

# Wells County Farm Bureau March 22, 2024

## “If We Huff and Puff, Will We Blow Your House Down?”

In “The Three Little Pigs” the third one got it right! He built a solid foundation, one brick at a time to withstand the test of time. He made sure there was mortar holding it together. We need the same in a family business as we work through the succession and transition process. We need “bricks” of communication, cooperation, and commitment with legal and financial follow through.

In this interactive presentation, Jolene Brown, will share lessons learned from her 30+ years of working with farm families. She’ll address the issues of communication and conflict, fair and equal, entitlement and transition. She’ll provide 10 template tools to help with the transition of labor, management, leadership, and ownership.

With valuable content wrapped in real life stories and lots of fun, we’ll discover that when your business is constructed correctly, not only do we have a productive and profitable result, but we have also laid the foundation for the legacy of a family business.



**Jolene Brown, CSP, CPAE**

1636 Eureka Ave., West Branch, IA 52358

319.643.2429 Jolene@JoleneBrown.com www.JoleneBrown.com

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## THE RESULT?

This workshop presented for your attendees will provide a time of laughter, appreciation and valuable lessons learned from Jolene's work with those in family business. They'll leave with tested and applicable "tools" to help them manage, lead and transition the business. They'll understand that in order to honor the family, there is important work to be done in and for the business.

### Attendees say it best:

*"...Many speakers have told us why, but you also showed us how. We're starting tomorrow to adapt the tools you provided today."*

*"...This workshop is about so much more than the "estate plan." It is also about making sure I do the leadership work right every day so that there is a successful and viable business to transition. Now I'd better get to work, because I have some work to do!"*

*"...Thanks for the 'not so gentle' nudge!!" There is nothing more important than my family and I now realize that if we want to be family we must get working on our business."*

*"...Next time I'm bringing the whole family!"*

*"...I've heard many speakers on estate planning and working in a family business, but none better than you. Your plain speaking and ability to relate not only makes what you say believable, I know it is true because I'm living it. I am grateful for specific 'how-to' information that will make our business better."*

### CONTENT POINTS: (will vary with time frame)

1. The Blueprint: vision; intent; the defining factor
2. The Key Players; the contractor (leadership and management); advisory council
3. Common Goal & Mission
4. Readiness of the senior generation – financial security; emotional readiness; "refirement"
5. Money matters. Cash flow reality, necessary records, compensation
- 6.. Carefully chosen work team - 6 questions before bringing family members into the business
7. The Mortar - What's clarified and in writing? The right materials including templates for a code of conduct; blueprint for ownership transition, communications contract, conflict management process, business overview, managing people chart, productive meeting protocol, and more
8. Communication – the reinforcing rods that hold the business together; contract for communication; productive meetings; managing people chart
9. A firm foundation built upon answers and action; recognition of earned sweat equity, fair and equal; praise and celebration

## **OBJECTIVES:** (will vary with time frame)

1. Learn the building “bricks and mortar” that create a productive and profitable family business, one that is worthy of transition to the next generation of owners, leaders and managers.
2. Explore questions that must be answered before someone is allowed to join or work for a business.
3. Define the prerequisites that must be met before ownership in family business is transitioned.
4. Identify the hidden areas of business agreements which often start as a conversation but must end in written documentation.
5. Recognize the value and the impact of in-laws, family members not active in the business, and employees.
6. Discuss the egos, emotions, and decisions involved in estate and management transfer planning.
7. Receive 8 tested and immediately adaptable take-home tools – necessities in a buy/sell, agreement, code of conduct, contract for communications, conflict management process, business overview and managing people chart, evaluation conversations, types of and topics for meeting agendas, listing of details beyond the will.
8. Understand the need for courtesy and celebration.

**Timeframe:** 90 minutes – 3 hours (will include a short break)

### **Short Bio for Program Book**



Jolene Brown is a walking-talking spokesperson and champion for the people of agriculture. She's a farmer in Eastern Iowa, contributor to *Successful Farming* magazine's popular family business column, author of two great books and an inductee into the prestigious CPAE Speaker Hall of Fame. Her worldwide audiences appreciate her fun-filled spirit and valuable information. She's on a mission to share leading-edge best practices, appreciation, laughter and celebration to increase productivity, profitability and peace of mind. [www.JoleneBrown.com](http://www.JoleneBrown.com)

# **Jolene Brown, CSP, CPAE**

**Champion for Agriculture**

**Professional Speaker**

**Family Business Consultant**

**Author**



Jolene Brown will have you laughing while you learn! She's an award-winning communicator, an inductee into the prestigious CPAE Speaker Hall of Fame and an honored recipient of the Certified Speaking Professional, the highest earned designation of speaking achievement worldwide! She's known as a Champion for Agriculture whether from the platform, in the magazines, on television, or on the radio.

Jolene is a walking-talking spokesperson and consultant for the family-owned business. With her keen insight and result-centered approach, she's been invited to sit at lots of kitchen tables and family business meeting rooms. Her popular book, *Sometimes You Need More Than a 2x4!*, contains how-to-tips so those in agriculture can increase productivity, profitability and peace of mind.

In Jolene's newest book, *Holy Crap! I Married a Farmer!*, she celebrates her "sisters in agriculture." She honors their multiple and valuable roles by bringing them useful tips, real life stories and lots of laughter.

As co-owner and active partner on their Eastern Iowa corn and soybean farm, her practical experience includes plugging a grain auger, denting the grain bin, identifying her special cows by names, not numbers, and entertaining folks behind the equipment parts counter.

Jolene cares deeply about the ag industry and is on a mission to share leading-edge best practices. She's a passionate supporter, promoter and champion for the people who feed, clothe, and fuel the world.

Her worldwide audiences appreciate her fun-filled humor and real-life stories. They leave with take home value, great big smiles on their faces and eager to return for more.

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