Train-the-Trainer Seminar for Consulting Professionals

History and 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. Our goal is to empower clients to become professionally managed farm family businesses. In 2005 Wittman Consulting began offering formal programs for training, coaching and mentoring professionals who want to establish or fine tune their consulting practices. Successful family business consultants and advisors have several ingredients: clearly defined technical abilities; proven experience; a passion for advancing excellence in agricultural family business sustainability; and a clearly defined and transparent process for delivery consulting services.

A key focus in my career has been creating a tangible and transparent ***consulting process*** where it is clear what the end product 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 format and content of the Wittman Consulting 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
- 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 client team

  - TRLC Case Study – Logistics for using this case study as a teaching tool
  - Using guidebook templates to build policy & SOPs 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

- This presentation raised my awareness of many things I had not previously considered…it will come to mind as I interact with clients in the future.

- I used the essence of the training session discussions with a client couple the day after the workshop. All my family business clients will be approached about their needs to consider these concepts.

- 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.

- Most valuable outcome from the workshop was seeing real life examples of how clients benefit from this tool, as well as how they are used proactively…this experience has already affected how I will approach client service delivery for farm and non-farm clients in the future. The immediate impact is how I consider and think through the services we offer current and prospective clients.

- It made me more aware of the specific questions I could ask to determine where I can better serve my clients.

- It rocked my world and helped me see that I am not as good as I thought at client service. I will be using some of the tools we discussed on every client and will be trying to pursue situations where review of the entire family business process needs to be undertaken. I particularly valued the interaction with Dick and his real-life stories.

- 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.

- The client seminar (taught in conjunction with the Train-the-Trainer Class) should be a required course for any family business that plans to have close family members return and join the business. Colleges are not preparing families to answer these questions. I had a wreck with a son and daughter-in-law because we didn’t identify and follow-through on critical family business discussions before joining forces.

How this course will affect participant’s approach to advising clients?

- 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

- Game changing. Opened my eyes to an ocean of opportunities
- Will help me to better coach clients on the design of business management and governance structure
- Gave me more tools for a broader discussion with clients to cover all aspects of succession planning
- More clarity on up-front information preparation, analysis and step by step approach
- Good discussion on how to structure and communicate pricing strategy

Most Value

- Going through how to more effectively communicate with prospects about conducting an engagement
- Tools, resources and process; the templates are awesome – thanks for inventing the wheel
- Importance of clearly defined structure and systemization of the process
- Hearing examples of how these tools have resolved real client conflicts & advanced professionalism
- Meeting other people with similar desires to help the farming community
- Networking and mentoring of peer groups. Strategies to implement succession initiatives
- Better understanding of succession planning process that I can compare to what we do now