



Phase 4 – Plan Implementation

Chapter 9: Turning Your Plan into Reality

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Congratulations! You've successfully worked your way through the transition planning process. Now, it is time to translate your plan into action.

Plan implementation is unique to each farm business, depending on its particular circumstances and the needs, priorities and wishes of its retiring and succeeding generations. As such, the timeline for transition's completion varies from farm to farm. Transition planning groups should develop specific implementation plans to meet both the farm business and each individual's needs.

Be aware that life does not always work out exactly how we plan. Challenges and opportunities will come along that may require your group to make changes to your plan. Open communication within your planning group is key to taking change in stride

Why is this relevant?

Implementation should seamlessly grow out of the planning process completed to date. As such, implementation plans build on the exercises and topics your planning group has already worked through.

How will this aid in transition?

After investing significant time and effort into transition planning, implementation is both the reward and the next step in the transition process. Rolling implementation out according to the same careful, step-by-step manner with which you built your plan will:

- keep the process moving forward;
- foster strong communication between the planning participants;
- keep all participants informed and involved;
- minimize conflict; and
- significantly increase the likelihood of a successful transition.

Implementation Instructions

*** Each person involved in your farm's transition planning should work together throughout transition's implementation. Additional stakeholders who have a vested interest in the farm business can be included where the planning group sees necessary.*

Your group started the transition planning process by working through Phase 1: Background and Getting Started, and Phase 2: Readiness Assessment. Then (depending on your group's chosen approach) you completed some or all of Topics 14 to 28 in Phase 3: Plan Development, making notes of any outstanding issues in your chosen approach's Summary document (pages 274 to 283 of the Appendix).

1. Now, return to this Summary document.
2. Step one in implementing your plan is to begin to work through any outstanding issues in your chosen approach's Summary.
 - a. Determine who is going to be responsible for monitoring each task to make sure it is completed.
 - b. Review the task list to make sure that people are okay with their responsibilities. Reassign responsibilities where needed.
 - c. IMPORTANT: If any of these tasks require more detail than is provided in the specific plan approach template, use the Critical Issue Action Plan form.
 - d. Agree on how information is going to be communicated. Options include:
 - i. Information distributed as it arrives.
 - ii. Information distributed on a set schedule. For example, once a month.
 - iii. Information distributed at meetings (see point #5 below).
3. While completing the action plan tasks, review and begin to roll-out your stated plans regarding operational, management and financial transition, as described in the plan.
 - a. As a group, review your plan (Topics 14 to 28). Turn any stated timelines into a transition calendar so you can ensure transition remains on track.
 - b. Set a schedule for regular meetings with your planning group as you move through transition. At these meetings:
 - i. Review Topics 14 to 28 of your planning process.
 - ii. Review progress to date. Review assigned tasks and their completion due dates to ensure no tasks fall through the cracks.
 - iii. Make note of any new/currently outstanding tasks and assign them to individuals for completion. Determine a date for completion.
 - c. Discuss challenges, concerns, opportunities and successes.
 - i. Discuss whether any of these challenges, concerns, opportunities and successes require that your transition plan be adjusted.

- ii. If the adjustments are significant, work through Topics 23 through 28 (the Review topics) again to ensure your plan is still sound.
 - iii. If the adjustments are significant, your group may need to work through additional planning topics again.
4. Keep advisors informed with changes, as required.
5. Store documents for future reference.



KEEP IN MIND:

- Consider changing who is responsible for keeping the process moving forward. It helps to keep the process fresh and can help to avoid frustration and conflict.
- Schedule regular (annual) meetings with advisors even if your plans haven't changed. There may be tax or legal changes that can impact your plan and situation.
- Completion dates are a form of accountability. Try to avoid unnecessarily criticizing someone who doesn't get something done when it was due. Try setting another date and getting a commitment that it will get done this time.
- Try to have only one person responsible for each task.



WHAT TO WATCH FOR:

- Watch for drift. Things not getting done when they were supposed to be done reduced transition's momentum, delays the entire process, and can cause frustration, conflict and/or discouragement among transition participants.
- If one individual does not follow through on their commitments, consider assigning the task to another transition participant and/or hiring external support.

Notes: