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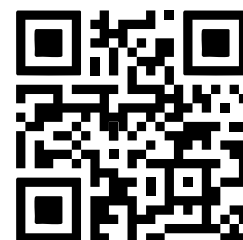


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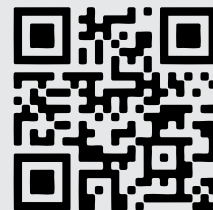
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From the Publisher

Welcome to Buying Local: Growth Edition!

At Buying Local, we celebrate the heartbeat of our economy: small to mid-size businesses and the entrepreneurs who pour their passion into them. There's no truer path to freedom than through small business ownership—a journey of grit, vision, and unrelenting determination. Our mission is simple yet profound: to provide unwavering support to those bold enough to walk this road, helping them grow, scale, and thrive in a world that often feels stacked against the little guy.

In these pages, you'll find stories that inspire and strategies that work. We shine a spotlight on coaching, consulting, and training organizations dedicated to empowering businesses like yours. These are the unsung heroes who equip entrepreneurs with the tools, mindset, and systems to turn dreams into reality. From leadership development to operational efficiency, their expertise is the rocket fuel behind countless success stories.

We also share the journeys of companies that have recently scaled new heights, thanks in no small part to the guidance of these growth partners. Their triumphs prove what's possible when vision meets expertise—whether it's a local startup breaking into new markets or a family business doubling its revenue. These aren't just case studies; they're proof that with the right support, no goal is too big.

Buying Local: Growth Edition is more than a magazine—it's a movement. We're here to amplify the voices of those who dare to build something from nothing, to champion the risk-takers, and to provide a playbook for sustainable growth. Whether you're a seasoned business owner or just starting out, this is your resource, your community, and your reminder that you're not alone on this path.

So, turn the page. Discover the organizations ready to help you scale, draw inspiration from those who've done it, and take the next step toward your own version of freedom. Here's to growing local, growing strong, and growing free.

With Unwavering Support,

The Buying Local Team

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RESOURCE TOOL BOX

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FAZ FORENSICS

A Blueprint for Growth

WRITTEN BY TYLER MURRAY
PHOTOS BY FIVE TOWERS MEDIA

A photograph showing two women in an office environment. They are seated at desks, facing away from the camera towards computer monitors. The woman on the left has long brown hair and is wearing a grey blazer. The woman on the right has long blonde hair and is wearing a dark top. They are in a modern office with glass partitions in the background.

In just over three years, FAZ Forensics has transformed from a team of six seasoned accountants into a powerhouse boutique firm with over two dozen employees spread over five distinct geographies from Boston to Tampa.

Founded in July 2016 by Stephen Ferraro, Charles Amodio, and Paul Zarecki, this Saratoga Springs-based company has carved out a niche in forensic accounting—a field that blends investigative prowess with financial expertise to uncover fraud, assess damages, value businesses and provide clarity in legal disputes. Their story is one of calculated risk, organic

growth, and an unwavering commitment to culture and process. For business owners and entrepreneurs looking to scale their own ventures, FAZ Forensics offers a compelling case study in how to turn specialization into success. We had a chance to chat with Ferraro and Amodio recently and learn how they did it—and how you can too.

You're not going to have **sustainable growth** unless you can manage the work and the throughput.

– **STEPHEN FERRARO,**
PARTNER, FAZ FORENSICS



1 STEP

Find Your Niche and Own It

FAZ Forensics didn't set out to be just another accounting firm. While larger firms might juggle tax prep, audits, and forensic work, FAZ zeroed in on forensic accounting as its sole focus. "We felt there was a need, in our area as well as the Northeast, for a boutique accounting firm specializing in forensic accounting," Charles Amodio explained in a recent podcast with Buying Local host Mike Nelson. This laser focus allowed them to develop deep expertise in investigating financial irregularities, calculating lost profits and business value, and tracing hidden assets—skills that are increasingly in demand as financial crimes and disputes grow more complex.

How-To: Identify a gap in your market that aligns with your strengths. Specialization can set you apart from competitors and position you as the go-to expert in your field. For FAZ, it was forensic accounting; for you, it might be a unique service or product that others overlook.

Commit fully—don't dilute your brand with too many offerings.

Leverage Experience to Build Credibility

In 2016 Stephen Ferraro, Charles Amodio and Paul Zarecki brought decades of public accounting experience to FAZ. Ferraro, a CPA for over 40 years, stumbled into forensic accounting in the mid-90s when an insurance claims adjuster needed help assessing lost profits after an automobile dealership fire. Amodio, with 26 years in the field, transitioned from traditional tax and audit work to full-time forensic accounting alongside Ferraro. Zarecki joined them in the forensic space over two decades ago after cutting his teeth in accounting, tax and investment advisory services. This depth of experience gave FAZ instant credibility, even as a startup. "We were seasoned accountants already well-established in our field," Amodio noted, acknowledging the risk of branching out but emphasizing the payoff.

How-To: Use your existing skills and network as a springboard. Experience is a powerful asset—clients trust proven expertise. Showcase your track record through case studies, testimonials, or, like FAZ, a YouTube channel where your team explains complex concepts to build rapport and authority.

2 STEP



STEPHEN FERRARO
CPA/ABV/CFF, MAFF, CVA, CBEC



CHARLES AMODIO
CPA, CFF, MAFF, MBA



PAUL ZARECKI
CPA, CFE, CFF



DAVID CONSIGLI
CPA, ABV, CDFA

3 STEP

Prioritize Culture as Your Bedrock

Ask Stephen Ferraro what fueled FAZ's rapid growth, and he'll point to culture without hesitation. "Culture is a very, very important thing for us," he told Nelson. "We want people to be excited and intrigued by the work they do day in and day out." This ethos earned FAZ a spot on Albany Business Review's "Capital Region's Best Places to Work for 2024." But culture at FAZ isn't just a buzzword—it's a strategic cornerstone reinforced by seven core values, including accountability, teamwork, and striving for excellence.

These values guide hiring decisions. "If you don't fit within those core values, you might not be a good fit at FAZ," Amodio said. The leadership team looks for candidates who embody at least five of the seven values, ensuring alignment with the firm's mission. This focus on "right people in the right seats" has fostered a tight-knit, motivated team—even as the firm expanded geographically.

How-To: Define your company's core values and live them daily. Use them as a filter for hiring and a foundation for team cohesion. Culture isn't static—it evolves with growth—but keeping values front and center, as FAZ does, ensures consistency. Host regular check-ins (FAZ's weekly 30-45 minute team meetings are a great model) to reinforce connection, especially if your team is remote or spread across locations.

4 STEP

Embrace a Growth Framework

FAZ's explosive growth—tripling in size over the past three years and opening offices in Boston and Tampa while adding "boots on the ground" in Metro NYC and D.C.—didn't happen by accident. Things were jump started in 2022 when Boston-based Dave Consigli joined FAZ as their fourth partner to head up business valuation services and Ashley Hurd came on as their Operations Manager...now she's Director of Operations. And nearly two years ago, they adopted the Entrepreneurial Operating System (EOS), a framework from Gina Wickman's book Traction. "It's been a game changer for us," Ferraro said. EOS keeps their values and strategic plan actionable, with tools like weekly leadership meetings (90-minute "Level 10" sessions) and firm-wide check-ins. "Our meetings are running so much more efficiently now," Ferraro added, noting how EOS prevents issues from lingering unresolved.

Charles Amodio, initially skeptical after past experiences with fleeting retreats, became a convert: "EOS lives and breathes with you every day." It's helped FAZ refine processes, onboard new hires, and maintain accountability as they scale.

How-To: Adopt a structured operating system tailored to your business. EOS works for FAZ, but alternatives like OKRs (Objectives and Key Results) or Scaling Up might suit you better. The key is consistency—choose a framework that keeps your team aligned and your goals measurable. Start small: FAZ didn't hire a Director of Operations until growth demanded it, proving you can scale processes incrementally.



5 STEP

Balance Sales and Systems

FAZ's growth teeters on a seesaw between external efforts (sales and marketing) and internal structure (processes and systems). Ferraro prefers leading with business development: "I like to do sales and marketing and then figure out how we're going to handle it." But he admits both are critical. "You're not going to have sustainable growth unless you can manage the work and the throughput," he said. After big wins, FAZ backfills processes—sometimes scrambling to catch up, as they are now with their recent surge.

The challenge? "Making sure we've got the processes and systems in place to handle that growth," Ferraro said. Documenting the "FAZ way" has been key to onboarding new hires, especially those accustomed to different workflows.

How-To: Don't let perfection stall progress. Push for growth through sales and marketing, but don't neglect the backend. Document processes as you go—start with simple guides or templates—and refine them as you scale. Hire strategically (like FAZ's Director of Operations) when growth justifies it, ensuring systems keep pace with demand.

6 STEP

Seize Opportunity Nationwide

FAZ's growth isn't just regional—it's national. "We're getting engagements all over the country," Ferraro said, a trend Amodio attributes to "opportunity." From farm claims in upstate New York to a vegan restaurant scandal turned Netflix series (*Bad Vegan*), FAZ taps into diverse markets.

Their work spans financial investigations and economic damage analysis, litigation support, insurance loss claims, and business valuations, serving attorneys (75% of their clients) and insurers (25%).

How-To: Look beyond your backyard. Technology—like Zoom and AI tools—makes geographic expansion feasible. Identify industries or niches with unmet needs (Among many other areas, FAZ excels with farms, cannabis valuations and commercial legal disputes) and market your expertise there. Organic growth will follow if you deliver results.

7 STEP

Stay Connected as You Scale

With half their team in Saratoga Springs and others spread across Tampa, D.C., Metro NYC, Charleston and Boston, FAZ prioritizes connection. Weekly check-ins keep the firm united, covering personal updates—like favorite desserts on a birthday—and business wins. Annual "track days" bring everyone together in person. "That weekly check-in meeting is the common denominator that keeps us connected," Ferraro said.

How-To: Invest in communication tools and rituals. Virtual meetings, supplemented by occasional in-person gatherings, maintain team spirit. Keep it light and human—FAZ's dessert chats show culture thrives on small, shared moments.

The Result: A Model for Success

From three founders to 26 employees, FAZ Forensics exemplifies how to scale smartly. Their formula—niche expertise, cultural alignment, structured growth, and adaptability—has turned a boutique firm into a regional leader with national reach. "If we find someone who values us and we value them, we are always interested in new markets and new clients," Ferraro said. For aspiring entrepreneurs, FAZ's journey offers a roadmap: specialize, build a team that shares your vision, and balance growth with grit. The rest, as FAZ proves, will follow.

To learn more about FAZ Forensics, visit fazforensics.com or email info@fazforensics.com. 

TRANSLATING SUCCESS



INTERVIEWED BY **MICHAEL
NELSON, PRESIDENT & CRO,
FIVE TOWERS MEDIA**

PHOTO COURTESY OF
SEAN KANE PHOTOGRAPHY

The Entrepreneurial Journey of Chris Leuzinger



In the world of entrepreneurship, success often comes from a mix of passion, perseverance, and a willingness to evolve. For Chris Leuzinger, founder of Nourishing Minds Tutoring, these qualities have been instrumental in shaping both his business and his impact on the community. His journey—from classroom educator to business owner, volunteer firefighter, and mentor—provides a compelling case study in dedication and adaptability.



*Chris Leuzinger, Founder,
Nourishing Minds Tutoring*

FROM TEACHER TO ENTREPRENEUR: A VISION FOR EDUCATION

Chris's story began in education. With a background in classroom teaching and administration, he witnessed firsthand the gaps in traditional schooling. He saw students struggling, not because they lacked potential, but because they needed more personalized support than schools could provide. Recognizing this need, he took a leap of faith and launched Nourishing Minds Tutoring over a decade ago.

Starting with a narrow focus on K-8 tutoring, Chris was meticulous about quality. "In the early years, I turned down a lot of business," he recalls. His primary goal was to perfect the model before expanding. Over time, as the business gained traction and credibility, he began to scale—offering high school tutoring, test prep, college-level support, and specialized instruction for students with unique learning needs.

BUILDING A SUSTAINABLE BUSINESS MODEL

From the outset, Chris approached his business with both short-term and long-term strategies in mind. He structured his goals into one-year, three-year, five-year, and ten-year benchmarks. The early objectives were simple: prove that people would pay for the service and gradually expand offerings. By year five, hiring became a necessity, allowing him to shift from being the primary tutor to managing a team. By year ten, Nourishing Minds had established itself as a thriving educational service, sustaining his family and supporting a growing roster of tutors.

WORK ON YOUR BUSINESS— NOT JUST IN IT.

This structured approach not only kept the business focused but also ensured steady, incremental growth. Today, Chris leads a team of nearly 20 tutors, supporting students across various disciplines. In addition to private clients, his business partners with school districts to assist students in special education and those facing long-term suspensions or medical homebound instruction.

THE PARALLEL PATH: LEADERSHIP IN THE FIRE DEPARTMENT

Entrepreneurship isn't the only arena where Chris has demonstrated leadership. As the First Assistant Chief at the Wilton Fire Department, he devotes countless hours to serving his community. Balancing his responsibilities as a firefighter and a business owner is no small feat, often requiring late nights and early mornings with little sleep. Yet, he believes that his experiences in the fire department have contributed to his effectiveness as a leader in business.

One of his key initiatives at the firehouse has been modernizing leadership strategies. Traditionally, fire departments have operated with a rigid, hierarchical structure. Chris has introduced progressive policies, including mental health support and structured physical training for firefighters. "We've contracted with Tandis

Orluk from Set Free Counseling and Max Level Fitness to help keep our team in top condition," he explains. His philosophy is simple: investing in people leads to better service. This same principle applies to his tutoring business, where he ensures that his tutors are well-supported and well-compensated.

WORKING ON THE BUSINESS, NOT JUST IN IT

One of the biggest lessons Chris has learned is the importance of stepping back from daily operations to focus on strategic growth. "I had to fire myself from certain jobs," he jokes. In the early years, he handled everything—from teaching and marketing to website design. But as the business expanded, he realized that delegating tasks allowed him to work on higher-level strategies.

This shift in mindset was a game-changer. It freed him to refine business processes, improve customer experience, and explore new opportunities for expansion. He also sought outside expertise, bringing in a business coach to help streamline operations and optimize decision-making.

"The accountability aspect has been huge," he says of his work with business coach Rich Youmans from Amplified Coaching. "Having someone objectively look at my business and give honest feedback keeps me focused."





GROWTH THROUGH NETWORKING AND COMMUNITY ENGAGEMENT

Chris credits much of his recent growth to networking and community involvement. While word-of-mouth referrals have always played a crucial role in Nourishing Minds' success, he has actively invested in building relationships with other entrepreneurs, educators, and professionals.

"Getting out there and meeting people opened up so many opportunities I wouldn't have found otherwise," he shares. Whether it's partnering with local organizations, sponsoring youth sports teams, or engaging with school districts, he has found that giving back to the community has led to organic business growth.

LESSONS FOR ASPIRING ENTREPRENEURS


For those looking to follow a similar path, Chris offers several key takeaways:

- 1 Have a Clear Plan:** Setting structured goals—both short-term and long-term—can provide a roadmap for sustainable growth.
- 2 Focus on Quality First:** Before scaling, ensure that your core product or service is strong. A solid foundation makes expansion much easier.
- 3 Invest in People:** Whether it's employees, mentors, or strategic partners, surrounding yourself with the right people is crucial for success.
- 4 Step Back to Grow:** Working on your business, rather than just in it, allows you to focus on strategy and scalability.
- 5 Give Back to the Community:** Engaging with and contributing to your community can create valuable relationships and opportunities.

LOOKING AHEAD

With a decade of growth behind him, Chris is now focused on the future. He envisions expanding Nourishing Minds further, developing new educational programs, and continuing to refine business operations. He remains passionate about education and leadership, committed to making a difference both in the classroom and in the community.

As he puts it, "At the end of the day, it's about helping people—whether it's students, parents, tutors, or firefighters. If we do that well, everything else falls into place."

Chris Leuzinger's journey is a testament to what's possible when vision, hard work, and adaptability come together. His story not only inspires entrepreneurs but also serves as a reminder that success is often about more than just business—it's about the impact you create along the way. 

from grit to GROWTH

Lessons in Leadership and Success

When Derek Foster set out to build a business, he didn't have a blueprint—just a relentless work ethic and a determination to succeed. Now, over a decade later, Daigle Cleaning Systems has transformed from a small startup into a thriving company with an expanding footprint across New York State. The key to its success? A combination of strategic vision, strong company values, and a commitment to continuous improvement.

Humble Beginnings and a Family Foundation

Foster's journey began in 2011, just months after graduating college. Without deep pockets or extensive resources, he launched Daigle Cleaning Systems with only \$1,500 on a credit card. Partnering with his mother, Michelle Daigle, the two worked tirelessly to build the company from the ground up.

"I wasn't surprised, because at a young age, Derek was very motivated and driven. When he graduated from college, he knew he wanted to start his own business," Michelle recalls. With experience cleaning houses while also working in banking, she played a key role in structuring the company's operations. "His words to me were, 'I put a business plan together.'" From that point, they steadily built their client base, refining their services and expanding their reach as opportunities arose.



WRITTEN & INTERVIEWED BY
**KELSEY SHERMAN, JUNIOR PARTNER,
VP OF WEB & PRINT OPERATIONS,
FIVE TOWERS MEDIA**





Our success isn't just about providing a service; it's about delivering **trust** and **consistency**. Clients know they can rely on us, and that has helped us grow through **word-of-mouth** and **referrals**.

— DEREK FOSTER,
DAIGLE CLEANING SYSTEMS

From a **\$1,500 startup** to a multi-location cleaning enterprise, Daigle Cleaning Systems was **built on grit, vision, and a drive to lead**.



Foster found inspiration in his grandfather, Wilfred Daigle, a custom home builder in the Capital Region. Working alongside his grandfather and uncle as he was growing up, he gained firsthand experience in construction and the discipline required to build something from the ground up. "Working with them, I saw what hard work was about, and the satisfaction that is felt by creating something from nothing."

That mentality, coupled with Michelle's background in both banking and cleaning services, laid the foundation for what would become a rapidly growing business. This background also helped Derek recognize the potential in the cleaning industry and the importance of delivering exceptional service to build lasting client relationships.

Overcoming Early Challenges

Like many young entrepreneurs, Foster faced hurdles in the early years. Stepping into a leadership role at just 22 meant managing people with far more life experience than he had. "Nothing could have prepared me for that except going through it firsthand," he admits.

Michelle echoes the sentiment, noting that staffing has remained one of the most challenging aspects of running the business. However, Daigle Cleaning Systems has maintained a significantly lower turnover rate than the industry average, a testament to their strong company culture and investment in employee development.

Through trial and error, the team refined their approach, establishing structured hiring and training programs to ensure employees are trained properly, and align with the company's values and service standards. Foster also had to evolve as a leader, learning that trust and delegation were just as important as hard work. "I had to learn to step back and trust my team," he says. "With the right people in place, coaching and guidance matter more than micromanagement." By investing in the right hires and empowering his team, he was able to shift from handling everything himself to building a scalable, well-structured organization.

Scaling Hiring, Supply Chain, and Customer Service

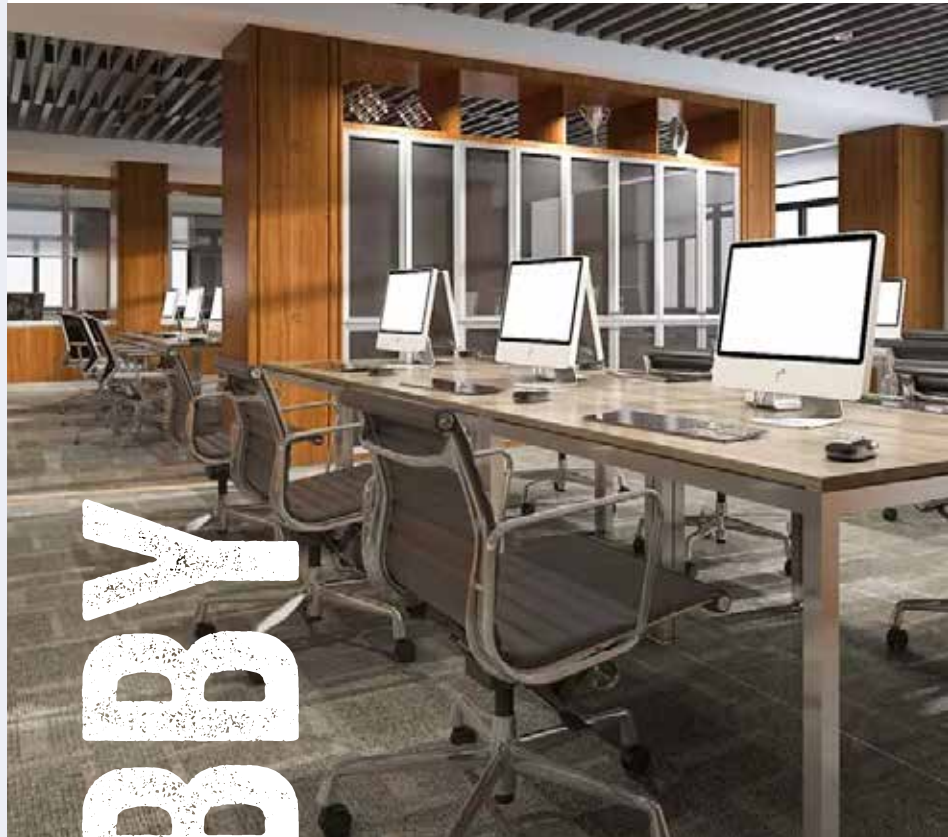
As Daigle Cleaning Systems expanded, managing hiring, supply chain logistics, and customer service at scale became critical.

Hiring the Right People: Foster emphasizes that finding the right team members is essential to maintaining quality service. "We don't hire just to fill positions—we hire for culture and values," he says. Their labor-intensive hiring process involves an initial phone screening of over 100 applicants just to find five solid candidates. Those who make it through then go through structured interviews, background checks, and training in the Daigle Cleaning Academy before stepping onto a job site. "We are lucky if we end up with two hires out of the five candidates we interview," Foster adds.

Managing Supply Chain Challenges: While many businesses struggled with supply chain disruptions, Daigle Cleaning Systems mitigated issues by diversifying vendors. "We didn't wait for problems to arise—we built relationships with multiple suppliers to ensure we had access to the best equipment and materials," Foster explains. Working with multiple reliable vendors ensured they could maintain operations smoothly.

Customer Service Excellence: Maintaining high customer service standards while scaling is no small feat. Foster and his team have reinforced their commitment to responsiveness and quality control, ensuring that both employees and clients feel valued. "We treat our internal team like customers too," he notes. "If our employees feel supported, that care translates to our external customers."

Michelle emphasizes the importance of being hands-on and leading by example. "When we first started out, I was out on the job sites—doing apartment turnovers, post-construction cleaning—working right alongside the team. Even today, I remain hands-on," she says. "I think you gain a lot of respect from your staff when they see you're out there grinding right along with them."



BY
BRY
SCRY





The Formula for Growth

In recent years, Daigle Cleaning Systems has seen steady growth. Today, the company serves clients across various industries—including manufacturing, retail, medical, and large office facilities—spanning from the Adirondacks to New York City. The team attributes this success to a few core strategies:

A Culture of Continuous Learning:

"Mistakes happen, but what matters is how we respond," Foster explains. Every error becomes an opportunity for improvement, with the team debriefing and refining processes to prevent future issues.

A Clear Vision and Strong Values: The company's mission and core values—integrity, communication, and teamwork—guide every decision. Two years ago, they redefined their mission with input from leadership, creating a roadmap with 10-year, 3-year, and 1-year goals.

Building Strong Relationships:

Customer satisfaction remains at the heart of their operations. Michelle personally checks in on job sites to ensure quality. "If you do a good job, that reputation carries," she explains. "Every morning, I stop at several accounts to check the quality of work from the night before. If something isn't up to my standards, I make sure it's corrected immediately." Their proactive approach helps maintain high standards,

reinforcing their commitment to exceptional service.

Foster emphasizes that genuine relationships with clients have been a key factor in the company's success. "Our success isn't just about providing a service; it's about delivering trust and consistency. Clients know they can rely on us, and that has helped us grow through word-of-mouth and referrals." By maintaining these high standards and staying engaged in daily operations, they continue to build meaningful relationships that fuel the company's growth.

Looking Ahead: Innovation & Expansion

As Daigle Cleaning Systems continues to grow, its focus remains on expansion, innovation, and staying true to its core values. With an increasing footprint across New York and plans for national expansion, Foster and his team are leveraging both people and technology to drive the business forward.

They've also diversified their offerings with Daigle Fire Solutions, which provides kitchen exhaust hood cleaning and fire code compliance services for restaurants, hotels, and industrial facilities. "It's been a natural complement to our existing business," Foster says, noting that having a trusted business partner, Ben Rieth, oversee operations has allowed him to remain focused on scaling their core services.

In addition to expanding their service offerings, the company is embracing automation to enhance efficiency. The integration of robotic cleaning solutions, including Scrubby, an autonomous floor-cleaning robot, and Violet, a self-mapping UV disinfection system, is reshaping their approach to commercial cleaning. These innovations free up labor hours, improve the quality of disinfection to include the air and all surfaces, and position Daigle Cleaning Systems at the forefront of industry advancements.

Beyond internal use, the company has secured distribution rights for these robotic solutions across New York and the East Coast, further establishing itself as a leader in the next generation of cleaning services. "We are implementing these technologies in several local facilities and are already seeing a positive impact," Foster explains. "Scrubby allows us to reallocate about six hours of labor per day, freeing up our team to focus on the more detailed aspects of cleaning."

Michelle agrees, adding, "Our staff at the facilities where we've deployed the robots are excited about working alongside them. They see it as an opportunity to develop new skills that will be valuable in the future."

But while technology plays a role in their success, Foster and Michelle believe the foundation of any business still comes down to people, perseverance, and strong leadership—lessons they've learned firsthand over the years.

Lessons for Entrepreneurs: Building with Purpose

Reflecting on the journey, Foster and Michelle agree that success isn't just about working hard—it's about working smart, making the right hires, and staying adaptable.

As co-owner and now Company President, Michelle has played a pivotal role in shaping the company's culture and operations. She emphasizes the importance of resilience, saying, "Never give up. Keep pushing, keep reaching for your dreams. Determination is everything."

Foster echoes that sentiment: "Keep working hard, do what's right even when it's difficult, and don't quit."

Their story is a testament to perseverance, smart decision-making, and an unwavering commitment to both employees and customers. As Daigle Cleaning Systems continues to grow, it remains rooted in the same principles that have driven its success from day one—integrity, teamwork, and a relentless pursuit of excellence. 🌱

“
Keep working
hard, do what's
right even when
it's difficult,
and don't quit.

– DEREK FOSTER



WRITTEN BY **MIKE PIEKARSKI**

Consulting Firm Provides a Personal ‘Advantage’

Describing Neal Stimler as merely the founder of an executive management consulting firm is like calling Albert Einstein “pretty good at math”—it barely scratches the surface.

Stimler, the founder, president, and driving force behind Stimler Advantage, is nothing short of a powerhouse. His company, which will celebrate its fifth anniversary later this year, offers far more than the typical consulting services for which the industry is known.

In addition to content management, business intelligence, resource planning, media strategy, project management, proposal development, and strategic planning, Stimler—who operates as a one-man firm—brings an expansive and formidable knowledge base that rivals companies with dozens of employees.

“I’m very much a person who is interested in and engaged with the world, and I try to bring that energy and enthusiasm to my clients,” says Stimler, a resident of Wilton.



When I set out to **master something**,
I do my best to bring that **knowledge**
to the **people I help**.

– NEAL STIMLER,
FOUNDER, STIMLER ADVANTAGE

He certainly has enthusiasm for knowledge. It's rare to find someone who has accumulated 490 certifications across various disciplines in a lifetime. As of February 2025, Stimler has achieved this milestone at the relatively young age of 41.

Some of those certifications, he explains, are "hard skills" in areas like software proficiency, content strategy, and management consulting. Others focus on "soft skills," with titles such as *Amplify Your Critical Thinking with Generative AI*, *Communicating in Times of Change*, and *Strategic Thinking Tips to Solve Problems and Innovate*.

"I set a personal goal to earn 500 certifications by the end of this year," says Stimler, an Ohio native who graduated from Miami University in 2006.

A Fusion of Business and Art

Stimler was exposed to the seemingly disparate worlds of business and art from an early age. In 2005, at just 21, he interned at the Metropolitan Museum of Art in New York City, a precursor to his 11-year tenure there.

At the Met, he held diverse responsibilities, including developing content, policies, platforms, and tools; managing the institution's digital assets; and overseeing partnerships with organizations such as Creative Commons, Google Arts & Culture, Pinterest, and the Digital Public Library of America.

Throughout his career, Stimler has worked with both nonprofit and for-profit organizations, traveling across the U.S. and internationally as a consultant, business development specialist, and technology collaborator. He also served as an Engelberg Center on Innovation Law & Policy Fellow at the New York University School of Law, where he co-authored a digital publication on the future of 3D imaging and open access in arts and culture.

"Each of those experiences has shaped me and guided me in helping others," says Stimler, who primarily works remotely but visits clients' facilities as needed. "I've learned from those engagements and applied those skills to helping clients succeed."

A Passion for Technology

Among his many talents, Stimler is particularly passionate about technology.

"I get excited about new technology," says Stimler, a self-described self-starter. "When I set out to master something, I do my best to bring that knowledge to the people I help. Technology is something I have an aptitude for."

That talent runs in the family—his grandfather was an aerospace engineer for Goodyear in Akron, Ohio.

"I'm not an engineer, but his passion for solving complex problems through technology definitely inspired me," Stimler says. "That interest grew even more when I was in college, especially in New York City."

In the early 2000s—just as Stimler was beginning his professional journey—the internet, high-speed connectivity, and social media were becoming integral to society.

"We grew up witnessing that transformation in technology, and it really started shaping culture in so many interesting ways," he says.



Bringing Expertise to Clients

At Stimler Advantage, he applies his tech expertise to help clients optimize their operations. One of his key services is content management, which, according to his company's website, streamlines "the creation, storage, and delivery of content to ensure the right message reaches the right audience at the right time."

Another crucial offering is resource planning, where he aligns business processes with technology "to improve efficiency, collaboration, and profitability."

Through media strategy and planning, Stimler helps clients determine the best distribution channels, asking questions like, Are you using social media? Are you leveraging email marketing? Is your website optimized? Are you utilizing third-party platforms like YouTube?

His understanding of intellectual property law also comes into play in licensing and rights management, helping clients "navigate the complexities of intellectual property to protect their assets and generate new revenue streams."

The '5 S's' Framework

One of Stimler's signature methodologies is what he calls the "5 S's": Study, Survey, Scout, Situate, and Start.

The first four steps involve evaluating a client's position in the industry, assessing competition and customer engagement, conducting research, and developing a strategic approach.

However, according to Stimler, the final step—Start—is the most critical.

"I always encourage my clients: Now that we've done all this great groundwork, let's put it into action," he

At Stimler Advantage, he applies his tech expertise to help clients optimize their operations.



says. "The most fulfilling part for me is seeing those actions unfold positively over time and watching my clients thrive."

Yet, the framework isn't a rigid formula.

"It's customized and tailored for every client based on their specific needs," Stimler explains. "It's also the approach I follow for myself."

A Global and Local Perspective

Stimler has collaborated with clients across Canada, Europe, and Australia, embracing a global mindset.

"I love working with people around the world and learning from them," he says. However, he's also focused on expanding his client base in the


Capital Region. "It's exciting to be situated between Montreal, New York City, and Boston."

Regardless of location, Stimler finds himself drawn to visionary leaders.

"I work best with people who have a clear goal, are inspired by it, and are committed to making it happen," he says. "For me, it's important to have a strong client relationship, so I ensure we're aligned in our approaches and understanding of how we'll work together."

Ultimately, his aim is to empower his clients.

"My goal is to help people do what they need to do and thrive on their own."

For more information, visit stimleradvantage.com. 

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Meeting & Beating the Challenge

The OpEx Shop Does More than Just Solve Business Problems

WRITTEN BY **MIKE PIEKARSKI** | PHOTOS PROVIDED

When it comes to the economy, there's an old saying: "A rising tide lifts all boats." In the workforce, if you substitute "employees" for "boats," then William ("Bill") Tansey Jr.'s company would be that tide.

Tansey is the COO of the OpEx Shop: Operational Excellence, an enterprise that, according to its website, guides organizational leaders "through resolution of complex business problems and change toward excellence."

Though his job title covers many roles, he says he's not exactly a consultant.

"It's more of an interim chief operating officer," says Tansey, 49, who lives just outside Saratoga Springs with his wife, Katie. "My focus is to help businesses overcome significant operational challenges. During the time I'm engaged with an organization, I work on helping them pivot or find their way through a challenge. That challenge could be penetrating a new region, overcoming a change in infrastructure or governance, scaling and growing, or acquiring another company—it could be any number of things."

Whatever the challenge, Tansey addresses the problem area and, in doing so, sets in motion a model that typically leads to better outcomes than the company had previously experienced. With the new business system he helps implement, "you can raise the level of play to almost as good as the [company's] best person—almost across the board," he says.





Operational Excellence is a 50-50 mix of transactional processes and people.

“Think of Operational Excellence as taking the variation out of the way people execute their jobs, freeing up mindshare to be creative and solve problems, and then shifting the need in a way that the customer values.”

DEFINING THE PROBLEM, LEADING THE SOLUTION

Tansey distills organizations into two primary sectors: commercial (such as sales and marketing) and operational (how a company creates a product or service).

“We go through a full process of defining the problem,” he explains. After that, “it’s my job to lead the business through solving it. I initially start out in a forward-facing role. As time goes on, I fade into the background and let the leadership team or person in charge step to the forefront and begin operating within the new infrastructure we’ve put in place.”

Explaining his role to employees, he says, “I start by opening the door and showing them what could be, and then they start to ask questions. How we answer those is by incorporating additional components. Before you know it, we’ve refined a bunch of different moving pieces. It’s a game-changer.”

Operational Excellence, Tansey explains, is a 50-50 mix of transactional processes and people. It consists of four key components:

- 1 Daily Execution:** Ensuring the organization’s revenue-generating operation functions effectively with minimal waste, measured simply and visually to maximize net profit.
- 2 Strategy Deployment:** Leading teams through planning, budgeting, and measurable execution of change.
- 3 Root Cause & Countermeasure:** A process, language, and toolkit that helps teams identify, prioritize, contain, and prevent internal operational problems from reaching customers.
- 4 Team:** Aligning employees with company values and business strategy while ensuring competent daily execution. This results in a happy, productive workforce, a strong return on employee investment, and overall operational success.

"It's critical to have both the people component and the transactional structure component aligned," Tansey emphasizes. "When those are tied together, they drive performance."

FROM ENGINEERING TO BUSINESS TRANSFORMATION

Tansey, who grew up in Clifton Park and attended Shenendehowa High School, earned a degree in mechanical engineering from Clarkson University in 1997. But his planned career took an unexpected turn soon after.

Working at an engineering firm, he recalls, "I'm sitting in an office looking at the guy next to me, and he's the smartest person I've ever met. Then I look at the guy over there, and he's also the smartest guy I've ever met. They're both extremely disgruntled. They're amazing, and I can learn from them, but I thought, I can't sit next to these guys the rest of my life at work. These two represent a whole population."

That moment sparked a desire to transition from engineering to business, leading him to take night classes toward an MBA. Not long after, he was asked to help two companies struggling to deliver new products to market.

"As I was doing that, it dawned on me that the work I was doing to turn around this failure to deliver new products was work I could apply to any other failure, problem, or challenge. The success I was having—the way I was executing—was more broadly applicable."

By the early 2000s, after earning his master's degree from RPI, he was fortunate to be mentored by Roger, the head of a local startup where Tansey worked. "He opened up his network to me and gave me numerous opportunities to learn and grow as a professional."

Later, as Director of New Product Delivery at Danaher Corp., Tansey mastered the renowned Danaher Business System. He then worked as a General Electric global operations leader, overseeing nearly \$15 billion in wind turbine installations overseas.

While working at GE and launching HR Resolved Inc., a human resources outsourcing firm, he was hired in

“
Seeing them play at a higher level,
knowing I’ve helped solve their
problem, and watching them succeed—
that’s the real win.”

2016 by the founder and president of a local organization to increase its revenue using his business-system model. That turned out to be the OpEx Shop—a move that has worked out well for him.

TRANSFORMING BUSINESS CULTURE

Since taking the reins at the OpEx Shop, Tansey has realized that when companies call him, it's often because they recognize the need for a radical shift in their business model—and, by extension, their culture.

"There's an interesting phenomenon that says you can't change a culture until the critical mass of the culture has reached sufficient dissatisfaction," he explains. "As leaders, we lead with positive intent. If you're manipulative, you lead with malice. In business, if you create sufficient dissatisfaction to help shepherd a group of people into something better, that's leading with positive intent."

Although he is generally positive, Tansey admits to occasional frustration when his work is misunderstood.

"One of the biggest challenges is getting that initial momentum going. Sometimes people hear 'process' and pull back, or they hear 'standard work' and pull back," he says.

"A lot of businesses have talked the talk but not walked the walk. Their only experience is, I've heard those words, and it didn't work."

Digging deeper, he's found that "it comes down to businesses half-trying something—dipping their toe in the water, adopting the language but not the way of acting or leading—and falling short."

As businesses grow, he says, there's a greater need for a structured system. "The work I do really enables a virtual

workforce to perform effectively," he adds. "One of the common questions I get is, How do you know if they're working well? If you have a business system, you know they're working because they're producing results. If they're hitting the goals and doing what you need them to do, then you're all good."

MAKING OPERATIONAL EXCELLENCE ACCESSIBLE

As a guest on a locally produced podcast and in short videos on his OpEx Shop website, Tansey speaks with the ease of someone with years of experience engaging people about his work.

Typically, the type of consulting Tansey does is beyond the reach of most midsize companies—but he's working to change that.

"I've made the choice to offer this service to companies with \$100 million or less in gross revenue," he says. "The companies that find the OpEx Shop most appealing are typically in the \$6 million to \$90 million range."

"What I'm really proud of," he adds, "is that the work I bring forward is based on real-world experience—things I've learned the hard way under the mentorship of amazing professionals and companies. I've been able to package it in a way that's beneficial and digestible."

"For me, the most fun is when the lightbulbs start coming on for the people I'm leading. Seeing them play at a higher level, knowing I've helped solve their problem, and watching them succeed—that's the real win."

For more information, visit theopexshop.com or search for William Tansey Jr. on LinkedIn. 

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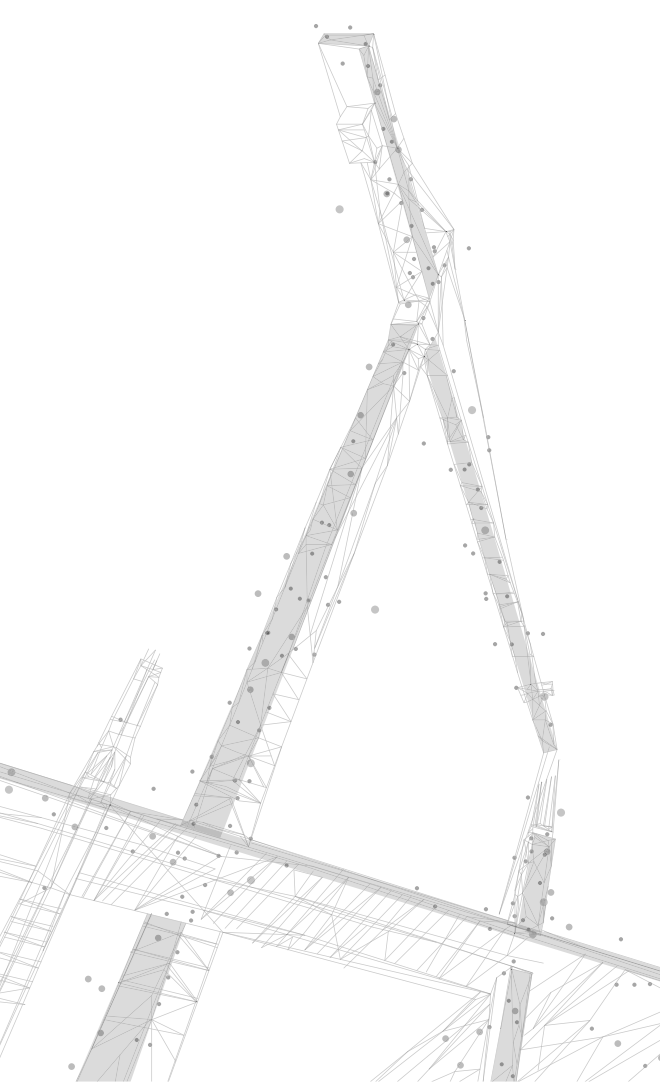


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WRITTEN BY **TYLER MURRAY**

CATAMOUNT CONSULTING

Building Better Leaders, Safer Workplaces, & Thriving Businesses

IN THE RUGGED LANDSCAPES OF WARRENSBURG, NEW YORK, A SMALL COMPANY WITH A BIG VISION TOOK ROOT IN 2005.

Catamount Consulting, founded by Scott McKenna, emerged from humble beginnings in the mining industry to become a nationwide leader in safety and peak performance training.

McKenna says, "It is important to stress both of those based on our 'People First' approach because you need both to be successful." Over the past two decades, Catamount has grown from a one-man operation into a dynamic team of experts, offering tailored solutions to small and medium-sized businesses across industries

as diverse as mining, construction, and beyond. With satellite offices and team members stretching from North Carolina to Vermont, the company's mission remains steadfast: to empower businesses with practical, affordable, and high-impact training programs that foster safety, engagement, and growth.

FROM THE MINES TO THE MARKETPLACE: A FOUNDER'S JOURNEY

Scott McKenna's story is one of grit, adaptability, and an unrelenting drive to improve the world around him. A collegiate wrestler turned college dropout, McKenna traded textbooks for hard hats in the late 1990s, diving headfirst into the mining industry. His first gig involved stacking two-ton pallets of rubblestone—rock harvested for fireplaces and walkways—a job that tested his physical endurance and sparked a lifelong fascination with the raw power of the earth. But it wasn't just the rocks that captured his attention; it was the people working alongside him and the risks they faced daily.

During the late '90s, additions to safety regulations in high-risk industries like mining, driven by agencies such as the Mine Safety and Health Administration (MSHA) and the Occupational Safety and Health Administration (OSHA). McKenna found himself tasked with overseeing safety practices at his operation, a role that opened his eyes to a troubling reality: workplace accidents and inadequate safety measures were all too common. Drawing on his wrestling background and over a 20 year career in high school coaching—where teamwork, discipline, and personal growth were non-negotiable—he saw an opportunity to bridge the gap. "I recognized the value of strong leadership and teamwork," McKenna recalls in a recent episode of Blue Collar StartUp. "Those principles from the mat could translate anywhere."



In 2005, armed with a business plan and a vision, McKenna founded Catamount Consulting. What started as a solo venture dabbling in safety training for mining operations quickly snowballed into something bigger. He bought out his silent partner after five years and began scaling the company, adding staff like Heidi, his first hire and a former loader operator turned office manager, who remains a cornerstone of the team today. "It was just me and her in the early days, figuring it out," McKenna reflects. From there, Catamount expanded its offerings, tapping into new revenue streams such as construction safety, rigging, Department of Transportation (DOT) compliance, and workplace violence prevention. But the real game-changer came when the company pivoted toward leadership training—a move that would redefine its impact.



The reality is that being a good leader is a skill. It can be learned, improved, and refined. And when you have great leaders, it trickles down—employees perform better, they want to be there.

— SCOTT MCKENNA



THE HIDDEN COST OF DISENGAGEMENT

Catamount's evolution into leadership development wasn't just a business decision; it was a response to a pervasive problem plaguing American workplaces. A 2024 Gallup poll paints a grim picture: employee disengagement costs U.S. businesses between \$450 billion and \$550 billion annually in lost productivity. On average, each disengaged employee drains \$2,246 from their employer every year. The ripple effects are staggering—disengaged teams experience 37% more absenteeism, 18% lower productivity, and 15% reduced profitability. Worst of all, only 30% of workers are actively engaged, the lowest figure in over a decade.

These numbers hit home for McKenna and his team. "The reality is that being a good leader is a skill," he told Buying Local. "It can be learned, improved, and refined. And when you have great leaders, it trickles down—employees perform better, they want to be

there." Catamount's philosophy hinges on a bold claim: leadership and management drive at least 70% of employee engagement. In high-risk industries like mining and construction, where a single misstep can mean injury or worse, an engaged workforce isn't just a luxury—it's a lifeline.

LEADERSHIP AS THE KEY TO SAFETY & SUCCESS

At its core, Catamount Consulting believes that safety, productivity, and quality are byproducts of strong leadership and emotional intelligence. "You can train people on rules and regulations all day," says Stacy Spector, the company's leadership training and curriculum development expert, in the Blue Collar StartUp podcast. "Why do people still do things that they know are unsafe? It's a lack of engagement—and that starts with leadership."

Spector, a former real estate attorney who traded a 20-year legal career for a chance to make a deeper impact, brings a

unique perspective to the team. Her shift from law to leadership training was fueled by a desire for personal growth and a rejection of the toxic, high-stress culture she had endured. "I didn't want to retire as an attorney," she explains. "I needed an out—for my well-being and to be the best version of myself."

Together, McKenna and Spector have crafted a leadership training model that's as practical as it is profound. Rather than focusing solely on business jargon or corporate buzzwords, Catamount's programs dive into what it means to be a better human—whether as a leader, parent, or spouse. "It's about human connection," Spector says. Whether you're a middle school wrestler or miner, we all have the same needs for human connection". Influenced by the works of Abraham Maslow and his Theory of Human Motivation, one of Catamount's core leadership training principles is that leaders must create environments that

Disengaged teams experience **37%** more absenteeism, **18%** lower productivity, and **15%** reduced profitability.



support their people's psychological needs of esteem and belonging. This truly is the "People First" approach.

The company customizes its offerings to fit each client, from single keynote sessions to more extensive immersive courses, delivered in person or online. Topics range from conflict resolution to culture-building, with a heavy emphasis on emotional intelligence, vulnerability, and resilience—skills McKenna calls "mental toughness, grit, and grind."

A COACHING MINDSET IN A BUSINESS WORLD

Catamount's approach is deeply rooted in McKenna's wrestling days and the belief that everyone needs a coach. "We run the business like we're coaching a wrestling program," he says. "I'm a college dropout—no degree, no formal business schooling. It's all hard knocks: get up, keep going, work harder."

This mindset permeates the company's culture and its training philosophy. Spector echoes this, citing three foundational truths for peak performance: people are flawed, mindset is

everything, and everyone needs a coach. "I relied on coaches to leave law," she admits. "They helped me change the narrative when self-doubt crept in."

LOOKING AHEAD: GROWTH WITH PURPOSE

As Catamount Consulting approaches its 20-year milestone, McKenna's ambitions show no signs of slowing. With a team of over 20 which includes employees and a network of expert subcontractors, the company operates with agility, serving clients nationwide from its East Coast hubs. "We want to keep expanding into more areas of business," McKenna says. "That means hiring more experts and working in industries where consulting might not yet be prevalent. We're excited about the future."

For businesses ready to tackle disengagement, boost safety, and unlock growth, Catamount Consulting offers a roadmap.

To learn more, visit their website at catamountconsultingllc.com, or connect with them on Facebook and Instagram. 

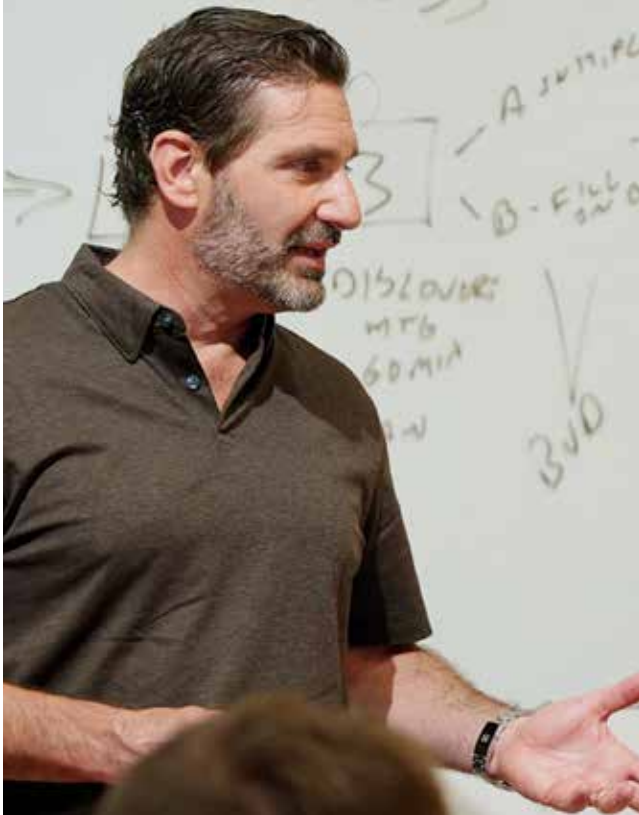


LEADERSHIP • SAFETY • TRAINING

Matt Scarchilli

Bringing Sandler's Transformative Methodology to Businesses

INTERVIEWED BY **MICHAEL NELSON** | PHOTOS PROVIDED



Matt Scarchilli. Photo provided.

In the dynamic world of business development, Matt Scarchilli stands out as a leader who combines real-world experience with a proven methodology to drive success.

As the CEO of Sandler Training Systems of the Greater Capital Region in Albany, NY, Matt has made it his mission to help small to medium-sized businesses sharpen their sales, management, and customer service skills. With a career that spans pharmacy, sales, and entrepreneurship, Matt's journey is one of resilience, and his work with Sandler is leaving a lasting mark on organizations and individuals alike.

Who is Matt Scarchilli?

Matt Scarchilli's path to Sandler is a winding tale of adaptability and ambition. Raised in New York's Capital District, Matt earned a chemistry degree from Hudson Valley Community College, only to find the job market unyielding. He pivoted to pre-engineering, then pharmacy school, dreaming of owning a small pharmacy. But by the time he graduated, corporate chains had overtaken independents, pushing him to rethink his plans.



Matt kicked off his career at Latham Pharmacy before stepping into management as the supervising pharmacist at Community Health Plan in Troy, NY. This role ignited his leadership spark, but his next chapter—ten years in pharmaceutical sales—truly defined his skills. There, he mastered the art of selling and relationship-building in a competitive field.



A soccer enthusiast and former president of the Latham Soccer Club, Matt co-founded SportsSignup, a software platform for youth sports organizations to manage registration and payments. As VP of Sales, he grew the company over 15 years, facing the ups and downs of startup life. It was here that he first encountered Sandler, bringing in Lorraine Ferguson—the previous owner of Sandler Training Systems of the Greater Capital Region—to train his team. The impact was undeniable: sales climbed, operations smoothed out, and the company's eventual sale to Sports Illustrated in 2015 reflected that polish.

After exploring another startup venture that didn't take off as planned, Matt found himself at a crossroads. Around this time, Lorraine Ferguson, impressed by his success as a client and his business acumen, approached him about taking over her Sandler franchise as she prepared to step back. Seeing his potential, she invited him to carry forward her legacy. Nine years later, Matt has not only stepped into the role but also elevated the franchise, blending his diverse background with Sandler's system to deliver tailored solutions.

I don't know if I can help unless I understand their problems and if they're ready to talk.

– **MATT SCARCHILLI**, CEO, SANDLER TRAINING SYSTEMS OF THE GREATER CAPITAL REGION

What Does Sandler Do?

Sandler, once known as Sandler Training, has grown beyond its roots into a comprehensive resource offering training, consulting, and coaching. Rebranded as simply “Sandler,” it’s built on the Sandler Selling System, pioneered by David Sandler over 50 years ago. This approach shuns pushy sales tactics for a consultative style—digging into prospects’ pain points with strategic questions, fostering trust, and aligning solutions to real needs. Curious about the details? Check out sandler.com.

Under Matt’s leadership, Sandler’s reach extends beyond sales to management and customer service. In sales, it tackles issues like weak prospecting, lengthy sales cycles, and ghosting. For management, it equips leaders with skills to set goals, hold teams accountable, and transition into supervisory roles. In customer service, it turns support teams into revenue drivers by teaching cross-selling and relationship-building. Matt delivers this through public classes—where multiple companies learn together—or private, customized sessions, often on-site, tailored to a single organization.

Every engagement starts with a discovery call, Matt explains. “I don’t know if I can help unless I understand their problems and if they’re ready to talk.” This step ensures solutions fit each client’s unique needs, whether it’s a structured program like the nine-week Sales Essentials series or a bespoke plan crafted from scratch.



The methodology
doesn't just
solve problems—
it builds a
framework
for lasting
success, both
professionally
and personally.



Who Does Sandler Help?

Matt primarily serves small businesses—typically under 100 employees, though occasionally solopreneurs too. “About 85% of my clients are in that range,” he says. These companies often lack internal training resources, making Sandler a perfect fit. Whether it’s a sales manager thrust into leadership without guidance, a customer service team missing revenue opportunities, or a sales force battling funnel inefficiencies, Sandler bridges the gap.

Signs a business might need Sandler vary by focus. For management, it’s the absence of training for new leaders—say, a top salesperson promoted without accountability skills. In customer service, it’s teams leaving money on the table or struggling with upset clients. Sales issues fall into three buckets: top-of-funnel shortages (not enough leads), mid-funnel delays (slow cycles), or end-of-funnel drop-offs (ghosting). Matt notes that while the challenges are common across businesses, the solutions depend on a company’s size and goals. Smaller teams (under eight or ten) often join public classes; larger ones get private engagements.

Sandler’s B2B focus spans industries—tech, services, you name it—but the common thread is growth ambition without the bandwidth to DIY. Matt’s discovery calls pinpoint where they fit, ensuring every solution aligns with their reality.

The Impact of Sandler

Sandler’s effectiveness shines through when people fully commit to it. “It’s just a structure and a methodology,” Matt says, highlighting that its true power emerges when applied with dedication. Those who embrace it can achieve remarkable results, turning potential into tangible success.

At SportsSignup, Matt witnessed this firsthand. Sandler unified his team, with concepts like “upfront contract” becoming part of the company’s fabric, boosting sales and cohesion. When Sports Illustrated acquired the business, that professionalism

added value. “It made us look buttoned up,” Matt reflects. Two current clients, each with over five years under Matt’s guidance, attribute their growth to Sandler’s philosophy—a clear sign of its lasting impact.

Personal stories bring this to life. One business owner, who joined Sandler in 2009 while running a snow and ice removal company, calls it “life-changing.” Facing commoditization, ghosting, and price wars, he used Sandler’s techniques to rethink prospecting, show value, and cut waste. “It revolutionized how I sold,” he shared in an interview with Matt. “And honestly, how I communicate in life.” He’s dubbed it “a self-help program disguised as sales training,” thanks to tools like DISC profiles and questioning strategies that reshape self-awareness and relationships. “It’s part of who I am as a human,” he added, underscoring Sandler’s deep personal influence.

Matt’s clients see practical benefits too: one sales team slashed cycle times, while another boosted retention through customer service training. For Matt, Sandler is a passion he believes in wholeheartedly. “I firmly believe in the Sandler system and what it teaches,” he says, a conviction that fuels his work. The methodology doesn’t just solve problems—it builds a framework for lasting success, both professionally and personally.

Conclusion

Matt Scarchilli is the heart of Sandler in the Capital Region: practical, driven, and committed to impact. Through his franchise, he offers small businesses a way to conquer universal challenges with customized solutions. Whether it’s growing sales, strengthening leadership, or elevating service, Sandler delivers for those who embrace it. His story—and those of his clients—shows a system that’s not just about deals, but about building stronger businesses and richer lives.

To see how Sandler can transform your organization, visit sandler.com. 



LIONS, AND TIGERS, AND BEARS, OH MY!

Cultivating Company Culture for a Lasting Transformation in Your Business

"You've always had the power, my dear. You've had it all along."



WRITTEN BY **MEGIN POTTER**

Glinda the Good Witch's empowering message about inner strength in *The Wizard of Oz* has been intuitive healer and coach Karen Carey's guiding mantra as she journeys to inform, educate, and inspire people to find the answers to their problems by searching within themselves.

Where the Magical Meets the Practical

When Karen Carey was struggling with her health, she felt like something was missing in her life. In her desperate search for answers, serendipity led her into the world of alternative healing.

That's when a client—and soon-to-be best friend, Marcia—sat in her chair at A Cut Above, Karen's hair salon, and

encouraged her to try Reiki. Opening up the flow of energy within her, this experience inspired Karen to explore beyond the limitations of traditional medicine and religion.

Karen became a certified Reiki Master and Transpersonal Counselor. Her journey into energetic medicine deepened when she and her husband, Kevin, moved to Seattle, Washington, where she completed a reflexology certification program.

Continuing her wellness adventure in California, Karen became a certified yoga teacher and fitness coach. A Corinth High School graduate, she later returned with Kevin to settle in Saratoga. She traveled to England and France with 365 Mentoring and Coaching's pilot program, learning transformational leadership strategies that would have a lasting impact on her life and business. In 2009, she became a certified life coach through Accomplishment Coaching in Seattle.

See Yourself. Be Yourself. Free Yourself.

Carrying her message of self-empowerment forward as a mentor and role model, Karen founded Ruby Red Road in 2012, offering guidance and energy healing through team-building workshops, one-on-one coaching, speaking engagements, and public appearances.

Guiding participants through a thought-provoking, creative process, Karen provides clarity and inspires them to overcome self-doubt, maximizing both their personal and professional potential.

In 2017, Karen became a CultureTalk Certified Partner, incorporating a technique rooted in psychiatrist Carl Jung's beliefs into her practice. By helping individuals identify their leadership style among Jung's 12 universal archetypes, she empowers them with new ways to approach challenges in their lives.

The Cost of a Culture Clash

Working with individuals, corporations, and nonprofits, Ruby Red Road teaches passionate participants how to tap into their inner strengths and resources to create a more balanced life and a healthier state of mind—translating into a positive work culture that

becomes a tangible asset in any environment.

To move from a state of stress to one of success, Karen encourages people to be boldly, bravely, and brilliantly themselves.

"Knowing who you are and who other people are creates quality conversations. Making assumptions instead of asking questions leads to misunderstandings, disagreements, and mixed-up ideas and energies in an organization," Karen explains.

Tools to Create a Lasting Impact

When working with a team, Ruby Red Road always starts at the top.

By teaching leaders and participants to discover their authentic selves and recognize the positive qualities in others, Karen fosters validation and transforms communication. These sessions are customized to fit your group's needs—whether it's a three-month program or a year-long commitment.

"Through essence coaching, we can be seen for our qualities (rather than our patterns of behavior at work), which creates value for leaders," says Karen.

Once an organization's team members recognize and appreciate each other for who they are, they can adjust their conversations to navigate challenges more effectively.

"You can't speak to everyone the same way. Your conversations can develop and grow. Because people change—and your product is created by your people—as people grow, your product grows," Karen explains.

Whether you're a "soft" leader feeling overwhelmed, a "hard" leader frustrated and angry, or an entrepreneur feeling stuck and spinning in circles, you may not be asking the right questions, she says.

Through essence coaching, we can be seen for our qualities... which creates value for leaders.



We're Off to See the Wizard

Begin your journey to discovering the wonderful wizardry that business wellness can bring with insights from Ruby Red Road during a FREE discovery call. In this hour-long consultation, Karen Carey will help you identify challenges and offer real-talk recommendations on how to advance toward your goals.

"Whether your mission is to improve your workplace culture, yourself, or your brand, I help people know who they really are and how to authentically show up in the world—and that's really powerful," Karen says.

As one of this year's Palette PRO Talk facilitators, Karen will be sharing Ruby Red Road's workplace wellness strategies. Sessions are held on the third Thursday of each month, with tickets available for \$10 per person. For more information, visit palettecommunity.com.

Tune into Inspire Saratoga Episode 7 – "Karen Carey: THE TRUTH About Life Coaching Methods" – hosted by Mike Kurkowski, available to watch on YouTube.

You can also hear Karen on the Buying Local podcast episode, "Life Coaching and Karen Carey," available at buyinglocal.us.

For more information, follow @RubyRedRoad on Facebook and Instagram, or visit rubyredroad.com.



Bridging the Sales Gap

How Small and Mid-Sized Businesses Can Overcome Their Biggest Growth Challenges

WRITTEN BY **ALAN VANTASSEL**

For many small and mid-sized businesses (SMBs), the challenge isn't just about selling more—it's about building a scalable, repeatable sales process that drives long-term revenue growth. Yet, most businesses struggle with structuring their sales organization, aligning sales strategy with execution, and creating a sustainable growth engine.





According to the latest 2024 State of Sales report from Sales Xceleration, these struggles are widespread and deeply ingrained:

96% of SMBs struggle with **Sales Organization**—Lacking proper staffing, hiring, training, and defined roles.

90% struggle with **Sales Methodology**—Missing structured territories, coverage models, and sales processes.

91% struggle with **Sales Analysis**—Failing to track goals, quotas, and sales performance effectively.

86% struggle with **Sales Strategy**—Unable to position themselves correctly in the market or clearly define their value proposition.



For business owners, CEOs, and executive teams, these gaps result in inconsistent revenue, stalled growth, high turnover, and missed opportunities. But what's the solution when hiring a full-time sales leader isn't financially viable?

THE CASE FOR AN OUTSOURCED FRACTIONAL VP OF SALES

This is where an Outsourced Fractional VP of Sales makes a powerful impact. By providing executive-level sales leadership on a part-time basis, companies gain senior expertise at a fraction of the cost of a full-time VP of Sales. The goal? To fix the foundational issues that prevent

sales success.

As a Fractional VP of Sales, I step in to diagnose, structure, and optimize a company's sales function—without the risk of hiring the wrong full-time leader. My work is not about providing consulting reports or theoretical advice; it's about building and executing a customized sales strategy that delivers real, measurable results.



The Four Biggest Sales Gaps and How I Fix Them



Sales Organization: Building the Right Team and Structure

PROBLEM: Companies lack defined sales roles, have ineffective hiring processes, and don't provide proper onboarding and training.

SOLUTION: I implement structured hiring processes, create clear role definitions, and establish onboarding/training programs that set salespeople up for success.

KEY STAT: 91% of SMBs provide no sales training—yet trained sales teams close more deals faster.



Sales Methodology: Creating a Repeatable, Scalable Process

PROBLEM: Most businesses lack a structured sales process, leaving sales efforts inconsistent and unpredictable.

SOLUTION: I develop and document a step-by-step sales process, aligning prospecting, lead qualification, and closing strategies with the company's goals.

KEY STAT: 74% of SMBs don't have a documented sales process—leading to missed deals and unpredictable revenue.



Sales Analysis: Defining Clear Metrics and Accountability

PROBLEM: Companies don't set clear quotas, track performance, or provide meaningful incentives for their sales teams.

SOLUTION: I implement data-driven sales dashboards, align individual rep goals with company objectives, and introduce balanced compensation plans to drive motivation and results.

KEY STAT: 49% of SMBs don't track sales performance effectively—meaning leaders don't know what's working and what's failing.



Sales Strategy: Positioning for Market Success

PROBLEM: Many SMBs don't have a Unique Selling Proposition (USP) or a compelling message that differentiates them from competitors.

SOLUTION: I help refine and clarify the company's value proposition, ensuring a strong, clear message that resonates with buyers and drives competitive advantage.

KEY STAT: 76% of SMBs lack a defined USP—meaning potential customers don't understand why they should choose them.

REAL IMPACT: TURNING SALES STRUGGLES INTO GROWTH

Many companies assume their sales problem is a people problem—that hiring more sales reps will solve the issue. But the truth is, without a solid strategy, process, and structure, no sales team can succeed.

One of my clients, a **\$10M B2B services company**, struggled with high sales turnover, missed revenue targets, and an unclear go-to-market strategy. Within six months of bringing me on as their Fractional VP of Sales, we:

- Implemented a structured sales hiring process, leading to two high-performing new reps.
- Developed a repeatable sales process, increasing close rates by 30%.
- Created a sales compensation model, boosting motivation and performance.
- Launched a sales dashboard, providing real-time data for better decision-making.

THE COST OF INACTION

For SMBs, failing to fix the sales foundation leads to:

- Flat or declining revenue—despite having great products/services.
- High turnover of sales reps—because there's no structured path to success.
- Frustrated leadership teams—who lack visibility into sales performance.

Hiring a full-time VP of Sales can cost **\$200K+ per year**—a significant risk if the wrong person is hired. An **Outsourced Fractional VP of Sales** provides the same strategic leadership and execution but at a fraction of the cost and risk.

IS YOUR SALES ORGANIZATION READY TO SCALE?

If your company is experiencing:

- Stalled growth despite a strong market opportunity
- Difficulty hiring and retaining high-performing sales talent
- Lack of a structured, scalable sales process
- Poor visibility into sales performance metrics

Then it's time to get an experienced sales leader who can transform your sales organization.

Let's talk about how I can help your business grow. I'm Alan VanTassel, your Fractional VP of Sales—reach out anytime at avantassel@salesxceleration.com or 518-232-8000. You can also connect with me on LinkedIn or visit my Sales Xceleration advisor page. 📞

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UNLOCKING EMPLOYEE RETENTION

Through Effective Workforce Development

WRITTEN BY **CHRIS THOMAS, FOUNDER & OWNER, ELITE 9 TALENT SOLUTIONS**



With competition for top talent at an all-time high, organizations are struggling to retain their best employees. As the owner of Elite 9 Talent Solutions in Glens Falls, New York, I have seen firsthand how crucial effective workforce development is in addressing this pressing issue.



Investing in leadership is investing in your culture, your people, and your future.

– CHRIS THOMAS

Our firm specializes in employment recruiting and workforce solutions, but our mission goes beyond merely filling vacancies—we focus on building reliable leaders who can nurture an environment that fosters employee engagement and retention.

Employee turnover can be detrimental to a company, leading to increased expenses, lost productivity, and decreased morale. This challenge becomes even more critical as organizations strive to maintain a competitive edge in an evolving market. The key to improving retention lies in a comprehensive workforce development strategy—one that prioritizes strong leadership, personalized growth opportunities, and the implementation of effective tools and strategies.

The Role of Leadership in Retention

At Elite 9 Talent Solutions, we believe leadership is at the core of employee retention. A major driver of job satisfaction is how well employees feel supported by their leaders. That's why our customized solutions focus on equipping leadership teams with the skills, tools, and frameworks needed to engage, inspire, and guide their teams effectively.

To enhance these efforts, we utilize Everything DiSC® personality assessments, a tool that enhances understanding among team members by providing valuable insights into individual communication styles and preferences. These assessments improve collaboration and foster stronger working relationships, creating an inclusive environment where employees feel understood and valued—ultimately leading to higher retention rates.



Elevating Leadership with RBLP Certifications

Our partnership with RBLP Leadership Certifications® further differentiates us in the marketplace. RBLP is the only nationally recognized leadership certification program, offering tiered certifications for frontline, experienced, and senior managers. This program validates leadership knowledge, skills, and experience, reinforcing an organization's commitment to workforce development.

Investing in workforce development strategies not only reduces turnover but also fosters a culture of excellence that **attracts and retains top talent.**

– CHRIS THOMAS



Employees are no longer driven solely by monetary compensation—they want fulfillment, growth opportunities, and a sense of purpose at work.

RBLP certifications also hold significant college credit recommendations from the American Council on Education (ACE), are listed on the U.S. Department of Labor CareerOneStop site as a workforce development resource, and are eligible for funding through the U.S. Department of Defense credentialing programs and the GI Bill for military personnel and veterans. Investing in leadership development directly contributes to a positive work environment, increased job satisfaction, and reduced turnover.

Addressing the Evolving Needs of Today's Workforce

As we implement workforce development strategies, it is also essential to consider the diverse needs of today's workforce. Employees are no longer driven solely by monetary compensation—they want fulfillment, growth opportunities, and a sense of purpose at work. To address these evolving expectations, our solutions emphasize personalized development plans that consider each employee's career aspirations.

Leaders trained through our programs learn to facilitate meaningful career discussions, ensuring employees feel valued and invested in their futures within the organization. Additionally, fostering a culture of feedback can be pivotal in addressing retention challenges.

By training leaders not only to give feedback but to actively seek it, organizations can create an environment where employees feel heard and appreciated. Continuous feedback loops help identify and resolve challenges early, preventing employee dissatisfaction before it escalates. Leveraging modern learning platforms can further support these workforce development initiatives. Modern learning platforms further enhance workforce development by providing seamless tools for ongoing training, assessment, and performance tracking. By integrating these digital solutions, organizations empower leaders to engage with their teams consistently, making workforce development more efficient and effective.

A Strategic Approach to Retention

The retention crisis many organizations are experiencing can be effectively mitigated through strategic workforce development initiatives. By developing skilled leaders, utilizing proven assessment tools like Everything DiSC, and offering certified leadership pathways, we help organizations create supportive and engaging workplaces.

At Elite 9 Talent Solutions, we understand the complexities of talent retention and are committed to transforming companies from within. Investing in workforce development strategies not only reduces turnover but also fosters a culture of excellence that attracts and retains top talent.

As we navigate the future of work together, let's prioritize leadership development as a key driver for lasting organizational success.

Learn more about us at elite9vtas.com, call us at 518.517.4744, email us at consulting@elite9vtas.com, or connect with us on [LinkedIn](#).



Investing in People

WRITTEN BY **MEGIN POTTER**

How Do You Guide a Small Business Ethically?

Creating a respectful and productive workplace is a balancing act. Momentum Makers, a time-tested, faith-based curriculum, cuts through the tension to get everyone on the same page.

When a team is divided, the work suffers. Character clashes and unrealistic expectations diminish company morale. Knowing how to deliver

criticism respectfully—without causing offense—can be a struggle for employees at every level, from upper management to the newest hire.

“I want to wake up knowing that I’m doing the best job I can,” said Steven Boxley, owner of Boxley’s Services.

Early on, Boxley learned that hard work reaps rewards. When a team’s principles, ethics, and values align, it becomes a goal-oriented workforce better positioned to provide improved service, increase customer retention, and translate those efforts into higher profits for a small business.



As a second-generation small business owner and entrepreneur, Boxley balances the daily challenge of generating revenue with building character within the community. He serves as an Associate Minister at Albany's Macedonia Baptist Church and the United Church of Saratoga.

Boxley strives to lead with integrity. More than a year ago, he teamed up with local leadership coaches—retired Saratoga Springs Police Chief and founder of Noble Cause Training and Development, Greg Veitch, and U.S. Navy veteran Jesse Davidson, owner of Duty First Leadership. Together, with the guidance of attorney Joel Roberts, they are bringing Momentum Makers to the Capital District.

Building Momentum

Momentum Makers was created 25 years ago by Kevin and Carol Hinman as a nonprofit, faith-based, character-building curriculum. In 2013, it was revised into a tool for shaping workplace culture at Towne Bank's educational branch, Towne University, in Suffolk County, Virginia. Today, it has evolved into a resource for businesses, educational institutions, community-based groups, and law enforcement training programs.



We want to respect the job that everyone has to do and be fair with time and expectations. As business owners, we want to create a work-life balance for our teams while also ensuring the work gets done.

— STEVEN BOXLEY, OWNER, BOXLEY'S SERVICES

By breaking the curriculum into approachable skill sets, the Momentum Makers team fosters professional development in **ethics, team management, and communication skills.**



Momentum Makers' eight-module Professional Skills Series is taught by certified trainers, each of whom completes a 16-hour instructional course. By breaking the curriculum into approachable skill sets, the Momentum Makers team fosters professional development in ethics, team management, and communication skills.

Throughout the process, Momentum Makers helps answer questions and resolve conflicts. It addresses public

speaking and self-assessment skills and follows up group workshop sessions with one-on-one mentoring calls.

"It gets everybody on the same page. When you have a business, you want to take care of that business and invest in it, but you might not know how. Projecting a professional image—and the other decision-making skills we teach—might not always be top of mind. You're probably more focused on the bottom line or dealing with a crisis. However, building these

skills benefits employees significantly. This approach is tried, true, and tested," said Momentum Makers trainer Greg Veitch.

Beyond the Paycheck: Principles That Drive Motivation

The goal-oriented Momentum Makers Professional Skills Series provides certified trainers who build a framework of principles for businesses through seminars, assessments, writing reflections, and group discussions.



The program presents self-evaluation techniques, including the DISC Personality Type assessment, which categorizes behavior into Dominant, Influencer, Steady, and Conscientious character classifications. Materials emphasize respect for authority while maintaining individual dignity and a personal set of values, presented in a flexible, needs-based timeline that aligns with an organization's goals.

"We're sensitive to the fact that not everyone has time to devote a half-day to one topic. We adapt to fit into leadership groups," said Boxley, who prioritizes cultivating local relationships while working within businesses' budgets. Momentum Makers' flexible framework is customizable and applicable to organizations willing to invest in their people "across the board," said Veitch.

"We want to respect the job that everyone has to do and be fair with time and expectations. As business owners, we want to create a work-life balance for our teams while also ensuring the work gets done," said Boxley. "The way we compete in the world today is by giving staff the opportunity to define best practices and be motivated by more than just a paycheck."

Playing the Game

Navigating the winds of change takes refined skills and a clear aim. To garner motivation, invest in, and empower today's workforce for a stronger tomorrow. Make momentum work for you.

"The point of retirement is to wake up and do what you want to do. Why not try to create that same feeling in the office today?" asks Boxley.

Learn new skills—and how to pass along the ones you've already developed—beginning with a FREE Momentum Makers consultation.

To learn more and register for the next complimentary Momentum Makers Virtual Open House, visit momentum-makers.com. 📍



THE EO EFFECT

Building Better Businesses, Leaders, & Communities

INTERVIEWED BY **MICHAEL NELSON**

Entrepreneurship is often portrayed as a glamorous journey of innovation and wealth creation, but the reality is far more complex. It's a roller coaster of highs and lows, requiring resilience, grit, and a strong support system to navigate the inevitable challenges. Recognizing this, the Entrepreneurs'

Organization (EO) has been empowering business owners for nearly four decades, fostering a global community where entrepreneurs can connect, learn, and grow. In an insightful interview with Heidi Nathaniel, Executive Director of EO Albany, the profound impact of EO and its tailored programs—EO Membership, Accelerator, and Catalyst—on business growth becomes strikingly clear. These initiatives not only help entrepreneurs scale their companies but also nurture them as leaders, family members, and community contributors.



The Genesis of EO: A Peer-to-Peer Lifeline

Founded in 1987 by Vern Harnish, EO emerged from a simple yet powerful observation: successful entrepreneurs often feel isolated. At a conference, Harnish noticed business owners lingering in corners, lacking peers with whom they could share their triumphs and struggles. This sparked the creation of EO, a global network designed to provide a safe haven for entrepreneurs to have what Heidi calls “2 a.m. conversations”—those late-night worries that keep business owners awake. Today, EO spans over 200 chapters in 64 countries, boasting nearly 20,000 members, with a goal to reach 35,000 by 2030.

Whether you're running the corner bodega or a public company, **there's a space for you.**

At its core, EO is about building a tribe. “It’s lonely at the top,” Heidi explains, a sentiment that resonates with entrepreneurs regardless of revenue size. By offering a peer-to-peer network, EO creates a space where founders, owners, and majority stakeholders can connect with others who truly understand their journey. This support network doesn’t just alleviate isolation—it drives tangible business outcomes. Stronger leaders emerge, building thriving companies that bolster local economies and communities.

EO Albany, celebrating its 25th anniversary in 2025, exemplifies this mission locally. With 18% of its members active for over a decade, the chapter demonstrates the enduring value it provides. One member, originally from EO Silicon Valley, brings decades of tenure to the Albany chapter, underscoring the organization’s deep roots and global reach. Annmarie Lanese, EO Albany Board President and Founder of Can Code Communities, reflects on this milestone: “Leading EO Albany during our milestone 25th anniversary year has been an incredible honor. Receiving the Best of U.S. award at the U.S. Presidents Meeting in February is a testament to our members’ dedication and the strength of our chapter. This recognition highlights the strength of our Capital Region entrepreneurial community and the power of our chapter.” Her words underscore how EO Albany’s success is a collective triumph, amplifying the region’s entrepreneurial ecosystem.

EO Membership: A Gateway for Million-Dollar Businesses

EO’s flagship program targets businesses grossing at least \$1 million annually—a threshold that varies in high-cost markets like South Florida or Austin, where it might reach \$2.5 million. Open to founders, owners, or majority stakeholders (including nonprofit leaders with budgets exceeding \$1 million and venture capital-backed firms with adjusted criteria), this program offers a robust suite of benefits. Members gain access to a global network, executive education at top universities, leadership development, travel opportunities, and conferences. With roughly 100 “products” available, there’s something for every entrepreneur, whether they’re refining operations or exploring new markets.

A cornerstone of EO Membership is the Forum, a monthly mastermind group of up to eight peers. These confidential, industry-conflict-free gatherings act as a “life board of directors,” Heidi says. Here, members share experiences—not advice—celebrating wins and tackling challenges together. This vulnerability and trust foster personal growth that translates into business success. For instance, a member grappling with a business pain point might uncover broader life lessons, becoming a better parent or community leader in the process. The ripple effect is profound: thriving entrepreneurs



build stronger companies, boosting workforce development and economic vitality.

Globally, EO's four core values—trust and respect, thirst for learning, think big, be bold, and together we grow—guide everything from member vetting to decision-making. This alignment creates what Heidi describes as “Global Trust.” An EO member in Albany can call a counterpart in Bangkok and expect a warm reception, whether for dinner or a business deal. This scalability of trust amplifies opportunities, connecting members to a worldwide ecosystem of like-minded leaders.

A Big Tent for All Entrepreneurs

EO isn't exclusive to million-dollar moguls. Adopting a “big tent” philosophy, the organization welcomes entrepreneurs at all stages. Even those below revenue thresholds can attend events or master classes, gaining inspiration and resources to qualify for programs later. “Whether you're running the corner bodega or a public company, there's a space for you,” Heidi asserts. This inclusivity combats imposter syndrome—felt even by multimillion-dollar owners—and ensures EO remains a beacon for growth-minded founders. The local EO chapter also has two other programs that give help to businesses that are at lower revenue thresholds.

Accelerator: Scaling from \$250,000 to Millions

For businesses earning between \$250,000 and \$1 million, EO's Accelerator program bridges the gap to the million-dollar mark. Unlike traditional entrepreneurial education, Accelerator is unique in its approach: “It's entrepreneurs teaching entrepreneurs,” Heidi emphasizes. Quarterly master classes, led by seasoned EO members like a 25-year veteran from EO Ottawa who has scaled multiple businesses, provide interactive, practical learning.



Globally, EO's core values—trust and respect, thirst for learning, think big, be bold, and together we grow—guide everything from member vetting to decision-making.

Monthly accountability groups, coached by EO members, ensure participants stay on track.

Christopher Quereau, an EO Member and Founder of Vibrant Brands, highlights the program's transformative power: “As an EO Accelerator coach, I've had the incredible opportunity to work closely with small business owners, helping them set goals and make small but impactful tweaks that lead to significant milestones. It's amazing to see how strategic adjustments—whether refining a sales approach or improving internal processes—can transform businesses, propelling them toward sustainable success. The Accelerator program provides not just knowledge but also accountability, and witnessing these entrepreneurs

break through barriers and scale is truly inspiring.” His experience illustrates how Accelerator's blend of mentorship and structure drives measurable growth.

The results are striking. While only 4% of U.S. businesses surpass \$1 million in revenue, 16% of Accelerator participants achieve this milestone—four times the national average. Since launching in Albany in 2019, the program has graduated 12 businesses, with success stories like entrepreneurs growing from \$250,000 to \$1.4 million in just 36 months. This isn't just about numbers; it's about equipping founders with foundational knowledge many lack. “Entrepreneurs often don't come from business school,” Heidi notes.



"They have a passion or idea and turn it into a business." Accelerator fills that gap, helping them avoid pitfalls and scale sustainably.

Notably, Accelerator also champions diversity. In Albany, 40–60% of participants run women-owned businesses, and about 20% lead minority-owned firms—mirroring or exceeding local demographics. For these entrepreneurs, who often face funding or networking barriers, the program offers critical support, leveling the playing field and amplifying their impact.

Catalyst: Nurturing Early-Stage Growth

Recognizing a local gap, EO Albany launched Catalyst, a pilot program now in its second year, for businesses below Accelerator's \$250,000 threshold. Capped at 10 participants, Catalyst targets solopreneurs and early-stage founders at inflection points—those wrestling with hiring their first employee or rebranding for broader appeal. Like Accelerator, it includes monthly coaching by EO members and access to master classes, ensuring personalized attention without diluting the experience for

more mature businesses.

In just 18 months, one Catalyst participant has graduated to Accelerator, with two more expected within six months. This rapid progression highlights the program's effectiveness in helping businesses bridge the "white space" between startup support and scalable growth. In a region rich with incubators but lacking mid-stage resources, Catalyst fills a vital niche, fostering resilience and ambition.

Beyond Business: A Holistic Approach

EO's impact transcends revenue growth. Mental health struggles, high divorce rates, and imposter syndrome plague entrepreneurs, and EO addresses these human elements head-on. "The struggle is real," Heidi acknowledges, citing the organization's role in supporting the whole entrepreneur. Forum discussions, for example, often reveal personal breakthroughs that enhance leadership at home and in the community. By prioritizing trust, learning, and boldness, EO cultivates not just better businesses, but better humans.

Heidi's favorite aspect of EO is its humanity. "There's a misconception that entrepreneurship is easy or only

for extroverted salespeople," she says. Instead, EO attracts engaged, curious learners willing to be vulnerable—a trait that fuels both personal and professional success. This holistic support is why members stay for decades and why EO Albany thrives after 25 years.

Conclusion: Building Thriving Businesses and Communities

Through its Membership, Accelerator, and Catalyst programs, EO empowers entrepreneurs to scale their businesses while fostering personal resilience and community impact. From global connections to local coaching, the organization offers tailored tools that transform ideas into million-dollar enterprises. In Albany, success stories abound—businesses quadrupling national growth rates, diverse founders breaking barriers, and leaders finding their tribe. As Heidi aptly puts it, "It's so far beyond business." EO doesn't just grow companies; it nurtures the people behind them, creating a ripple effect of stronger families, workplaces, and economies. For entrepreneurs ready to think big and grow together, EO is the ultimate partner on their journey. 🌱



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Running Your Company with EOS

WRITTEN BY **MEGIN POTTER** | PHOTOS PROVIDED

Called a “must-have” for entrepreneurs of small to mid-size businesses feeling stagnant, the Entrepreneurial Operating System (EOS) is a framework for harnessing human energy in simple yet powerful ways.

Originally developed by entrepreneur Gino Wickman, the EOS method and tools have helped more than 150,000 companies worldwide, either through a coach or DIY, with more than three million copies of EOS books sold.

CLARIFY. SIMPLIFY. ACHIEVE.

When a founder starts a company, the exciting and terrifying first stage is often followed by a second stage where the weight of responsibility becomes overwhelming. At this point, many entrepreneurs find themselves treading water, working for the business rather than on the business, said EOS Implementer Dave Borland.

When he begins working with a client, Dave invites the organization's open-minded leaders to picture their phone's lock screen and imagine what they want to see there just three years from now. Then, he guides them step by step through the process of achieving that vision.

This purpose-driven approach prioritizes what to do, when to do it, and by whom. It provides a solid, scalable, and sustainable foundation for the road ahead.



You're not only creating a vision and goals—you're also holding better, more effective meetings, working with the best people, and enjoying the process.



Dave Borland at an EOS conference with clients from Washington, DC, and Boston, MA.



Dave Borland at GreenSprings Capital Group's annual offsite meeting in Burlington, VT.



Local entrepreneur Dave Borland speaking at the 2025 Total Impact Kick-Off, in Atlanta, Georgia.

"It makes it 'stupid-easy' for people to follow, especially those who aren't prone to project management," said Dave.

Informed by his years of real-world experience, he calls himself a "serial entrepreneur" who has "founded, floundered in, grown, and exited" four companies. A Clarkson University graduate with a Bachelor of Science degree in Business Management, Dave was the president of his fraternity in college. In the mid-1990s, he formed a software training company called CompTutor. By the

late 1990s, he added uTrax, a database management developer, and ran them both concurrently until their sale.

In 2001, he formed IntelliSites, which grew into the Capital Region's largest web development firm. In 2012, the company merged with a successful printing company and a boutique ad agency to create Burst Marketing—and that's when the issues began.

Dave admits that the leadership team struggled mightily in that business. "There was a lack of a shared vision, the wrong people in the wrong seats, and we almost immediately started losing money. Within a year, the partners were literally paying to work there and became increasingly frustrated and angry with each other, while our team remained unaware of anything except the negative culture at the top."

"We stumbled into EOS, and once we began implementing it, it changed our lives. Within six months, we completed a turnaround, made money again, and became a healthier team."

Upon discussions of another merger, Dave successfully exited that company in 2014.

After selling, a business friend asked Dave to help implement EOS in their company in 2015. That's when he discovered his knack and passion for helping other entrepreneurs. Since then, he's conducted more than 850 sessions with over 80 leadership teams across the U.S., helping them achieve their vision. Many of these companies have been awarded "Best Places to Work" or made "Fastest Growing" lists in Entrepreneur or Inc. Magazine. Others have had highly successful ownership exits.

"It's funny—as I train, coach, and facilitate these teams, I recognize that every team is different, but there are a few main things they need to push through to success. One is to be curious and open. Two is to delegate and elevate—there's a right 'who' for every critical function, and it doesn't have to be the same person."

Today, Dave is invaluable to many, serving as a down-to-earth business coach with a singular goal for every client: to finally get what they want.



Creating a leadership team where everyone is **100% on the same page** with **where you're going** and **how you're going to get there** may seem simple, but it can be hard to do. **It can give you rocket fuel.**

– DAVE BORLAND

IDENTIFY. DISCUSS. SOLVE. (IDS)

The EOS Worldwide system consists of actionable items presented in various formats—through books and easily accessible free tools online—which can be implemented DIY-style or with expert guidance from an EOS Implementer like Dave.

"Entrepreneurs finally get what they want, whether they do it themselves or use a coach," said Dave.

During a FREE 90-minute consultation, Dave shares information, tools, and processes from the EOS system with leadership teams. He encourages teams to decide if EOS is right for them, rather than it being something imposed by the boss.

For example, when companies face challenges, EOS employs the IDS Method:

- **(I)** Identify the real issue.
- **(D)** Discuss the options for a solution.
- **(S)** Solve the problem by voting on the best option and creating steps to implement it.

By using this technique, everyone feels heard, and nobody walks away angry, said Dave. It's so effective that he even uses it at home. "It takes away the drama from issues and problems and allows you to pick options for solving them faster and better," he said.

GROW EXCEPTIONAL.

By prioritizing what your company can do now, you're not only creating a vision and goals—you're also

holding better, more effective meetings, working with the best people, and enjoying the process.

"Creating a leadership team where everyone is 100% on the same page with where you're going and how you're going to get there may seem simple, but it can be hard to do," said Dave. "It can give you rocket fuel."

While facilitating full-day EOS sessions designed to create a healthy, thriving, high-performing company, Dave always has one goal in mind—graduation.

"Most coaches are like counselors who become a part of your business. That's not what I want. I'm not your crutch. I want to get you up to speed as fast as possible and work with you until you graduate. I get you into a quarterly rhythm, then give you the tools to solve issues yourselves when they come up," said Dave.

Working with local companies to enhance their growth through EOS techniques, Dave's satisfied clients include financial advisors like Tailored Wealth Solutions, manufacturers such as G&G Industrial Lighting Solutions, and real estate investment firms like Greensprings Capital Group, among others.

When Chick-fil-A opened in Clifton Park, the rapid pace left no room for downtime, said Dave. They had to quickly become a 100-person team with fast-moving parts. Although Chick-fil-A is a national chain, opening the restaurant was like operating a start-up because the team was young and inexperienced. Through the EOS system and with Dave's help, they were able to adjust quickly, secure the right team members, and realize the company's mission: to leave something behind in the world that makes it a little better than when they found it.

GIVE BACK.

Although EOS Worldwide primarily serves small to mid-size companies with 10-250 employees generating between \$2 million and \$20 million annually, its impact is transformative. Dave said he truly felt he was playing in the big leagues when he had the privilege of sharing the stage with best-selling leadership author John Maxwell and legendary basketball coach Mike Krzyzewski at the 2025 Total Impact Kickoff in Atlanta, GA.

Giving back to the community is a focal point for Dave. Since 2022, he has served as a strategic partner for the Albany chapter of the Entrepreneurs' Organization, a global peer-to-peer network of over 18,000 leaders in 63 countries. He also offers pro bono EOS guidance to several local nonprofits, including Can Code, Starpoint Church, and the Troy Farmers Market.

"There are no strings attached. I just want to help," he said.

To learn more about how Dave Borland and EOS Worldwide's tools and resources can help your business, visit EOSworldwide.com/dave-borland. 



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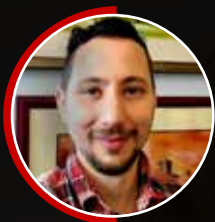
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SEASON 3, EPISODE 18

LARAC

Your host, Mike Nelson, interviews Philip Casabona, executive director at LARAC. Tune in to hear them discuss supporting and uplifting the local artist community, curating events, obtaining funding for a non-profit, and much more!



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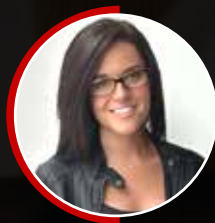
SEASON 3, EPISODE 17

Set Free Counseling

Your host, Mike Nelson, interviews Tandi Orluk, mental health therapist at Set Free Counseling. Join in on the conversation as they discuss helping the homeless veteran population, using EMDR to help treat trauma, different attachment styles, and much more!



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SEASON 3, EPISODE 16

Annie Newman

Your host, Mike Nelson, interviews Annie Newman, local saleswoman and advocate for hydrogen water. Tune in as they discuss high end water distribution, paying attention to what's in the water you drink, forming connections through business endeavors, and much more!



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SEASON 3, EPISODE 15

FAZ Forensics

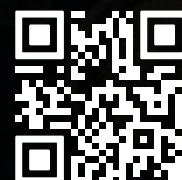
Your host, Mike Nelson, interviews Stephen Ferraro and Charles Amodio of FAZ Forensics. Tune in as they discuss getting the right people in the right seats, the scope of some of the cases they've worked on, upholding core company values, and much more!



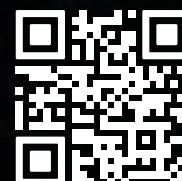
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**EPISODE 71****Hudson Valley Preservation and Trades Up**

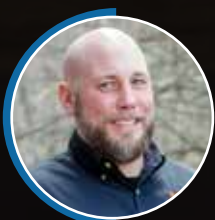
Your hosts interview Mason Lord, co-owner and founder of Hudson Valley Preservation and Trades Up. Tune in as they talk about giving kids hands-on experience with tools, handling the stress of building a business, and much more!

**Scan to Listen****EPISODE 70****Northwestern Mutual**

This episode features Ryan and Thomas Farnan of Northwestern Mutual, with questions from your host, Derek Foster. They dive into personalized financial planning, the benefits of no minimum investment, and more!

**Scan to Listen****EPISODE 69****Peoplease**

Your hosts interview Nick Schkrioba, sales consultant with the professional employer organization, Peoplease. Listen in as they talk about workers comp models, maintaining a high retention rate, modern software, and much more!

**Scan to Listen****EPISODE 68****Whitbeck Construction**

Your hosts interview Matt Whitbeck, owner of Whitbeck Construction. Listen in as they explore the experiences of a first-generation business owner, the challenges of growing faster than one can access education & resources, maximizing the lifespan of construction projects, and more!

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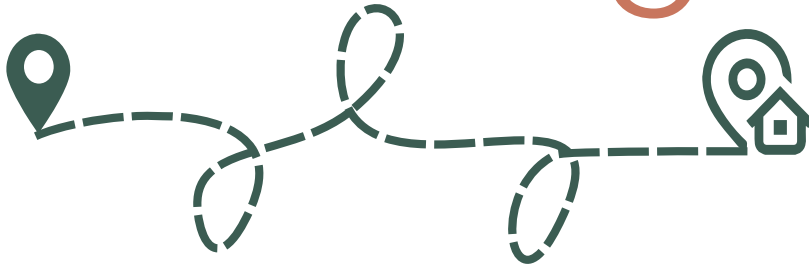
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