

GET shift DONE

Grow your
organization
forward.



Get **Shift** Done.

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Navigating change can be a challenge. ShiftUp helps you:

Get **CLARITY**
on your growth strategy

Build **TRUST**
in your brand & culture

Take **ACTION**
to market & sell smarter

Are you ready to ShiftUp?

When Do You Know It's Time to Shift Up?



Change is inevitable. There is no denying that your business or non-profit will go through transformation. Whether these are minor, adaptive changes or deep, systemic shifts, your organization is likely working to improve sales, retain employees, and innovate your offerings. According to the Harvard Business Review, “more

than one-third of large organizations have some type of transformation program underway at any given time.”¹ So, if you are not sure if you need to shift up, there are several tell-tale signs that change is needed. But what do you look for and how will you know when it's time to adapt in order to grow to the next level?



Consider these important questions:

- > Has growth become stagnant?
- > Has your market left you behind?
- > Are you and your team running low on energy?
- > Struggling to retain or motivate employees?

Let's uncover opportunities to **grow forward** by taking a deep dive into the challenges that many organizations face, clarifying the small shifts that can make a big difference. Strategic changes that **innovate leadership, differentiate brand, activate culture, and orchestrate marketing.**

shiftup

VISION

Transform your
organization from
the *insight* out.

Find your new
way to lead.

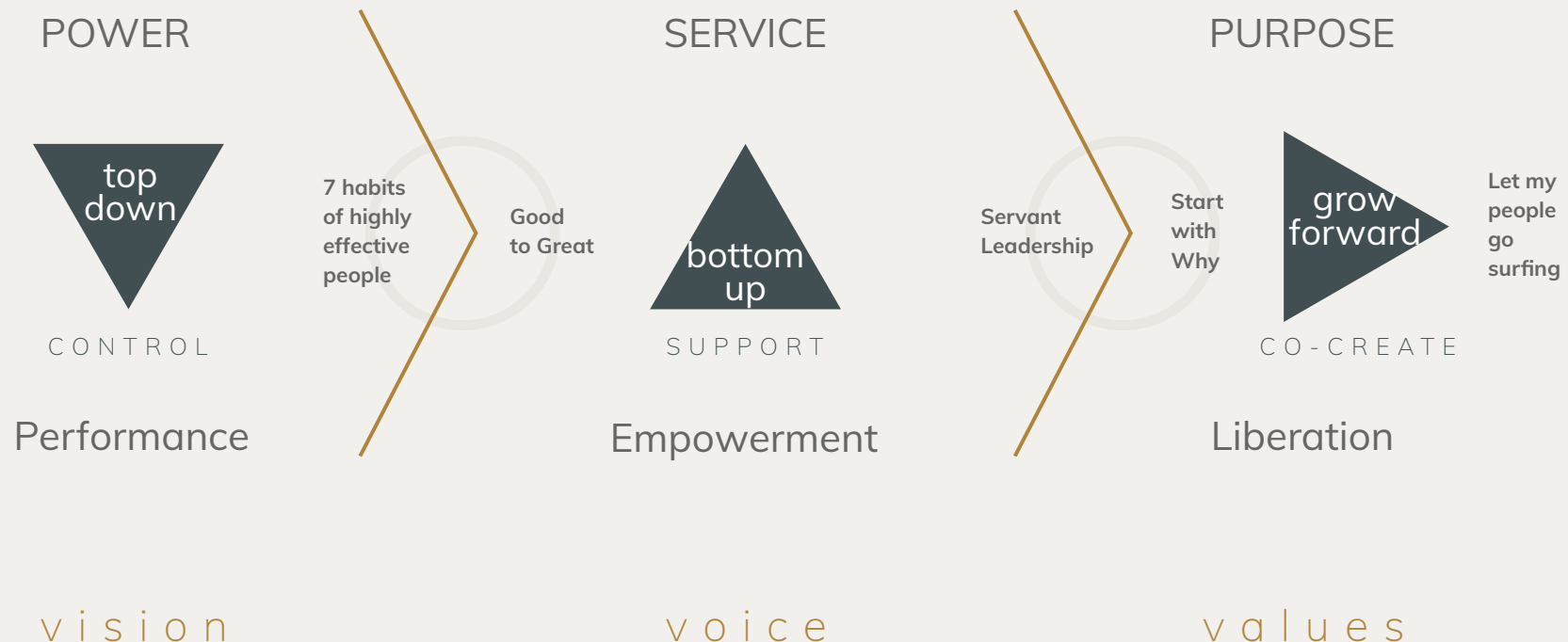


INNOVATE LEADERSHIP



Business owners and non-profit leaders often lose sight of the path ahead, uncertain about the next course of action. Whatever the reason, many of us find ourselves in a place where we are temporarily stuck. But how do you break through this stagnation to move forward?

Evolution of Leadership

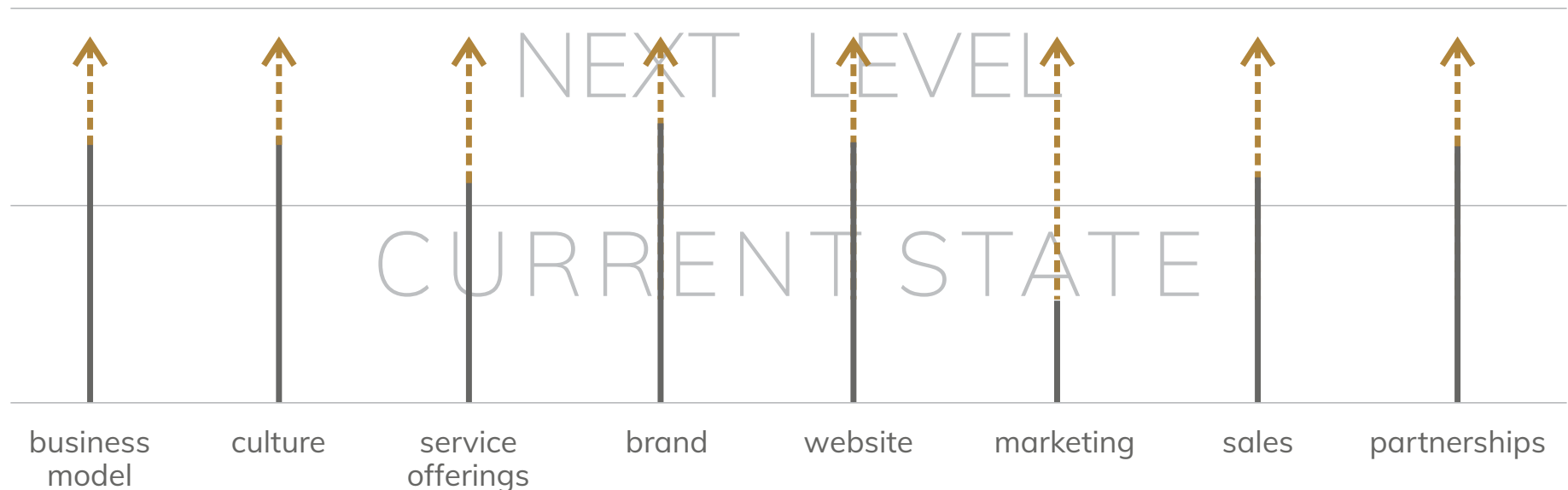


Activating next-level leadership shifts your perspective to invite collaboration and empower new ideas. The evolution begins with understanding the core principles that set people up for success, starting with clarity of vision (goals and roles), then developing a supportive culture that empowers each person to express their voice and align value-based action with an authentic purpose. The diagram above shows leadership styles moving from Top Down to Grow Forward with several key books/ideas that transformed our thinking over the years.

shift **1**



In a leadership role, having clarity around your mission and values is essential to realize your vision. Sometimes we can be so focused on the day to day, that we lose sight of the big picture. When this happens it is important to take a look at all aspects of your organization in order to make the shifts needed to make positive change.



By taking a closer look at what your organization needs to shift up, you will prioritize what needs to happen and when. Clarifying what's next, exploring possibilities and defining goals into an integrated vision.

It all starts with a Shift Session.

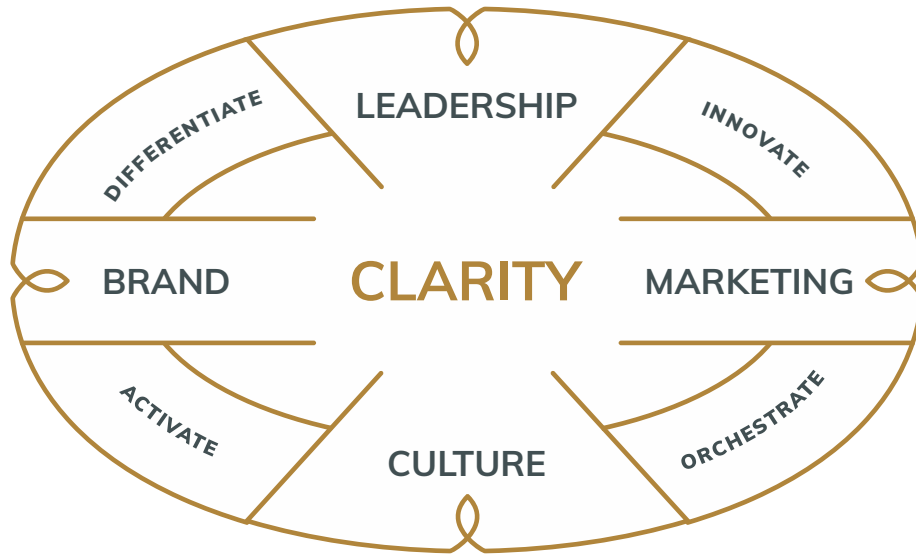
CLARIFY VISION

The **Shift Session** is all about co-creating what's next by uncovering opportunities to **Adapt** your business model, **Innovate** your offerings, **Market** smarter, **Engage** your team and, partners, **Attract** high-value clients and **Grow** revenue. Delivering a high-level recommendations and Change Map.

shift **2**

Turn your vision into action with a dynamic strategy that drives immediate results and sustainable growth. Identify obstacles, clarify purpose, and power your business forward. Map out a plan that organizes actionable goals to promote long-term growth and short-term impact.





Grow Forward Model

The Grow Forward Model supports getting shift done with an integrated strategic vision that energizes voice, aligns values and achieves victories for your business or non-profit.

Transformation from the insight out.



DEFINE STRATEGY

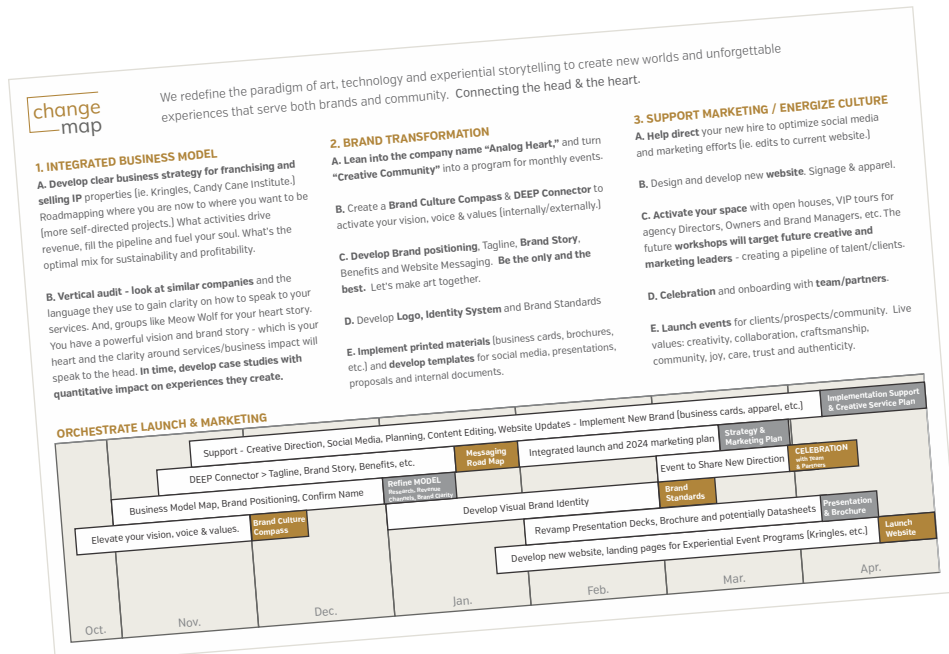
The **Grow Forward Strategy** helps leaders define what's next for their business or nonprofit. Through a **co-creative approach**, we help develop a strategy to **innovate** your organization, **position** your brand, **energize** your team, and **generate** more revenue.

shift **3**



Once you know what and how you want to transform your organization, it's time to turn your strategy into practical actions - a clear plan with a timeline that identifies what the changes are, when they will occur, and who will be involved, honing in on the fine details essential for turning your vision into a reality.

ORGANIZE ACTION



Align team members and stakeholders, with easy to follow next steps that organizes action, communication, and accountability, ensuring everyone stays informed and synchronized.

Knowing what's next ensures success.

ORGANIZE ACTION

Visualize your path forward with a high-level view of the process and required action for implementation. A **Change Map** helps to support the implementation of change, serving as a key document that outlines the **steps needed** and acting as a **guide** for those involved.

VOICE

When your brand lives
on the inside, it thrives
on the outside.

Take a stand for
your brand.



DIFFERENTIATE BRAND

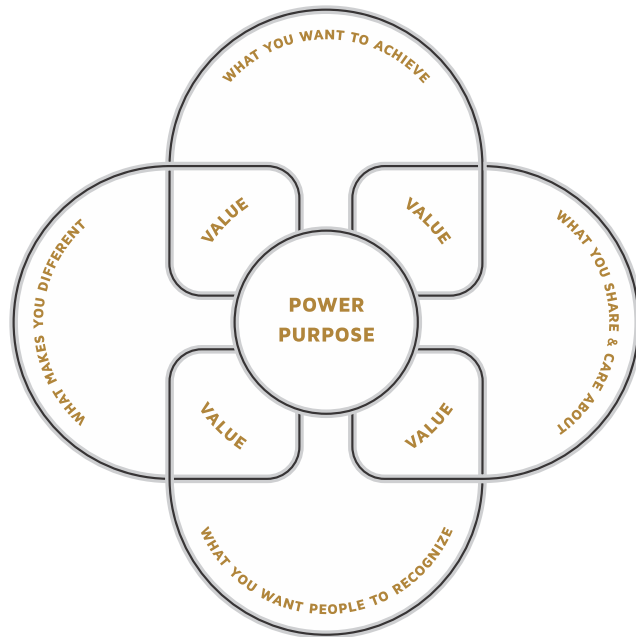
Today, businesses and nonprofits have to constantly evolve while being true to their mission and values. With this many quick shifts, it can be easy to lose sight of what attracted loyal clients in the first place. So, how can you make your brand stand out from the crowd while remaining authentically you?



shift 4

Purposeful leadership is re-defining how business gets done. Having a set of values that are foundational to your organization is essential to maintaining an authentic brand culture and a clear path forward. However, if your organization never went through the process of defining its values or has simply lost track of them, how do you go about uncovering them?





When choosing your values, consider:

What key values/ideas were a catalyst for your mission?

What values do you most admire within your team currently?

What do you imagine your organization looking like in the future? What values are present?

ALIGN VALUES

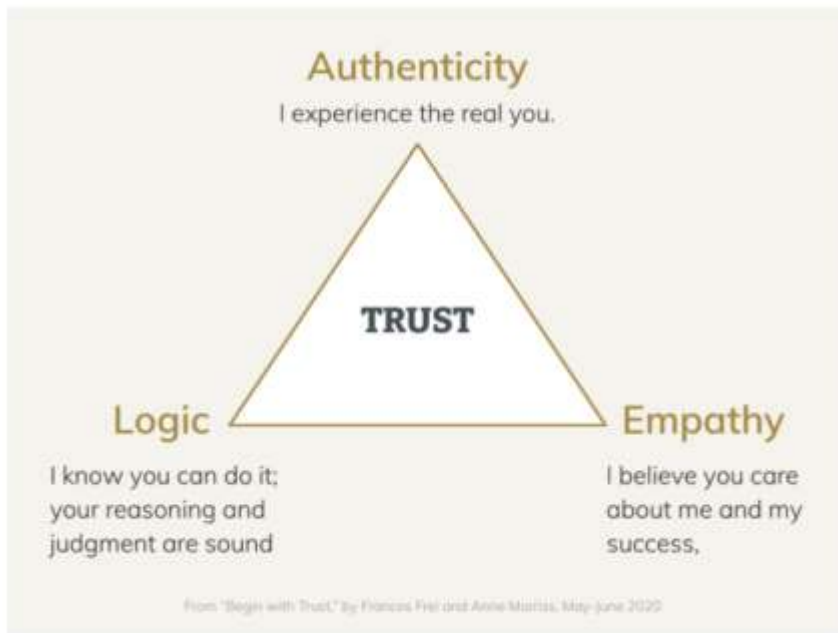
The **Brand Culture Compass**[™] transforms typical mission and values statements into a visual tool that aligns your “why,” “how” and “what.” Use it to guide your organization as you live your **values**, activate **purpose** and uphold your **brand promise**. Make better business decisions, integrate marketing and get your team **on the same page**.



shift 5



Standing out means being authentically you. Your brand messaging needs to do more than pitch your products - it also needs to establish trust with your team, customers, and market. When the verbal elements of your brand work together as a unified message, everything becomes cohesive and in sync. Express your true voice with the Trust Playbook.



Building and maintaining trust hinges on three key elements: authenticity, logic, and empathy.¹ To truly connect and earn trust with your customers, showcase your organization's unique strengths and values, highlighting what makes you unique.



ENERGIZE VOICE

Accelerate growth by building trust with authentic communications. Confidently navigate change with an engaged culture and consistent marketing. The **Trust Playbook**[™] delivers a solid, yet flexible brand foundation and messaging framework that guides internal and external communications.



shift 6

First impressions matter. Similar to meeting someone for the first time, how someone initially encounters your brand will determine whether they will be a lifelong customer. How you choose to express your brand has the potential to instill loyalty and trust between you and your intended audience. Ultimately, customers want a genuine and positive experience with your company.



REFRESH CREATIVE



When people trust and respect your products and services, they become truly invested in your brand and offerings. Thrive in an uncertain economy by crafting a compelling message and visual strategy that highlights what matters most to your market.

Make a lasting impact with your brand.

REFRESH CREATIVE

Imagine a brand culture so strong and vibrant that it makes anything possible. Aligning and energizing your brand from the inside out creates a confident, **positive culture**. With us as your partner, you'll have a **solid foundation** on which to build a sustainable brand.



Brand
Powered
Marketing

VALUES

Get your people
and priorities
working together.

Belong & believe
full team ahead.



ACTIVATE CULTURE



Getting your team on the same page is easier said than done; with so many different backgrounds, perspectives, and ages, it can be difficult to find common ground. With five generations actively employed and with a more hybrid business model finding new ways to energize, connect, and inspire everyone is a top priority.

ACTIVATE CULTURE

So, how do you help a team connect?

- 1. GET INSPIRED** | Find unity through shared ideas and experiences.
- 2. FIND SHARED VALUES** | Create and uphold a company culture centered around core values.
- 3. ACT THROUGH INNOVATION** | An opportunity is most fruitful when there is inclusive participation.



shift **7**



Values exist at the very root of a company and individual, serving as an internal compass for decision making and a mirror for reflection, making them the perfect place to start for developing an inclusive group. As an organizational leader, the key to having a unified team is finding a shared set of values.

INSPIRE TEAMS



What makes up the building blocks of a strong company culture? At ShiftUp, we use the CULTURE acronym to define the key components that help to foster an environment that is collaborative, inclusive, engaging, and energizing.

Supporting you to lead change.



INSPIRE TEAMS

The **Full Team Ahead Program** is designed to get people on the same page and working together. Starting with a belonging assessment and discovery, we uncover needs and define key strategies to motivate and **engage your people** to activate your CULTURE.



Full Team
Ahead
Program

shift 8

Trust is foundational to building strong teams. According to a report from the HR tech firm, Limeade, trust is one of the top 3 predictors for employee satisfaction.³ When a company culture is built on trust, employees are more engaged, motivated, and in sync.





BUILD TRUST

The **Trust Tower** workshop is a brand culture activation activity (in person or virtual) that fully engages your teams by building trust through self-expression and collaboration. By championing their values, your team members will not only discover a **common purpose** but also forge deeper connections, fueling a culture of solidarity and shared victories.

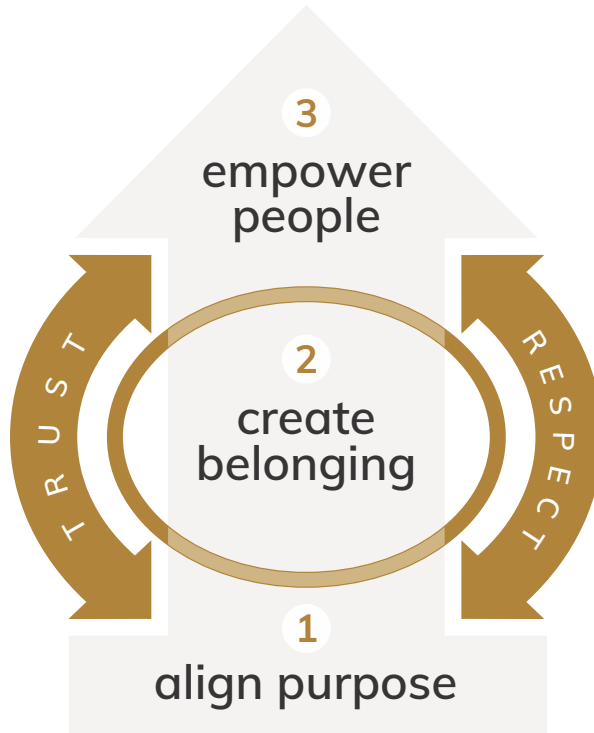
trust
TOWER

shift 9



CREATE
BELONGING

It's time to move from "Me" to "We". No one exists in a silo and in a time of rapid change, fostering a strong company culture is essential to maintaining a stable brand, positive relationships with customers, and sustainable growth. As a leader, existing in a co-creative mode can open space for new ideas and a team that is not only adaptive to change but eager for the opportunities it brings.



According to a study by McKinsey on employee retention, 51% of people cited feeling a lack of belonging as a reason for leaving their current employment.⁴

Belonging can profoundly impact the health of an organization.



CREATE BELONGING

Building a strong community based on belonging can profoundly impact the health of an organization. Aligning the purpose of your organization with the **hearts and minds** of your people is how belonging is created.

belonging
ASSESSMENT

VICTORY

**Activate marketing
to drive engagement
and increase sales.**

**More of what
works, now.**



ORCHESTRATE MARKETING

Marketing is essential to every type of organization. Reaching your target audience by connecting your mission and messaging while standing apart from the competition is more important than ever. However, all too often, the dollars marketers spend yield disappointing results.



ORCHESTRATE MARKETING



Worse, the standard fixes – new campaign, new website, AI tools, etc. – routinely fall short of expectations. However, the most persistent source of inefficiency in marketing is not the performance of individual efforts or tactics – it's the way all those tactics interconnect.

A group of people are gathered around a table, brainstorming a 'New Project'. The central focus is a mind map with 'New Project' at the center. Branches radiate outwards to various stages and components: 'SWOT Analysis', 'Product', 'Advertising', 'Production', 'Marketing', and 'Financial Projection'. Each branch is further detailed with handwritten notes and colorful sticky notes. For example, 'Advertising' includes 'Creativity', 'Teamwork', and 'Target'. 'Production' includes 'Forecast', 'Ideas', 'Vision', and 'Action Plan'. 'Marketing' includes 'Research', 'Team', 'Branding', and 'People'. 'Financial Projection' includes 'Goals' and 'Action Plan'. The overall scene depicts a collaborative and strategic planning session.

DEVELOP PLAN



From inside your company or nonprofit, it can be hard to know what marketing initiatives to deploy to get great results. By digging deeper into data and trends, a smart strategy can be developed into an executable plan that achieves your marketing goals.

Stay in sync with your audience.



DEVELOP PLAN

A **WebShift Strategy** is a quick, budget-friendly way to elevate your website. Whether you need strategic updates, messaging or a fully custom re-design, we start where you are and create a **plan to optimize** your site.



Let's get some quick wins as we map out long-term growth with a **Market Smarter Plan**. A data-driven sales funnel/campaign that increase conversions.



shift **11**



Have you ever been at a loss for words? Or have you been in the opposite scenario where you have had too many messages in your mind all at once? When communicating with your customers, it can be challenging to find the right message.

OPTIMIZE MESSAGING



Superpower

Focuses

Passion

Narrative

One way to focus your communications is to interweave your marketing with your mission, vision, and values. By staying true to the center of your organization, you can maintain clarity and authenticity in your marketing strategy.

Connect deeply to increase engagement.

OPTIMIZE MESSAGING

Your marketing activities and tactics should be structured so they work together to foster trust and engage with potential customers. The **DEEP ConnectorSM** is a simple single-page document with four elements:

- 1. Your Superpower** | What your offering succeeds in, meets your customer's needs and sets you apart from competitors.
- 2. Your Differentiator** | How your company works to achieve its mission and support the Superpower.
- 3. Your Passion** | Why your company exists. Your deepest layer of connection.
- 4. Your Narrative** | A brief paragraph that consolidates the top three tiers of the DEEP Connector. It serves as a loose script or outline for your elevator speech.

shift 12

With today's numerous communication channels, especially social media, brands must engage frequently and consistently. In a fast-paced marketing landscape, how can you stay authentic?





Always refer back to your mission and values, stay connected to your market, nurture customer relationships, and ensure that your brand (visual/verbal) aligns with your standards, not fleeting trends.

Brand fresh, by design.



MANAGE CAMPAIGNS

Our **Creative Service Plan** offers consistent, high-quality results with scalable support to develop and execute campaigns that attract attention, build awareness and inspire action, all while reinforcing the brand. Best of all, enjoy a reduced hourly rate and a credit rollover system for ultimate flexibility.



Creative
Service
Plan



Values to Victories

Our passion is helping business leaders realize purposeful growth. Change (remote work, AI, etc.) is forcing businesses to find new ways to approach revenue growth and workforce stability. ShiftUp is a strategic change agency that helps purpose-driven leaders create opportunities to grow forward. Our approach unites culture, brand and marketing to increase trust within an organization and with their customers.

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What is a Strategic Change Agency?

ShiftUp has uniquely positioned itself as a strategic change agency. We empower purposeful business leaders to transform vision into action, offering services to accelerate growth, differentiate brands, activate culture, and orchestrate marketing. Through these core pillars, company culture strengthens, employees become more engaged, and the whole organization becomes more unified and adaptive to a changing world.

We assist organizations in strategically engaging their people, giving them a say in how the brand is expressed internally and externally. This manifests in authentic branding and messaging inherent to the company culture.



shiftup

A Strategic Change Agency

> shiftupagency.com