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Balancelogic – Providing Small Businesses with a Full Host of Strategic Services to Support their Digital Transformation Journey

Bill Campbell, CEO

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CEOCFO: ***Mr. Campbell, according to the Balancelogic site you are the answer for small business; how so?***
Mr. Campbell: Good question. We have always been the answer for small business in the aspect of small businesses need a variety of solutions to successfully operate, which include moving to the cloud and moving their business to the digital world. We provide a full host of strategic services to support their digital transformation journey.

CEOCFO: ***Was it a deliberate strategy to focus on small businesses or was it more opportunistic?***
Mr. Campbell: It was 100% deliberate to focus on small businesses. I have had the opportunity to work in small businesses, mico-businesses, as well as large enterprises and I found that in large enterprises everybody is just another number on the production line, so to speak. However, in small businesses, it is really what you call, "In the trenches." In small businesses everything is happening, people are wearing multiple hats, things are super exciting and that is where the core of the experience is. That is what I chose; that is my background as far as managing operations and technology for the SMB. Therefore, that is where we focus.

CEOCFO: ***Would you give us an idea of how you work with small businesses in a manner that is different from most other tech companies?***
Mr. Campbell: Most service companies work in an aspect where it is more of an account manager. If you get a client, you have an account manager, and the account manager manages the account. It is kind of like being in the enterprise where you are just another number; you are just another account. We do not take that approach. We take more of the partner approach.

We are really hands on; we humanize the IT, humanize the relationship and really get to understand the business. We really get to understand how they operate, who is in the business, and what their goals and objectives are. Then we work with them to achieve those goals and objectives.

CEOCFO: ***What is the key to not overwhelming a client or potential client with too much technology and too may choices?***
Mr. Campbell: That is easy. You need to talk in layman's terms. You cannot throw a bunch of technical jargon at them; they are not going to understand it. You need to have plain English conversations with them. Also, you need to provide real solutions and not try and sell them everything under the sun. You, yourself need to understand what their solution is and explain it to them in laymen's terms, educate them and then allow them to make the decision.

My position is, we are not trying to sell anything. Our job is to make recommendations, educate the client and their responsibility is to make the decision whether it's fit or not, whether they can afford it and if it fits within their business goals.

CEOCFO: ***Are there particular types of companies, industries and locations that make up your client base?***
Mr. Campbell: We have a shotgun blast of different industries and different verticals. We find ourselves working a lot more with healthcare and construction, mostly service businesses within those arenas. We also have some nonprofit clients. However, every business has the same challenges regardless of what industry you are in, so it really does not matter what the industry is, per se.

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CEOCFO: ***What have you learned from your clients as time over time; what do you do differently today than you might some years back?***
Mr. Campbell: Just like in personal relationships, communication is key. The biggest thing we learned is to be in constant communication with them and listen to them. They may be explaining one of their problems, issues or challenges, and if you are not listening the proper way you will not be able to provide the right solution or any solution at all. It is about really listening to what they are saying, reading between the lines to understand what they are trying to communicate and asking questions. Do not be afraid to ask the client questions to really understand what they are looking for.

CEOCFO: ***Would you give us an example of what a typical engagement might be and maybe something more outside the box?***
Mr. Campbell: Once we get through the sales process, one of the most important things is onboarding the client. Also, there is communicating the shared responsibilities; explaining to them what we are responsible for and what they are responsible for. We also explain to them that they need to keep us accountable and for us to keep them accountable as well. That is what will kick start the beginning of the relationship. Constant communication most importantly, delivering with what you say you are going to deliver, do not over promise and under commit, and just continue building the relationship.

CEOCFO: ***How do you keep with all of the new technology, and recommend something new or tell a client they should stick with what they have?***
Mr. Campbell: I think keeping up with the latest technology is the biggest challenge in the world. One is that we are constantly training; myself included. Whether it is vendor training, industry training or technical training, we always have certified staff in the company. It does not matter if it is technical or non-technical staff, everybody gets some type of certification. We have a very comprehensive professional development plan in place here, to make sure we are as up to date as possible.

With regard to our clients, it is about providing the right solution. We are not in the business of selling shiny new toys, because it is not all about sales. It is about looking and the client and seeing the proper solution; and sometimes that solution has a large expense and sometimes it does not. Sometimes it is just a change in process. It is making sure we are not throwing technology at problems. We want to look at the process first and only apply technology where it needs to go.

CEOCFO: ***Would you tell us about helping your clients with compliance; this is a big feature on your site?***
Mr. Campbell: The big buzz word or the year is, "compliance." "Our clients are required to follow various compliance standards. On a daily, weekly, monthly, and quarterly basis, we are looking at what industry the client is in and what regulations they have to be compliant with and do assessments. We talk to them as a lot of clients do not even know that they have to be compliant with certain regulations or rules. Therefore, we want to educate them on that and then communicate that we need have a plan for where we need to get them compliant in a specific area. Then we put a plan together and help them execute it.

We are about making recommendations, so if a specific client needs to be HIPAA compliant for healthcare or CMMC (Cybersecurity Maturity Model Certification) for government contractors, or safeguards for a car dealership, we educate them. We let them know what they need to be in compliance with and then the technology and processes that we need to implement, as well as the costs. Then we talk about a plan to get them there. We have clients where that is not a high priority for them, and other clients where compliance is their highest priority.

CEOCFO: ***Do most small businesses recognize the need for someone that specializes in that arena, and when some is looking how do they find Balancelogic?***
Mr. Campbell: That is another challenge in the industry. One is that clients do not always know that they need us or they do know that they need us and do not want to invest the capital to engage a tech company; and those are two different challenges. Therefore, we do a lot of outreach and a lot of training. I attend a great many conferences and do a lot of speaking engagements to educate the target audience. That is one way we reach out to clients and they can find us.

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We also have a strong SEO presence on Google and Bing, where if you search for specific keywords you will be able to find us. Some of those we are number one in. In addition, we do a lot of cold outreach. We nurture potential clients, whether it is an infographic, or an ebook, or white paper of a new compliance rule or a new technology available. We love to communicate not only to our clients, but also to potential clients as well.

CEOCFO: ***How is business these days?***
Mr. Campbell: Business is great. We're seeing excellent results and healthy revenue growth

CEOCFO: ***What are some of the challenges in having enough staff, the right staff, so that you can service your customers and future customers the way they deserve?***
Mr. Campbell: It is a challenge to find staff and it is an even bigger challenge to find the right staff. You can hire anybody, but that does not mean they are a fit for your organization or a fit for your roadmap. Sometimes it is not even finding someone who has all of the technology acumen. It may be that you are looking for someone who is a fit for your culture, because you can train people, but you cannot train attitude, motivation or loyalty. Therefore, it is about finding the right person who is the right fit.

With AI exploding, that helps a little bit as far as internal process and procedures, to be a little more efficient, effective and productive. However, you still need the right people doing the right thing.

CEOCFO: ***What are you surprised we can do with technology today, and what are you surprised we have not figured out yet?***
Mr. Campbell: I'm surprised that we have not cured more diseases. There are a lot of things we have figured out, and some are absolutely mind blowing, but a lot of the focus is on being more effective, efficient and productive. A good percentage is solving problems, but I think there should be more emphasis on solving bigger problems, not siloed problems.

CEOCFO: ***What is your daily focus as CEO?***

Mr. Campbell: I am a different kind of leader and CEO. I am all about delegation, empowerment and training. Some of my day is doing CEO administrative work, part of it is doing business development or sales, and part of it is getting my hands dirty, whether it is helping a tech solve a problem or working on a ticket at the helpdesk. A big part of my day is about operations; making sure the company is running the way it should.

I am not the kind of CEO that sits at my desk dictating and barking orders. I have always been hands on and in the trenches, and will always be that way.

CEOCFO: ***How do you help your clients understand when they should reach out to you or when they should handle a problem themselves?***
Mr. Campbell: Some providers want their clients to solely rely on them, because it is for job security. However, we do not operate that way. We want to empower our clients to do things themselves to a point; and I want to be direct when I say, "to a point." If they have an issue and they submit a ticket, then they have to wait for the process for us to go to the helpdesk, respond to them and solve their problem. This process is pretty quick, but for those who want to try to solve their own problem we also provide knowledge based articles, email training tips, tips of the month, articles and blogs. We want our clients to be as self-productive as possible, but rely on us when they do need us. It is kind of like the insurance strategy. We do not want to handcuff them to where they can only come to us when they need help. We want to train them to help themselves as well.

CEOCFO: ***What does 2026 look like for Balancelogic?***
Mr. Campbell: 2026 looks exciting. We have a lot of things on the roadmap. We are looking at doing some acquisitions, M&A activity. We are also looking at expanding our software development division to build some great webapps for our clients. We just started the software development division, so we looking to get that out. That fits perfectly with our digital transformation strategy and roadmap, so we are really excited about that.

We are also creating our own ecosystem of webapps that will help SMBs. We have 3 webapps out there now as part of the ecosystem and we are looking to develop another 3 by the end of 2026.

CEOCFO: ***Are acquisitions something new or have you done them in the past?***
Mr. Campbell: Acquisitions are not new for us. I have done 3 acquisitions in the 21 years that I have been in business, and each one was very strategic. One was not the outcome that I wanted, but the other 2 were very lucrative and helped us with our roadmap of where we were going. We are looking to do that again in 2026 and 2027.

CEOCFO: ***Put it together for our readers. There are so many companies offering technology, why choose Balancelogic?***
Mr. Campbell: Choose Balancelogic because if you want honest direct solutions that are the right solutions and not just shiny new objects to throw technology at problems, then we are the right company to come to. We have a ton of experience, a great deal of experience with all kinds of SMBs. We are here to make sure we give you the right answers and the right solutions.

balancelogic
THE ANSWER FOR SMALL BUSINESS.