



Shift/Co<sup>®</sup>  
**IMPACT  
REPORT**

It's TIME for a  
Collective Impact

2020-2022

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# CEO WELCOME

Thank you for being part of our amazing community!

What matters to us more than anything – is supporting YOU in growing a thriving conscious business. It's our PURPOSE!

We launched Shift/Co as a Public Benefit Corporation July 15, 2020, and as we celebrate our first 2 years of operations, we're delighted to share the impact we've made. More than 77% of our Members have doubled or tripled their income within 1-2 years of joining our platform.

This report not only outlines what we've achieved in our first two years, but also the impact we've made on hundreds of conscious businesses and dozens of communities.

Most importantly, we've proven that the formula for growing a business that ALSO makes the world better is: Purpose + Value = Impact.

We believe that igniting the success of conscious businesses is the best way to create a more grace-filled planet. On behalf of the Board of Directors and the Leadership Team...thank you for being part of the SHIFT.

**Let's CREATE a collective impact!**



Terri Maxwell, Chief Executive Officer  
Shift/Co, PBC

# PURPOSE | IT'S WHO WE ARE

From the beginning, we were clear on WHY Shift/Co was needed in the conscious business landscape – to provide quality, effective conscious business training. The desire to fill this gap framed our purpose.

**Shift/Co's purpose is to support the development of conscious entrepreneurs in building socially and environmentally friendly businesses.**

We exist to help our Members grow profitable and purposeful companies.

- Because of our purpose - we measure our corporation's success based on whether Members' businesses are growing. It is the most important metric we have.
- Shift/Co's programming is focused on helping Members develop thriving conscious businesses through application-based skills training, coaching, mentoring, and community. We support businesses that are just starting, up to \$10 Million in revenue
- We recognize that conscious entrepreneurs also have a desire to work on their personal evolution and leadership skills. Therefore, we provide business training, as well as personal and leadership development.



# OUR VALUES

One of the first things the initial Shift/Co investors did was define our core values. Today, these values are used by our Board of Directors and Leadership Team to make decisions that are in alignment with who we are, and how we serve.



## **Soulful:**

We're called to a higher purpose. We work to actively embody our sense of vocation in all that we do.

## **Honorable:**

We recognize our role as ambassadors for conscious entrepreneurship. We live and work with integrity, never placing profits over principles.

## **Inclusive:**

We proactively seek to diversify our membership. We intentionally recruit from outside our circles and reduce barriers to attending our events, receiving our services, and joining our community.

## **Focused:**

Personally and professionally, we embrace accountability and intentionality in pursuit of measurable results toward meaningful goals.

## **Truthful:**

We embrace transparency and communicate with honesty, accuracy, and clarity. We avoid hyperbole and manipulative language.

/

The (forward slash) energetically connects our internal values to our external focus and represents the role of technology in connecting, innovating, and enabling our members individually and globally.

## **Courageous:**

We boldly pursue our biggest impact. Guided by our principles, we remain tenacious through the discomfort of difficult choices.

## **Open-Hearted:**

We unite with others on the same journey, openly sharing our combined resources to maximize our collective impact. Our goal is to thrive together.

# Impact

Our impact comes from living our purpose - to support the development of conscious entrepreneurs in building socially and environmentally friendly businesses.

## How We Measure Purpose: Member Success Ratio

Shift/Co measures the success Members have when they apply our methods and coaching. To measure our purpose and impact, we created a metric called the **Member Success Ratio (MSR)**, which represents the percentage of Members who double their revenue within 1-2 years from joining Shift/Co.

As of June 30, 2022, we can report that **77%** of Members who joined Shift/Co more than **DOUBLED** their revenue (in some cases tripled), reaching the next business phase in the Conscious Business Growth Platform™.

Our Board and Leadership Team also uses MSR to modify and enhance programs to ensure more Members have business growth success.

We also measure average monthly Member Retention, which is the percentage of Members that stay with us each month. As of June 30, 2022, we can report that an average of **97.1%** of our Members have elected to maintain their Membership each month.

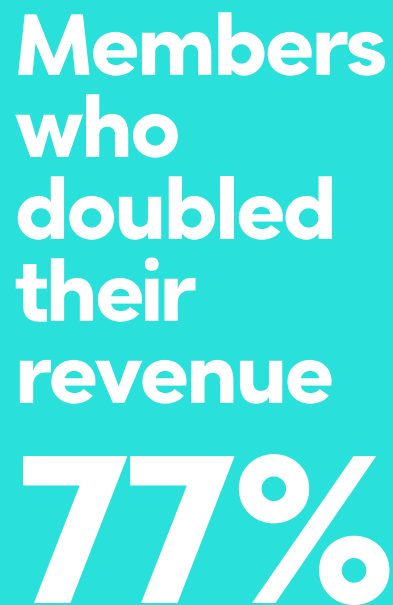
What causes these kinds of results in just two years?

**We believe a big part of it is something we affectionally refer to as a Success Shift™**

A Success Shift occurs when a Member SHIFTS his/her mindset in alignment with a stated purpose and business goals.

Finally, we estimate that collectively our Members' success represents **\$15.6M** in new revenue generation in the last 12 months alone.

**And... we're just getting started.**



Members  
who  
doubled  
their  
revenue  
**77%**

# Conscious Business Growth Platform™

Shift/Co® leverages, and was built on, a methodology called The Conscious Business Growth Platform™, which we licensed from Share On Purpose™, Inc.

This methodology helps Members pinpoint where to focus to grow from their current business phase to whichever phase they want to grow into.

Each of these business phases includes a doubling of business revenue from the previous phase.

The Conscious Business Growth Platform™ is a diagnostic framework. Quite simply, we help members DIAGNOSE precisely where to focus and then match them with a specific roadmap to get there.

The Conscious Business Growth Platform™ shows each member what to FOCUS on to evolve his/her business and elevate success. Members receive specific learning paths, as well as coaching and mentoring to ensure their success throughout this “journey.”

## The Conscious Business Growth Platform™

(Confidential Property of Share On Purpose, Inc)



Master the three fundamental components of a successful business.



Scale for IMPACT or scale for growth, and then shape the business model and strategy.



Build the foundation with eight elements of a multi-million-dollar brand.



Evolve foundation from working IN the business to working ON the business; become financially free.



Ignite your growth engines and elevate to a new level of success.



Select one of four strategic growth models to scale to new heights.

## Grow where you want to be.

# Hero Highlights

So, why did we create Shift/Co?  
Why is the Member Success Ratio so important to our purpose and impact?  
Quite simply, we want to amplify their impact!



**Meckala 'Kala' Alexander**  
Owner  
Shift/Co Member #174

**Keep You Moving Logistics**  
keepyoumovinglogistics.com

## Business Impact

Keep You Moving Logistics is a platform that helps trucking owner-operators expand their profit and increase their success. Her business supports their personal development and teaches them how to increase revenue.

## Success Shift Moment

Kala more than tripled her income and became a serial entrepreneur (creating multiple businesses) by expanding her ability to manage self-talk and see herself through the impact she makes on others.



**Christina Sjahli**  
Virtual CFO  
Shift/Co Member #207

**Profit Reimagined Inc.**  
theprofitreimagined.com

## Business Impact

Profit Reimagined Inc. elevates the success of purposeful businesses and increases profit through fractional CFO advisory services and financial management. Christina helps her clients create profit that aligns with their purpose; with financial results they can understand; and financing readiness they can trust.

## Success Shift Moment

Christina more than tripled her income by learning how to shift her mindset and energy, while expanding her business strategy. She leveraged the Prosperity Challenge (included with each Membership), to attract ideal clients.



**Carrie Rattle**  
Principal & Founder  
Shift/Co Member #22

**Behavioral Cents, LLC**  
behavioralcents.com

## Business Impact

Carrie helps professional women build confidence and find their power by coaching them on more effective ways to manage their money and make better financial decisions.

## Success Shift Moment

Carrie cites three shifts that created her success:

1. Giving up the need to be perfect
2. She increased her ability to manage risk
3. She began to trust and be in flow with the universal flow towards good



**Josh Tan**  
President & Founder  
Shift/Co Member #63

**Alchemist Consulting LLC**  
joshtan.net

## Business Impact

Josh works with mid-sized businesses to increase profit, achieve operational excellence, inspire management, and increase overall impact. This includes strategic planning, operational consulting, and leadership development.

## Success Shift Moment

Josh more than tripled his income by shifting his inner dialogue from the fear of what could go wrong to learning how to focus on what was working, as well as embracing a bold vision for the impact he can make in the world.



# Hero Highlights

We created Shift/Co to serve Members like these, and thousands of others just like them, whose business will make a lasting difference in the world.



**Janna Willoughby-Lohr**  
Owner & Artist  
Shift/Co Member #72

**Papercraft Miracles**  
papercraftmiracles.com

## Business Impact

Papercraft Miracles creates eco-friendly gifts that are also good for the planet. These beautiful and sustainable gifts are perfect for once-in-a-lifetime occasions, magical moments, and gifts that make a difference.

## Success Shift Moment

Janna more than quadrupled her success in the last 2 years. She cites her passion for creating new things that make an impact. She feeds her fearlessness by the pure love for creating impact through art.



**Sam Prynne & Tig Hodson**  
Cofounders  
Shift/Co Member #244

**StrongHer Women Limited**  
strongher.co.uk

## Business Impact

StrongHer is a London-based gym that creates the space for women to build confidence THROUGH strength training. They help women find their physical power, strengthening their inner power to achieve bigger goals.

## Success Shift Moment

The StrongHer cofounders learned how to shift success by internalizing business knowledge in a way that strengthened their intuitive knowing of what steps to take to reach the next level.



**Kelly Marshall**  
Founder  
Shift/Co Member #70

**TerraCare Financial**  
terrarefinancial.com

## Business Impact

TerraCare Financial supports conscious entrepreneurs with accounting & bookkeeping services, coupled with money mindset coaching – all provided in a judgment-free space. They elevate the financial success of entrepreneurs who are making the world better.

## Success Shift Moment

Kelly more than tripled her income. She cites the support of the Shift/Coaches & community for creating a safe space for her to shift her energy and mindset around the type and size of business she was destined to build.



**Gustavo "Tavo" Vasconcelos**  
CEO  
Shift/Co Member #254

**Asinpa, LLC**  
asinpa.com

## Business Impact

Asinpa provides high-quality near-shore software development & strategy services that provide maximum value to corporations across North America. Asinpa helps clients achieve business goals through customized, value-driven solutions, with an agile development approach.

## Success Shift Moment

Tavo's success shift came from his own inner drive to make a bigger impact, combined with the disciplined Shift/Co business growth methodology. Tavo learned a powerful insight from his father, that framed his business success: "nothing is perfect, but everything is perfectible."

# How Do We Create Impact?

## It's about Member Success & Connection

Unlike most business training programs; Shift/Co Members don't take the exact same courses and programs. On purpose. Shift/Co is a diagnostic-prescriptive platform. Each Member receives a custom "Pathway" specifically to help them go from where they are to where they want to be.

Our Member Success Team is comprised of mentors and coaches who have already reached the next phase of business success. In addition to running their own businesses, they guide each Member through their unique and custom pathway.

## Member Success Team

A team of professional Mentors and Coaches support each Member in growing their business to the next phase.



### **Mentor:**

Member's 1st point of contact & guide



### **CORE Training:**

Skill-based instruction



### **Pathway Coach:**

Skill-based expert



### **Phase Coach:**

Business growth expert

## Plus: Community & Connection

In addition to business growth training and coaching, we also know that community and connection are key, so we offer local Hub-based connection events, Personal growth Co-Labs as well as business Co-Ops and Collectives.

### Local Networking Hubs

- Austin
- Buffalo
- Dallas
- New York
- Southern California
- Tampa/Orlando
- Toronto
- Hawaii (Coming Soon)
- Denver (Coming Soon)
- London (Coming Soon)

### Business Collectives: & Co-Op

#### **Business Collectives:**

Members who are in the same industry (such as marketing, coaching, leadership consulting, etc.) can join a Business Collective. These collaborative groups work together to share work, support each other, and provide best practices.

#### **Business Co-Ops:**

Whereas Collectives share an industry, Co-Ops share a target market (such as corporations \$10M and Up). They share ideas, make introductions for each other, and cheer each other's success.

# Shift/Co Leadership

## Our Leaders guide Shift/Co in several ways:

### -Board of Directors:

As a Public Benefit Corporation, the Board of Directors is responsible to serve both Shift/Co's stated public benefit/purpose (stakeholders) in addition to its shareholders.

### -The Leadership Team:

A small but powerful team of entrepreneurs serve on Shift/Co's Leadership team, guiding the day-to-day organization.

### -Coaches:

Successful entrepreneurs in their own businesses and masters in the Shift/Co pathways, Shift/Coaches help Members apply the business training to experience success.

### -Mentors:

Mentors are also successful entrepreneurs. They serve as confidants and advisors, specifically assisting Members in identifying business gaps and mindset blocks, so the Member knows where to focus.



**Bev Isla**  
Events;  
Member Connection



**Bob Prince**  
CORE  
Development



**Carla Reeves**  
Phase Coach -  
Launch Foundation



**Dena DeLuco**  
Breakthrough  
Coach



**Elizabeth Eiss**  
Board Member  
Shape-to-Build Mentor



**Josh Tan**  
Business Simple™ &  
Breakthrough Coach



**Kelly Marshall**  
Phase Coach -  
Launch-to-Shape



**Kevin Dooley**  
Coach -  
Differentiation

# Shift/Co Leadership

**Lives Our Values**

**Serves Our Purpose**

**Commits to Self-Growth**



**Kim McKernan**  
Launch Phase  
Mentor



**Launa Lawhorn**  
Launch & Shape  
Phase Mentor



**Lisa Maxwell**  
Board; CFO;  
Mentor; Member  
Experience



**Melissa Mittelstaedt**  
Member Success Team



**Meshell Baker**  
Coach -  
Demand Generation



**Ray Madaghiele**  
Launch Phase  
Mentor



**Terri Maxwell**  
CEO; Board;  
Coach



**Tricia Livermore**  
Mentor &  
Foundation Coach

# Our Vision of the Future

There are now an estimated 582 million entrepreneurs globally = 12% of population. (Source: Global Entrepreneurship Monitor)

Shift/Co's Leadership estimates that about 10% are "Conscious" Entrepreneurs, meaning that their business is dedicated to making the world better in some way. That's an estimated 60 million businesses using their brand to make a difference!

In the most recent Global Entrepreneurship Monitor Study researchers uncovered that in 9 developed Countries, 3 out of 5 entrepreneurs said their reason for starting a business was to "Make a Difference" versus for purely financial gain.

Whereas Conscious Capitalism® seeks to build a movement of business leaders improving the practice and perception of capitalism, and B Lab® creates definitive standards for businesses measuring their entire social and environmental output...

**Shift/Co exists to elevate the success of conscious entrepreneurs, equipping them to build profitable, purposeful businesses that make the world better.**

We believe when we elevate the very nature of business, we can indeed shift humanity.

By 2025...we seek to SHIFT the Success of 5,000 conscious entrepreneurs adding \$120 Million in revenue to conscious business owners seeking to make the world better.

# 5,000

**Conscious Entrepreneurs  
Served by 2025**

**We thank you for your  
ongoing support of  
Shift/Co.**

**We are stronger when we collaborate  
around the common goal of making the  
world better...**

**AND**

**We do good business in BETTER ways.**

**Here's to our collective impact!**

**Shift/Co**

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