

Session 6: Action Planning – From Strategy to Implementation (11:00–12:30)

Objective

Provide advisors with frameworks and tools to help clients transform strategic objectives into an actionable plan. Participants will learn how to create implementation plans that specify *who does what and when*, and how to ensure resources are allocated. By the end, they should be able to guide a client in developing an action plan (for example: a timeline or Gantt chart, task list) for at least one strategic initiative, and understand how to set up checkpoints to keep things on track.



Presentation: From Goals to Actions (10 min)

Connect the dots: We have a vision and strategic targets (from Day 1), we analysed and communicated. Now, *implementation planning* is about breaking down each strategic target or initiative into tasks. Introduce the concept of an **Action Plan** – typically includes *activities, timeline, responsibilities, and required resources*. Show an example format on a slide or flipchart:

- Goal/Initiative: “Establish 5 ha of silvopasture by 2026.”
- Activities: “Design field layout (by Aug 2025)”, “Source tree saplings (Sept 2025)”, “Prepare land (Oct 2025)”, “Plant trees (Nov 2025)”, “Install fencing (Dec 2025)”, “Train staff on tree care (Early 2026)”.
- For each activity: who is responsible (assign owner), when (deadline or duration), and what resources needed (budget, tools, help from extension, etc.).
- Possibly show a Gantt chart snippet illustrating these tasks over a timeline for visual effect.

Emphasize that an advisor can facilitate this breakdown by asking guiding questions: “*What steps are needed? In what order? Who will do each? How long and how much might it cost?*” This detail is crucial to move from idea to execution.



Presentation, Tool Highlight – Gantt Chart & Work Plan (5 min)

Briefly explain tools like Gantt charts (timeline charts) or even simple calendars to schedule actions. While not every farmer will want a formal Gantt chart, the advisor can use simplified versions. For small operations, even a whiteboard with tasks by month can serve. The key is scheduling and assigning responsibility. Mention creating a *budget* for the strategic plan if relevant (some actions require investment – planning those finances is part of implementation readiness).



Activity – Action Planning Practice (30 min)

Return to the case from earlier (Sunrise Farm or another example everyone knows by now). Say one of their strategic targets was “*Develop a new agroforestry product line within 2 years*” (for example: mushroom cultivation under trees). Each group (4–5 people) will create a mini action plan for this. Provide a handout template or flipchart with columns: Activity, Person Responsible, Timeline, Resources.

Groups have to come up with at least 5 key activities to make that happen (such as research mushroom market, training on mushroom growing, procure spawn, trial on small scale, marketing plan, etc.), assign roles (maybe roles like farmer, spouse, hired help, advisor), and a rough timeline. After 20 minutes, have each group quickly report one interesting activity they listed and any challenges they foresee scheduling it.

Debrief: Acknowledge that coming up with tasks is usually straightforward, but estimating time and assigning roles can be tricky – especially if the client is already busy. That is where prioritization and maybe phasing comes

in (advisors can help decide what can be done this year vs next). Discuss resource constraints: did anyone include “Budget X amount” as an activity? It might be necessary to plan financing.

Tip for Success: Encourage groups to think of at least one *monitoring* activity in their plan (like “*review progress after first season*” or “*check tree survival rate next year and adjust plan*”), anticipating the next session on monitoring. If no group mentions it, bring it up in debrief.

Group Discussion - Overcoming Implementation Barriers (10 min)

Lead an open discussion on common reasons strategic plans fail in implementation and how to overcome them. Possible points (obtain from participants and add):

- People get busy and revert to “*business as usual*” – to counter, integrate plan tasks into regular farm schedule and set check-ins (advisor can schedule follow-up visits).
- Lack of skills for new tasks – plan training as part of the strategy (for example: if introducing a new crop, include an activity “*attend workshop on X*”).
- Financial shortfall – maybe the plan assumed funding that did not come; have contingency actions or scale down rather than drop the goal entirely.
- Changing conditions – drought, market crash, etc. – build flexibility (“*If not able to plant in spring, do in fall*”; or maintain a cash reserve).
- Loss of motivation – celebrate small wins to keep morale, keep the vision visible (literally put a picture of the future state on the wall), advisors can act as accountability partners with periodic encouragement calls or visits.

As each barrier is mentioned, ask if anyone has seen that happen, and what was done. This grounds advice in real experience. Provide a concise example where good implementation planning can make a difference.

Case Example - Step-by-Step Execution (Belgium)

A Belgian agroforestry initiative aimed to transition a conventional farm to an agroforestry demonstration site within 3 years. The advisor helped the farmer create a detailed implementation plan, including a timeline for each field to be converted, training apprentices to help (addressing labour needs), and quarterly progress meetings with the local advisory service.

Because of this clear plan, the farmer knew exactly what needed doing each season and could prepare in advance (e.g., ordering trees a season early, scheduling machinery). When minor setbacks occurred (one tree supplier delay), they adjusted the timeline easily because everything was laid out. By year 3, they had achieved 90% of their milestones and opened the demo site on time. In contrast, a neighbouring farm tried a similar transition without a formal plan and faced delays and confusion, ultimately taking two extra years.

Key Takeaway:

The structured plan (and advisor’s regular check-ins) kept the project on schedule. It shows how “*planning the work and working the plan*” with an advisor’s support leads to timely results.

Group Discussion - Action Plan Gallery (10 min, if time allows)

If possible, tape the groups’ flipchart action plans on the wall as a “gallery”. Let everyone walk around briefly to see each other’s work during a short break or moving period. This can spark additional ideas as they compare approaches. You can highlight a neat idea from one group (“*Look, they even planned a farm open-day event as part of implementation to engage community – that’s a great idea!*”).



Methods Used: Short presentation, hands-on group planning exercise, guided discussion, and sharing of examples. **Interactive element:** high – they actively create an action plan and discuss barriers.

Session 6 Wrap-up

Summarize that an advisor's job is to make sure the great ideas actually happen on the ground. With solid action planning, the strategy becomes tangible. Encourage participants to use templates provided (like the action plan worksheet) with their clients. Now lead into the next session: *"We've got the plan and started implementation – how do we ensure it stays on track and adapt as needed? That's our next focus: monitoring and controlling the strategy."*