Wittman Consulting – Tentative Agenda
Family Farm Business Consultant Train-the-Trainer Workshop XXI
Kansas City, MO May 14-15, 2024

- ☐ 8:00-8:30 Introductions – Faculty and Participants

- ☐ 8:30-9:00 History, Defining Your Deliverable & Linkage to Process Improvement
  - History of "Train-the-Trainer" (TT) program experiences
  - Defining your deliverable as a consultant or advisor
  - How TT program emulates Process Mapping/Process Improvement
  - Review of Wittman Consulting Toolbox to be reviewed during course - concepts, rationale behind design & intended use of tools and templates used in process

Five-stage process used by Wittman Consulting to conduct consulting practices

- ☐ 9:00-9:30 **Stage I** - Creating Awareness of Need for Engagement
  - Administering the Management Proficiency Test – Ag & Commercial versions
  - Review of Best Practices – TEPAP 20yr Survey results and implications for advisors
  - Other tools: seminars; articles, referrals, use of Guidebook

- ☐ 9:30-10:15 **Stage II -** Negotiating the client relationship
  - Engagement outline, Pre-vetting template, Inquiry Response Process
  - Sample templates-Consulting agreement; Release of Information
  - Initial engagement communications to clients for gathering input

- ☐ 10:15-10:30 Break – participants use time to network; peruse resource materials

- ☐ 10:30-11:45 **Stage III** - Building client profile – what and how to gather data
  - Hard vs. soft issues; family business life cycle; key elements in ***Management System Processes*** that must be inventoried
  - 3-Circles of Family Business; Labor/Management trains & Entity Complexity
  - Using tools of the trade: guidebook for training; compiling client Proficiency Tests
  - Using interviews and ***Family Business Questionnaire***s to compile business profile
  - Using Compensation Summary to inventory compensation profiles

- ☐ 12:00 – 12:45 Working Lunch

- ☐ 12:45-1:00 Wrap Up - Morning Topics
  - Setting up family meetings & agenda to start the transition conversation
  - Bringing stakeholders along – Decision-Making Wheel

- ☐ 1:00-2:00 Using Personality Profile Tools to promote professional communication
  - Review profiling tools & deciding tools best adapted for different client situations
  - Coaching advisors and clients on how to make optimal use of results

- ☐ 2:00-2:45 **Stage IV** - Preparing preliminary conclusions/recommendations
  - Preparing preliminary conclusions and recommendations; and executing the exit conference with client team – (*Review Sample Exits*)
  - Alternatives for transmitting conclusions – What can end product of consulting effort look like to deliver tangible outcomes and transparency
    1. Template files and strategies for standardizing storage and formats for client material – Management System and Operations Handbook Sample
    2. Hard copy examples – three-ring binder format
    3. Dropbox/Other Cloud based systems

- ☐ 2:45-3:00 Break

- ☐ 3:00-3:30 **Stage V** - Problem resolution and ongoing support
  - ■ Assigning implementation homework to the client
  - ■ Agreement on what research and support is expected of facilitator
  - ■ Consensus on follow-up meetings to track progress
  - ■ Termination of services vs "on call" ongoing support understandings

- ☐ 3:30-4:15 Case Study Discussions
  - ■ Case study illustration – "What is a Management Audit?"
  - ■ Using TRLC Case Study in Guidebook for succession planning; conflict resolution
  - ■ Case study illustration – separation of interests; multiple entities; Kamenik Farm

- ☐ 4:15-5:00 Other Practice Management Topics
  - ■ (15) Appointing on-site point of contact or project coordinator – why and how
  - ■ (15) Differentiating succession planning from estate planning
  - ■ (15) Transitioning from CEO to Board Chair; defining client CEO 2nd mountain; Letting go—Bridges Transition Model; Satisfaction Triangle

- ☐ 5:00-5:30 (15) Day I De-Briefing – course pace; suggestions for second day; may also shift to Day 2 - Opening Discussion

Day 2

- ☐ 8:00-9:30 Other Practice Management Topics – (continued)
  - ■ (15) Financial planning tools that can be used to reduce fear of retirement
  - ■ (15) Bringing non-family owners into closely held family business
  - ■ (20) Pricing Your Services – strategies for making the process affordable
  - ■ (10) How consultants have set compensation for use of Intellectual Property
  - ■ (30) Other firms' experiences & approaches in getting started; protocols for shared engagements; Managing Work Files

- ☐ Break – 20 min

- ☐ 9:50-10:15 Other Practice Management Topics – (cont'd)
  - ■ (10) Designing and using your personal website to leverage your practice
  - ■ (10) Coaching clients on setting up advisory boards and peer groups
  - ■ (5) Next Steps: Introducing concept of Family Councils to advanced clients

- ☐ 10:15-11:45 Case Study Discussions
  - ■ Hops Farm Case Study – dealing with multiple entities & governance structures; getting to clarity on a governing council
  - ■ Participant cases posed for group discussion

- ☐ 12:00-1:00 Working Lunch
- ☐ 1:00-2:00 (1.0 hours) Case Study Discussions – (continued)

- ☐ 2:00-3:00 (1 hour)
  - ■ Networking options after training
  - ■ Criteria for being added to Wittman Consulting Contact List
  - ■ Getting Accreditation & Affiliating with support organizations – ASAC, FFI, etc.
  - ■ Continuing education, reading resources
  - ■ Summary/workshop evaluation