

## Session 1: The Advisor's Role in Strategic Planning & Importance of Strategic Orientation (09:30–10:45)

### Objective

Establish why strategic planning is important for agroforestry businesses and clarify how an extension advisor can effectively support clients in strategic issues. By the end of this session, participants should be able to explain the benefits of having a clear strategy for a business and identify keyways an advisor adds value in the strategic planning process (facilitator, sounding board, information source, etc.).



### Activity- Mini-Presentation (20 min)

Using slides, introduce the concept of strategic planning and “strategic orientation.” Define what a *vision* and *strategy* are in simple terms (vision = “where we want to go long-term”; strategy = “how we get there”). Present 2–3 key reasons why having a strategy is critical for businesses. For example: it helps in *proactively managing change* (rather than just reacting), in aligning decisions with long-term goals, and in making the enterprise more resilient to shocks. Cite a compelling statistic or statement: *Preparing a strategic plan helps businesses objectively assess opportunities, trends, and developments in their environment*, leading to better-informed decisions. Also, highlight how strategic planning unites the team: *when the whole team shares the same goals, it is easier to coordinate efforts and measure success*. Use an agroforestry-specific angle: for example- “*Why does a silvopasture farm need a strategy?*” – perhaps to integrate tree planting with livestock phases over years, or to secure grants by showing a clear plan.

- **Interactive Discussion Prompt:** Ask participants: “*In your experience, do most farmers or rural businesses you know have a written strategy or clear long-term plan? Why or why not?*” This opens discussion on real-world attitudes. Some might say farmers often plan season by season; others might mention coops or innovative farmers who do strategic planning. Use 2–3 responses to illustrate common barriers (lack of time, knowledge) and benefits (direction, funding access).



### Advisor's Role (20 min):

Transition to how an advisor fits into this picture. Explain that advising on strategic issues is different from advising on, say, crop management. Here the advisor acts more as a **facilitator and coach**: guiding the process, asking the right questions, providing tools, and connecting to information, but *the business owner must own the strategy*. On a slide, list key roles an advisor can play in strategic support:

- *Analyst*: help analyse the situation (bring in data on trends, market info, financial analysis tools).
- *Facilitator*: run strategy meetings or vision workshops with the client's team, ensure everyone's voice is heard, and foster consensus on goals.
- *Challenger*: politely question assumptions (“*What if...?*”) to expand the farm client's thinking or consider new angles (e.g., suggest looking at climate forecasts, new market opportunities).
- *Resource Connector*: link the business to resources (like market research, innovation funding, or networks such as the **Agroforestry Business Model Innovation Network (AF4EU)**) that can inform their strategy.
- *Supporter*: motivate and encourage the client to think long-term, and later, to stick with the plan implementation.

**Tip for Success:** Emphasize *what the advisor should NOT do* – take over the decision-making or impose their own vision. It is about empowering, not dictating. A good phrase: “**We are process guides, not bosses.**” Clients are more committed to a strategy *they* develop; our job is to make that process effective. Share a quick anecdote if

possible: for example, an advisor who wrote a strategic plan for a farmer that ended up unused because the farmer did not feel ownership.

### **Group Activity – Strategic Advisor Mindmap (15 min):**

Split into small groups of 3–4. Give each group a flipchart sheet. Ask them to draw a quick mindmap or list: “*What knowledge, skills, and qualities does an advisor need to effectively support strategic planning?*” Have them think of as many as possible (e.g., knowledge of business planning, facilitation skills, patience, understanding of agroforestry systems, networking contacts, etc.). After 10 minutes, each group shares one or two top points. The trainer collects these and highlights any that were missed, reinforcing a holistic view of the advisor’s role. Likely points: **Communication skills** will arise (leading into Day 2 topics), **analytical ability, knowledge of tools** (like SWOT, business plans), **trustworthiness/confidentiality**, etc. Tie this back to how strategic advising often means wearing many hats. To ground the discussion, present a real-world inspired story.

### **Example – Helping a Farm Develop a Vision (Spain)**

In Andalusia, Spain, a small organic farm was struggling with no clear direction – each year they changed crops and marketing channels, chasing short-term income. An extension advisor intervened to support strategic planning. In a farm workshop, the advisor guided the family to articulate a vision: “*to become the region’s leading example of regenerative agroforestry, integrating olive orchards, livestock, and ecotourism.*” This inspiring vision was tied to their values and local opportunities. The advisor then helped them set three strategic targets for the next 5 years:

- (1) **Agro-tourism development** – build a farm stay cabin and educational trail by year 3;
- (2) **Value-add olive products** – start producing olive leaf tea and olive oil soap;
- (3) **Training & networking** – host annual field days for other farmers to share knowledge.

With a clear vision and targets, the farm owners felt energized and focused. Over the next year, they stopped pursuing random side ventures and concentrated on these targets. The results: they secured a rural development grant for agro-tourism and formed a local farmer network on regenerative practices.

#### **Key takeaway**

The advisor did not *tell* them what to do, but by facilitating a vision session and providing planning tools, helped the farmers define their own strategic direction.

–*Interactive Q&A:* After the story, ask participants what stood out. For instance: “*What did the advisor do to help the clients create a vision?*” and “*Why do you think having those specific targets helped the farm?*” This reinforces the role and importance of vision.

**Methods Used:** Interactive lecture (with slides), group discussion, brainstorming in small groups, and a case study discussion. **Interactive element:** high – participants share experiences and create a mindmap in groups.

**Session 1 Wrap-up (5 min):** Summarize that strategic orientation is crucial for long-term success and that advisors are catalysts for strategic thinking. Transition to Session 2: “*Next, we’ll practice how to actually develop that vision and strategic targets with a client – one of the first steps an advisor would facilitate.*”