



FCC Knowledge Podcast – Episode: Season 3, Episode 3

PODCAST TRANSCRIPT

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N: From AgExpert, it's the FCC Knowledge Podcast, a show that features great conversations about the business of farming while guiding you down the pathway to transition.

KG: It's okay to laugh at ourselves because we're going to make mistakes and we're going to learn from mistakes, so let's not be afraid to laugh at ourselves. Let's make sure we take time to do our own things or do some things together.

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N: Hello, and welcome to Episode 3 of our nine-part series on farm transition. Today we're going to be talking all about setting values, visions and goals. This step in the transition process helps confirm that everyone is committed to transition. And it also helps identify the shared values and vision of your key stakeholders. The goal is to build a solid foundation together with all key players in the transition process. Today we are joined by FCC agriculture transition specialist, Patti Durand, and Director of Industry Relations at Ag-West Bio, Kent Gulash. Patti and Kent are going to have an in-depth discussion on these topics, and their combined years of experience and knowledge about farm transition will be invaluable in this discussion. Don't go anywhere. Lots of info on the way.

PD: Hello everyone. I'm Patti Durand and I'm a business advisor with FCC and I'm excited to be here with you today. I am really pleased today to be joined by Kent Gulash. Welcome, Kent.

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KG: Good afternoon.

PD: How's it going, friend?

KG: It's going well. How are you today?

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PD: I am so happy to be doing this with you. This is something that I know means a lot to both of us, so coming together is a big deal. Can you remind me how long you've worked in the agriculture industry?

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KG: Do I have to put it in years or can I just use decades? It's been four, so almost 40 years since I started working in the ag sector working with producers at a variety of levels. A lot of it was agronomic and it transitioned over time to a different relationship with many of them and one that has led me to bringing a focus towards this whole area of transition and succession planning.

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PD: It's a big deal. And I think between the two of us we have 65 combined years of working in the agriculture industry. So, if we can share some of the tidbits of what we've learned but also what we've just begun to understand, I think that will be a great day. Before I spend more time talking to Kent, I really want to set the scene and really think about why is setting values, vision and goals often a missing piece of planning for farms. As I sat with a mom and dad who were in their 50s, a few years ago, I was asking questions to explore each person's hopes and dreams for their future and for the transition of their farm. And I really like the visual of thinking about this view of the mountains where with the close-up mountain range, the details are more clear in the picture. But as you move further and further out, it gets a little foggy, it's not as clear. And planning for the future can be very much like that. When we were talking, the mom shared, she said, our son keeps confidently sharing that his future vision for the farm is that he wants to grow it to be the largest farm in Canada. She really wanted to be encouraging, but she wondered out loud, doesn't he want to have a family life? How will that impact our retirement? Would that really be successful? This is just one example of hundreds of farm families where future vision, expectations, and plans aren't lined up often because they're not verbalized. So, how do you get it lined up? When you think about this vision looking out into the mountain range, the key is to begin and to continue conversations, talking about it, sharing and asking questions, being curious. Kent is going to share some great questions that he uses to help people to unpack what their hopes are and where they're aiming, and you can use them too. Too often farm family members think they're aiming for the same goal when they actually haven't compared or discussed. Sometimes figuring out long-term plans and values and vision is tricky because different team members on your farm have different approaches. Does this sound familiar? So, this picture: the mom who is so meticulously focused on the tiny details right in front of her that there are some big issues getting missed. Or, perhaps the brother that is so busy with day-to-day operations, the longer term goals never get the needed time to plan. Or, what about the cousin, thinking about the new ventures five years down the road and implementing plans without consulting with the rest of the team? Or, maybe the dad so concerned with past mistakes that they fail to see the new opportunities and options right in front of them in the current market. This isn't labelling specific people, but rather saying that this actually does happen. So, Kent, this is our opportunity to just have a chat

with the two of us to share some of our learnings and understandings. From your experience, why would a farm family choose to spend time figuring out their shared values, vision, and goals?

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KG: I think it's one word, Patti. It's alignment. It's understanding where everyone is sitting from a standpoint of what they want versus what you want. Values ground you on that common way of being, how you're going to act with each other, how you're going to behave in situations of working together. But it creates a harmonious state with the family when there's connectedness on that. Vision is a very interesting one. It's a powerful word and it's kind of daunting at times. But if farm families can wrap themselves around that looking forward and getting pointed in the same direction, it makes it easier to move together. And then goals, goals are just magical things. They're not hard to do but they're hard to commit to. A lot of people have goals but they haven't taken those goals and put them in a referenceable place. I think we can spend some time talking about that today.

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N: The key word for today's episode is alignment. As Kent shares, getting on the same page with other stakeholders can create a harmonious state. It seems like an obvious idea, but actually getting there can be really difficult without some clear conversations and guidance. Thankfully, we have Patti and Kent here today to enlighten us on this path. So, why sit down and map out your visions, values and goals? What happens if you don't do this? Let's let Kent elaborate on this.

KG: Our day-to-day is what's in the foreground. It's what we can see that's mapped out pretty well in front of us, things we need to do as producers and as a farming family to get through this year. There's going to be moments when we're working on things that are counterproductive towards each other. We're going to be using a lot of energy up throughout the year and every day that's not going to be contributing to moving the operation forward.

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PD: You just said something I just want to hone in on in terms of not necessarily doing the things all in the same direction. They get kind of that friction. The outcome of spending some time on this can be saving relationships.

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KG: Oh, for sure.

PD: One thing that you commented on and I think it was really powerful. You described it as shifting the farm lens from "I" to "we."

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KG: In farm family coaching, that's a lot of what we talk about, is the key understanding of who is doing what. What are the roles, what are the responsibilities, and how do we connect as a family team? Connecting as a family team is a lot different than connecting as a family. But getting towards that piece, we use the words "pulling in the same direction" and "moving away from I". If we get alignment, if we get together on where we're going and what our vision is, how we're going to work together, what our values are, what we need to accomplish is our key milestones to move us towards the future. And we'll talk more about vision as we go ahead, but the vision always continues to move. It's not like we set that at one point in time and it becomes a journey of days, months and years, and we're there. It's going to revolve. It's going to reset itself in time. So, we need to keep coming back to it and keep moving those proverbial goal posts. But that "we" connectedness is a part of what comes out of that, and it's building a foundation for good common conversation about what we're doing, why we're doing it, how we're going to do it, and who is going to do what to move things ahead.

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N: Some reassuring words from Patti and Kent. Your vision for your farm doesn't have to stay static. It has to be revisited. And really, you should make a habit of coming to the table with the key players involved in your farm to make sure everyone is working towards the same things. Creating a shared vision isn't a perfect process, and sometimes in past planning, it may not have led to your desired outcomes. This is why finding a shared vision is a practice and must be revisited often. The results can be powerful if you put in the work and if you move from the "I" to the "we".

PD: Okay, so we've done the persuasion, Kent. We've convinced the people. They've shown up today. They said, okay, we're going to give this a try. We're going to begin this with values. Start us off. What are values?

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KG: I like to refer to values as the guiding principles that apply to your farm family business. When you come together, how are you going to act, how are you going to behave? And they become non-negotiables but also show a high level of respect towards each other. Understanding what's important to me from a value might be different than what's important to you. But taking the time as a family to bring them out, talk about them, not just define the values. Values are quite often defined in a single word or represented in a single word, but that single word can have a different definition for everybody. Once values are identified, creating definition around them and then to take them to make them real it's to identify what the behaviours are going to be. So, for any given value, there needs to be a set of behaviours that we're going to wrap ourselves around and agree that that's how we're going to be. It sets a higher level of presence with each other. It also helps to really define how you work through things when everything is going well but

how you work through situations when they're tougher as you understand each other at a deeper level.

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PD: Okay, Kent, that was water from a fire hose. That was a lot. It was really, really good, but we're going to break it back down again. So, the definition of values, I heard you say they're non-negotiable guiding principles.

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KG: Right.

PD: So, someone would have that as an individual and you can have those as a team as well?

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KG: Certainly. My personal values port across to everything that I do. An example is integrity for me. That's a value I hold very high. I have my own definition of integrity, but when I ground truth with behaviours, I talk about being truthful, I talk about being reliable, I talk about being authentic, and I talk about being accountable. That's what builds my value of integrity.

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PD: Excellent. So, then in turn what happens if a value is compromised, if you hit a nerve with someone and it happens to be one of their values?

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KG: If it's an agreement that's established within the team, within the farm family, it gives that point of going back, permissibly going back and saying, hey, remember when we talked about this and we talked about this as a way we're going to be and an important value to us. What's going on with you right now? What's happening right now that it feels like this isn't happening? Another value might be open communication. Suddenly I'm feeling as a member of this team there is stuff going on that I'm not aware of. What's happened to the communication?

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PD: So, it becomes a touchstone for that conflict resolution you referred to.

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KG: Conflict resolution, even forward planning, decision-making. And that's a different time and a different place. But these values really start to represent the things that we're going

to agree on, (inaudible) the proverbial cloth so to speak, and say, yeah, this is how we're going to be with each other, how we're going to act, and how we're going to show up when we work together in this farm family business.

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N: Again, just to keep it fresh in our heads, values are non-negotiable guiding principles that can be individual or held as a group. Kent puts a high value on integrity and in turn, that impacts how he behaves in everything he does. Our values inform the actions we take, and in many ways, they define our common ground with others. Values ultimately become the foundation we build from. Kent will elaborate on this now.

KG: It's really the foundation on which you're going to move to the next step of creating your vision and in turn developing your goals. If this piece isn't in place, it's like building a house without a good foundation. Eventually one corner is going to fall away. Eventually something is going to slip away. But if you can come back to these things, it's got utility in a whole bunch of situations. Whether it's one-on-one within the farm family, whether it's when you all get together as a group, it's not a bad thing to put up. It's not a bad thing to talk about with frequency. Because it's not like if you talk about it once, it's there. If you remind yourself towards them, they'll become a lot more relevant and a lot more real. You become a lot more grounded.

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PD: Okay, so you just said values as in 'them.' So, let's dig a little deeper into what values, because I think some of the words around it could be really helpful. So, what are some ways that you approach it in terms of when you're figuring out a farm family's values?

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KG: I like to approach this early. And particularly when I like to approach this is when we get to that stage of the family meeting, when we come together for the first time through transition planning. And this is a tool from farm family coaches that we use as a part of that meeting. Hand this out to everyone and have them take a look at these words. Put it up on the screen. Look at these words and then really reflect on them and say, what resonates with you. So, regardless of how many people there are in the room, the way I like to approach it is we probably can connect to every one of these words and say they mean something to me. Pick five. Pick four or five that really become your non-negotiables. Which of these words are you not going to give up on? Which of these words are so important to you in your day-to-day that you think they've got applicability in working together as a family. I did this very recently with a family that was in a very proactive state of transition planning, and the one word that came up created, it was two words, but it created a bond in that family, it energized the entire meeting, was "have fun." And it suddenly became safe, it became very safe for everyone to say, we can have fun and still run this business and grow this business. But by getting everyone to go through that and identify their words, they narrowed it down as a family to five words

that they could align on, that meant something, took it to that state of each of them creating their own definition. And then we defined some behaviours. It became a very rich exercise for them. Maybe 45 minutes total. But since then I've heard back from them. They've sent me their values map that they've created for themselves, that's up in the shop, it's on the wall. It's also in the house. They can pull it out of the drawer. They try to avoid now doing their meetings at that place of eating and they've put a table out in the shop instead. Have a different dynamic. But this is that reminder of, hey, how are we going to be when we're with each other?

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N: Kent has discussed that a family he was working with decided that having fun was an important value in their operation, and it became a shared value. They realized how important it was to make time for fun and to find the fun in their work. However, what does that look like in reality? What behaviours are reflected in that value? Let's listen to what Kent has to say about this.

KG: So, the one thing that one of the sons brought up is, it's okay to laugh at ourselves because we're going to make mistakes and we're going to learn from mistakes. So, let's not be afraid to laugh at ourselves. As we plan our weeks and months, let's make sure we take time to do our own things or do some things together. So, they walked away with a quarterly plan of their own family team activities they're going to do to get away to make sure they build fun in. But when it came to the day-to-day, I think the most important one is let's accept our mistakes, learn from them, and not be afraid to laugh them off.

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PD: That's a pretty good plan. It gives people some grace in the process too.

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KG: Yeah.

PD: How can someone drill down on what really is their most valued core values?

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KG: And that's probably a little bit of a bridge point opportunity to go between you as the individual, you as part of the farm family business, you as part of the team. So, if you're looking at some of these and saying, well, I like all of them, I want all of them, which ones are going to become more important now for the success of the farm family business? Which ones should we focus on and create definition? And everyone has got a bias. We all have a bias unconsciously to which one of these is most important. Maybe you can't do it in a one and done exercise. Maybe you have to look at this, put some thought into it and do your own rank sorting and come back and say, okay, I attach myself to 12 or 15 of these, but now I've gotten to the point of saying, these 4 or 5 are the

most important. And the reason I stick on that number, Patti, is that if you make this a list of 10 or 12 or 15 values, it's going to become really challenging to ground yourself to it. And some of the checks I use on that are to go search out some of the companies that you do business with, that you enjoy doing business with, go look at their websites and go and find their values. The majority of companies have their values and missions on there. Go see what their values are, see how they define them, and see how they're representing them. And it can give you a bit of guidance to how do we approach this, how do we do it.

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PD: You also mentioned in our previous conversations about if someone is really kind of stuck in narrowing it down, asking them, "what is something that brings you frustration or annoys you in the world?" Can you expand on that?

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KG: That's a good one. A lot of times that's linked to the people that we deal with day to day and the way we do business inside and outside the organization you're in. So, think of yourself as your own consumer. Think of those you deal with in business. What do you experience? Is it going into the parts counter and not being acknowledged? Is it phoning someone for information and being sloughed off? Is it not getting a response when you really need a response to something? What are the things that set you off, that frustrate you, that you could proactively look at and say, we don't want to be that way, I don't want to be seen that way, and I don't want to be experienced that way?

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PD: So, then, what behaviour do you want to be known for? So, if it's something that you are aware triggers you, typically the opposite or the positive side of that is the value that is kind of corresponding. Is that accurate to say?

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KG: Yeah.

PD: Okay. I think you've alluded to this, Kent. I'm just going to get you to just kind of maybe wrap this portion up by talking about this. So, the values are labelled, but then you said you want to define them amongst the family.

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KG: Absolutely. It's taking it to the next stage of getting to a common definition so to speak. So, if I say teamwork, Patti, what does teamwork mean to you? Or, if I take that around the table and I ask everyone, what does teamwork mean to you? What does responsibility mean to you? And a really nice way to approach this is not just start by

putting somebody on the stage and going around the table and saying, what does it mean to you in the moment. Take pen and paper in hand. The value of responsibility, what does it mean to you? Write out a definition. Come back, everybody shares their definition. Ideally, put it up on the whiteboard, put it up on a flip chart, put all of the definitions up and then look at them. Ruminates on them a little bit. Come to a definition that lands for everybody. And that gives common understanding, because there are differences. The same word has very different meanings to different people. So, it's going one level deeper, going one layer deeper. We like responsibility as a value. If we just leave it at that and there are 10 of us involved in the operation or 6, there are 6 different definitions.

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N: After the break, Patti and Kent will move on to discussing vision and goals. There's a lot of inspiring stuff to come. Stay put.

KG: A goal is a measurable outcome. It's something you write down that you could measure. It may have a numeric value attached to it or it may have a change attached to it, a qualitative value.

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N: Welcome back to the second half of today's episode. So far, Patti and Kent have spent a lot of time talking about values. They highlighted the importance of having regular discussions about your values and clearly defining them for yourself and for your operation. Values form the foundation for all actions that we take as individuals and as businesses. They can also help create cohesion and alignment between stakeholders. The transition process works best when all key players are aligned and proceeding from a common place. So, that brings us to our next word in the step of the transition process, vision. Let's rejoin Patti and Kent.

PD: Can you define vision for me?

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KG: It's really that image of the future. It's an aspirational image of where you see the operation going in the future. And it's multidimensional. It can be size, whether that's acres or the number of head of livestock is one factor. The other factor could also include location, change of location, what the main yard might look like over time. It should and it will also bring in who is going to be involved, how many people are going to be

involved. Visions generally are a five-year timeline. We know where we are today. Where do we want to be in five years? What does it look like? Some visions are very well represented by words. Some visions are very well represented by images. And I like to give people permission to take a blank slate. Actually, I prefer to use, take a blank sheet of plywood and think of that as your canvas. Draw your picture of your future state. What's it going to look like? And don't worry about being an artist. Scratch it. Scratch it out at whatever level as you can. But when you start putting some images and then attach some words to that, a vision is that shot in time for the future. It's where do we want to go. And then in behind that comes everything of how do we move from where we are now to then. But the most important part of visioning is getting everybody aligned to one picture and seeing one picture in the same way.

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PD: If you encounter a family, which I would imagine would happen, is that this person has this vision and they've painted this picture on the plywood. I really like that illustration. They're painting this picture and describing it to everybody and someone else has a completely different picture or it appears quite different. How might someone manage that? How would a farm family talk through that?

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KG: I'd call it a beautiful moment of revelation, because now we understand the difference in where they're at.

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PD: Those two mountain peaks.

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KG: Absolutely. And one person might say, you know what, I've been thinking this way, but your mountain looks a lot better than mine, and now I'm curious about it. Or, it could be the other way, where they could say, I really like your idea, what do you think of my idea? How can we bring those together? That's not bad if there are two people. If there are three or four or five and you're pointed at different peaks, that's going to become more challenging. So, you find points of common ground what that's going to look like, and use that as your starting point, and then you start figuring out what makes sense for all of us. What can we all buy into? What can we all support? And you work yourself through this slowly. Don't think that you have to just jump in and get to a vision in a matter of minutes or hours. It might take you a little bit of time, but use the resources that are out there. Let yourself go into this a little bit. It's some blue sky. And some of us are comfortable with blue sky and others aren't, because there is a little bit of, well, I can't predict the future, I'm not sure what it's going to look like. And that's okay.

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N: Visions are all about having an idea of where we want to be in the future. And as Kent suggests, they can generally be five-year timelines. Where are you now with your operation and where do you see the farm in five years? Sometimes that's not altogether clear for some people. So, as Kent identifies, defining your vision shouldn't be rushed. There also needs to be alignment here as well. Common values and a common vision are important if you want to make progress as a farm, especially during a farm transition where there can be many competing interests. However, just like with your values, your vision has to be revisited too. Let's hear Kent continue on with this topic.

KG: Large organizations have leaders. They focus on keeping people connected to the vision on a daily basis. They bring it up often. They make it part of the conversation often. So, the same thing with your farm operation. When you shape a vision, come back to it, talk about it, refine it, make it relevant, and make it what you want. There are a few farms right now that have launched their own websites and they're sharing their vision. They're defining their purpose. They're putting it out there. They're worth exploring. They're worth looking at. They may give you some thought. That's not your vision. Your vision has to come from in here. It has to be where you want to go. And if you're going to do that as a family, it has to be where you want to go as a family and serve everyone going forward.

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PD: Well, it's an opportunity. I really appreciate some of the questions you've shared with me before. So, if you're asking people, an individual or a farm family team member to share their vision, can you give an example or two or three questions that you would ask to help them to express that?

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KG: Patti, I'm pretty blessed because I've been able to do this with several dozen farm families and organizations over time. And I've got a little bit of a recipe that works. It helps people move forward. It starts off with, what's your purpose, why do you exist? So, that's coming back to why are you here today farming, raising crops, raising livestock, doing whatever you do? What's got you here today and why do you exist as that? Where are you heading and ultimately, what do you want to achieve? And it's okay to start reaching out there and putting those longer-range quantitative and qualitative goals in place. Five years out, we want to grow from X number of acres to Y. That could be doubling. That could be increasing by 50%. But putting a quantitative number on there helps to create that commonality of alignment for everybody. If we're going to move from 5,000 to 7,500, 10,000 to 15,000, what's that going to take then? What's in behind that? The final one is, what do you want to become, and is something you want to become greater than what you are today? Is it going to have a different feeling and meaning five years out? And five years is a microcosm of time. It's pretty short when we start thinking about where are we going to take the business in five years. It's okay to say, this is hard and this is taking a lot of energy to do, but it's so worthwhile.

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PD: Yeah, you know what? That's a big deal what you just said in terms of sometimes the answer is, I don't know, I don't know what I want, I don't know where I'm aiming.

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KG: M'hmm.

PD: If that ask comes and that it is clear that this is impacting everybody else and we really all want to go in the same direction, that's a call to action in itself. Only you can figure this out as an individual and then let's figure this out together as a team. Once that vision is more clear, it becomes kind of a filter of function. Every decision and choice can be tested. Does it line up with those values that we said were important, that we set as the top ones? Does it line up with that vision? And if not, why are we doing it? Does this task, this decision, actually line up with what we actually said was important and that we valued? Can you share an example of a family that used values and vision to benefit their family and their farm?

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KG: Yeah, I think in a lot of cases it's been what's allowed conversations to start to happen, by getting visions out. I've got one family I'm thinking of, by getting the visions on the table of all of the stakeholders. And I refer to it that way because there's the business aspect of the farm. But it was the parents trying to sort things out with the kids, with the children that were involved in the farm and not involved in the farm. And it wasn't until we got the conversation started about what each of their visions was that the parents could start to wrap their minds around where we were thinking of taking this is radically different than what their expectations are, what their visions are. So, it gave a moment to allow them to come, more than a moment. It gave them that pivotal strategic moment to be able to come together and have a conversation as a group in a very safe space, to be able to say, we have two out of five siblings that are currently involved in the farm and want to be involved in the farm. And now we've got a whole different paradigm towards the future of what the three non-farming siblings are thinking and how this farm can be successful going forward. What it can look like in five years and what we'll be doing as the parents. What our succession will be and the transition steps are going to be to that. Which involved them being able to work themselves out of the farm over time, look after their financial needs. And the interesting part was, pop the lid off of their bucket list of stuff that they've been piling up over time that they wanted to do and they didn't know if they'd be able to and they didn't know how they'd be able to. But by being able to put those pieces together, they were able to start doing some of the things on that list with comfort knowing that the farm was going to be able to move forward and they were going to have the support they needed.

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N: Kent has provided some really practical questions to ask when reflecting upon your vision for your farm. Questions like, why do you do what you do and what do you hope to achieve? These are genuine questions, but ultimately defining a vision is all about identifying your purpose. When you have a vision, you can then in turn analyze your operation and decide what tasks are important and what tasks actually go against your vision. It's really about efficiency then as well as purpose.

PD: So, we have these values and visions and we're going to talk a little bit about goals now and kind of the next step in working towards everybody pulling in that same direction. Can you first start off when we think about wanting to work towards that vision, define what you view as a goal? What's your definition, Kent?

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KG: A goal is a measurable outcome. It's something you write down that you could measure. It may have a numeric value attached to it, or it may have a change attached to it, a qualitative value. And goals will come and they're thrown in two buckets, quantitative, there's a number, qualitative, there's a measurable change in the organization in getting towards the future to what they want to do. That can be cultural. That can be operational. That can be organizational. So, cultural things could really relate to how we see ourselves growing the culture of this farm business going forward. How we're going to be seen by those that we interact with and do business with. That's a cultural goal and that can be a changing point for some farms, especially if they look in at some type of vertical integration. There could be lots of culture changes coming in the future. Operational goals, just how we're going to do things in the future, what changes we see from an equipment standpoint, from a processing standpoint, from processes we actually do on the farm could be another one that comes into play when it comes to those qualitative goals. They're a little fuzzier every time, but they're just as important as the number ones.

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PD: Absolutely. So, it's interesting. I think that of the three general topics – values, visions, goals – I think that goals are probably the most accessible thing for most people in their day-to-day life. Goal setting is a kind of lingo that most people would use at some level. And in fact, I think on farms there are lots of goals that are set. Here's our bushel target. Here's our return per acre target. Here is the goal that we have in terms of involving people. There are a number of things, but they're not necessarily spoken or documented anywhere. How do you push someone to more clearly define their goals and then connect it to their vision? What order does that happen in?

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KG: The goals support the milestones. Those goals need to be attached to if we want more acres this year, we're at this level, and next year we're at that level, how are we going to

do that? What's our growth target in acres from this year to next year? If we're redefining our productivity goals, whether we look at that from a financial productivity, whether we look at that from a bushel productivity or kilograms of milk if that's what's relevant to you. Then it's a matter of, okay, what exactly do we need to write down, and then we build a plan and we need that to support it. Goals need to be something that is specific that we can look at and build around. They need to have a time component to them. Goals aren't endless in time. Setting goals for the sake of setting goals but never achieving them, never putting together the work plan behind them to achieve them is going to dissuade us. It's going to make us not want to set goals. Why should I bother, because I never hit my goals anyway? But when we make them more real by writing them down, by visiting them on a regular basis, by bringing them up and watching how those goals move the metre so to speak, they become that barometer of success. Oh, look, we're moving towards our vision and we're doing that because we're achieving our goals. That's the connectedness. The value support, everything we're going to do when we work together, but the goals are the things that we're actually going to do that are going to move us.

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N: I'm sure many of you out there can relate to setting goals and getting frustrated when you don't complete them. A lot of us regularly make new goals at New Year's and quickly abandon them as our lives get busy. Kent encourages us to not get discouraged by unfinished goals. Instead, by writing things down and having specific goals with timelines, you can see your operation moving towards your vision in real time as you complete them. I imagine there's a certain amount of accountability in writing down goals and sharing them as a group as well. It's very practical advice for ourselves as individuals and for business owners.

PD: You talked and we've spoken about this in terms of short- and long-term goals. Can you tie that in? You talked about a five-year vision. Where do those goals fit in and by documenting them, how does that become such a powerful tool?

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KG: I worked with a client that when it came to their vision, their vision was to double their acres in five years. So, we talked about three years. In order to get to where you want to be at doubling your acres in five years, where do you want to be in three years? They put a number there. And then I said two years. And then I said one year. And as they took and mapped that from where they were today, they had steps. They had stage gates in those acre growths to go from where they are today to 2X in five years. Very simple ones. It sounds very easy. But as you get in underneath that now, that's where the planning comes in to get to the goal. What am I going to do to grow my acres by 25% this year, by another 25%, by 15, 15 and 10 to get me to that doubling? So, they actually broke it down over that time span of what percent in growth each year in order to get to double the acres. Then we started working inside that and putting the actual plan together to support getting to the goals as a group, as a family.

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PD: That group, that family, that's the key, right? It's like, oh my gosh, we all are in the loop. We all own this, know this, we're all aiming there. And again, that whole guesswork factor is removed. The other comparable I would say, the scenario that really comes to mind as you're describing that, is I think about talking to a successor and they want to be the lead decision-maker in five years. Okay, what do you need to do in the next five years to prepare for that? What actions do you need to take? What courses do you need to take? What questions do you need to ask? Laying out those things to become their goals in order to reach that vision, it allows us to have a focus, to get things done. And if we do that as a team, it is, like, exponentially powerful and way more fun.

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KG: And a really good opportunity where you get to with that conversation as well is you're talking about the individual, the successor. Don't forget the founder in that equation. Somebody has got this operation to the state it is today. They've got the intellectual property. They've got the story of what they did but they can play a really, really important role going forward as a mentor. And as we define roles and responsibilities going ahead in time, those founders can be very important if they want to play that role in helping that successor to move forward. And one of the roles could just be cheerleading. The other role could be teaching them the things they don't know or helping them in things that they're really good at. What I like to say is, a lot of those founders have superpowers. And you take and use those superpowers over time and in essence build your own talent capability in what the founder was great at.

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PD: So, speaking of encouragement, this is something that Kent and I have discussed extensively. We both feel really strongly. This is something that farm families have the abilities to do on their own. They can dig into this and use resources and ask the questions and use the tools. However, it's also understandable that they may be seeking and craving a third party, a coach or advisor that could help them through this. When you reach a crossroads and you're not certain what to do, you want to get more clear on your values, vision, and goals, but you're really perhaps feeling like you're stuck, it's very reasonable to reach out for coaching and support. And so, I guess, Kent, that is something that I know that you do. Do you want to comment on that? When you're invited to a table, what value are you bringing?

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KG: I'm bringing the value of curiosity, not the answers, curiosity from a standpoint of understanding their situation. Presence in that I will ask questions and let people share what they're thinking. Let them hear what they're thinking, because a lot of times this stuff stays bottled up. It's not talked about. So, by being present with them in doing that,

it lets them speak. I think the biggest thing we bring as a coach is we bring process. Help identify what you have got in place that's moving you into a transition state towards succession, and what do you have to get through next. What are those things that you've been putting off, what have you been putting off discussing, putting off doing, putting off getting involved in, because you may have tried it? You may have used some of the resources that you folks have available. And you hit that one, and, aww, this one feels hard, maybe a little hard, so I'm going to stop now. And you stop because it does feel hard. We play a big role of accountability when we work with clients. We help them to be accountable to themselves. We don't take the (inaudible). We don't do the work they need to do, because that works means something when you do it for yourself. But by having that presence, by moving at the right pace for you, everyone has got their pace, but as long as we can identify that and work with them, it helps them to move things forward. And they may get to a point in their time when they say, hey, we've got this again, but we'll keep in touch. But a lot of times because we create acceleration, they like that feeling.

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PD: So, I need to put a wrap on this. Kent, it has been an absolute pleasure. Thank you for all of your knowledge and wisdom and know that you can do this alone, but if it's something that you need help with, that is a possibility as well. Thank you.

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KG: Thanks, Patti.

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N: What a fantastic conversation. Thanks so much to Patti Durand and Kent Gulash for providing a wealth of insight around this step of the transition process. As always, there's a lot to unpack after today's episode. So, let's jog our memories and sum up what we talked about today. First off, your values are really the foundation that you build from and they are non-negotiable guiding principles. We all have individual values in our daily lives. But as an operation, it's important to work towards identifying your common values with key stakeholders. All the actions your business partakes in should flow from your common values. Defining your shared values is also a way to achieve alignment in your operation. Kent suggested coming up with a few words that resonated with everyone, words like integrity, honesty, and having fun are things that came up in the conversation. Secondly, we talked about having a vision. Simply put, this is where you see your farm in the future. Kent called it an aspirational image of where you see your operation progressing. It can be defined well by words and sometimes just by images. It can include a variety of things related to progressing your operation. Furthermore, it's something that Kent believes should be defined by a five-year timeline. That means your vision has to be revisited, and all key stakeholders should be involved in defining this vision. Lastly, we talked about goals. I think this is the most easily relatable piece. A goal is defined by Kent as a measurable outcome. It's something you write down and

know when it's complete. It can be quantitative and have a number attached to it, like perhaps you have a goal to farm a specific number of acres in a year. Goals can also be qualitative, things that are related to cultural, operational and organizational aspects of your farm. For example, maybe you have a cultural goal to change how you are branded as a farm. Whether your goals are quantitative or qualitative, your goals are the tangible actions you take that work towards your vision and they are informed by your values. As a whole, the common theme is that your values, vision and goals should be clearly defined and they need to involve all key stakeholders. A transition process requires alignment for it to be successful. Collaboration and communication are key here. And don't be rushed. The journey it will take you on is likely worth all the time you spend and will help ensure your farm's future success. Well, that brings us to the end of another episode. Thanks so much for checking us out. We hope you'll come back for Episode 4 of our 9-part series on farm transition. Next time, we're going to talk all about step 4 in the process, connecting with experts. Until then, dream, grow, thrive.

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