

## Session 7: Execution and Monitoring (Strategic Controlling) (13:30–15:00)

### Objective

Introduce the concept of strategic monitoring and controlling – in other words, tracking progress and making adjustments during execution. Advisors will learn how to set up simple monitoring systems (KPIs, periodic reviews) for strategic plans and how to facilitate adaptive management. By the end, participants should be able to help a client define a few key performance indicators for their strategy, run a strategy review meeting, and understand the cycle of revisiting and updating the strategic plan.



### Presentation - Definition and Rationale (5 min):

Explain that *strategic controlling* does not mean “controlling people,” but controlling in the sense of monitoring and steering. It is about checking: Are we doing what we said? Is it producing results? Do we need to change anything? Use a metaphor: It is like navigation – you set a course (strategy), but on the journey you check the compass/GPS and weather, and sometimes correct course. Without monitoring, a strategy can drift off target or become outdated.

### Setting KPIs (Key Performance Indicators) (10 min)

Introduce the idea of metrics for strategy. These are measurable signs of progress or success, linked to the goals. For example, if a goal was increase income by 20%, a KPI is annual farm profit or revenue growth rate. If goal was plant 5,000 trees, KPI is number of trees planted per quarter. Not every goal is purely numeric (“*improve soil health*”), but then find proxies (soil organic matter % or earthworm count). Advisors can help identify and track KPIs. Show 1-2 examples on slides:

- Strategic Goal -> KPI -> Target Value -> Actual (to date).
- For example: “*Shade trees on pasture -> % of paddocks with shade structures -> target 100% by 2025 -> currently 60%*”. Emphasize keeping the number of KPIs manageable (maybe 5 or so for a small business) and aligning them with what actually matters to success. These indicators should be reviewed regularly.



### Activity – Pick the KPI (15 min)

In pairs, have participants look at a strategic goal from earlier exercises and come up with one possible KPI to measure it, from Green Acres coop’s targets or Sunrise Farm’s plan, for instance.

Goal: “Increase biodiversity on farm” -> KPI could be “bird species count on farm” or “insect pollinator index.” Have a few pairs share their KPI ideas. Discuss: is the KPI easily measurable? (If not, refine it). This trains them to think in terms of measurable outcomes.



### Presentation - Monitoring Schedule & Methods (10 min)

Advise on how often to monitor. Many small businesses might do a formal review annually, but advisors can suggest quarterly check-ins for key actions, or even simple monthly progress notes. Tools: Could be as informal as a journal or Excel sheet, or as structured as project management software for larger projects. The advisor might set up quarterly meetings with the client to review the action plan status (what is done, what work is falling behind), look at KPI data, and discuss any changes needed. This is a chance to celebrate progress or identify bottlenecks. Encourage involving team members in these reviews if possible (to maintain buy-in and transparency).



Mention that monitoring also ties back to communication: sharing progress with stakeholders keeps them engaged (for example: a co-operative board gets a quarterly strategy update). It ties back to motivation – seeing progress builds momentum, and seeing shortfalls early allows problem-solving rather than blame later.

### Adaptive Management (10 min)

Explain that strategies are not set in stone; they may need adjusting as conditions change or if assumptions were off. Advisors should cultivate with clients a mindset that *changing the plan is okay if done thoughtfully*. Provide a short example: Suppose a farm's strategy included planting a new crop, but after a trial, results are poor or market prices crashed – rather than stubbornly continuing, a strategic pivot might be to try a different crop or approach. The vision can remain, but paths to it may change. This is not failure; this is learning. Advisors can facilitate a mid-course correction meeting. Perhaps introduce a simple structure for such reflection: What's working? What's not? What have we learned? What needs to change in the plan?

### Group Discussion – Advisor's Role in Execution (10 min):

Ask, “*How involved should an advisor be during execution? Where's the line?*” Some participants might worry about doing too much versus leaving client to it. Discuss that the advisor is *not* there to do all the work, but to be a coach on the side: check in, offer advice if new problems arise, connect to resources if needed (e.g., “*you need a marketing expert now, I can help find one*”), and hold the client accountable in a supportive way (“*you said you'd finish X by June, how is that progressing?*”). Sometimes advisors can organize peer exchanges, bringing farm clients together to share how their strategies are going, which can spark solutions and encouragement.

Mention if available: some advisors use formal agreements or MOU with clients for a strategic planning service, which includes follow-up meetings. But even informal, it's good to set expectations: “*I will visit quarterly to see how things are progressing, and I'm available by phone if issues come up.*” Provide a short story of the benefits of strategy adaptation.

### Case Example – Mid-course Correction (Germany)

A German agroforestry enterprise set out a 5-year strategy to transition from conventional to organic and add agroforestry. Midway, they hit a snag: after converting 50% of land to organic, a new pest (brown marmorated stink bug) started affecting their tree fruits, causing losses. The original plan had not accounted for this pest (a new threat).

In a yearly strategy review meeting with their advisor, they decided to adjust course: they slowed down the remaining conversion (to focus on pest control research) and applied for a new government integrated pest management program (opportunity) that became available. They also changed one strategic target (instead of expanding fruit production as originally planned, they diversified with some timber trees less susceptible to pests).

These changes were documented in an updated strategy document. The following year, with better pest control and diversified crops, they were back on track, albeit with a modified strategy. If they had rigidly stuck to the old plan, they might have gone bankrupt; adaptation saved the business.

#### Key Takeaway:

Regular monitoring and willingness to adapt are keys to long-term strategic success; advisors help in recognizing when and how to pivot.

### Final Thoughts on Monitoring (5 min)

Summarize key points: choose a few meaningful indicators, set a regular review schedule, celebrate wins, and be ready to adjust. Use another metaphor or analogy: “*Strategic planning is a marathon, not a sprint – and you need mile markers and water stations (KPIs and check-ins) along the way to finish strong.*” Encourage advisors to build



follow-up into their service – it might even be an opportunity for ongoing engagement (and possibly new business for them as consultants).

**Methods Used:** Short presentations, Q&A, pair exercise on KPIs, discussion. **Interactive element:** moderate – less hands-on than earlier sessions but still engaging through questions and sharing experiences.

### Session 7 Wrap-up

“We’ve now covered the full cycle: vision to implementation to monitoring and adjustment. In our final session, we are going to tie it all together in a capstone exercise where you get to be the advisor and develop a mini strategic plan, applying everything from the two days. This will solidify your learning by practice.”