

How to Start an Advisory Team for Your Dairy¹
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An off-farm coordinator works best, but the producer is always in control of the group.

In the last article “Many farms could benefit from an advisory team”, we discussed the advisory team concept and how teams can keep dairy farms viable (see page 135 in the February 25 issue). Like other producers, you may be searching for ways to become more profitable or are searching for ways to improve your lifestyle.

An advisory team can help you make progress on your business goals. Our goal is to offer information about the team process so that you can successfully launch your new advisory team. We will discuss the nuts and bolts of forming a team and what your first team meeting may look like. Starting your team will be exciting and rewarding. The more time that you invest into your team, the more payback there will be.

Don’t think of the team meeting as another committee where time disappears with few results. On the contrary, teams are designed to *save time* for both the producer and team members. Dairy advisory team meetings should resemble a board meeting where there is a concise agenda and a limited time to perform the team’s work. Using the team process described below will **save time**. Meetings are convened regularly and stay focused with the understanding that time will not be wasted.

Choosing your team members...

In most situations, team members will be selected from advisors that visit your farm regularly and whose counsel you value. Teams generally have three to six people depending on your farm’s size; two people should represent the farm. Choose team members who have knowledge, good judgment, and diverse experiences in areas that you wish to improve. It is essential that they be “team players” who possess special skills that can be used toward accomplishing your goals.

Advisors who are concerned about team outcome, committed to team goals, willing and able to listen, eager to work on teams, and able to offer challenging ideas will make the best team members. The producer may replace any member of the team if he/she is not committed to the team.

In order to have an effective team meeting, it is important to have people willing to accept the following team roles.

- Decision Maker (owner)
- Coordinator/meeting facilitator
- Recorder/communicator
- Time keeper
- Advisors

¹ Appeared on page 451 of the July 2001 issue of Hoard’s Dairyman.

The **producer/owner** will need to focus on providing input and processing what is said. This is a very demanding function. The producer is also the ultimate decision maker.

The control of the team process is another demanding duty and requires someone other than the producer; we will call this person the team **coordinator**. Our experience from five years of working with dairy advisory teams has demonstrated that teams with off-farm coordinators perform best. The coordinator will keep the meeting moving and draw out ideas from everyone.

The **recorder/communicator** will take notes on team progress, team decisions and assignments for future meetings. The important points can be listed on a blackboard or flipchart to help keep people focused and avoid wasting time. At the close of the team meeting, the recorder will pass the minutes to the coordinator who will then distribute copies of the minutes to each team member. Sometimes the coordinator is also the recorder/communicator but it is good to share responsibilities equally across the team.

Meetings are short and must stay on track. The **timekeeper** is responsible for keeping the meeting on time by watching the time remaining and how many items are left on the agenda. And finally, the remaining team members are **advisors** who generate new ideas and bring expert advice to the table. Spreading the roles and workload among team members will help in keeping everyone involved as well as make everyone more effective.

Organizing a location for your meeting...

The location of the team meeting is an important factor for productivity. Many producers choose to hold meetings around a kitchen table while others choose to have meetings at a restaurant or another location off-farm. Here are some factors to take into consideration when choosing a location:

- Comfort (chairs, table, lighting, heat, ventilation and cleanliness)
- Convenience
- Freedom from interruptions (workers, family members, and telephones)
- Access to production and financial data
- Use of computers
- Flipcharts/white board for recording ideas

Before the first team meeting...

In preparation for the first team meeting, it is important that the producer do a business assessment. What are the family values and objectives? What is the owner's vision for the business in the next five years?

Consider doing a walking tour of the farm at your first meeting. Although most have walked parts of the facility before, it is important for the team to develop a broader image of your operation. Different eyes see different things during the tour. People will discuss their observations of your dairy in a much deeper way when talking to each other than when visiting solo having a specific task at hand.



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Some example agenda items are listed below. You will not accomplish all of these items in a one-hour meeting, however it is important to cover each of these items at some point.

1. Introductions. Take time to know each other because you will be discussing various points of view (controversial) and it is easy to remain silent if uncertain. Teams need time to develop new understanding of each other’s abilities and adjust expectations. You want free-flowing brainstorming in the beginning, then evaluation of ideas later in session.
2. Complete a S.W.O.T. analysis together as a team will get all team members up to speed with the current issues on the farm. The SWOT analysis and facility tour go hand in hand and should be completed before finalizing specific team goals. For more information, see sidebar.

S trengths (On-farm)	These are the things that the business does best. They are most likely to be the things you are achieving as well as or better than others. For examples, good with cows or employees.
W eaknesses (On-Farm)	These are the things you want to improve on or what you are behind on compared to others. For examples, too much land for the equipment or labor pool.
O pportunities (Off-Farm)	These are the things that you could take advantage of but are not currently. For examples, purchasing cows, contracting forages, or building farm store because of local highway.
T hreats (Off-Farm)	These are the things that could prevent you from achieving what you want. For example, landlocked, new environmental regulations, and neighbor complaints.

3. Appoint team roles
4. Ground rules. One of the most important agenda items to discuss at the first advisory team meeting is ground rules. This set of rules tells team members how to act during a meeting. Ground rules are written by the team, and when agreed upon, the coordinator has a means to keep the team focused and on-track.



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Here is an example set of ground rules

- All ideas should be discussed openly.
 - Everyone needs to respect the ideas of their fellow professionals and those of the farm family for the betterment of whole farm operation.
 - The owner has final say.
 - The dairy farm family takes “ownership” of the final priorities and the goals agreed upon.
 - Advisory team members need to put the dairy farm family’s interests above self-interests.
 - All discussions and information are confidential and will not be shared beyond the team.
5. Present production and financial data
 6. Identify the most important problem in the business from the management point of view
 7. Confirm problem with experts in attendance
 8. Diagnose the problem and component parts
 9. Develop a people plan to resolve problem. Keep asking “why” until a person of position in the business is named—do not accept external factors such as weather, the economy, someone off the farm.
 10. Set goals
 11. Develop an action plan
 12. Check the plan against the data
 13. Set up control points and timing to measure progress
 14. Reevaluate progress later and report to group
 15. Celebrate successes

The first Dairy Advisory Team meeting will help everyone around the table get familiarized with the whole farm business and identify the current challenges of the farm. Over time, the team of experienced advisors will generate the best solutions to these challenges. Watch for part three on “Goal Setting” in an upcoming issue.