

Meet Steve Barber, LevelUp Solution Services

Jim Ries: [00:00:00] Hello and welcome to Java with Jim. I'm Jim Ries, Director of Business Development at Offit Kurman. Joined here today with Steve Barber, Managing Member at LevelUp Solution Services. Steve, how are you today?

Steve Barber: I'm doing great, Jim. How are you?

Jim Ries: I'm doing wonderful. So glad you joined us today. Let's jump right in.

Steve, tell us about LevelUp Solutions services. What does the company do and how is the company different from similar services in and around the area?

Steve Barber: Sure, and its simplest form, LevelUp solution services is a fractional CFO business. So what does that mean? We're gonna come in as a fractional chief financial officer and pick up where your either internal or external accounting, outsourced accounting department leaves off.

We don't wanna do the transactional accounting, we don't want to close the books. We wanna focus on strategic management, long-term planning and [00:01:00] forecasting, treasury management, exit planning, scenario, planning for growth, things along those lines. Again, it's not an accounting business.

It's a fractional CFO business that picks up where the accountants leave off.

Jim Ries: And Steve I want to go off script for a minute. What market do you serve? Both from a revenue standpoint and demographic geographic standpoint.

Steve Barber: Sure. And that actually leads to the second part of your first question there.

We're looking for growth businesses. We're looking for businesses that started around in terms of revenue. It's not a hard, fast, but in terms of about 5 million, maybe 10 million in revenue, up to that 30 to \$40 million mark when at that point they should probably have a full-time CFO.

And really what makes us different as folks who may follow me on LinkedIn know I had a prior business, a good business, a high volume of clients, and I learned I don't need to be the solution to everybody. [00:02:00] So what makes LevelUp Solution Services different versus some of the folks who do what we do is we wanna be very structured in who we bring on as clients.

We wanna focus on the nonprofit industry. We wanna focus on trades and construction, and we wanna focus on e-commerce businesses. We wanna be that partner to those three industries, and then we wanna partner with other folks who do what I do. Taking a very consultative approach. There's not a one size fits all solution.

We do value-based pricing. I don't want to charge by the hour. I want my clients to feel comfortable picking up the phone and talking to me, or, one of my CFOs I have on my team.

Jim Ries: Great explanation. Thank you Steve. So Steve, I know you're a young company, but when it comes to LevelUp Solution Services, what are you most proud of?

Steve Barber: Sure. I believe in the acronym FAIL. F-A-I-L, which is first attempt in learning. And with the other business I had, I grew very fast. [00:03:00] So what am I most proud of? I'm proud of my growth projection now, which is steady. We're taking on the right clients. We're learning what clients to say no to, what clients work for us.

And so I'm proud that I've learned to say no and grow steadily and smartly.

Jim Ries: Yeah, and every time you say no, you're saying yes to something else. That sounds like a great strategy. All right. Steve, what do the next six months look like for you and LevelUp Solution Services?

Steve Barber: It's really more of the same of what we've been doing.

We're getting the word out there. We're showing how we provide real value to our clients and our community. I'll expand it to the community because it's just not about clients. And continue to grow steadily, sign the right partners for long-term relationships.

Jim Ries: Great.

Alright. Here's the fun one. What do most people watching this video not know about you?

Steve Barber: Sure. I am a [00:04:00] Lego aficionado, I guess is the best way to say. You can see some of them behind me. I do a Lego every night as a stress relief. I have well over 200 sets throughout my house. My wife is telling me to stop and I'm telling her we need to move and upgrade.

So we're getting older. So listen, not downsize, we're upgrading 'cause of my Lego. I love doing Lego. I'm always doing it. And I love to talk to folks about the Lego that I do.

Jim Ries: Well, I'm gonna bring my grandson over. I think he'd have a picnic there.

Steve Barber: Yes. And Jim just for those watching the way I justify this too to my wife is I don't golf.

Jim Ries: Oh, there you go.

Steve Barber: Perfect.

Jim Ries: There you go. That seems like a very fair trade off. Steve, thanks for spending time with us today and thanks for sharing so much information about LevelUp Solution Services. Wishing you the best of luck, I know you're gonna crush it and I know I'll be seeing you soon too.

Steve Barber: Definitely. Thanks Jim, and I appreciate you. Appreciate it.

Jim Ries: You betcha.

Steve Barber: Thanks.