

Shift/Co[®]

IMPACT

REPORT 2026



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GRATITUDE

Thank you to all of the purposeful founders and businesses we serve today, as well as the ones we expect to serve in the future. We are grateful for everything you do to make the world better. ***Your work matters.***

We exist to support YOU in growing a thriving & impactful business – one that is built on a Value-first Business Model™ – which means it creates more value than it consumes.

As we celebrate six years of operations, we remain grateful to early Members who inspired us to create Shift/Co, as well as the hundreds of purposeful Founders 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 impactful businesses we serve.**

We are honored to share the impact we've made since we launched Shift/Co on July 15, 2020. As of August 31st, more than 92% of the Founders who've used the Shift/Co® platform have doubled or tripled their revenue within 1-2 years of implementing our tools and methods. More importantly, as their business has grown, their impact increased.

We've also proven the formula for this type of business is:

Trust + Value + Impact = GROWTH

This Impact Report outlines what we've achieved, as well as what we've learned. It also celebrates Shift/Co's impact on hundreds of businesses and dozens of communities around the world.

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

Let's create more impact.



Terri Maxwell, Founder and Chief Executive Officer
Shift/Co, PBC

PURPOSE

More Than Our Why

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



We exist to help Founders grow impactful companies that are both profitable and purposeful.

- 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 methods are focused on teaching Founders how to implement a Value-first Business Model™ – so their business creates more value than it consumes.
- We support a variety of businesses – from those just starting, to those who are ready for the next level, as well as those who want to scale to multi-million-dollar growth.
- Our methods include application-based skills training, powerful tools that work, 1-on-1 and group coaching, plus seasoned mentoring. All of this is wrapped in a vibrant community that supports each other.
- We recognize that purposeful entrepreneurs also have a desire to expand their personal evolution as well as leadership skills. Therefore, we provide impactful, personal, and leadership development to complement business training.

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:

S

Soulful

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

H

Honorable

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

I

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.

F

Focused

We walk the talk of conscious growth. Personally, and professionally, we embrace **accountability** and **intentionality** in pursuit of measurable results towards meaningful goals.

T

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.

C

Courageous

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

O

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 an Entrepreneurial Tipping Point

After six years, we know with absolute certainty who we are built to serve: Founders who want to grow profitably by establishing a Value-first Business Model™.

A business model is a foundational strategy outlining how an organization creates, delivers, and captures VALUE as it earns money.

A Value-first Business Model leaves every stakeholder better than it found them and creates more value than it consumes. Companies that balance purpose AND profit implement this type of business model. These are companies that are BUILT to make the world better and uniquely balance making money with making a difference.

Some companies are created solely to earn a profit, while other organizations are non-profits or social impact ventures. A Value-first Business creates prosperity by generating value for customers, employees, owners, communities, and the environment while earning healthy profits.

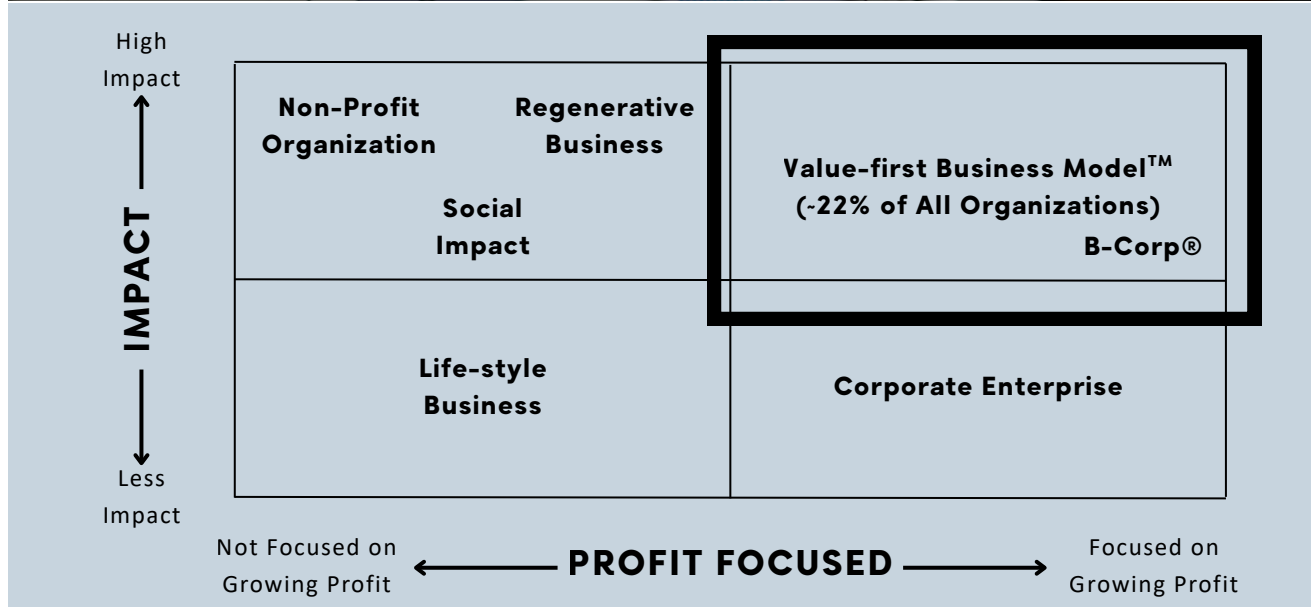
Share On Purpose, Inc.¹ has studied this space extensively for over a decade and estimates that ~22% of all businesses are using a Value-first Business Model.

¹ Founded in 2012, Share On Purpose creates, launches and invests in companies with innovative, meaningful solutions.

WHY SHIFT/CO MATTERS

Business Landscape

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(Source: Business Research Study)



There are many terms to describe this type of business, including conscious, purposeful, regenerative, impactful, generative, catalytic capital and a B-Corp.

Shift/Co believes that what these businesses share is that they implemented a Value-first Business Model™. It is through their business model, rather than their philosophy of purpose alone, that the organization delivers a greater impact and adds more value than traditional businesses.

A Value-first Business Model™ has four foundations:

1 **PRODUCT/SERVICE RATIONALE**

A key reason the product or service was created is to make a meaningful difference, as well as money.

2 **PRICING & PROFIT METHODS**

Pricing is fair for value-received. Customers are charged reasonably, accompanied with a return policy, guarantee, or value-first billing model. There is financial integrity in the business and the culture.

3 **CUSTOMER ACQUISITION**

Customer acquisition programs are based on trust and authentic marketing, without hype, hyperbole, or FOMO-based promotions.

4 **SUCCESS REDEFINED**

Success is defined by impact, AS WELL AS growth & profit. The purpose of profitable growth is to create MORE impact.

Source: Share On Purpose, Inc Business Research Study

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.

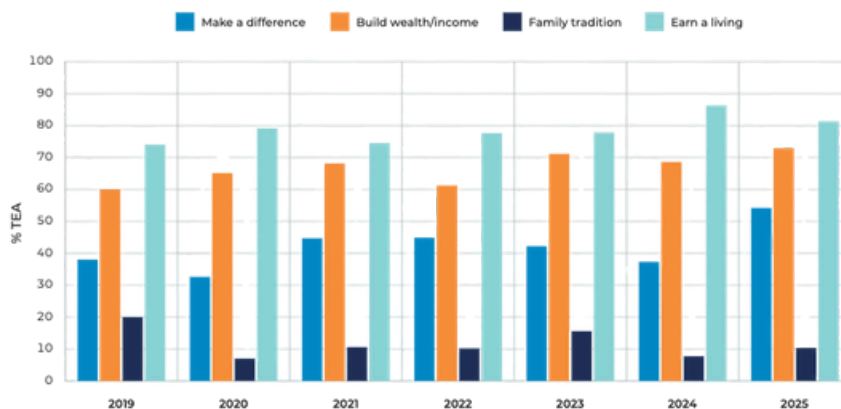
We observed that these new ventures needed **authentic** business growth training, yet most of the resources available didn't meet their needs.

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. Highlights include:

- * **For the last 5 years, ~50% of US and Canada Founders said their motivation to start a business was 'make a difference in the world.'**
- * **'Make a difference in the world' is now listed as a primary reason for starting a business in many countries.**
- * **'Make a difference' as a motivation for the business, has increased significantly, regardless of other motivations such as earn a living, seeking wealth or even family tradition.**

Global Entrepreneurship Monitor's Study looks at several factors by country, from who starts a business to why they start a business. They measure this on a scale called TEA, which stands for Total Entrepreneur Activity.

TEA – Total Entrepreneur Activity



Source: Global Entrepreneurship Monitor 2025/2026 Study
THE WORLD'S FOREMOST STUDY OF ENTREPRENEURSHIP SINCE 1999

We believe this shift will continue as more companies recognize the power of a Value-first Business Model™ in creating a sustainable business.

WHAT WE'VE LEARNED

After six years serving purposeful Founders and teaching them how to grow profitably (see our Impact Section), we've identified that Founders must have training in 3 areas to build a Value-first Business Model™.



- ✓ **Trust:** This essential aspect is incredibly important and requires two things:
 - a) **Authentic Business Growth:** A Value-first Business Model remains committed to acquiring customers in authentic ways, based on relationship, trust and servant leadership. These businesses also prioritize customer retention through the delivery of value and impact.
 - b) **Personal Evolution:** Authentic businesses grow as the Founder evolves their style, skills and mindset as they develop into the role of CEO. We found that successful businesses are led by Founders who are COMMITTED to personal growth.
- ✓ **Value:** Creating a Value-first Business Model requires understanding your Ideal Client Profile (ICP) and defining the business from what the ICP values. Knowing your buyer and the problem they need solved is the first step. Then, the founder must understand how to deliver value and how to price the product or service so that the value equation remains high. The higher the value, the greater the increase in growth and impact.
- ✓ **Impact:** Although purpose is well-known as the 'why' behind starting a business, we've found that it's bigger than that. Purpose is a verb. It's the action a founder takes that aligns with a meaningful vision. That's why purpose is something to be measured, allowing action to be taken to increase value and impact.

Shift/Co® exists to help Founders master these three drivers, with the goal of maximizing their impact in the world, while building sustainable profits. We believe Shift/Co's impact is defined by the success our Members have rather than simply increasing the number of Founders we serve.

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.**

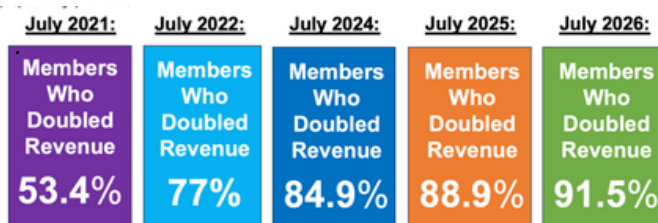
As we've discovered over the last six years... to fulfill our purpose, **we first measure it**, and then we refine programs to improve our results, which increases our impact.

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.

As of July 30, 2026, 91.5% of Members who used Shift/Co's tools and training at least DOUBLED their revenue (in some cases tripled), reaching the next business phase in the Business Growth Platform™. As we've grown the business that is Shift/Co, we are also growing the impact we make, and MSR has already climbed to 92%.



Our Board and Leadership Team uses MSR to evaluate, modify, and enhance programs to ensure Members continue to experience business growth 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 vision. It also ensured that existing Members got the support they needed, support that strengthened both the metrics that measure each member's success and impact in addition to Shift/Co's growth.

The best indication of Shift/Co's Impact is that we estimate that we've helped our Members generate over \$38,350,000 in additional revenue.

We also measure average monthly Member Retention, which is the percentage of Members that stay with us each month. As of July 31, 2026, we can report that more than 98% of Members elected to maintain their Membership each month.

To amplify our collective impact, a small portion of membership dues reinvests directly into our community through the Shift/Co Scholarship Fund. This fund empowers high-potential, deeply committed founders with temporary financial barriers and who are actively implementing Shift/Co's tools to build sustainable, value-based businesses.

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

Kate, Shift/Co Member

I found Shift/Co as a solo entrepreneur and they've been incredible. The value for what I paid far exceeds the cost. This has been one of the smartest investments I've made in my business...

[See More](#)

Al, Shift/Co Member

Shift/Co is an amazing community of entrepreneurs at all levels. The curriculum is unique, focused on the deep work we entrepreneurs need to do to move the needle. It's not merely the basics of how to run a business, it's the fundamentals of the most important thing at the right time... [See More](#)

Michelle, Shift/Co Member

I joined Shift/Co earlier this year, looking for structure, clearer direction, and a community of entrepreneurs who actually care about building something with purpose. What I didn't expect was how much working directly with Terri and Elizabeth would move the needle... [See More](#)

Ray, Shift/Co Member

I believe wholeheartedly that whether you are starting a new company or are a seasoned entrepreneur like me, Shift/Co's leadership team will thoughtfully custom design the right and perfect pathway experience to simultaneously lift your business and life to the next level of success and fulfillment. [See More](#)

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... [See More](#)

WHAT MEMBERS ARE SAYING

Stephen, Shift/Co Member

I joined Shift/Co to grow my business in late 2023. Shift/Co has helped me to come close to doubling my revenue from 2024 to 2025... [See More](#)

Marie, Shift/Co Member

Like going to a very adaptive & responsive business school WHILE running your business. The only professional development I have found that gives me exactly what I need for my business progressively as we grow and solve problems.... [See More](#)

Kat, Shift/Co Member

I joined Shift/Co in May 2025 because I needed mentorship, accountability and guidance to grow my business. Shift/Co has helped me gain confidence, clarity and build a business that deepens the impact I wish to create... [See More](#)

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... If you own a business, you NEED Shift/Co... [See More](#)

Kelly, Shift/Co Member

Shift/Co is unique because it so perfectly blends both the professional and the personal sides of development needed to grow a conscious business. I am learning how to show up as my best self so that I can best serve my clients... [See More](#)

HOW WE DO IT

The Business Growth Platform™

(Property of Share On Purpose, Inc)

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

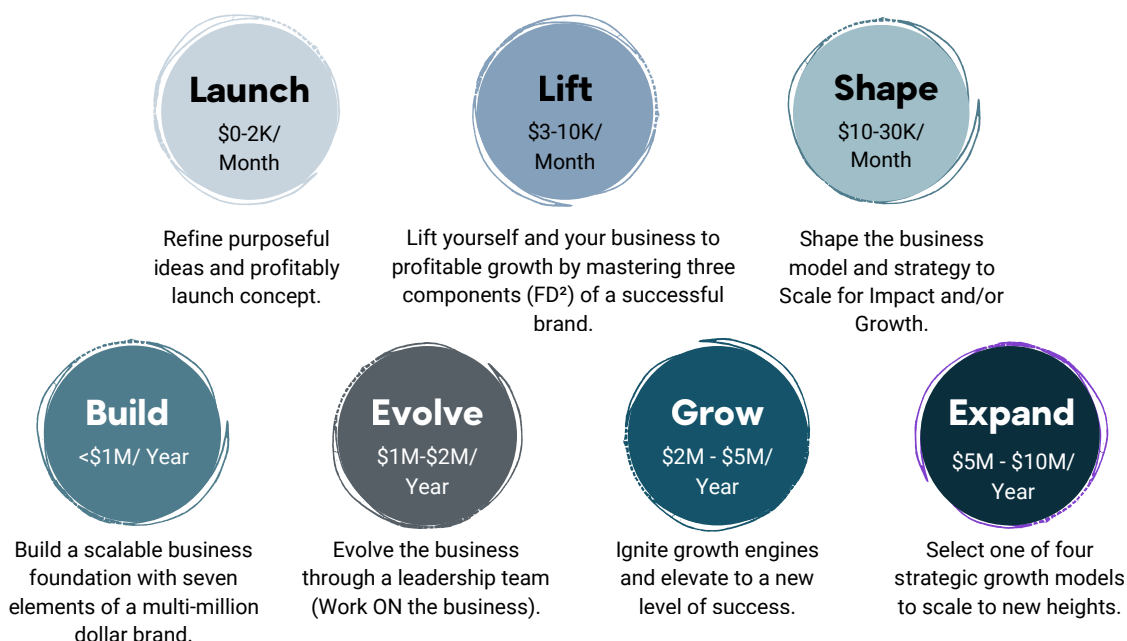
This methodology guides Founders through a customized and personalized Roadmap which defines a path from their current business phase to where they want to go. Each business phase includes a doubling of revenue from the previous phase.

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

The Business Growth Platform™ identifies where each Founder needs to FOCUS to evolve their business and elevate success. Members receive specific learning paths, coaching, and mentoring to ensure their success throughout this journey.

The Business Growth Platform™

(Proprietary Property of Share On Purpose, Inc.)



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 an individualized 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 draw on their experience using The Business Growth Platform™ and guide Members through an individualized roadmap.

Member Success Team

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

Mentors

are the growth guide & progress champion for each Member. Mentors are trained to use a Business Assessment Tool to fine-tune what skills are needed to grow to where the Member wants to be.

Phase Coaches

facilitate a Master Mind group of Founders who are in the same Business Phase. These Phase Pods meet bi-weekly for accountability, problem-solving, and support.

Breakthrough Coaches

·support Members in working through a personal block, such as confidence, mindset or FUD (Fear, Uncertainty or Doubt).

Skill Coaches

are skill-based experts (Marketing, Operations, Financial, etc.). Skill Coaches show Members how to apply specific skills, using application-based learning techniques. Most Skill Coaching is conducted 1-on-1 with each Member.

Co-Lab Facilitator Coaches

create “collaborative learning” intensives that tackle a “Personal Gap” such as Confidence, Focus, Money Mindset, etc.

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, plus a powerful annual Member Symposium in beautiful locations around the world.

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

SHIFT/CO LEADERSHIP

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

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 who serve on Shift/Co's Leadership team, guiding the day-to-day organization.

- **Member Success Team:**

-Successful entrepreneurs in their own businesses and trained in the Shift/Co® programs, the Member Success Team includes Mentors, Skill Coaches, Phase Coaches, Breakthrough Coaches, and Co-Lab facilitators.



**Annemarie
Shrouder**

Mentor



**Anthony
Billoni**

Mentor



**Tawnia
Wise**

Mentor



**Fred
Kosnac**

Mentor



Kelly Marshall

Coach



**Merritt
Minnemeyer**

Coach



Meshell Baker

Coach



**Margaret
Hughes**

Coach

SHIFT/CO LEADERSHIP

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



Marcela Killin
Coach



Dena DeLuco
Coach



Claire Crum
Coach



Anne Ryan
Coach



Jaime Chambron
Coach



Joe Wyras
Coach



Linda Bucher
Coach



Vicki Landers
Coach



**Gustavo
Vasconcelos**
Board of Directors



Elizabeth Eiss
Board Secretary,
Mentor



Lisa Maxwell
Chief Financial Officer,
Mentor



Nick Lobuzzetta
Operations Manager



Terri Maxwell
CEO, Coach,
Mentor

OUR VISION FOR THE FUTURE

As we look ahead to the next two years, our vision is shaped by two priorities:

- 1) Teaching more Founders how to grow their business and increase their impact.
- 2) Solving key challenges small businesses face.

1 **Priority 1: MORE FOUNDERS GROWING PROFIT & PURPOSE**

There are now an estimated 665 million entrepreneurs globally, which represents 12% of the population (Source: 2024/2025 Global Entrepreneurship Monitor).

We estimate that 22% of all entrepreneurs are implementing a Value-first Business Model™, meaning that the business is focused on making the world better in some way. There's an estimated 146 Million businesses using their business 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.

2 **Priority 2: SOLVING KEY CHALLENGES SMALL BUSINESSES FACE**

Small businesses have unique challenges, the biggest of which is affordable health care insurance. Our primary focus in the next year will be finding a partner to provide health insurance to Shift/Co® Members and testing the most effective way to do so.

In addition to the value affordable health insurance will provide Members, we will also be building a partner network to work side-by-side with our Members in these areas:

- MSP: Managed Services Provider (Tech Stack)
- Payroll / PEO Services Provider
- Credit Card w/ low APR – Might be branded Shift/Co
- Tax Prep/CPA Partner
- Podcast Platform Partner
- Business Insurance Partners
- Life Insurance Partners
- Legal Services Partners
- Book Publisher Partners
- Merchandise Partners

OUR VISION FOR THE FUTURE

Finally, we envision developing a Member-to-Member Referral Network so Members can do business with each other.

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 purposeful entrepreneurs who make the world better, by showing them HOW to implement a successful Value-first Business Model™ that improve financial success and business impact.

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

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

Empower 1000 Value-first Businesses by 2028

We expect to have served 500 Members through 2026, and the goal is to increase that to 1000 by 2028.

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 well by GROWING good.

Here's to our collective impact and continued success!



Shift/Co

ELEVATE BUSINESS. SHIFT HUMANITY.

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