

TAKE ACTION

Visual Map & Step-by-Step Directions

TAKE ACTION PLAN

• **THREE ACTION AREAS:**

① BY: _____	② BY: _____	③ BY: _____
---------------------------	---------------------------	---------------------------



• **MINI STEPS: ONE** • **MINI STEPS: TWO** • **MINI STEPS: THREE**

BY: _____	BY: _____	BY: _____	BY: _____	BY: _____	BY: _____
BY: _____	BY: _____	BY: _____	BY: _____	BY: _____	BY: _____
BY: _____	BY: _____	BY: _____	BY: _____	BY: _____	BY: _____
BY: _____	BY: _____	BY: _____	BY: _____	BY: _____	BY: _____

 SHIFT-IT
Mentoring Map 16 ©2003-2013

The SHIFT-IT Visual Coaching Process®



SHIFT-IT Coach, Inc.
www.shift-it-coach.com

SHIFT-IT products and services are designed to assist creative, resourceful and whole people in their self-development pursuits. They do not replace or substitute for medical or mental health advice and their use is solely at the discretion of the user.

THE SHIFT-IT VISUAL COACHING PROCESS™

This Merkley Map is part of a larger Visual Coaching process called SHIFT-IT.

SHIFT-IT is a seven-stage process to assist individuals in doing their own personal visioning and planning work. There are 17 visual templates in the process (called Merkley Maps®). These tools can be used in order, or separately to supplement other coaching or personal development work.

The Take Action exercise falls into: **Take Action.**



1. At the Crossroads
- 2-5. Life Maps
6. Catch & Release
7. Focus on Me
8. S.E.L.F. Inventory
9. Essential Extracts
10. Future Self Vision
11. Magnetism
12. Flip It, Flip It Good
13. Inner Alignment
14. Archeology of Beliefs
15. Big Picture Plan
- 16. Take Action!**
17. Declaration of Intention

TAKE ACTION PLAN

Purpose of Map:

- To gather baseline data on your current self and situation (before engaging in personal visioning and planning work).
- To create a personalized Action Plan in service of your Personal Vision.
- To bridge the gap between your present reality and your desired future.
- To break your actions into three focus areas.
- To create mini tasks in your three focus areas.

DESCRIPTION:

"Man Stand For Long Time With Mouth Open Before Roast Duck Flies In!"
Chinese proverb

Yes, you need to get clear on your Vision and what you want. Yes, you need to align your energy and motivation. Yes, things get manifested from the inside out. But there also comes a time with every Personal Vision where you need to switch from inner work to outer work and start taking action in the real, day-to-day world.

Bridge the Gap:

After creating a Personal Vision and dealing with your 'Trouble at the Border' issues, you next need to determine how to bridge the gap between your present reality and your desired future. Even my most confident and 'macho' clients get a bit uptight when it comes time to figure out their actual 'real world' moves. After all, they are coming face-to-face with what they really, really want --- and what is standing between them and it --- a big gap of empty space. Space that they will have to navigate and go through if they are to manifest their Vision.

Staring at the big gap between your Now and your Future can be intimidating but thankfully all Visions can be broken down into doable action steps --- you just need to work backwards and to break things down into manageable chunks.

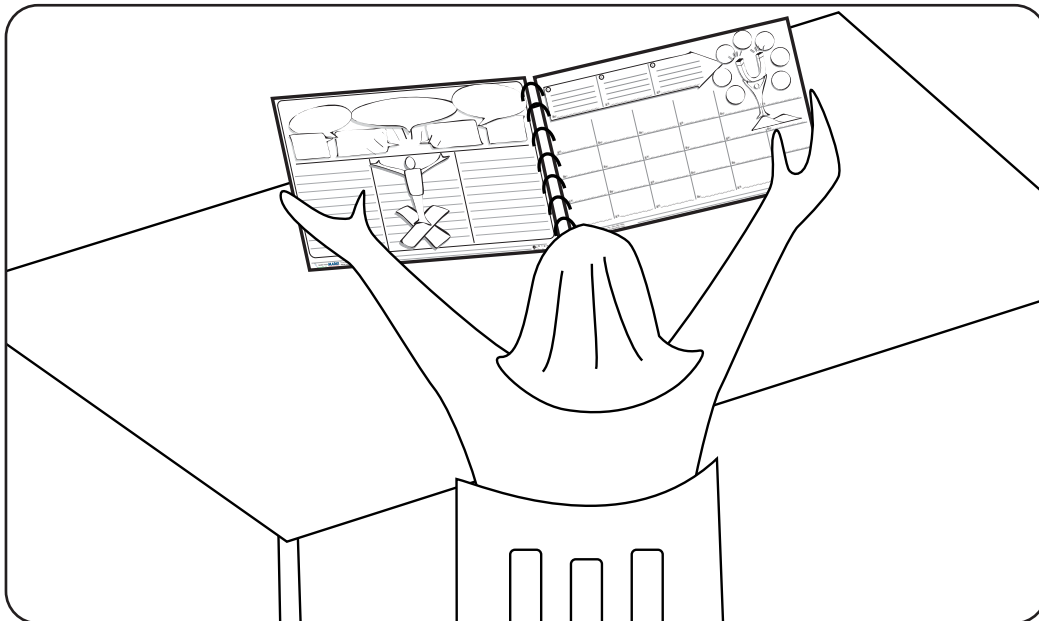
Keep Yourself On Track and Accountable:

This Take Action Map helps you bridge the gap between your present reality and your Vision. It helps you break that space into three main Shift Areas, and then in turn, break each of those areas into mini, doable tasks. Little task by little task, you will use this Map to build yourself a Take Action Plan. A Plan that you (and your coach, coaching pal, or mastermind group) will use to keep you on track and accountable.

CREATE YOUR TAKE ACTION MAP:

Quick Summary of Steps:

1. **Assemble Materials & Create Quiet Space**
2. **Identify Three Big Actions**
3. **Brainstorm Mini Steps**
4. **Assign Due Dates & Schedule in Calendar**
5. **Create Ongoing Support Structures**
6. **Adopt Flexible Stance & Attitude**
7. **Appreciate Progress & Celebrate Successes**



OVERVIEW OF MAP:

3 Main Shift/Action Areas:

Big main areas you need to take action in.

Your Vision:

All actions aligned to your personal vision.

By When:

Commitment date.

TAKE ACTION PLAN

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① BY: _____	② BY: _____	③ BY: _____
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• **MINI STEPS: ONE** • **MINI STEPS: TWO** • **MINI STEPS: THREE**

BY: _____	BY: _____	BY: _____	BY: _____	BY: _____	BY: _____
BY: _____	BY: _____	BY: _____	BY: _____	BY: _____	BY: _____
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Mini Steps:

Break each SHIFT area into small, doable steps with specific due dates.

Column One

Column Two

Column Three

STEP BY STEP DIRECTIONS:

STEP 1: ASSEMBLE MATERIALS AND CREATE QUIET SPACE:

BEFORE YOU BEGIN

Set aside 45 Minutes

Find or create a quiet, peaceful place for yourself where you aren't likely to be interrupted. Minimize distractions as much as possible (phones off, away from the door, etc). Set aside at least 45 minutes to complete this exercise.

Assemble Materials

You'll need a Take Action Map, this worksheet, and a pen. Also, have some stickie notes handy. If you have completed your Magnetism Map (Personal Vision) and your Big Picture Plan, have them within easy access.

USE PEN OR MARKER:

Using pens or markers as opposed to pencils is recommended, as ink will last longer than pencil (you may want to preserve these maps for a while).

"You Can't Just Sit There And Wait
For People To Give You That Golden
Dream; You've Got To Get Out There
And Make It Happen For Yourself."

Diana Ross

STEP 2: IDENTIFY YOUR THREE BIG ACTION AREAS:

If you have completed a Big Picture Plan, transfer your Three Big Shifts to the Take Action Map. If you have not created a Big Picture Plan, follow the instructions below.

To begin, determine your “Three Big Shift” areas. These are the three main areas that you will have to make shifts or movement in, in order to manifest your desired Vision.

Looking at your Vision, ask yourself: What are the three biggest action areas where I need to take action to make my Vision a reality? The three big areas that will give me the most bang for my buck? The three significant actions that will bridge the gap between where I currently am and what I want?

Working Backwards:

One quick and fun way to do this is pretend you have fully reached your vision and work backwards: Imagine yourself in the time and place of your vision. You have manifested everything beautifully and you are feeling very good and pleased with yourself and your creations. From this wonderful vantage point, turn back and look over the terrain that you have covered. Consider all the many, many things you had to BE and DO to get to this wonderful realization of your vision. Consider all the many shifts and changes that you made in your outside and inside world from where you started to where you are now. Somehow find a way to categorize or break these many, many doings and beings into THREE, main, overarching steps or shifts that you made.

Working Forwards:

Another way to define your three shift areas is the more conventional route of starting in the here and now and imagining the big shifts or steps that you will have to make to reach your vision. Somehow break all the many, many doings and beings that you will have to accomplish into three, overarching categories.

Action Words, Present Tense and Determine a ‘Completed By’ Date:

Whichever method you use to determine your shift areas, work your wording into present tense and action-oriented language. Begin your action areas with a verb ... an action word like create, build, develop, maintain, implement, etc. Also, estimate a date that you will need or want to have this action completed by.

Some Examples:

1. **Create Immediate Income Stream For Short-term Expenses.**
By: June 30th
 2. **Find Investment Projects For Longer-term Development.**
By: Sept. 1st
 3. **Create Healthy, Balanced Lifestyle.**
By: Now And Ongoing
-
1. **Get Married And Make Babies**
By: Sept. 15
 2. **Sell Old House And Buy New One**
By: Dec. 31st
 3. **Refocus My Business**
By: Mid May

Other Examples of Action Areas:

Simplify My Life

Create a Healthy Environment

Connect With My Family

Develop & Launch Online Marketing

Create and Implement Workout & Eating Plan

Improve My Relationship

Create a Cool Social Network

Increase My Personal Prosperity

Fix My Business

Cleanse My Physical System

Invest in Property & Passive Income

Look After Myself Better

Develop a Spiritual Practice

Move Business Overseas

Keep working on it until you have created Three Action Areas for yourself. Your action areas should feel right, powerful and significant and each area should ideally work towards one or several of the elements of your Vision.

THREE MAJOR SHIFTS:

1 _____ _____ _____ _____ BY: _____	2 _____ _____ _____ _____ BY: _____	3 _____ _____ _____ _____ BY: _____
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Record Your Action Areas In The "Three Big Shifts" Area In The Top Of The Take Action Map.

STEP 3: BRAINSTORM YOUR MINI-STEPS:

Now take those Three Big Action Areas and break each one down into little, doable Mini Steps. Make chunks out of the chunks. Make sure each Mini Step is specific and that it is something that is doable and can be assigned a due date.

Brainstorm the many smaller, mini-steps that will fall into each big shift area. This template has room for three shift areas, and eight smaller steps within each shift area. If you require more room, just print off another sheet and keep building.

You may find it useful to write your ideas on little stickie-notes that you can move about. Eventually organizing your steps into a rough, chronological order. At this point, don't worry about complete accuracy – in fact, if it helps, know there is no way you can ever be completely accurate in creating a plan. The map is never the territory and a plan will NEVER be executed exactly as is. What we are looking for is a rough road map of the many little action steps that will most likely need to happen in your different shift areas. Many of the things you plan on doing will happen (and several will not, at least in the form you thought). Many other things, previously not thought of, will occur as well. That is natural and to be expected.

As with the main shift areas, give each of these mini-steps a due date too.

● MINI STEPS: TWO		● MINI STEPS: THREE	
BY: _____	BY: _____	BY: _____	BY: _____
BY: _____	BY: _____	BY: _____	BY: _____

Examples of Mini Steps:

1. Create Immediate Income Stream For Short-term Expenses.

By: June '04

• Step Up The Networking	Now And Ongoing
• Attend Chamber & Rotary Meetings	Every Month
• Talk To Ghj And Kpmg About Joint Work	By: March 30
• Teaching Gigs (Local University & College)	By: May 30
• Volunteer With Political Party	By: March 15
• Write Article For Biz Examiner	By: March 30
• Host Monthly Webinars / Teleclasses	Start: March
• Attend Trade Show (Do Booth?)	By: April 15
• Refine Site	By: May 15

2. Find Investment Projects For Longer-term Development.

By: Sept. '04

• Talk To David P.	By: March 15
• Call Ghj And Mark T.	By: March 21
• Follow Up With Ch	By: March 25
• The M's Dinner Party Next Week	On: April 15
• Find Out Where Sh And Crew Are Going This Winter	By: Dec. 15
• Online Sign Up For Nrn	By: March 15
• Research Trends In Restaurant/food/urban Living	By: May 15
• Talk With Architect Contacts / Team	By: May 15
• Email Clm, Reconnect	Today
• Talk To Sm, Tr, Lzn About Financing	By: May 30
• Return Bk Call	Today

3. Create Healthy, Balanced Lifestyle

Now & Ongoing

• Switch From Running To Yoga, Rowing & Light Weights	Start On Monday
• Find Volunteer / Community Activity To Get Involved In	By: April 30
• Be More Open To Dating (Ask D. How He Is Meeting Women)	By: May 15
• Continue To Have My Kid's Activities As A Priority	Now And Ongoing
• Cultivate Whole Foods / Slow Food Approach To My Eating	Start Tomorrow
• Get Back Into The Real Estate Game	By: Sept'04

1. Get Married And Make Babies

By: Sept. '06

• Say Yes To Combining Homes And Proposal	Already Done
• Talk To Lawyer, Figure Out Co-mingling Issues	By: Jan. 15
• Set Wedding Date	By: March
• Plan Wedding	By: Now/ongoing
• Nutrition/exercise Consultations	By: March 30
• Research Back Issues / Health Issues	By: July 1
• Talk To My Doctor, Begin Pregnancy/older Mom Research	By: March 1
• Investigate Pre-marriage Counseling (Church?) (Other?)	By: Jan. 1
• Plan Honeymoon, Travel Arrangements	By: Jan'06
• Start Practicing	By: Now/ongoing

2. Sell Old House And Both Move Into New One

By: Dec. '04

• Get A Market Assessment Done On My House	By: Nov. 1
• Find Realtor	By: Oct. 15
• Talk To The Neighbors And Tenants	By: Nov 15
• Do Landscaping And Clean Up Junk	By: Nov. 30
• Investigate Pre-nup / Legal Aspects	By: Oct. 30
• Talk To My Lawyer	By: Oct. 1
• Decide About Paint, Remodeling Of New Home	By: Jan. 1
• Talk About Space Issues In New Home	Now/ongoing
• Talk About Furniture, Different Tastes	Now/ongoing
• Sell My House	By: Dec. '04
• Pack And Move	Now/ongoing

3. Refocus My Business

By: May'05

• Complete Taxes	By: April 1
• Complete Claim Paperwork	By: Feb. 1
• Create New Website	By: Feb. 30
• Optimize New Site For U.S. Client Searches	By: Feb. 30
• Samples/Portfolios	By: Feb. 30
• Update Clients On New Focus	Now/ongoing
• Newsletter (Revised Issue/look)	By: March 15
• Biz Plan And Marketing Plan	By: April 30
• Local Pr Campaign	By: May 1
• Find Assistant And Sub-contractors	Now/ongoing
• Talk To M About Working Together	Now

1. Simplify My Life

- Decline Grad Chair
- Ask To Be Released From Board Roles
- Declutter Family Room
- Get Virtual Assistant
- Hire Housekeeping Help

2. Fix My Business

- Create Recovery Plan
- Switch Bookkeepers
- Frame It As Comeback Story
- Switch Debt Sources Around
- Create Small Copies Of My Vision & Carry/post
- Ongoing Coaching
- Face-to-Faces With Jb, Cm, Jr, Dmz

3. Cleanse My Physical System

- Explain To Sue And Seek Her Help In Eating Better And Less
- Decrease My Portion Sizes
- Research Cleansing Methods
- Do A Fast
- Talk To Mr. H About Karate Instruction
- Do Full Blood Tests

Transfer your own work onto your Take Action Map. Voila! You have just created a basic action plan that will kick off your first actions aligned with your Personal Vision.

"I'm A Great Believer In Luck, And I Find The Harder I Work The More I Have Of It" .

Thomas Jefferson

STEP 4: ASSIGN DUE DATES AND SCHEDULE TASKS IN CALENDAR:

Ink It Just Don't Think It:

"The Discipline Of Writing Something Down Is The First Step Toward Making It Happen."

Lee Iacocca

Now that you have identified your steps, go to the next level and write them into your day timer or ongoing calendar. Transition them from the realm of idea or imagination into the realm of reality and your day-to-day. You've got to ground them into physical reality and actually do them! The first step in implementing your steps is to write them into your schedule. The next step is to create ongoing accountability and support in getting them done.

"People Are Always Blaming Their Circumstances For What They Are. I Don't Believe In Circumstances. The People Who Get On In This World Are The People Who Get Up And Look For The Circumstances They Want, And, If They Can't Find Them, Make Them."

George Bernard Shaw

STEP 5: CREATE ONGOING SUPPORT STRUCTURES:

After you've got your Big Action Areas and Mini Steps on paper and into your schedule you've got to create some accountability and support around them. Some people are very disciplined loners, but the majority of us need to create supportive structures to keep ourselves motivated, on track and accountable.

Create some sort of ongoing support structure for yourself. Perhaps you and your mate are an entrepreneurial couple who can support one another. Or you have a friend or business buddy whom you can pair up with to swap plans and encourage one another. Or, you can join or create a 'mastermind group' of like-minded individuals to meet on a regular basis for the sole purpose of creating a supportive, dynamic environment. Depending on what you are working on, life and business coaches are excellent resources that more and more people are engaging for confidential support and strategy. Whatever you do, create some sort of ongoing support structure to help you deal with the inevitably ups and downs of manifesting your Vision --- it will be a journey that is made much more enjoyable and productive when you have others to share things with, encourage you, affirm you and, when needed, kick your butt!

"One Of The Principles Of Your Universe Is That Every Situation In Your Life Is Teaching You How To Love. You Cannot Leave Something Until You Love It. You Are Tied To Things You Don't Like. If You Hate Something, You Will Drawn To It Again And Again (Even Though The Person And Form May Change) Until You Love It. Once You Love It, You Are Free From It."

Sanaya Roman

STEP 6: ADOPT A FLEXIBLE STANCE & ATTITUDE:

You don't have to have everything worked out completely. Just begin with what is top of mind and go from there. Action Plans are living documents --- they shift and morph as life does.

Take a "Software Versions" Attitude:

You know the saying about the 'best laid plans' --- they will be overturned somehow or someday. The key is to take a 'Version 1.0' approach to your Action Plan. Think of your plans like software --- new versions will be created as you go along. As such, be flexible and adaptive. Take a step. Gather information. Adjust accordingly. Create natural feedback loops.

Step by step your path to your goals and Vision will reveal itself and unfold. Your job is to take your first known steps and trust that others will become apparent as you complete your immediate tasks. When you look back on your route, it probably won't likely look totally like your first version 1.0 Action Plan. But that is ok; the draft was just a starting place that got you moving out in the real world --- which is ultimately its greatest value.

Your Ongoing, Emerging Process:

This plan is a starting place. It gives you something tangible and organized to begin from. The fun (and angst, pain, ups and downs) comes in seeing how this plan pans out in reality. Some things will be bang on, others things will be off the mark. Track where your energy is through the process of taking actions on your steps. Notice what gets accomplished, what doesn't, what still holds energy, what doesn't? As you take actions, more information and clarity will unfold and emerge. It is an exciting, organic process. Ride the ups, downs and 'arounds' of your manifestation process. Trust that answers will unfold as actions are taken (or not taken).

"Even If You're On The Right Track, You'll Get Run Over If You Just Sit There."

Will Rogers

KEEP DRAFTING: CREATE NEW VERSIONS:

Be sure to keep drafting as you work through this Plan or learn from feedback from your experiences that you need to go back to the drafting board. Create Version 2.0, 3.0, 4.0, etc. of your Action Plan as you move along. The Action Plan Map is a tool that you can use repeatedly as you accomplish goals and determine new priorities.

"It's Not Enough To Sit Around And Believe. Demonstrate Trust By Listening To Your Inner Guidance And Taking Action On It. Since You Live In A World Of Form And Substance, Action Is The Physical Link To Having What You Want. You Can Develop Trust By Putting Your Ideas Into Action, Getting Feedback, And Seeing The Results. Every Time You Are Willing To Take A Risk You Increase Your Ability To Trust And Believe In Yourself. There Is A Difference Between Trust And Hope. Trust Is Believing And Knowing That What You Want, Will Come; Hoping Is Wanting Something But Not Really Believing It Will Come."

Sanaya Roman

STEP 7: APPRECIATE & CELEBRATE SUCCESSES:

Keep your Take Action Maps on file as you move along. Appreciate what you have accomplished and marvel at the circuitous and fascinating route that your journey takes. Recognize what you have accomplished and be sure to take time to celebrate your successes before moving onto another series of goals and tasks.

Allow for Downtime and Resting on Your Laurels: (at least occasionally!)

Life isn't all about climbing mountains, so be sure to enjoy the journey and the mini-successes along the way. Champion yourself. And be sure to surround yourself with positive, encouraging and validating support. It is not always easy to keep one foot in front of the other and keep plowing ahead. Taking a look at your big picture and how far you have come will keep you connected to what you are doing and why and will make the journey understandable and meaningful.

"Even The Best Plans Must Be Constantly
Revised ... An Airplane That Is Flying To Its
Destination Must Constantly Readjust Its Flight Path
To Stay On Course".

Sanaya Roman

CASE STUDY:

Case Study: Take Action Plan

An example of a partially completed Take Action Plan ... this woman is a new coach going through the process of learning about and implementing proper systems in her emerging business (book-keeping, accounting, identity, branding, marketing, developing a website, etc.). Together we worked on her first two action areas (with me coaching and educating her on these typical start-up challenges).

The final column was assigned as homework for her to complete for our next tele-coaching session.

MY TAKE ACTION PLAN
TAKING IT TO MY NEXT LEVEL - Legitimate business - support future growth.

THREE ACTION AREAS:			MINI STEPS: ONE			MINI STEPS: TWO			MINI STEPS: THREE			
BUILD MY BUSINESS SYSTEMS BY: April 10.	CREATE & LAUNCH MY WEBSITE BY: April 15th	CLARIFY MY PROCESS BY: April 15th	Get Books in order - collect receipts - pull together. BY: March 20th.	Choose word press theme. BY: April 15th.	Pull Content From old site to new places. - to format static pages. BY: April 15th mid May.	What's my 90 day plan? - identify BY: now ongoing.	Create 1st Draft of site map BY: May 1st	Send TO DO... SEND TO ME FOR FEED BACK. BY:	Explore Biz License BY: April 30.	Explore Grants. - seed BY: April 30.	Explore Insurance BY: April 30 April 30.	Find Lawyer BY: April 30.
Consider contracting bookkeeping - suggest around. BY: mid April.	Choose + Buy Accounting Software. BY: mid April.	Get 1st version of new site up BY: June 30th.	Get 1st contract w/ Sara. BY: now and ongoing.	Create web client picture BY: April 15th.	Get 1st version of new site up BY: June 30th.	Get 1st version of new site up BY: June 30th.	Get 1st version of new site up BY: June 30th.	Get 1st version of new site up BY: June 30th.	Get 1st version of new site up BY: June 30th.	Get 1st version of new site up BY: June 30th.	Get 1st version of new site up BY: June 30th.	Get 1st version of new site up BY: June 30th.

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Merley Map 16 02010

NEXT STEPS:

Previous Move:

MY BIG PICTURE

• FUTURE SELF GUIDANCE:

• internal: _____

• SUPPORTS:

• external: _____

• VISION: _____

• 3 MAJOR SHIFTS:

1. _____

2. _____

3. _____

• POTENTIAL BARRIERS:

• internal: _____

• external: _____

BIG PICTURE PLAN:

Ink It; Just Don't Think It ---

Link your vision to your current reality. Begin to define your major steps. Create a one-page 'big picture' plan of your Vision, your supports, your challenges, your big action areas and the actions that you need to take to bridge your current reality with your desired future. Move into 'action-mode'.

Current Move:

MY TAKE ACTION PLAN

• THREE MAJOR SHIFTS:

1. _____ BY: _____

2. _____ BY: _____

3. _____ BY: _____

• MINI STEPS: ONE

BY: _____ BY: _____

BY: _____ BY: _____

BY: _____ BY: _____

BY: _____ BY: _____

• MINI STEPS: TWO

BY: _____ BY: _____

BY: _____ BY: _____

BY: _____ BY: _____

BY: _____ BY: _____

• MINI STEPS: THREE

BY: _____ BY: _____

BY: _____ BY: _____

BY: _____ BY: _____

BY: _____ BY: _____

TAKE ACTION PLAN:

Take Action ---

Create a detailed action plan. Organize your Top 3 action areas into doable mini-steps with priority and specific due dates. Build responsibility and accountability structures --- implement your steps for ongoing, incremental movement. Step-by-step creation of your Personal Vision over time and with sustained action.

Next Move:

DECLARATION of INTENT

• RELEASING: _____

• CLAIMING: _____

• MY VISION: _____

DATE: _____

WITNESS: _____

DECLARATION OF INTENT:

Take Action ---

The closing move of SHIFT-IT Visual Coaching Process. Lock in your learning and define true, strong intentions for yourself and your manifestation journey. Bring closure and step 'over-the-line' into your new reality. Activate supportive energies and alliances.

PRESERVE YOUR INSIGHTS:

You have taken the time to do this deep and thoughtful work ... so be sure to preserve it for ongoing and future reference.

Create a SHIFT-IT file folder or binder to collect and keep your notes and manuals.

If you are working through the full SHIFT-IT process, each Merkley Map will become a page in your Visual Coaching report. Simply work through all 17 templates in order, then staple them together. For more lasting preservation, go to your local stationary or office supply store and have them bound together into a formal report (with a clear (transparent) front cover and a sturdy, cardstock, back cover). Or scan your maps into digital files that you can save and share.

SHIFT-IT is an ongoing experience that you may wish to do again and again. Preserve your early experiences so you can compare with your later ones: witness your changes and progress and more clearly see the evolutionary flow of your life.



TAKE ACTION PLAN

• THREE ACTION AREAS:

1

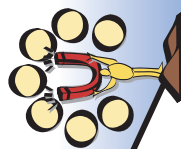
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• MINI STEPS: ONE

• MINI STEPS: TWO

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SHIFT-17

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