

Attachment D: Planning Checklist

Strategic Planning Checklist:

1. OWNERS' VALUE & DEFINITIONS:

What do you want from your investment (time, energy, money) in this business? i.e. why do you do this?

2. VISION

What will the enterprise look like future in 10 years; 50 years?

3. STRAW PLAN

Sketch it, kick it around, throw it in the air and see where it lands.

4. STRATEGIC PLAN CHECKLIST:

How do you get there? What will guide you?

5. SUCCESSION CHECKLIST

Who will control the company? Own? Manage? How will those decisions be made?

6. INVENTORY CHECKLIST:

What condition is the land? The vegetation? The infrastructure?

7. PROCEDURES & POLICY CHECKLIST:

How do you delegate? How do you communicate in the company?

8. NEW ECONOMY MEASURES:

What is coming that poses a risk? Opportunity? To what?

9. IDEA PROPOSAL POLICIES

How do you optimize contributions from talent? How do you capitalize new ideas?

10. AGRICULTURE BUSINESS SPECIFIC TOOLS:

How do you delegate? How do you get people to do what you want?

Agland's Land Business Planning Discussion Outline

Discussion topics steps in chronological order:

1. Owners' value (Attachment C)
2. Land vision (Attachment C)
3. Business vision (Attachment C)

Step 4. Straw Plan; Business Projection at 5 and 10 years:

- a. Revenue needs
- b. Marketing & sales
- c. Capital & stock flow
- d. Human Talent (HT) management and labor
- e. Risk
- f. Budget projections

Step 5. Strategic Plan in chronological order:

4. Business structure:
 - a. Ownership & business structure
 - b. Control
5. Marketing Plan
 - a. Customer profiles
 - b. Research
 - c. Feedback loops
 - d. Pricing
 - e. Advertising
 - f. Manufacturing
 - g. Distribution & merchandizing
6. Capital Plan
 - a. Operational capital
 - b. Investment capitalization
 - c. Owner compensation model
7. Strategic level HT organization; advisors, management and labor position needs:
 - a. Experience
 - b. Personality types
 - c. Metrics
 - d. Incentives and salary
 - e. Compensation strategy
8. Land Business Financial Goals & Metrics
 - a. Gross margin(s)
 - b. Profit

Attachment G: Agland's Land Business Planning Discussion Outline

9. Risk management:
 - a. Labor
 - b. Markets
 - c. Food safety
 - d. Regulatory
 - e. Catastrophic flood & drought
 - f. Epidemiological
10. More Risk Management: Succession:
 - a. Estate plans (owners)
 - b. Management why; successor qualifications
 - c. Management how; recruiting and training
 - d. Management when; timing triggers

Step 3. Conservation Plan (CP):

1. Prerequisites
 - a. Natural resource assessment (NRA)
 - i. baseline (quantify)
 - ii. analysis (qualify)
 - b. Agricultural infrastructure assessment baseline
 - c. Owner's value defined
2. CP Steps
 - a. Owners landscape vision (define success in the mind's eye)
 - b. Strategy and strategic goals
 - c. Agricultural infrastructure assessment analysis
 - d. Develop projects
 - e. Draft conservation polices and standard procedures

Step 4. Land Business Operational

1. HT Performance and evaluation
2. Financial and inventory policy (Operational Handbook chapter).
 - a. Bookkeeping and reporting system
 - b. GIS System. NOTE: this need not be computer based
 - c. Purchasing procedures
 - d. Capital investments in infrastructure
 - e. Capital investments in equipment and tools
3. Outreach procedures
4. Land and production practice; operational policies and SOP document (Operational Handbook chapter).
 - a. Road and other infrastructure maintenance procedure, reporting and prioritizing

Attachment G: Agland's Land Business Planning Discussion Outline

- b. Equipment maintenance procedure, reporting and prioritizing
 - c. Grazing or cropping practices
 - d. Harvesting
 - e. Reforestation
 - f. Guest procedures
5. Conservation, rehabilitation, and restoration projects; these should all be planned together. The plan must be map based and incorporate the strategic plan, and be reviewable by the controller, managers, and advisors.
6. Assessment metrics and charting.