



## 2020 OFFERINGS

OUR MISSION IS TO EQUIP YOU TO ACHIEVE  
WHAT MATTERS MOST.



HOLISTIC PLANNING

## PAIRING REFLECTION AND PLANNING FOR PURPOSE- DRIVEN ORGANIZATIONS

Inspired by Ivy Lee, public relations pioneer and creator of his namesake Ivy Lee Method of productivity, we started Ivy.ly because we are passionate about changing the culture of planning and the assumptions around productivity.

The Ivy.ly offerings help leaders and team members within organizations have meaningful and transparent conversations about aspirations, achievements, and the work required to get there, while building valuable skills in project planning, time management, and honest evaluation.



## BRANDS WE'VE WORKED WITH



LEARN MORE AT [IVYLYCO.COM](http://IVYLYCO.COM)



## HOLISTIC PLANNING

# CREATE A CULTURE OF ACHIEVING WHAT MATTERS

Today's organizations, regardless of speciality or sector, all struggle with the "silo effect". The silo effect occurs when separate departments, teams or individuals within an organization may not communicate effectively with each other – and productivity and morale suffers because of it. Despite the fact that employees are more technologically interconnected than ever before, the silo effect continues to be a problem.

- 39% of employees within a surveyed group believe that there isn't enough collaboration between people in their organization.
- 86% of polled executives and employees blame a lack of collaboration or bad communication for team problems and failures.

\*Source: [blog.clearcompany.com](http://blog.clearcompany.com)

## THE IVY.LY METHOD

We are driven to help organizations and individuals conduct more holistic planning. The old models of planning are often monotonous and void of real reflection and discussion around fears, joys, and aspirations. The Ivy.Ly Method is a 3-part planning cycle infused with Focus, Courage, and Kindness (our values) that stimulates a unique blend of independence, motivation, collaboration, and accountability.

- **Reflect:** During this phase, we ask you to be introspective and ask yourself questions. What worked? What didn't work? What do you want to build upon?
- **Design:** During this phase, we build upon your time reflecting and allow you to dream big, brainstorm, be ambitious and bold!
- **Do(n't):** During the Do(n't) phase, we dive into the area that most people often start with – the executing and the list making. Our customized planning templates help you build a bridge from the Design phase into an informed action plan. This phase is where you can decide HOW you will do (or not do) what matters most to you.

LEARN MORE AT [IVYLYCO.COM](http://IVYLYCO.COM)





HOLISTIC PLANNING



## TOGETHER WE CAN CREATE STRATEGIES TO

- **Foster productivity within team members and leaders and create a culture of goal setting and evaluation**, helping everyone feel inspired and directed when thinking ahead and exploring new ideas.
- **Keep high performers engaged: learning, growing, and thinking about the future.** When all levels of the organization are encouraged to think holistically about their goals, organic accountability grows.
- **Provide tools for managers, leaders, and contributors** to have transparent conversations and align individual goals and aspirations with the team and company metrics and performance expectations – these do not have to be mutually exclusive.

## OUTCOMES INCLUDE

- 1** Shared language and framework for goal setting
- 2** Increased manager capabilities in 1:1 and team goal setting conversations
- 3** Greater employee engagement, satisfaction, and retention
- 4** Culture of goal setting and goal tracking that supports increased productivity and achievement of key metrics

LEARN MORE AT [IVYLYCO.COM](https://www.ivylyco.com)



## OUR OFFERINGS AT A GLANCE

### HOLISTIC PLANNING: BUILT TO FIT YOUR NEEDS

**Virtual Goal Setting Webinar:** Let us educate your team on the value of goal setting! We'll host an engaging 60 minute discussion on the power of goal setting while equipping attendees with FREE tools and templates to outline goals of all sizes and build systems of accountability to track their progress. These sessions are geared toward work-from-home workforces.

**Goal Setting Workshop:** Through small group discussion, individual activities, and custom Ivy.ly templates, we'll create the space you need to identify your goals, plan the steps you want to take to achieve them and identify the people and support you need to feel successful! These sessions are hosted in-person for up to 40 attendees.

**Leadership Branding:** A personal leadership brand conveys your identity and distinctiveness as a leader and colleague. It communicates the value and contributions you offer. Through an individualized approach we can help you identify your authentic leadership self and equip you with a toolkit to consistently lead your team.

**Reflection Workshop:** Despite how often we launch a new campaign, release a new product, or welcome in a new leader, organizations and teams struggle to take the necessary time to reflect and learn from their experiences. We'll lead your group through an organized retrospective that holds space for honesty, acknowledgement, and continual learning.

**Strategic & Operational Planning:** We specialize in strategic and operational planning for organizations with 10-100 team members. We guide you through a process to identify and prioritize your organizational goals aligned with your resources and skills. During our engagement, we strive to provide flexible and effective tools for leaders and contributors to ensure buy-in and shared passion across the organization.

**Event Production:** Events require detailed planning! We provide full service event production services for purpose-driven conferences, company retreats, partner summits, and national sales meeting (just to name a few). We pride ourselves on being solutions-oriented, guest-centered, and communicative!





## ABOUT IVY.LY

AnneMarie Schindler, MBA and Melissa Stewart, LCSW have a long and rooted past together. They both worked at the LIVESTRONG Foundation during its prime and in the wake of its crash. While colleagues, the pair will tell you that they have shared, but different, experiences of those fateful years and yet agree it was the best training ground for managing through significant growth and contraction, building highly effective teams, and honing their expertise in organizational management.

Over the next four years, AnneMarie and Melissa grew their own consulting firms, acting as sounding boards for complicated projects, providing ideas and feedback on new approaches, and celebrating the successes (and challenges) of small business ownership. Over this time, they also started partnering on client projects that were focused on strategic and operational planning. These engagements provided a welcomed chance to collaborate and co-lead conversations that sought to ignite lively conversations and lean into new strategies for the future.

In 2019, the former colleagues and solo-preneurs, sat down to discuss forging a partnership. With more than three decades of combined experience across non-profit and for-profit settings, they agreed the potential in joining forces was to build something different, something that changed the culture of planning.

Ivy.Ly was born to help you achieve what matters most.



## NEXT STEPS

**Consultation Call:** After reviewing these materials, we'd love to hop on the phone and hear more about your goals and their fit with our offerings and skills. We're happy to answer any questions about capabilities, provide client referrals, and give insights on pricing and timing.

**Customized Proposal:** Following our conversation, we'll build a custom proposal for you and your organization. The scope will align with the goals you shared and will fit within your budget and time parameters.

**Project Kick-Off:** Once the proposal and contract are finalized, we'll kick off your project, deliver focused energy, courageous solutions, and kind communication. We can't wait to get started!



CONTACT US AT  
HELLO@IVYLYCO.COM