

## Session 8: Capstone Exercise – Strategic Plan Integration & Presentations (15:15–16:15)

### Objective

Allow participants to integrate and apply the concepts and tools from the entire training in a realistic scenario. In groups, they will simulate working with a client to produce a strategic plan outline (vision, analysis highlights, key strategies, implementation steps) and present their recommendations. This consolidates learning and builds confidence in using the toolkit in real life. By the end, participants will have a concrete example of a strategic planning process they have developed collaboratively, and they will have received feedback on it.



### Activity – Group Strategic Planning Simulation (30 min)

Form new groups of about 4 (mix participants so they get to work with different people than earlier if possible). Present a **comprehensive case scenario** that includes rich details. For example: **“EuroAgro Forestry Ltd.”** – a mid-sized diversified farm business in a non-specific EU country. Provide a handout or slide with: background of the business (crops and livestock, current agroforestry practices or lack thereof), the people involved, some financial info, external environment notes (e.g. local market info, climate, community relations), and a stated problem or opportunity (e.g., they are considering a big change like transitioning to agroforestry or expanding processing, and need a strategy).

- For instance: EuroAgro Forestry Ltd is in France, run by two brothers; they grow cereals and raise poultry, with some hedgerows. They are interested in silvoarable systems and value-added products. Challenges: grain prices fluctuating, farm succession unclear, community pressure for more eco-friendly farming, etc. They have contacted an advisor to help make a 5-year strategy that ensures profitability and environmental sustainability.

**Task:** Each group is the advisory team. In **30 minutes**, outline a strategic plan for this business. Specifically, they should produce:

1. **Vision statement** for the business (long-term goal/mission).
2. 2–3 **Strategic objectives/targets** (SMART) for the next 3–5 years.
3. A brief **SWOT analysis** (at least one point per quadrant) or identification of key Strengths, Opportunities, etc. that justify their strategy.
4. 2–3 **Strategic initiatives** or actions they recommend (the main components of the strategy to reach the objectives). These should link to the SWOT (e.g., use a strength to capitalize on an opportunity, or mitigate a weakness/threat).
5. At least 2 **risk factors** to watch and ideas to mitigate them.
6. 1–2 sentences on **how they would communicate** this strategy to the farm’s stakeholders (such as *“We will hold a family meeting and create a simple one-page summary to share with the co-op”*).
7. 2–3 key **implementation steps** with who/when (does not need full plan due to time, just major next steps).

They can use flipchart or large paper to write these points in a structured way (like a mini strategic plan on one page). Emphasize to focus on applying concepts, not writing an essay. The format can be bullet points. It is acceptable if some parts are hypothetical – it is about the thought process.

### Presentation (15 min)

Each group gets about 3 minutes to present their strategic plan highlights to the room as if they are pitching their advisory recommendations to the farm owners (and perhaps other stakeholders). Encourage creativity in



presentation – even role-play as consultants if they wish. They should cover the 6 items above succinctly. The trainer (and group) acts as the farm/client listening. After each presentation, allow 2 minutes for the “audience” to ask one question or give one positive comment. As a trainer, ask a question if needed like, “*How did your SWOT inform the initiative on agro-tourism?*” to prompt them to explain their reasoning, which reinforces learning.

### **Feedback & Synthesis (10 min)**

After all presentations, congratulate them – they practically drafted a strategic plan in a short time! Highlight common themes or particularly good ideas each group had. For instance, Group A had a strong vision, Group B identified a critical threat and addressed it well, Group C’s initiatives were very innovative, etc. This reinforces key points by example. Point out the diversity of strategies – there is no single right answer, but they all practiced a structured approach.

Link back to learning objectives: “*You’ve just demonstrated you can guide vision, do SWOT, plan actions, consider risk, and think about communication. That’s exactly what we aimed for!*” This helps them see their progress in concrete output.

**Case Wrap-up:** If this were a real client, the advisor would now refine this plan with the client’s input and then support implementation as we discussed.

**Methods Used:** Team project, presentation, peer feedback. **Interactive element:** very high – culmination of all participation.

**Tip For Success:** Ensure the atmosphere is supportive, not overly critical. The point is to practice integration. Any major gap (like if a group forgot to mention any threats) can be noted as something to remember. However, focus on positive reinforcement.