

CHAPTER 5

Phase 3 – Plan Implementation

Congratulations! You've successfully worked your way through the transition planning process. You had different planning approach options to choose from when you started. How long it's taken you to get this far will depend on which planning approach you chose.

The work ahead of you now involves implementing what's included in your plan. Most families will have already started with some of the implementation. Changes and opportunities come along that often require decisions that have transition implications. However, there can be situations where decisions were made prior to the plan being fully developed. This can create challenges. Adjustments to your plan will have to be made if you find yourselves dealing with this reality.

In any event, during the planning process, you will have recorded several outstanding tasks in your specific plan approach template. **These tasks are your plan. Acting on these tasks is the implementation.**

Plan implementation is specific to each family, their circumstances and their wishes. Timelines can vary from farm to farm. Farm families should develop specific implementation plans to meet their needs. The implementation plans should build on the exercises and topics they worked through to build their plan.

Why is this relevant?

Working through each of these tasks is key to a successful implementation. The devil is in the detail. Attention to each task is important.

How will this aid in transition planning?

- **Careful planning and attention to implementation significantly increases the likelihood of a successful transition.**
- Following the action plans:
 - Helps to keep the process moving forward.
 - Requires that information be shared which in turn increases communication.
 - Increased communication helps to minimize the potential for conflict.

Instructions:

1. Determine who is going to be responsible for monitoring each task to make sure they are completed.
2. Review the task list to make sure that people are okay with their responsibilities.
 - a. Reassign responsibilities where needed.
3. IMPORTANT
 - a. If some of these tasks require more detail than is provided in the specific plan approach template, use the Critical Issue Action Plan template.
4. Agree on how information is going to be communicated. Options include:
 - a. Information distributed as it arrives.
 - b. Information distributed on a set schedule. For example, once a month.
 - i. This option might be preferred as it can help to maintain individual's focus.
 - c. Scheduled meetings.
 - i. Meetings can complement regular information distribution.
 - ii. If you choose to have meetings, follow the meeting protocols that you learned in the planning process.
5. Keep advisors informed with changes, as required.
6. Store documents for future reference.



PLANNING POINTERS:

- 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 on 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 causes delays.
- If one particular family member is not following through on their commitment, consider assigning the task to a different family member.