Train-the-Trainer Workshop for Consulting Professionals - Syllabus

History, Faculty & Purpose of Course—Advising family farm businesses is both an art and a science. Since 1980, Wittman Consulting has been advising and coaching clients and professional advisors with the goal of empowering clients to become professionally managed farm family businesses. Since 2000 Wittman Consulting has offered formal programs for training, coaching and mentoring professionals who want to establish or fine tune their consulting practices. In 2021 Lance Woodbury of Pinion Global joined the training faculty working with Dick Wittman and Cori Wittman Stitt. Successful consultants and advisors have several ingredients: strong technical abilities; proven experience; a passion for advancing excellence in agricultural family business sustainability; and a clearly and transparent process for delivery consulting services.

A key focus of our training has been creating a tangible and transparent ***consulting process*** where it is clear what the product or deliverable will potentially be and the methodology that will be followed to get clients to a successful outcome. It has been a rewarding career experience to have influenced and mentored many consultants who share the above talents and are now part of an ever-expanding stable of resources needed to meet an exploding demand for family business advisory services. Attendees of the Train-the-Trainer program gain insight and access to proven tools for jump starting their practices. They also build networking relationships with other advisers trained in this process who are committed to integrity and quality product delivery. The design of the Train-the-Trainer Program and well as testimonials from past participants is outlined below.

Workshop Format—The Train-the-Trainer program generally is delivered as a standalone two-day workshop. It has also been offered in two parts with an introductory seminar for family farm business clients and a companion Train-the-Trainer session the following day for professionals advising family farm business clients.

Target Audience—Currently practicing or those aspiring to be consulting professionals with an interest in honing skills and delivery methods for advising family farm business clients in financial management, transitions/succession planning, resolving conflict, and incorporating professional governance systems and structures in commercially complex family farm businesses

Seminar Sessions – Train-the-Trainer Workshop

- History of Course and parallels to other Train-the-Trainer experiences
- Review Five Stage Consulting Process & Primary Tools Used in Each Stage:
    - creating awareness of need for consulting assistance
    - negotiating the relationship
    - building the client profile
    - forming preliminary conclusions, recommendations, and action plan
    - problem resolution & ongoing support
- Creating transparency on what you are providing as a “deliverable product” from the engagement
- Setting up family meetings to start the conversation
- How to use alternative Personality Profile tools to promote professional communication
- Dealing with multiple entities & governance structures; getting to clarity on a governing council
- Facilitating creation of advisory boards/family councils
- Helping CEOs make the transition to board chairs, transition coaches and mentors
- Coaching clients on how to form and facilitate client peer groups
- Pricing your consulting services & setting up and administering your own consulting service website
- Technical Topics – these sessions give participants hands-on discussion on how to use and personalize tools, exhibits, and templates in the Wittman guidebook and consulting process
    - Administering the Management Proficiency Test – Ag & Commercial versions
    - Pre-vetting template; Engagement Letter & Engagement Outline (1st meeting discussion outline)
    - Consulting Agreement & Fee structure options
    - Proficiency Test, Questionnaire and Compensation Summary
    - Executing the “exit interview” with the client team.
    - TRLC Case Study – Logistics for using this case study as a teaching tool
    - Using guidebook templates to build policy & SOP manuals, job descriptions, etc.
    - Strategies for storing and retrieving client material – Handbook/Cloud-based systems
    - Case study illustrations on how to conduct Management Audits
    - Differentiating succession planning from estate planning
- Numerous case studies are interwoven to apply many of the practices covered in this course

Participant Testimonials – Professional Service Providers

"Dick's training is one of the best professional growth opportunities I have experienced. It will have a lasting impact on my family farm, my work as an agriculture lender and all the family farms who receive training from those trained in this workshop. Through his personal experience as a multi-generational farmer and a foundation in the Farm Credit System, Dick has built and developed a system for structure that is lacking on many farms. *"Andrew Miles, Ag Banker/Farmer*

Information on how we build effective client relationships was most valuable. Once we are viewed as a trusted advisor, we can move into problem resolution and implementation. This will be a tremendous tool for our firm. We now have a clear process to help our family businesses understand the need for management resources.

The "educate before you consult" discussion was huge for me. I now recognize I will need to slow down the process and put it into "bite size" chunks to do a quality job. This course is exactly what I needed to share the skills and knowledge I've gained over the years with other families. I feel like an insider getting access to all of the tools and tips that you've spent 50+ years accumulating. The guidebook is priceless. This is the only conference that I've attended where I truly felt engaged the entire time. I didn't want to miss one nugget of information. Staci Grimm

Your workshop changed my outlook on many things…it could be a life changing event for me. I came in a little skeptical, figuring it would, like previous continuing legal education (CLE) classes, provide a few helpful insights, but implementation would be difficult, and the lessons soon forgotten. Since your class, I have told everyone it was the best CLE I have ever attended. It provided a complete structure and method to change the focus of my practice to something I feel will give real, value-added service to my clients. Since the class got over, I've been pouring over the materials and figuring ways to genuinely incorporate this into my legal and farm families' businesses. Before your class I was skeptical about the personality test. The class changed my mind. I came back to the office and took a test. As you anticipated, I'm a classic C. Before the class, when you suggested we purchase the guidebook, I was skeptical. When I got home, I ordered it immediately. I can't wait to use it. I haven't been this excited about practicing law since before law school. I guess that's why I feel your train the trainer workshop was life changing. I can't thank you enough for sharing your talents with me. *Ted Larsen, Williams, Meservy & Larsen Attorneys*

Being proactive for our clients is a key value of our firm…the philosophy of creating awareness with the client greatly improves our ability to help clients and provide additional services. I am now more aware of how we can better help the client and what struggles they might be facing without even realizing it.

Presentations were extremely practical and gave me insight on what we should be pushing our clients to do. I will be much more forceful with my clients in pushing them to be better business owners and managers of their information. I will also do a better job on addressing required discussions at the setup of a new business.

I was an ag teacher for 8 years and now in Extension for 22 years. I've never had a training class in 30 years that was as useful and left me with a set of tools to really start honing my skills. I plan to take what you taught us and start re-creating what others you have taught are trying to get started. I have about 12-15 years left in this position and for the first time in years I feel like I have a real challenge that will make a real impact with Idaho ag producers. I am looking forward to that challenge with my colleagues. I hope that in 5 or so years you can see we are making strong inroads in this area and being the impactful players that we should have been all along. *Stephen Hines, UI Extension*

This course will significantly affect our approach to advising clients. It gives me a place to start and how to do an engagement. It is helping me focus more clearly on my deliverable and on what my potential business may become. It has opened my eyes to an ocean of opportunities and will help me to better coach clients on the design of business management and governance structure. It gave me more tools for a broader discussion with clients to cover all aspects of succession planning. It provided more clarity on up-front information preparation, analysis and step by step approach.

This course provides tremendous value in how to effectively communicate with prospects about conducting an engagement; tools, resources, and process (the templates are awesome); importance of clearly defined structure and systemization of the process; learning how these tools help identify and resolve real client conflicts and advance professionalism; networking with other people with similar desires to help the farming community; mentoring of peer groups; strategies to implement succession initiatives; and better understanding of succession planning process that I can compare to what we do now.

Dick and Cori, teamed with Lance Woodbury provide a valuable service to us as agricultural business consultant professionals. From my prior career as an ag lender, this workshop validates the belief that farm business owners need to master business administration as much as they need to master the production aspects of the business. Credit must also be given to the participants in the workshop who brought their advising experiences into the discussion. The Wittman Consulting Guidebook is a goldmine of "how-to's" in addition to answering the "why" for our clients. This resource is a gift to long tenured consultants for refreshing their thought processes as much as a resource textbook for those beginners, young and old, who aspire to help clients develop and implement sound business practices for lifetime and multigenerational profitability and viability. It can be overwhelming, even to the seasoned professional, but the stakes are high, and we must rise to the challenge. The Guidebook is a valuable tool in the process. *Pete Weisenberger, Incoming President, ASAC*