide products that train the people that care for our people.

From a pragmatic perspective, you create simulators, which are skin pads, and all kinds of things that allow medical professionals to practice on that versus an actual human and that simulation is quite sophisticated.

Yes, every layer is engineered to mimic what actually exists in nature. And we try to get as close as we can get to that from what we put into the material, to how hard it is when it when it's when it's finished curing, to how springy or sticky it is. Each layer is built so that you know when a practitioner puts their needle through it to repair a laceration, they're encountering those layers the same way that they would on a human being. Because that's important to know what you're going to run into.

If I'm a physician's assistant in one of the schools across the country and I receive a kit from SurgiReal, what do I actually receive it in the kit?

In a suture kit you receive your suture pad that supports up to 1500 sutures. That's hours and hours of practice and thousands of reps. The kit includes all your instruments, including a needle driver, forceps, and scalpel, all of which enable you to make incisions and then repair them with the suture that's also included. The purpose behind the suture kit is to be able to practice with it anywhere. I think we shipped between 4 and 6,000 kits last year.

"A lot of our ideas come from working close with our customers."

Let's talk a little bit about what a high-value customer is for SurgiReal?

For us, a high-value customer is an institution with a program containing at least 30 students, that's accredited and willing to enter into a deal where they can order from us year after year, for each incoming class of students. They're also a customer that's highly referenceable. I love the word referenceability. It's someone who is either going to give us credibility when we say their name to someone else we're trying to sell to, or someone who's going to make someone we're trying to sell to jealous. Because there's competition between these programs and each one wants to differentiate themselves from their competition. The way they do that is through the quality of the tools that they're training their students on.

You are not only a research engineering company, because you're designing the product, you're also involved in manufacturing, producing, shipping and supporting the product. Is that true? Can you talk about that?

A lot of our ideas come from working closely with our customers, identifying their pain points and creating the tools that they wish that they had to be able to train their students. Both our incision and drainage for the cyst abscess pad and ingrown toenail model came out of that kind of partnership. We engineer the product internally and then the people who are going to be our customers are also our testers and they give us really good feedback.

"Our ability to be predictable took taking a part the sales cycle and really defining all the different pieces."



SurgiReal has been growing fairly consistently over the last few years. And with that level of growth it's really hard to be predictable. Let's talk about the fact that in 2021 however, your accuracy of forecasting your business and hitting the results are within 1%. So you fall within our top benchmark companies relative to that. We know from research that predictability comes by learning from the operation, and then making modifications or changes. What have you been learning? And then what did you do about it?

Our journey to being within 1% of our forecast really started two years ago. In 2019 we started really putting in the work to know our unit of measure, our lead cycle, the definition of a lead and what makes a qualified lead. Then once we determine that, we figure out what it takes for us to close a lead and then the steps in between that we need to hit so that we can break this down as granularly as possible, leaving as little of it to chance as possible. We know that at the top of our funnel we're putting in qualified leads. Our funnel doesn't start with leads, it starts with qualified leads because then we know that we have a chance of closing them. Then we know how many appointments we need to schedule with those types of qualified leads to be able to close a deal. We know our average deal size and we're able to extrapolate from that how many appointments our reps need to be setting with qualified leads to be able to close a certain number of deals, then to see those deals close over the course of the year. We have we have a relatively long sales cycle, anywhere from three to 12 months. The focus this year is being able to tighten that down. But to get to our ability to be predictable, it really took taking apart the sales cycle and really defining all the different pieces.

You've made some pretty big changes, including bringing in a sales leader that you've empowered to really grow that part of your business. What has that experience been like? What have you gone through there that you can teach the rest of us?

I'll start that by saying it took us a long time to find the right person. It wasn't the most comfortable thing. I wanted it off my plate as quickly as possible because I was ready to be done doing sales. I can get the job done, but I'm not a spectacular salesperson. I was ready for someone to come in who was a professional and it took us six months to find him. We went through a couple candidates that we thought were the one, but they weren't.



Ultimately, I'm happy that we took the time to make sure we got the right person in that seat. Because for the second half of 2020, he and I were able to go to work on defining our lead cycle, and really vetting the theoretical knowledge and data that I put together beforehand. We were able to actually test it with him as essentially a new sales rep and then refine it down to the knowledge set that we have today.

Can you walk us through the decision that you made to bring an ERP (enterprise resource planning) system in? What is it providing you now that you've made that investment? And what is it providing you relative to predictability?

approach based on the fact that a sample by itself is not closing business. Our salesperson roadmap now requires them to only send samples if they also have a Zoom appointment scheduled so that they can discuss those samples with the customer in real time and make sure that the sample is actually viewed. We're hypothesizing that this is going to help drive that continued engagement from potential customers.

How have you been able to find the talent to grow? Are you finding the talent and what can you share around that since talent acquisition also plays into predictability?



What really drove our decision to move in that direction was a lack of visibility. When you're working with five or six disparate systems and trying to make them talk to each other in a way that's going to give you clean data on the other end it's very difficult. Even one of those connections breaks down, or something stops working, you're stuck with bad data. As CEOs, we need to have the information to be able to make or not make decisions and changes. That that was a huge driving factor in taking those five or six disparate systems and melding them into one. Rather than handling a bunch of different logins and making sure that everything was talking, now in our ERP system, all our processes are in one program. So, we have greater visibility into our actual margins now, what our people are working on, and we're able to keep track of notes a lot better. The reporting is astronomically better, rather than trying to pull some Excel wizardry to make reports talk to each other, it all talks.

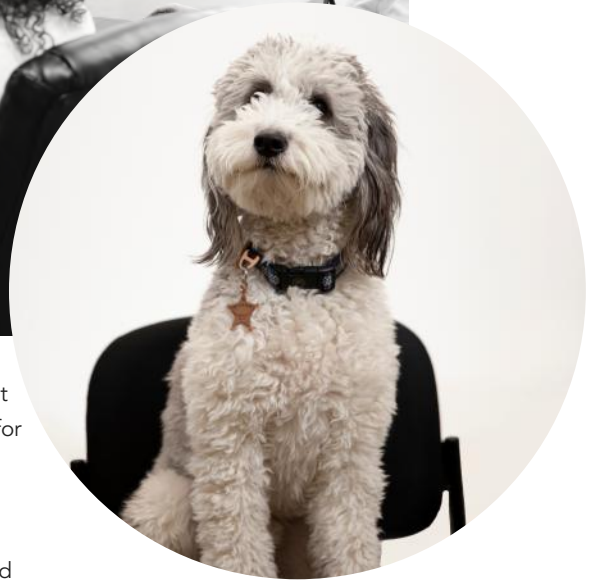
How are you now looking at past and current patterns that impact growth? What are some of those patterns?

Probably some of the most important patterns that we're looking at are the way that we engage with customers on the front end of the funnel. What we're seeing is that we're not getting as much success when we're sending samples. That's a really specific example. But we're able to make changes in the way that we make our sales

At some point, we will figure out how to find and retain salespeople. We've been working with a recruiter for the past several months to try and fill in that piece of our business. Funnily enough we've been more successful on our entry level production associated search. I think a lot of that has been driven by our culture and the people that workday in and out to build these training models. We've had people moving here, along with their families, to take our entry level production associate positions at SurgiReal which is quite interesting.

How has your team taken to the Five Conditions? How are you using it? What can you share with our group that way?

I think it's been a journey. And I think the most important thing that I can share is, you as a CEO, you must be a visioncaster. And it's really easy to go to a governance session and glean takeaway and go back and change things. But if you don't communicate why you're changing things, I think you stand to lose your people very quickly. And that was me, right? That was me and my VP of sales that we hired in 2020. We just had a frank conversation where he said, "you know, you go [to TrueSpace] to do these half days away from the office where you're learning these things and then you come back and want to change things. And I have this set way that I'm planning



on doing things and you come back and change that, which makes it really difficult for me to plan things.” That was a good wake up call for me; just because it's clicking for me in my head, doesn't mean I'm communicating that well to my team. Now I'm involving them on a more consistent basis with what we're doing at TrueSpace, what takeaways we're getting, what pieces we're trying to put in place and the overall strategy.

Are there any other big lessons that you can share with people that are trying to get their business to a level of predictability like yours? What should I avoid? What should I do more of? Where should I pay attention?

I think one of the things you're fond of saying is that your business is your teacher. But you can't learn from it unless you're willing. I think it's very easy to see what you want to see from your business. What's been helpful for me is going into looking at the business, like I'm going into a strategy session ready to learn and open to what my business is trying to show me. But you must be teachable to see that.

“

What's been helpful for me is going into looking at the business, like I'm going into a strategy session ready to learn and open to what my business is trying to show me. But you must be teachable to see that.

”

TEAKOE

**PETE
JOKISCH**

Founder & President



 FOUNDED 2009	 INDUSTRY Consumer Packaged Goods	 BUSINESS MODEL B2B2C	 EMPLOYEES 8	 LOCATION Denver, CO	 LEGO Rocky Balboa
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Playbook Work

WHAT ARE YOU BUILDING AT TEAKOE?

A wellness brand that makes premium, healthy products more accessible for all.

WHY DOES YOUR BUSINESS EXIST?

TEAKOE exists to inspire healthier communities by connecting modern consumers to better-for-you-beverages.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We focus on the "use occasions" of our customers and partner with strategic accounts that cater to those usage points, presenting a solution that benefits both parties. Our clients provide a unique experience for people looking to make better decisions about their wellbeing and we offer the product that allows everyone the opportunity to remain true to their core values. We create aligned partnerships for our consumers, clients and community.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our high value customer(s) are individuals looking to make healthier decisions about the products they consume to benefit their lifestyle(s). Consumer personas include motivated professionals, conscious parents, wellness warriors and creative culinarians.

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Our focus centers around inclusion of the entire team as it relates to building our business. I can't do it alone and it's imperative to include all team members in the development and execution of our goals.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

Building trust and validation with our customers and focusing on the development, personally and professionally, of our team.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

Belief in myself and my ability to lead others and our business. We have countless people who have entrusted me with responsibility and capability, and I need to be the person they know I'm capable of becoming. Being your own toughest critic is the ultimate blessing and curse and it's my duty to rise above and lead with confidence and conviction. a time.

WHAT ADVICE WOULD YOU GIVE SOMEONE NEW COMING IN TO TRUESPACE?

Have patience with the process but be persistent with your commitment to the process.

TERRA FERMA



DENNIS ROARK
President

Playbook Work

WHAT ARE YOU BUILDING AT TERRA FERMA?

Terra Ferma is building a technology innovator using our proven patented technologies and processes solving cybersecurity and communications problems. Leveraging our expertise in rugged communications technologies, governmental sales channels, supply chain and third-party manufacturing, Terra Ferma is building a portfolio of solutions solving real world problems. We engage with engineers and designers of communications and secure networks, understand their challenges and opportunities and apply our solutions for improved results.

WHY DOES YOUR BUSINESS EXIST?







Terra Ferma exists to solve real world issues with proven technologies and processes.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Our Power over Ethernet (PoE) and Light Fidelity (LiFi) products are widely used by the US and NATO governments, research and development centers and high-tech manufacturing companies to solve cybersecurity, efficiency and bandwidth issues in difficult environments. LIFI was recently added to our product portfolio, joining the PoE technology. Our legacy sales channels for PoE – military, government communications, and secure networks - have reacted enthusiastically to the LIFI technology. We are working diligently to keep up with demand from this sector. As we continue to grow our legacy sales channels, Terra Ferma is presenting our LIFI solution to applications in cyber security among government contractors, manufacturing and distribution centers, as well as the conference and hospitality industries. Reaction to our LIFI technology and the possibilities it provides creates a great deal of energy in every introductory sales conversation.

WHO IS YOUR HIGH-VALUE CUSTOMER?

US and NATO government agencies. consistent revenue.

 FOUNDED 2015	 INDUSTRY Rugged Communications Products
 BUSINESS MODEL B2B - Manufacturing, Product Delivery	 EMPLOYEES 9
 LOCATION Colorado Springs, CO	 LEGO Builder

Lessons & Takeaways

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

In 2022 we are launching our latest products which brings marketing, production and cash flow challenges.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

Efficiency. We need to improve our process flow in product procurement and production. Over the past couple of years, we've been reverting back to the "hero mentality" where individuals have had to take on extra duties at a moment's notice to adapt to logistical and production issues. In 2022, we will reimplement processes and hire to fill gaps.

WHAT ARE BAD RECOMMENDATIONS YOU HEAR IN YOUR PROFESSION OR AREA OF EXPERTISE?

Quite often I am questioned as to why Terra Ferma doesn't bring production and manufacturing in-house. I am told we would be more efficient and profitable if we controlled all processes. They miss the larger picture of "feast and famine" of product development and production. Our suppliers and contract manufacturers are experts at what they do. We pay them for a sliver of time extracting their expertise while receiving a quality product with no overhead costs. Graphed over time our outsourced model is more efficient with little overhead when compared to an in-sourced model.

THE RFP SUCCESS COMPANY

LISA REHUREK
Founder & CEO



Playbook Work

WHAT ARE YOU BUILDING AT THE RFP SUCCESS COMPANY?

We are building a company that transforms how mid-market technology businesses respond to RFPs by increasing their win rates and simplifying their processes. We're building a sustainable, scalable business that allows us to hire appropriately and anticipate the needs of our contractor bench.

WHY DOES YOUR BUSINESS EXIST?







To help companies find new ways to build their business through consistent forms of revenue from state government contracting.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Our successes consistently occur with companies earning \$10M - \$50M per year in the IT, tech, and telecom mid-market spaces that are looking to ramp up state government contracting.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our high-value customer has internal accountability and respects deadlines, understands the value of collaborative partnerships, is open to process and culture change, dedicates the resources needed for a successful collaboration, is passionate about their solution, prioritizes value over cost, respects our pricing, understands the value of our outsourced/fractional proposal team and sees us as experts.

 FOUNDED 2011	 INDUSTRY Consulting
 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 8 (+ 1 part-time and 13 bench contractors)
 LOCATION Tempe, AZ	 LEGO Clark Kent

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

2021 shifted dramatically when I was able to shed my tunnel vision regarding our service offering. It can be difficult to envision a wildly successful outcome with new business initiatives, but when the blinders come off, it's magic! Getting outside perspectives was key for making these new offerings a reality.

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

Hands down, my team is my greatest leadership win to date. We continue to grow consistently and the incredible excitement and energy the entire team brings to the table is electric. We've got amazing talent and we're building this business arm-in-arm.

WHAT ARE BAD RECOMMENDATIONS YOU HEAR IN YOUR PROFESSION OR AREA OF EXPERTISE?

There can sometimes be a push to create too much process, or even a "one-size-fits-all" approach when it comes to RFP responding. A true, winning RFP response process requires adjustments specific to the business and often needs to be simplified from the processes they currently have in place.

Alignment Award Winner

TRIBUTARY REAL ESTATE





**AMY
ALDRIDGE**
Partner

Tell us about Tributary Real Estate.

We're a Denver-based commercial real estate firm focused on brokerage and investment. We help companies ensure their real estate strategy aligns with their overall business goals. We work with both office tenants and buyers. Tributary was founded in 2015 as an investment firm. In 2017, my current business partner, Andy Cullen, joined to build out a brokerage team here at Tributary.

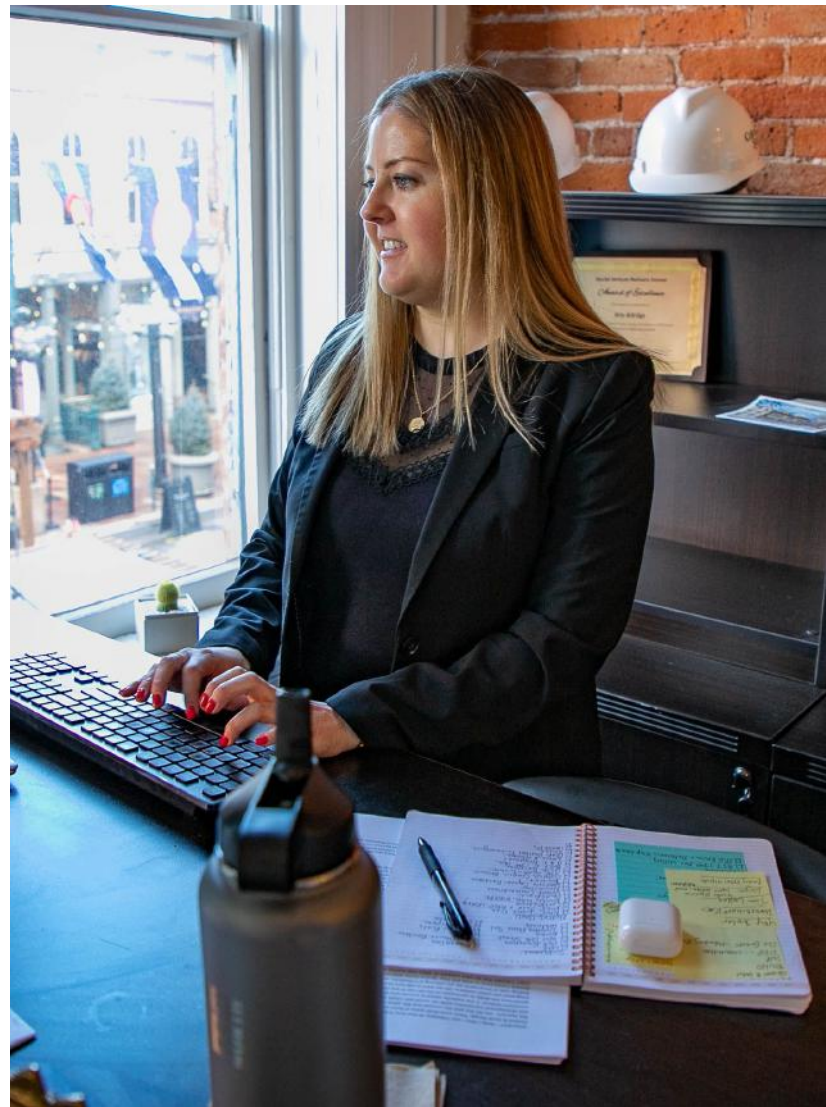
We know from our research that the process of business building starts with the condition of Alignment - Is the business ready and capable to grow? When you joined TrueSpace, you and Andy had already sensed some conflicting views between the two of you and your other business partners that impacted your ability to grow Tributary. Take us through how these disagreements manifest and how you eventually resolved the misalignments.

As I mentioned, Andy and I came over in 2017 to build a brokerage team. We really wanted to build a team that would outlive us. At that time, Tributary also had a couple other business niches and focuses that we weren't as close to day to day. What we came to realize, after a few years, is we were essentially operating as two separate companies and neither had a clear line of sight into the other. Ultimately the other partners left Tributary to continue their focus at a new company.

Did you take some of the work that we did on alignment, mission, the focus on customers, the points of view and those kind of elements and actually have those conversations with your partners as a way to flesh it out? Or was it more sort of background knowledge that you and Andy had?

I think that there's always been an innate alignment between Andy and I, and I think that's a big part of why we left where we did to come over to do what we're doing at Tributary. Whether that was intentional or not, that's one thing that's become very apparent – that we're very aligned. Looking back now with hindsight, we absolutely had different points of view on high value customers and purpose with the other partners. I think since we were operating as two separate companies, we had different alignments, and that came to light over time. Fairly quickly we realized that we needed to resolve the misalignment. I don't think anybody thought that it would be a separation of the two groups, but that's what ended up being in the best interest of the company.

And then when you realized that, then it got into the mechanics and got into a lot of the details about how you actually restructure partnerships and all the rest of that, right?



"WE REALLY WANTED TO BUILD A TEAM THAT WOULD OUTLIVE US."

Yes, absolutely. There was a kind of a mini regroup once the separation took place where we asked "Okay, now where do we go from here?" Nobody expects this situation; we sure didn't. All you can do is put the company and your team first and ensure that you're navigating a path forward that is sustainable for the long term, not a short-term fix that feels good, or one in which you don't have to have hard or challenging conversations.



The other the other thing I'd like to have you talk a little bit about is how all this played out with your team at Tributary with the business of the business that you and Andy are really driving. As you're going through this process, was it impactful on the team? Or was it mostly stuff that was in the background that you and Andy had to work through?

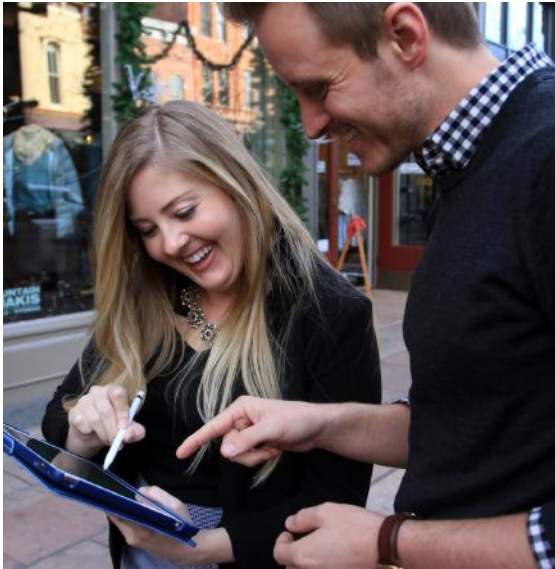
Our first thought was "What's the impact on the team with this big change?" One of the partners who left was one of the founders, so that is impactful. Providing clear, consistent communication was key to creating a transparent and open environment during the transition. Brokerage is the biggest part of Tributary and at the heart of what we do. Most of Tributary is on our brokerage team, and they had trust in Andy and me that when this came to light, we were going to navigate well. Based on how things ultimately landed, deeper trust and respect was built with the team as a result. But yes, it was absolutely a challenging time for us as leaders as we determined what and how much to share. It was a big learning curve for Andy and me as leaders, but I think we have a strong team. And fortunately, the foundation of trust was already in place to get through and navigate it unscathed.

You went through this all on top of two years of COVID. Between being able to and not being able to hold in-person meetings and using Zoom and all that, it probably added a little dimension to the uncertainty of the whole team.

Absolutely. I think that there was trust that was built during that time. I think that helped a lot. Also, most of our team had been around for a while, so they already knew how Andy and I operate as leaders.

The commercial real estate business is notoriously very competitive and tends to be very transactional. So how do you and Andy, take what the work you've done and create distinction for Tributary so that you're not just one more commercial real estate broker?

Andy and I have worked together a long time, even prior to Tributary, and we left our previous firm with a clear vision of what we wanted to build. Simply put, Andy and I both believe strongly that there is a right way and a wrong way to do what we do. We set out to build something around that. There were very clear aspects of the way our business has been done for many years that we knew we didn't want to bring over and there were some aspects that we did. We were aligned on what those aspects were. I think we both bring different perspectives and ideas, but because we're on the same page about our purpose, our why and building what we're building, it works. I also think we've always had very open, honest and non-judgmental dialogue about our business and what's best for it. As a team, we adopted five core values that we strive to work out of each and every day: Show Up, Advocacy Always, Do the Right Thing, Team Above Self, Give Back. This type of commitment is what helps set us apart in the marketplace.



In the recent retake of your 5CA, you assessed Tributary's Alignment condition at 68 - among the highest Alignment assessments we've seen. Now that you have a solid foundation for being capable to grow, how do you see the development of your talent and leadership structure to stay focused?

This is something Andy and I talk about often right now as well as something we've prioritized this year. So far, we've been lucky to find great talent and we've invested a lot in them, which was intentional. We've done that firstly because we believe it's the right thing to do and we wanted to build the best brokers in the business, and second, because we wanted to build a company organically, which includes the future leadership. As I mentioned, Andy and I set out to build something that outlives us. We know that in order to retain the talent we have – because they're actively being recruited by our competitors and we know this because they're open and honest with us about that – that we have to provide some paths of leadership in the firm. They all operate as leaders to one another and have embraced Andy's and my approach to mentorship and investing in the less experienced team members, which is great to see. However, we talk continuously about how we continue to recruit talent and build out our leadership structure if Tributary is to outlive both of us.

Something I find very unique about your approach, Amy, is that unlike many businesses that try to recruit talent that's been around for a long time and will bring those experiences, you intentionally don't do that.

Correct. As I mentioned Andy and I are aligned on a lot of things, but the biggest one is that we believe there's a right way and a wrong way to do what we do. And because of that, I think that's how our recruitment and talent development has taken shape, which is about finding the right skill sets in individuals. Real estate isn't rocket science. It can be taught, and in fact, we want to teach it so we don't want to have to undo bad habits, or what we feel like are bad habits. Therefore, we're always on the lookout for right kind of talent. And through that process, we've found great people with varying backgrounds of expertise, both personally and professionally. I think our team is very well rounded, and our culture is built around who we bring in. It's a big part of Tributary and why we're successful. But I think we also took a different approach in investing in our team. In other real estate shops, it's kind of sink or swim. That's probably the easiest analogy, whereas here, we wanted our brokers to be hungry but not starving. We want them to make right decisions and not make decisions because they need to pay their rent. Based on that, we incorporated our benefits and compensation differently than others in the industry. Our intention was to do things the right way, the way we feel it should be done. By doing this, we've found we are truly challenging our industry and disrupting it. It's going to take time, but we're trying to do our part.





What are you working on now? You've got this great foundation in alignment so what are the big themes for 2022?

I feel like we've spent the last year building the Playbook. This year we're actually in the Playbook, learning about our business and how to grow it. It's been very interesting. Going through the process of building our Playbook validated what we do well already and what we need to work on. We don't overlook the things we do well. A lot of the things we've already talked about, like alignment, knowing our high-value customer and staying focused, but there are other elements we need to focus on at any given time to continue to build what we are. As I mentioned before, talent and leadership structure are priorities for us right now. We have also incorporated the scale metrics into our weekly team tracker, which we review at our team meeting every Tuesday morning to understand how everyone is contributing to the overall team revenues for the year, which we thought was very important. Everybody sets individual goals and we set a team goal, but really aligning the two, tracking them along the way and using our metrics scale as our unit economics changes the data and how we look at it.

We've been doing that since January and it's motivated the entire team, including Andy and me. So, we've taken that data and further broken it down by broker. It'll be interesting to see what the data tells us at the end of the year and what business decisions we make as a result. I think the other piece of that, too, is when we talk about our current leadership, obviously there's two of us now. As such, we've talked a lot about if we bring on other partners, if/when that would that make sense and if we build out a board.

What else would you like to share about your work with TrueSpace and where you go from here?

Our work with TrueSpace has been both challenging and rewarding for us so far. Building out the Playbook was painful, to be honest, and it took us a full year to build. I learned my lesson the hard way by not keeping the data up to date early on and I had to go back several months and pull information, which took a ton of time. But the end product has given us a tool to understand our business in a way we never have before, and we use it weekly. I expect we'll continue to evolve what we build as we learn more about our business and where opportunities to improve exist.

VARTEGA

**ANDREW
MAXEY**
CEO



Playbook Work

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

Double down - 10X scale-up.

WHAT IS ONE OF THE BEST OR MOST WORTHWHILE INVESTMENTS YOU'VE EVER MADE? (COULD BE AN INVESTMENT OF MONEY, TIME, ENERGY, ETC.)

My 2006 Saturn Ion - best \$ per mile you can find.

WHAT ASPECT OF TRUESPACE HAS HELPED YOUR BUSINESS THE MOST?

Role definitions and the cadence of leadership one-on-one meetings.

WHAT KIND OF CULTURE EXISTS IN YOUR ORGANIZATION, AND HOW DID YOU ESTABLISH IT?

A culture of trust. We are all going to make mistakes. These are not failures; they are data points. We own our mistakes and learn from them. We also trust each other to support us in that growth.

WHAT ARE YOU BUILDING AT VARTEGA?

A vertically integrated advanced materials producer.

WHY DOES YOUR BUSINESS EXIST?







Vartega exists to change the way manufacturers view and use industrial manufacturing waste by solving advanced materials recycling problems.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Carbon fiber producers and thermoplastic compounders currently supplying carbon fiber or carbon fiber reinforced thermoplastics to applications in sporting goods, additive manufacturing, and automotive – specifically for cost-sensitive or sustainability-driven applications.

WHO IS YOUR HIGH-VALUE CUSTOMER?







Advanced material producers and users looking for supply chain security through utilization of a captive material supply in composites waste stream

 <p>FOUNDED 2014</p>	 <p>INDUSTRY Advanced Materials, Cleantech, Manufacturing</p>	 <p>BUSINESS MODEL B2B - Manufacturing, Product Delivery</p>	 <p>EMPLOYEES 20</p>	 <p>LOCATION Golden, CO</p>	 <p>LEGO Indiana Jones</p>
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VERIFENT



LANCE DILLARD
CEO

 FOUNDED 2019	 INDUSTRY SAAS	 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 13	 LOCATION Virtual	 LEGO Frodo Baggins
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Playbook Work

WHAT ARE YOU BUILDING AT VERIFENT?

Verifent is building a verification platform that enables organizations to securely and efficiently exchange HR/Payroll data that is needed during employee times of transition.

WHY DOES YOUR BUSINESS EXIST?

Verifent exists to alleviate the stress for education employees by advocating for them during times of transition.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We win and grow when we partner with K-12 school districts that are looking to create efficiencies, improve data security and go paperless.

WHO IS YOUR HIGH-VALUE CUSTOMER?

K-12 school districts.

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

Once our 'why' was established, everything came into focus. That was very exciting, but it also came with apprehension. Will there be 'buy in' from the entire organization? Will there be a mass mutiny on the sales team? How will our current clients respond? However, after many conversations and a significant investment of time, everyone is now moving in the same direction with the same purpose and point of view. 2022 is going to be a lot of fun!

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

Watching the development and growth of the team. I believe in people over products. To hire very capable talent with little to no experience in the industry and watch them grow into contributing team members has been very rewarding.

WHO DO YOU DEPEND UPON TO TELL YOU THE UNVARNISHED TRUTH?

TrueSpace's scorecard and my wife.

WHAT ADVICE WOULD YOU GIVE SOMEONE NEW COMING IN TO TRUESPACE?

Take the risk you are being asked to take.

VISIBLE NETWORK









EXEMPLAR BUILDER WINNER

LABS



DANIELLE VARDA

CEO

 <p>FOUNDED 2018</p>	 <p>INDUSTRY Healthcare Technology</p>
 <p>BUSINESS MODEL B2B - Technology, Software, Professional Services</p>	 <p>EMPLOYEES 16</p>
 <p>LOCATION Denver, CO</p>	 <p>LEGO Daenerys Targaryen</p>



What is Visible Network Labs?

Our company exists to tackle the issue of social connectedness and adverse social connectedness and its effect on people's health, mental health, and well-being outcomes. And our purpose is to provide the tools and data to providers so they can incorporate better social connectedness into people's care plans. My big vision is that everyone has a social connectedness screener in their medical, school or financial records and then help people have the insights they need to help people fill in gaps or leverage their strengths so that they can live better lives and thrive.

Some people that receive numerous instructions, or have a lot of needs, can walk out of that office and have people around them who can help them do all those things. But then there's a whole lot of people who don't. When we leave a doctor's office without the ability to follow through on things like getting a ride to pick up prescriptions, we won't be as healthy as someone who could. What we're trying to do is help those people who don't have someone to help them when they get instructions or when they have certain social or economic needs, and then find ways to make that visible.

"We're not the solution, we're the resource. We're not the ride, we're not the food, but we're the folks that help find the people who are at risk of not having those things, and then provide insight so that those systems resources can find and help them."

If we were to describe what a social network is, and you making it visible, what would that look like? Give us an example of what that looks like?

Almost everyone goes to a doctor, we hope. And anytime you go, whether you're there for a blood draw, prepping for a surgery, getting news about a heart murmur, whatever it is, there's stuff that they're going to tell you that you need to do to take care of yourself. But it's rare, if ever, that you're asked in that setting if you have someone to help you do those things. Even if they do ask, they don't ask you things like "can you trust them to help you?" or "how dependent are you on them?"

Because many systems solutions do exist. We're not the solution, we're the resource. We're not the ride, we're not the food, but we're the folks that help find the people who are at risk of not having those things, and then provide insight so that those systems resources can find and help them.

There's at least two roles here: the patient (or the person in need) and the provider of care (e.g. physician, PA, nurse, specialist). How is it that your network connects with those people? How would you describe the role as provider of care, relative to your platform? And how would you describe the role relative to the person in need, or the patient?



Well from a business perspective, our user is really the provider. They're the folks buying the service. It does take a certain kind of provider to know that they need this. But in healthcare, in the last decade, we've seen mountains moved in terms of people understanding whole person care and understanding that a person's social determinants of health matters to their health outcomes. So providers are doing this kind of screening on people more and integrating it into their primary care more than ever.

So the provider is the primary role there actually who pays for this?

Yes, or maybe the health system or the clinic. They pay for it, but then the provider is the one that has to put it into their workflow.

It's been very important to us to try to solve the problem of adding workflow tasks to a provider. But once the provider does that, it's not just screening someone, it's also kind of changing the way they think about how to provide care for the patient. It requires a bit of a mindset shift. Once a provider makes that shift, they start to think of their patients in a whole different way. The patients take a screening and then what they get from it is usually referrals to resources. But they also receive their data in a summary report. This is really different, because most of us, as patients, never get to see our data that providers type or write into a notepad. Therefore it's been really important to us that we make it really patient centered and ensure patients benefit from it.

From a business perspective, I think this is going to be really important for payers, for example, in the future, trying to figure out how to save costs.

VNL is highly well balanced with your composite scores in the 70s. And with that balance hopefully you're starting to see business results. Can you describe what's changed in your business over the last 12 to 15 months, that's enabled you to build that balance? What's been changing?

Alignment is enormous.

We have become so aligned, that it affects our culture, our view on what we're building, where we're trying to go and how we're trying to get there.

But the second and most important change is building a leadership team. I feel like one by one, we've figured out what kind of leadership team we need and then found the people to fill it. In particular, I recall when you came to VNL's August retreat and spoke to the whole team. It left us with a renewed confidence in the TrueSpace process and what we needed to do. And I think that brought the team together a little bit.

The third thing I would say is that although our assessment scores are lowest in endurance, I'd love to take it again, even right now. Because we have focused on it so much. And I've taken more risks and built the team up. We also measure capacity now. We do an internal survey on burnout to try to create a couple of data points that help us understand when we're overworking people.

Our fulfillment of our product has shifted, because now we keep good track of our capacity to provide and fulfill. So those three things have been enormous shifts in the company.

Did you change the trust, your ability to trust others? For the purpose of our readers, they should know that you basically had to take quite a bit of time off to run for public office. And by extracting yourself from VNL, you had to rely on a team of people to do that. Let's just talk through that story. Tell us a little bit of what you learned and what came out of that effort.

My first reaction was desperation because I just couldn't do all of the things and I over committed myself to too many things. But we're at this point where, as the CEO or leader, you get so overwhelmed with taking on all the tasks and doing all the work, that you're just going to kind of break.

Logistically, the best thing for me has been to know that what I need people to do is create some kind of paper trail. This sounds very specific, but if there's something going on my team can just copy me on an email, with no expectation for me to respond or need for me to get involved. It just keeps me in the loop so I can take inventory that something's happening. So in a new relationship with someone as I'm trying to hand something off, that's been a really good strategy for me since I don't need to be a part of all those things anymore. But when you try to handle everything, you can get burned. On the other hand, you can't have someone come in, take everything away and leave you with no visibility on it.

You've more than doubled the size of VNL in terms of revenue and people, customers and all kinds of things in the last year. You've also been operating now for quite a few years. If you were to describe to people, what's changed in that doubling effect? And then second, what do you expect to continue to change because of it?

We've shifted our mindset from just providing services and saying yes to everything to becoming more predictable while working on becoming recurring. That has changed everything. It's enabled us to know when we're going to sell something, how much we can sell when and how we track growth and scale. I think what will change for us the future is our ability to become more recurring. We're working really hard on shifting from a services company built on a technology platform. So we had that going for us. But making most of our money on services, and we still are, but now our services are predictable. It's just like a package now. And the whole team works from that lens. We're continuing to work from the mindset of how we package and sell and where we won't negotiate. We had a data science meeting yesterday and someone said, what are we going to do when a client asks us to add one more network or a report? Our team has been really big on customer service. I would say customer service in quotes because we'd say yes. And after that meeting, the VP of data science said I want you to remember these two phrases to tell clients, one being "we'll have to revisit that and rescope it because that request isn't in what you've ordered."

And the other is to remind people that we can't expand timelines because our team is on a schedule and we have to pay for people's time. It was interesting to watch the team learn how to use non-negotiable language.

I think that's a hard transition for any firm to make that loves each customer like your company does. It's not easy to say, look, the best way to serve you is to not change this construct, the best way to serve you is to be really good at what we do. How's the team doing with that?

You asked a really important question because our customers are solving big complex problems in the world, like solving systems of care for kids with special health care needs or just doing heartfelt important social impact work. They're also on restricted budgets, so it's hard to say no if we think that their impact is going to be lessened if we can't help them do that thing. That said, we have surprised ourselves by valuing ourselves more. We've had discussions on if we don't charge enough for our offerings, clients might think we're offering a cheap product. So, we actually have to price ourselves to look a little bit more expensive, so clients can understand the value they'll receive. The shocking thing to us is that people do value us and they happily pay us those rates.

What else has the doubling of the company done? That, of which you can actually share with other people?

I had a big mindset shift on understanding that we have to grow to grow. We've always been bootstrapping and I'm still extremely conservative. I track this really well. But for the first time, in anticipation of becoming more of a SaaS product company, I hired people who didn't have a funded position yet, with the funding that we had, and with some of our SBA money that came in. Basically, we created a customer experience division of our company to help us scale our SaaS product line, in anticipation of it becoming overwhelming, with the technical and customer experience processes to support that. I had to take a huge risk to invest in a team that could prepare for that growth. I know that might not sound like rocket science, but for me, it is totally different. I think we still struggle with a lack of capacity in some of our areas. For example, I decided to build out customer experience instead of development. I need more in development, but I can't have our developers building all kinds of stuff and then no customer support for what I hope is an overwhelming amount of SaaS sales. So that's been different too and I think it's grown our capacity in a way that when you grow a team like that, they start to kind of build off each other's expertise and energy.

You're coming up on two years with us at TrueSpace. What is it you can teach other people that are in this craziness of growth and trying to figure it out? What are some of the things that are kind of apparent to you that could be helpful to the group? And do you have any nuggets that you can share with the group?

I've learned that it's important to be a good learner. I think for other business owners, if they come into this afraid of learning, looking vulnerable, or exploring things they don't know or getting advice from people they don't agree with, it will be incredibly difficult to be a really good leader without that trait.



What has the business been teaching you? All the things you've been putting into motion are an adaptation from what you've been learning, so how have you responded?

I feel like I've learned things the hard way, one being relationships. Who I trusted along the way occasionally was a mistake. Because I was a professor, when I came into this business, a lot of people said I couldn't do this. I probably spent the first six months of running VNL convinced that I was not the right person to do it. I think it can take entrepreneurs some time to feel like they're the right person to run their business. But I'm very certain of my role now, although I also have learned how much I don't know as well as how much I can lean on others.

I think a second thing, is that it's been hard for me to focus on and narrow on the high-value customers and to say no to all kinds of opportunities. For example, a great contract of ours is coming up for renewal, but it's just not our thing. It's not going to get us to where we need to be. I think little mistakes have helped me learn, but they're still coming. I can feel them, like even imminently, but I'm trying to make sure I don't repeat them. I've repeated mistakes before which kind of makes me upset sometimes. But I think that there's a process by which you start to learn and then integrate your experiences into your decision making.

I think most of our CEO members of TrueSpace struggle a little bit with the theory of TrueSpace, the data we have, and translating that for their team and getting them to really embrace it in their own roles. And I think you've done this in an exemplary way. How is it you've involved your team in in this work and made it a part of how you're how you're leading your business?

We have a leg up because we are data geeks, hands down, that sell data. So the idea that there is an evidence-based program that we're a part of is already a good start. My team is incredible into thinking about data and how we use it in practice. What's interesting is that my leadership team suggested we meet every other week to focus on the [5CA] results and think about one of the concepts. We call that meeting our 5C's meeting. It's on my calendar and it's 45 minutes every other week. It's basically become our leadership meeting. My team has really embraced thinking about where we're strong and where we're not. One more thing that we do culturally is have a team meeting on Tuesdays. There are three important components to it. One is that everyone on the team has a moment to speak. The second one is to have updates from the leadership team. And the last part is to discuss big picture topics like the Playbook or our why. I think it's these components that give the team a sense of visibility and transparency with what's happening.



Just for the record how many employees did you add last year?

Maybe 12, like half the company. We had a little bit of turnover, which will happen as we get bigger. But honestly, my goal right now is to kind of try not to grow for a little while. But because we're trying to scale the SaaS product, we just need to automate everything that our people do. My hope is to kind of stay steady at our numbers for a little while. And really focus on our team's job security by growing the business.

Any other thoughts that you have for the group, if you were to be in front of them speaking to them, but just don't have a chance, of course, to say a few things at the awards ceremony?

The last thing I would say is that when I found TrueSpace, I had no idea that it existed or what made its framework so unique and different. I hope people stick around and participate in it. Because the program and content is good. The community that you all have built, and the way that it's implemented, is like nothing I've been a part of before.

I hope that the other members trust the process and get really into it, because for me, I don't know where I'd be without having our company in this program. I can't wait to see in five years the story that TrueSpace is going to be able to tell about all these companies and where they've been. Trust in the TrueSpace process and don't give up. Because I personally don't think you'll find something as high quality as what TrueSpace offers.

“
The community and the way that it's implemented, is like nothing I've been a part of before.
”





WORDWRITE

**PAUL
FURIGA**

President & Chief Storyteller

Playbook Work

WHAT ARE YOU BUILDING AT WORDWRITE?

A sustainable, multi-owner professional services business committed to sharing the great untold stories of our clients.

WHY DOES YOUR BUSINESS EXIST?







WordWrite exists to connect providers of complex services to the decision makers who hire them. We do that by uncovering, developing and sharing their Capital S Story – the one that answers why someone should buy from them, work for them, invest in them or partner with them.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Complex service providers in healthcare, manufacturing and professional services (architecture, engineering, financial services, law, etc.) struggling to define their identity, messaging, competitive difference, results tracking or growth.

WHO IS YOUR HIGH-VALUE CUSTOMER?

The ultimate decision maker in a firm providing complex services who says things such as "I don't know how to describe what we do" or knows that "Prospects can't tell us apart from competitors" or can't connect marketing spend to client growth.

 FOUNDED 2002	 INDUSTRY Marketing & Public Relations
 BUSINESS MODEL B2B - Technology, Software, Professional Services	 EMPLOYEES 10
 LOCATION Pittsburgh, PA	 LEGO Clark Kent

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

That need I need to get out of the sales process more fully if we are to grow. This has also been a grit moment and my greatest challenge since starting the business.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Growth.

WHAT'S BEEN YOUR FAVORITE LEADERSHIP WIN?

Coming out of COVID with a solid plan to grow.

WHAT ARE YOU HOPING TO GET BETTER AT THIS YEAR?

Staying focused on areas where I bring the most value to our team and clients rather than straying into areas (such as sales) where I no longer need to focus.

WORKLIFE PARTNERSHIP



LIDDY ROMERO CEO

<p>FOUNDED 2009</p>	<p>INDUSTRY Workforce Development Nonprofit</p>
<p>BUSINESS MODEL B2B Nonprofit</p>	<p>EMPLOYEES 29</p>
<p>LOCATION Denver, CO</p>	<p>LEGO Hiker</p>

Playbook Work

WHAT ARE YOU BUILDING AT WORKLIFE PARTNERSHIP?

WorkLife is building impact. We believe prosperity is possible for everyone through work and believe businesses have a responsibility to make meaningful investments towards employee success. By expanding our reach, we aim to engage more companies in making work work for more employees.

WHY DOES YOUR BUSINESS EXIST?

We exist to influence a CEO's investment in quality jobs to improve the economic opportunities for their frontline employees and to lead a work environment where people feel safe and supported. Our expertise is informed by the real and constantly evolving needs of all workers.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

We win when we work with businesses who care about the success and wellbeing of their employees and understand their role as an employer in creating exceptional frontline-employee work experiences.

WHO IS YOUR HIGH-VALUE CUSTOMER?

Our highest value customer operates in the middle-market and has a genuine curiosity about their employees. Our HVCs want to understand what is holding their employees back and seek ways to address barriers to work. These businesses want more than survey results; they want insights they can translate to actionable change.

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

After very little staff turnover in 2020, we experienced a flurry of voluntary and involuntary terminations in the last two quarters of 2021. When you're in the middle of the confusion high turnover creates, it can be very difficult to see clearly to the other side. Nonetheless, we rallied and rebuilt our team with a group of talented individuals who see the impact we hope to make and are excited to build alongside us.

WHAT IS YOUR OPERATIONAL FOCUS (OR GOAL) IN 2022?

We are working diligently on discipline and predictability across our entire organization. From narrowing our sales to focus on HVCs to creating more consistency in how we fulfill our contracts, WorkLife is building the structure we need for growth this year.

WHAT ONE WORD WOULD SUMMARIZE THIS PAST YEAR FOR YOU AS A LEADER?

Steady.

WHAT ARE YOU COMMITTED TO IN YOUR LIFE RIGHT NOW?

Creating work that works with the life I want. Too often, it works in the reverse.



ZERIGO HEALTH



JOHN SCHELLHORN
CEO

WHAT ARE YOU BUILDING AT ZERIGO HEALTH?

A platform which delivers self-administered, at home, prescription therapy to people who suffer from autoimmune skin disorders.

WHY DOES YOUR BUSINESS EXIST?







To empower people with chronic skin conditions to take control of their lives and their disease, providing them the opportunity to live a confident life.

DESCRIBE YOUR MARKET WHERE YOU WIN AND GROW:

Health plans and self-funded employers turn to Zerigo to manage their members with chronic skin disorders, from mild to severe, employing multiple treatment alternatives. People who suffer these disorders find confidence and encouragement from their experience being on our platform.

WHO IS YOUR HIGH-VALUE CUSTOMER?

People with chronic skin disorders have their lives disrupted continuously because of their condition: they want the freedom which self-administering guideline therapy provides. Additionally, those paying for healthcare can no longer afford the \$50,000 annual drug costs to treat members with skin disorders. We offer them a highly effective alternative which delights their members.

 FOUNDED 2016	 INDUSTRY Medical Technology
 BUSINESS MODEL B2B2C	 EMPLOYEES 49
 LOCATION San Diego, CA	 LEGO

Lessons & Takeaways

YOUR BIGGEST LEARNING FROM 2021? / TOUGHEST GRIT MOMENT? / GREATEST CHALLENGE?

I took over Zerigo in late 2020 and early in 2021 fired our customers and completely changed the company's strategy from a legacy medical device supplier sold through dermatologists to a platform technology sold through health plans as a covered benefit for their members. This resulted in a monthly subscription charge versus a one-time payment model. It took all of 2021 to build out this platform. I was able to raise a \$43M Series B financing on the back of this new direction.

WHERE WILL YOU SPEND THE MAJORITY OF YOUR TIME AND WHY?

More of my time will be spent look as far down the road, trying to understand opportunities in a young, rapidly emerging sector. I fear the things I don't know and the potential for it to disrupt our business.

WHAT ONE WORD WOULD SUMMARIZE THE PAST YEAR FOR YOU AS A LEADER?

Comprehensive.

WHAT HAS BEEN YOUR FAVORITE LEADERSHIP WIN?

I have reimagined Zerigo and attracted exceptional talent to join our team and be part of something which has never been done in dermatology before.

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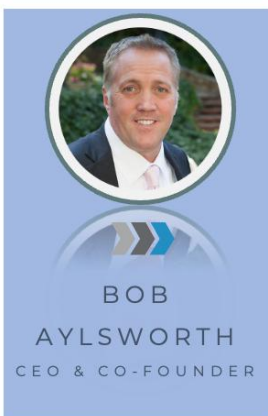


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A FEW WORDS FROM OUR CEO

Relationships and teamwork form the foundation of our business and day to day operations. Creating three wins is what we love most about our business: the candidate wins through securing a new job, the company wins through acquiring new talent, and we, as the facilitator, win through the satisfaction of a high-performing placement. Making a living helping people and companies thrive is deeply satisfying and is a big reason why we love doing what we do. We hope you'll partner with us.

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- Shawn Edwards, Founder, Mindsight

”



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COLORCO PHOTOGRAPHY

A big thank you to Cody Sowa of ColorCo Photography for taking this year's award winners' photos for this magazine. Cody is an amazing Colorado-based photographer specializing in weddings, travel/adventure, corporate events and headshots.

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Email: sowa.cody@gmail.com

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TO DO LIST:

- * KEEP CLIMBING
- * ENJOY THE JOURNEY
- * HYDRATE

POSITIVE ATTITUDE



COMPASS

~~I THINK WE'RE LOST AGAIN~~

never quit on a rainy day!

safety first



Remember the vision

JERKY & TRAIL MIX