

FARM VIABILITY COHORT

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FARM VIABILITY TRAINING

MODULE 4

SWOT ANALYSIS
AND STRATEGIC
PLANNING

Presented by



PROVIDED BY



KTC TOOLBOX: SWOT AGENDA

- Introduction to Strategic Planning
- SWOT Analysis
- Goal Setting
- Action Plans
- Progress Tracking



WHAT IS STRATEGIC PLANNING

Strategic planning your business's process for defining direction and setting goals, creating a focus for planning for the year.

This process informs decision making to prioritize time, money, and use of resources to achieve goals.



WHAT ARE THE STEPS IN STRATEGIC PLANNING

1. Reality check
2. SWOT Analysis
3. Goal Setting and Strategic Objectives
4. Action steps and accountability
5. Review and revise on a regular basis



REALITY CHECK

What is this business good at doing?

What are we spending most of our time doing?

Are we profitable?

How do we generate profits?

How are we doing with capacity for production and staff?

Do we have the equipment we need to expand?

What's our competition doing?





***"Passion is vital, but you got
to have a strategy."***

-Barack Obama



THE SWOT ANALYSIS

A detailed look at how
you operate and how
external factors impact
your business

SWOT is an acronym for strengths, weaknesses, opportunities and threats and a structured planning framework for evaluating a business's internal strengths and weaknesses and the external opportunities and threats.

This is an effective tool for clarifying your direction, identifying where you need help, minimizing weaknesses, and knowing how you can capitalize on your strengths.





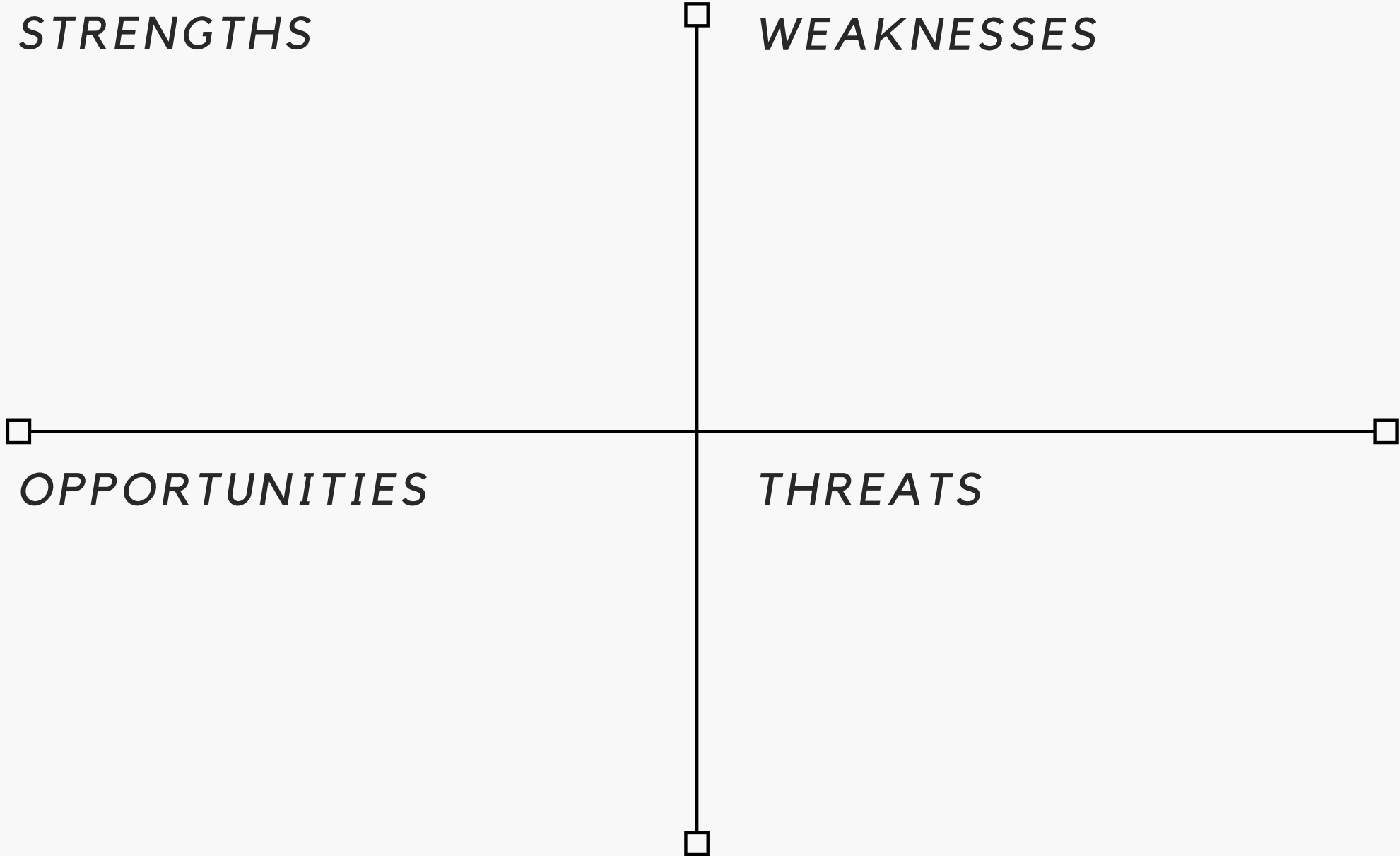
THE SWOT

STRENGTHS

WEAKNESSES

OPPORTUNITIES

THREATS





You don't know what you don't know

No matter what the scale, discovering the gaps in your business and overcoming them, through learning, repetition, and collaboration with others, is essential for innovation and success. Uncovering a flaw is a first step to a solution.



HOW TO SWOT

Who, When, How

Set a 2 hour window with no distractions.
Can be done annually, or when evaluating
a major change.

- Owner
- Husband/wife of owner
- Management team
- Trusted collaborator
 - A long time customer
 - A board member
 - An accountability partner
 - A peer who knows your business really well

Doing this alone is not ideal. You need to get out of your own head and patterns. Using a moderator can be so helpful!



GOALS + ACTIONS

How do you determine
the most important
goals and get invested
in taking action?

Determine priority goals
based on your SWOT...

Questions to ask:

- What skills/strengths can be leveraged?
- What weaknesses need more attention?
- Are you addressing the threats?
- What are your steps for harnessing an opportunity?

Goal Setting: Focus on 6 month to 1 year
priorities that move the needle.

Longer term? What's the first year
milestone?



GOAL TO ACTIONS

- Break your goals down into specific tasks that need to happen to get you there.
- Decide: When will I do this by and hold myself accountable?
- Slice your year down into 3 month segments with achievable short term goals.
- This will keep you motivated to your larger goals as you see progress!



GOALS + ACTIONS

Rituals support
your goals.

Actions in
sequence make a
ritual.

Schedule a ritual for each goal

Example:

Goal - Generate 8 leads to secure
2 buyers in 3 months.

Ritual - Thursdays at 7:30am, do 1
hour of marketing tasks followed by
30 minutes of outreach to buyers.

Create detailed actions needed to
fulfill rituals and reach goals

*Let's take a few minutes
to determine goals and
actions for each of them!*



PROJECT PLAN + PROGRESS

How to Use the
Red/Yellow/Green
Accountability Tool

Green - you're making progress and feel confident that you'll complete the action or task by its due date.

Yellow - you're getting stuck and uncertain if you'll meet the deadline. When an item is yellow, consider assigning a new due date and figure out if you need help to complete it.

Red - all progress has stopped and you're sure you'll miss the deadline. This is urgent - take action or get help.



PROJECT PLAN + PROGRESS

Review your task list each week and assign a color for tracking progress.

Project Plan	Employee Lead	Start Date	Due Date						
Goals + Actions	Employee Lead	11/3/2019	1/15/2020	11/10/2019	11/17/2019	11/24/2019	12/1/2019	12/8/2019	12/15/2019
Marketing Schedule									
Facebook posts	Admin Asst			Confident	Confident	Confident	Confident	Confident	
Website									
Hire new designer	Farm Owner			Confident	Confident	Confident	Uncertain	Stalled	
Crop Planning / Planting Plan									
Certified Organic Plan	Farm Owner			Confident	Uncertain	Uncertain	Uncertain	Uncertain	
Whole Farm Budgeting									
Find a bookkeeper	Who is doing this?			Stalled	Stalled	Stalled	Stalled	Stalled	
Delivery Strategy									
Research truck for purchase	Farm Owner			Uncertain	Uncertain	Uncertain	Stalled	Stalled	
Sales Pipeline Management									
Update buyer list	Admin Asst			Confident	Confident	Confident	Confident	Confident	
Completed Tasks									



**PLAN +
PROGRESS
SANITY CHECK**

Do you and your staff have the capacity and skills to meet your goal alone?

Where do you need support in your plan?

How will you pay for support?

What other expenses such as supplies and equipment will I incur to reach my strategic goals?

Bottom line: All plans should be supported with a budget.




REVIEW + REVISE

- Check in with your plans monthly and evaluate progress on 3 month goals and annual goals.
- Every quarter, set new 3 month slices of your goal to get to the major goal.
- Review your budget to make sure you are making the expected profits - go deeper than sales!
- Modify your plan as needed if results are not satisfactory
- Seek help and advice when you get stuck



You don't know what you don't know.



Sometimes it takes a team exercise to shed
light on what makes a business great...
or what's holding it back.



Get in touch!

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THANK YOU!



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