

Shift/Co[®]

IMPACT REPORT 2024



**Doing
GOOD
Business in
Better
Ways**

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GRATITUDE

Thank you to all of the conscious founders and businesses that are part of the Shift/Community. Thank you for everything you do to make the world better. Your work matters.

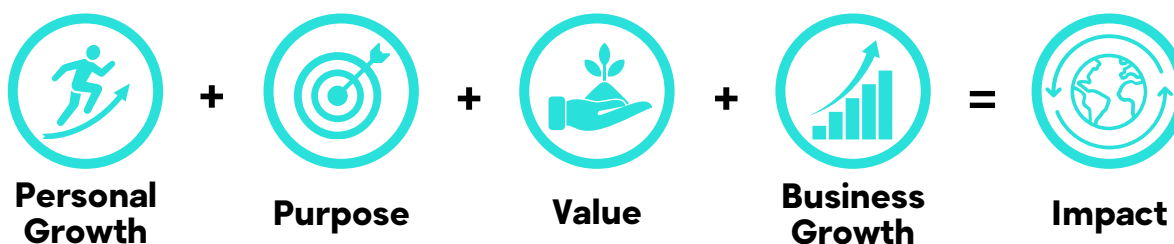
We exist to support YOU in growing a thriving conscious business. It's our PURPOSE!

We launched Shift/Co as a Public Benefit Corporation on July 15, 2020, and as we celebrate four years of operations, we remain grateful to our early Cofounders, as well as the hundreds of conscious entrepreneurs who've used our platform and provided feedback. We are also eternally grateful to the Mentors and Coaches who serve our community daily. It is this team that makes a difference for each of the conscious founders we serve.

We are honored to share the impact we've made in four years. More than 84.9% of our Members have more than doubled their business revenue within 1-2 years of joining our platform.

This report outlines what we've achieved, as well as what we've learned, but more importantly, it will celebrate the impact on hundreds of conscious businesses and dozens of communities.

We've also proven that the formula for growing a business that ALSO makes the world better is:



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

Let's do GOOD Business in Better Ways!

Terri Maxwell, Chief Executive Officer
Shift/Co, PBC

PURPOSE

More Than Our Why

We've always been clear on WHY Shift/Co was needed in the conscious business landscape – to provide quality, effective conscious business GROWTH training. The desire to fill this gap, framed our purpose.



Our Purpose: 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 Benefit 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 who are just starting, up to \$5 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 purpose is guided by core values. The values we defined in 2020 became our foundation, and today we consult these values when making business decisions.

Shift/Co Values:

Soulful: We feel 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 at both the individual and cooperative level. We intentionally recruit from outside our natural circles and actively work to reduce barriers to attending our events, receiving our services, and joining our community.

Focused: We walk the talk of conscious growth. Personally, and professionally, we embrace **accountability** and **intentionality** in pursuit of measurable results towards 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. Numerological, as the eighth element, it also represents our belief in the infinite, untapped potential within each of us and within our community.

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.**

WHY SHIFT/CO MATTERS

We're at a Conscious Business Tipping Point

After four years, we know with absolute certainty who we are built to serve: Conscious Entrepreneurs.

Some companies are created solely to make a profit, while other organizations are non-profits or social impact ventures.

We believe there is a third option: conscious companies that balance purpose AND profits. These are companies that are BUILT to make the world better and uniquely balance making money with making a difference.

This breed of entrepreneur cares EQUALLY about four things:

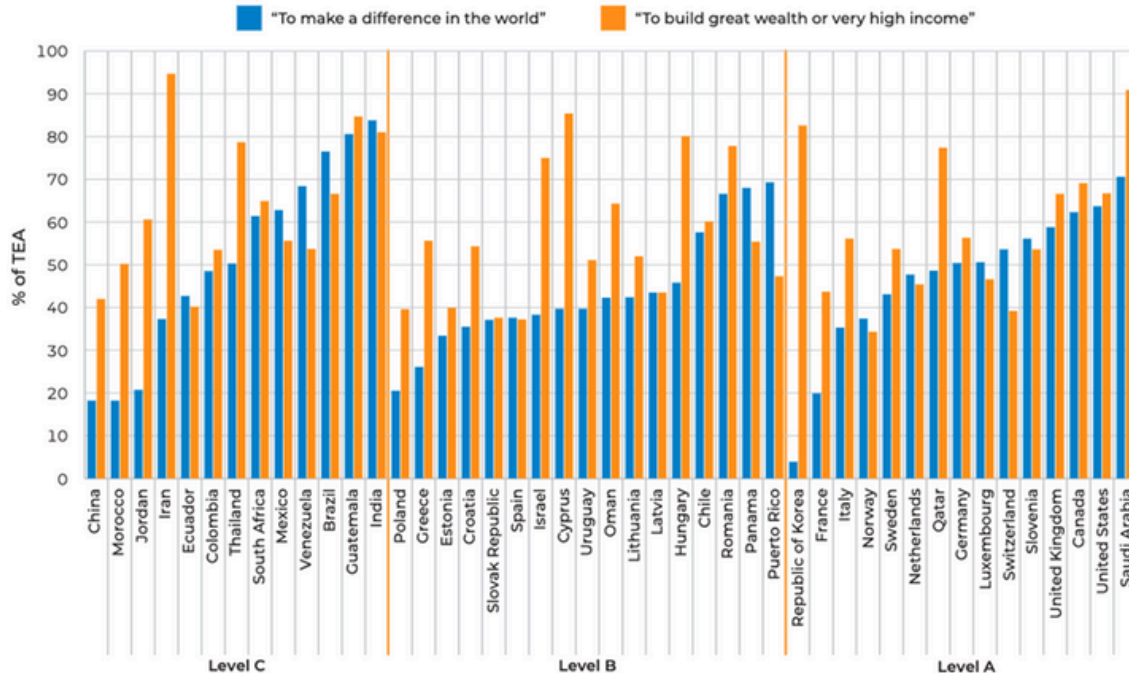


When we started Shift/Co in 2020, it was clear the world was changing, and that more businesses were being founded for the dual purpose of impact and profit.

We observed that these new ventures needed business growth training, yet most of the resources available didn't meet their needs.

Our research told us this growing entrepreneurial segment would become a driver in the global economy. Since then, we've followed the Global Entrepreneurship Monitor's Study on Global Entrepreneurial Activity.

TEA – Total Entrepreneur Activity



Source: Global Entrepreneurship Monitor 2024 Study

- * For the last few years, almost 50% of Founders in North America (US and Canada) declared that their business was founded to 'make a difference in the world.'
- * Many other Countries are seeing the same shift (See Blue Lines), indicating a continued rise in Conscious Entrepreneurship.
- * We believe this shift will continue as more companies recognize the power of conscious business as a model for success.

WHAT WE'VE LEARNED

After four years serving conscious companies and helping them grow (see our Impact Section), we've identified four drivers of conscious business success.



- ✓ **Personal Evolution:** Conscious businesses grow as the founder evolves his or her thinking and grows into the role. Unlike traditional business, you can't "fake it until you make it."
- ✓ **Purpose:** Although Purpose is well-known as the emphasis for "why" a business is started, we've found that it's bigger than that. Purpose is a VERB. It's the action we take that aligns with a meaningful vision. That's why purpose is something to be measured, so action can be taken to increase value and impact.
- ✓ **Value:** The formula for Value is Benefits – Cost. Knowing who your Buyer is, and what problem they need solved is the first step. Then, to understand what benefits they are seeking and how to price them so that the value equation is HIGH is key. The higher the value, the greater the increase in growth and impact.
- ✓ **Business Growth:** A conscious business MUST grow to increase its impact.

Shift/Co exists to help our Members master these four drivers, so they can increase the impact they are making in the world. We believe that the more businesses we serve, and help them scale their work, the bigger the impact we'll all make in the world.

ELEVATING OUR IMPACT

By Living Our Purpose

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

As we've discovered over the last four years... to fulfill our Purpose, **we measure it, and then act on it**, which is how we increase our impact.

How We Measure Purpose: Member Success Ratio

Shift/Co measures the success its members experience when using our methods.

To measure our purpose and impact we created a metric called the Member Success Ratio (MSR), which represents the percent of Members who double their revenue within 1-2 years of joining Shift/Co.

Our Board and Leadership Team uses MSR to evaluate, modify, and enhance programs to ensure Members have business growth success. MSR is used as an indicator to determine resources needed to help members grow their businesses. It is also used to evaluate the quality of all programs every quarter so that we can continually increase Member success.

The deliberate act of measuring how we're living our Purpose guided our decision to grow more slowly than planned to stay true to our mission and reason for being. It also ensured that existing members got the support they needed, driving the metrics that measure each member's success and impact in addition to Shift/Co's.

The best indication of Shift/Co's Impact is that we estimate that we've helped our Members generate over \$27 Million in additional business.

As of May 31, 2024, we can report that **84.9%** 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™ (detailed below).

Members Who
DOUBLED Their
Revenue

84.9%

We also measure average monthly Member Retention, which is the percentage of Members that stay with us each month. As of May 31, 2024, we can report that an average of **97.8%** of Members elected to maintain their Membership each month.

Finally, we conducted a satisfaction survey to assess Shift/Co's Net Promoter Score. When asked "how likely are you to refer Shift/Co to a friend or colleague?" our Members rated us 9.4 (Out of 10)

'How likely are you to
refer Shift/Co to a
friend or colleague?'

9.4/10

WHAT MEMBERS ARE SAYING

Melanie, Shift/Co Member

Joining Shift/Co has been life changing! Prior to joining, I was drowning in the growth of my business and struggling with handling the day to day work as well as all the other areas of owning a business. Since joining Shift/Co, I have so my clarity on where to take my business and how to get there. Terri and team are amazing to work with and have so much experience they share with you! I would absolutely recommend Shift/Co to everyone who owns a business! Hands down the best thing I have ever done for my business.

John, Shift/Co Member

I joined Shift/Co luckily during covid. My coaches helped me stay focused during turbulent times. My business not only maintained market share at first but even grew quite a bit. They helped me change from the entrepreneur to the executive.

I highly recommend Shift/Co to help you set and achieve your goals.

Veronica, Shift/Co Member

I joined Shift/Co in late 2023 to get clarity on the future of a rough concept that was at that time a weekly, digital newsletter. In the very first coaching session (!) I got a much clearer sense of why this concept was different from other initiatives I'd launched and how it could be the roots for a conscious business. In less than six months, the concept has crystallized and a new website is about to launch bringing news, information, best practice resources and more to business people everywhere. I literally could not have done this without the support of Shift/Co. The truly brilliant coaching and insightful perspectives makes this company easy to recommend to business owners who want to move their conscious and mission-based businesses to new levels of profitability and community value.

WHAT MEMBERS ARE SAYING

Sherri, Shift/Co Member

I've been reflecting lately on what an extraordinary organization Shift/Co is. As one of its earliest members, I joined not long before the pandemic hit. Thank goodness I did! My husband and I have a photography biz in NYC, and photography is NOT the business to be in when all events have been cancelled and no one wants to be 6 feet away from anyone without a mask on. We flatlined ... but not for long.

Shift/Co helped us plot out how to best pivot to commercial photography (food, products, architecture), a move that kept us afloat until the world began regaining a semblance of normalcy and people became comfortable being together again. The cohorts and regular workshops also helped me maintain sanity, and they've continued to this day to be a community that understands the unique challenges that entrepreneurs face.

With stellar coaching and thoughtful brains helping me think through how to optimize our processes and marketing, we've had the three best years since launching the business in 2006. Our loyal base of clients has grown, and we've expanded into new markets. Take that, Covid!

If you're a conscious entrepreneur who wants to do well while doing good, I highly encourage you to drop by for a couple of Shift/Co's many free events to get a taste of what this organization can do for you and your business. You won't regret it.

Josh, Shift/Co Member

Shift/Co is an amazing multi use platform. Shift/Co is part training and coaching platform, business incubator, and networking group. Shift/Co consistently brings in high caliber entrepreneurs and thought leaders who are out to make positive impact in the world! On top of that, the leadership is world Class and provides excellent guidance.

WHAT MEMBERS ARE SAYING

Ray, Shift/Co Member

Being an active member of Shift/Co during the past two years has re-energized my business and life even during these uncertain times. During the Covid pandemic, my primarily in-person consulting business caused me to reevaluate new mechanisms to connect with and serve my clients. It was during this discovery process that I encountered Shift/Co's conscious business growth platform and its supportive like-minded community.

Shift/Co's purpose-driven business and personal development classes, mentoring, and coaching have provided me the guidance, confidence, and practical and actionable tools to take my business to its next level of success and fulfillment.

Srirupa, Shift/Co Member

I joined Shift/Co in 2021 for help with my post-pandemic business pivot. Shift/Co has helped me to fine-tune my vision and grow my business by 40% year over year. Being part of the Shift/Community has supported me professionally and personally, and has been one of the best business decisions I've made!

Dena, Shift/Co Member

Shift/Co is ALL THE THINGS I've been looking for!

After being in business for over a decade, Shift/Co is teaching me how to (finally) go from a, heart-centered hobby, to an actual (profitable) business that makes a difference in the world. Beyond the business growth platform, Shift/Co offers personal courses too (such as well-being, mindset and prosperity... to name a few). I am blown away by the diversity of classes included in my membership! And, the offerings continue to grow.

Far beyond the learning and growth opportunity, I am thrilled to be a part of this incredible, loving, supportive community. Shift/Co is such a well-thought-out platform! After a year, I am still amazed at the thoughtfulness and forethought at the foundation.

WHAT MEMBERS ARE SAYING

Christine, Shift/Co Member

Joining Shift/Co has been an absolute game-changer for my business! After being part of several coaching groups that felt more like cash grabs with little return, Shift/Co has truly set the gold standard. They offer a brilliant mix of community, a conscious business growth platform, on-demand courses, one-on-one mentoring, focused coaching, power-teams, and group forums that have revolutionized how I serve my clients.

Unlike previous groups that charged triple the amount and delivered a fraction of the value, Shift/Co is a breath of fresh air. They take the time to understand where you are as a business owner and pair you with groups that are at a similar level in business development. This personalized approach is incredibly effective and refreshing.

In just a few months since the start of 2024, I've made significant changes to my company and tackled problems I once thought unsolvable. The power-teams and group forums are particularly invaluable, offering a space to connect with other business owners, share experiences, and support each other through tough business decisions.

If you own a business, you NEED Shift/Co. It's not just a coaching group; it's a transformative community that propels your business forward in ways you never thought possible. Highly recommend!

Jason, Shift/Co Member

I joined Shift/Co initially for my web development business in 2020. Shift/Co helped me accomplish clarity in my business and life. While that business is still humming along I've also been involved in a Passion Pivot for which I am now seeing the fruits of that labor too. Being part of the Shift/Community has supported me in accountability, clarity, taking consistent action, organizing my time and also keeping a positive mindset.

Really grateful for all the wonderful individual who make up Shift/Co and the Shift/Community!

HOW WE DO IT

Conscious Business Growth Platform™

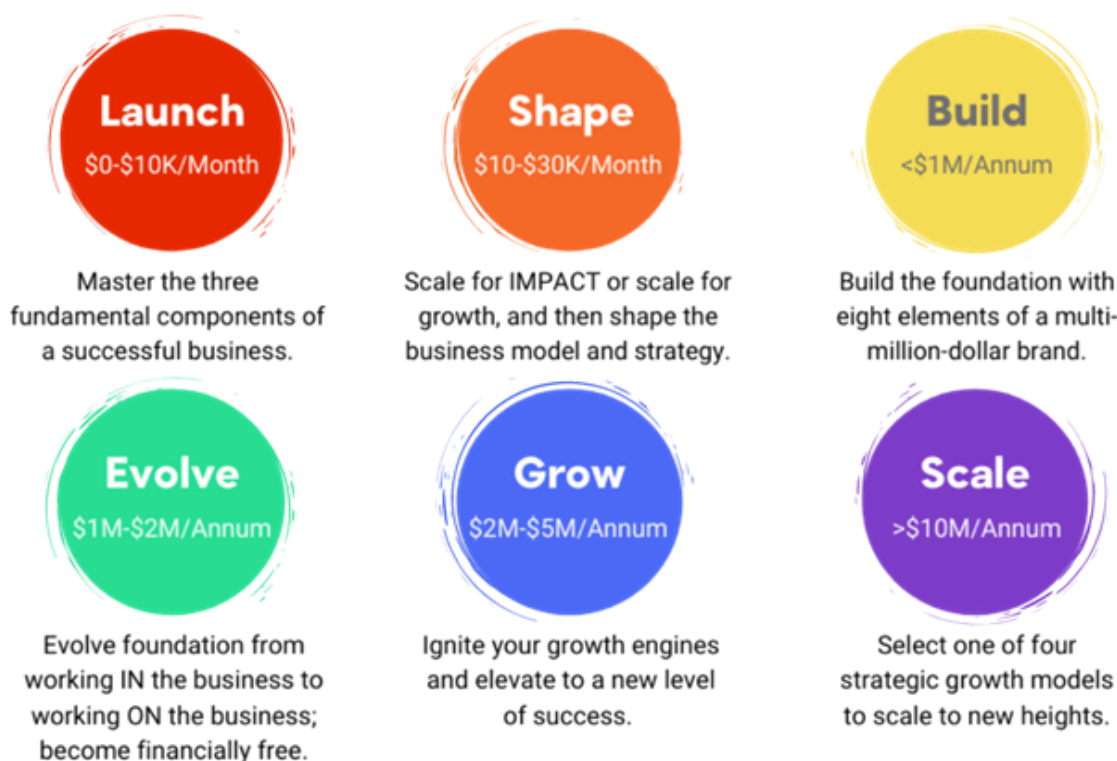
(Property of Share On Purpose, Inc.)

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 guides Members through a pathway from their current business phase TO where they want to go. Each of these business phases includes a doubling of business revenue from the previous phase.

What's unique about The Conscious Business Growth Platform™ is its diagnostic framework. Quite simply, Founders start where they are, and determine where they want to go. They are then matched with a specific roadmap and programming to take them there.

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



Grow where you want to be.

Membership includes the specific training, coaching, and mentoring for EACH business phase so you can "grow where you want to be."

HOW DO WE CREATE IMPACT?

It's about Member Success & Connection

Unlike most business training programs, EACH Shift/Co Members' journey is unique. 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 their next phase of business success. In addition to running their own businesses, and by drawing on their own experience using the Conscious Business Growth Platform™, they guide Members through their unique and custom pathway.

Member Success Team

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



Mentors

Mentors are the primary point of contact & a growth guide. Mentors work to identify challenges & gaps. We use a Root Problem assessment tool to fine-tune WHAT to focus for a Member's business to grow.



Pathway Coaches

Pathway Coaches are skill-based experts (Marketing, Operations, Financial, etc.). Pathway Coaches help Members apply specific skills for each Business Phase, showing HOW to get to where they want to be.



Master Teachers

All of Shift/Co lessons are licensed from Master Teachers. These expert-created training modules are placed in a custom-built Learning Management System and are available 24/7 to ensure its convenient for members.

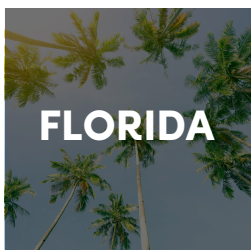


Phase Coaches

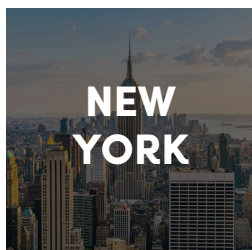
Phase Coaches are business growth experts who oversee progress and ensure Members navigate through each Business Phase with the goal of doubling your revenue and scaling profitably.

Plus: Community & Connection

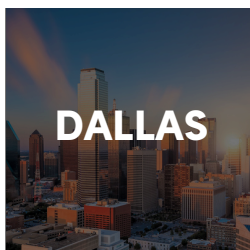
In addition to business growth training and coaching, we also know that community and connection are key, so we offer local Hub-based connection events, an annual Member Symposium, plus Personal growth Co-Labs as well as Power Teams (Master Minds).



FLORIDA



NEW
YORK



DALLAS



SOUTHERN
CALIFORNIA



TORONTO

Communities Coming Soon: Austin, Hawaii, Denver, London

Plus... we offer many other ways to collaborate and connect..

SHIFT/CO LEADERSHIP

Our Leaders guide Shift/Co in several ways:

- **Board of Directors:**

As a Public Benefit Corporation, the Board 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.



Ann Ranson

Mentor



Bev Isla

Events;
Member Connection



Bob Prince

CORE
Development



Claire Crum

Growth
Sprint™



Dena DeLuco

Breakthrough
Coach



Elizabeth Eiss

Board Member
Mentor



Kelly Marshall

Coach - Pricing
Phase Coach -
Launch-to-Shape



Kim McKernan

Mentor

SHIFT/CO LEADERSHIP

**Lives Our Values * Serves Our Purpose *
Commits to Self-Growth**



Lisa Maxwell

Board; CFO;
Mentor; Member
Experience



Melanie Kirton

Mentor



**Melissa
Rapaport**

Mentor



**Merritt
Minnemeyer**

Differentiation and
Shape Phase Coach



Meshell Baker

Coach -
Demand Generation



Marcela Killen

Formation™ Coach



Ray Madaghiele

Launch Phase
Mentor



Tony Carnesi

Coach -
Financial



Terri Maxwell

CEO; Board;
Coach

OUR VISION FOR THE FUTURE

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

Shift/Co's Leadership estimates that 10-14% of all Entrepreneurs are "Conscious", 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!**

As mentioned earlier, in the most recent Global Entrepreneurship Monitor Study researchers uncovered that nearly 50% of 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 empowers the success of conscious entrepreneurs that that make the world better, by showing them HOW to build successful companies.

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

**Shift/Co's Vision:
Empower 1000 Changemakers
by 2026**

In the NEXT 2 years, we seek to SHIFT the success of 1000 Conscious Entrepreneurs, teaching them how to grow businesses that are profitable, purposeful and IMPACTFUL.

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

Together, we are stronger and united by our shared goal of making the world a better place.

We do GOOD business in better ways.

Here's to our collective impact and continued success!



Shift/Co.

ELEVATE BUSINESS. SHIFT HUMANITY.

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