

DairyNZ QuickPlan

A strategic planning tool for dairy farm employees

Design your pathway to success



DairyNZ 

Introduction

The NZ Dairy Industry offers a wonderful lifestyle, career path and wealth creating avenue for anyone willing to work hard and continually develop their knowledge and skills. Employees can progress from farm assistant to farm manager to an operations manager of a large multiple unit dairy farm. You can also choose to invest your own money in farming through sharemilking and ultimately farm ownership. It is a great path, but it might not be straight forward. You will experience a few bumps along the way, so to ensure you achieve to your potential it is critical to plan the direction you need to head in to achieve your goals. Some of the things you will need to do are to:

- Learn the skills of profitable and efficient pasture based dairy production
- Develop a supportive network of people to learn from – good employers, motivated friends and family
- Continually learn and upskill yourself through on the job training, courses, groups and reading
- Get very good at budgeting and evaluating opportunities
- Start a very good savings programme, and manage your spending
- Build a reputation as a good employee.

Writing down the direction you want to head, the skills you need to learn and specific tasks you must complete is part of a process called Strategic Planning. This is what this Strategic Planning workbook, 'Design your Pathway to Success' is all about. It is designed to help you develop a plan or a roadmap for your life.

The 3 step planning process we will take you through is:

1. Choosing meaningful Vision and Value statements that align with desired direction
2. Selecting relevant Goals and Actions from the four focus areas
3. Completing the one-page Planning Wheel by transferring the Vision, Values, Goals & Actions from the workbook.

Vision and Values

A Vision is a high level or over-arching statement that describes what you want your life to be like and the principles or values you want to live by. It includes three main areas: What important things you want to have, what contributions and accomplishments you want to make and what type of person you want to be. Turn to the vision and values page. Select one to three Vision Statements and four to six Values that are important to you. Then write them into the 'Vision' circle. Use the words provided or alter any words to personalise your plan even more. Then transfer to the Planning Wheel.

Goals and Actions

Without the identification and achievement of specific goals and actions, dreams will stay dreams. Clarify what are the important goals you want to achieve and what things need to happen for those goals to be reached. There are four focus areas: Financial Planning, Production, Personal Development and Lifestyle. In each of the four focus areas choose two to four goals and up to seven actions then transfer these to the 'My goals' and 'My actions' column adding dates for completion. Personalise these goals and actions if desired and ensure they link to your vision.

Planning Wheel

Transfer your Vision, Values, Goals and Actions onto the one page Planning Wheel. Stick it on the office wall, look at daily and you will discover the daily decisions you make will become aligned with your Vision and Goals. Consider also putting a picture alongside your vision statement. It may be a picture of your family, where you want to live and other important things you want in your life.

This workbook and planning wheel should be a living document. Keep working on it, reviewing it, and make planning a regular part of your life.

If it is to be, it is up to me!

Vision and Values

Instructions:

1. Select one to three Vision Statements and four to six values that are important to you
2. Then write them into the 'Vision' circle
3. Use the words provided or alter any words to personalise your plan
4. Then transfer to the Planning Wheel.

It is important to us to create a secure, balanced and positive home life for our family and our marriage

Perform in my role to a high standard so that I can be proud of my accomplishments, and be recognised for this

My spirituality provides the central purpose for my life

We have loving, respectful, happy relationships and enrich the lives of those around us

Be a positive role model for our children and encourage them to develop into happy content adults that achieve to their potential

Build enough equity to be an owner in a farm business

We continually seek to grow our skills and knowledge and have the courage to take on new challenges

Vision.

I/we value:

To be fully involved in the dairy industry and get to know people in the area

Build a solid equity base to ensure a secure financial future for my family

To make a significant contribution towards increasing the profitability of the farms I work on

Share my goals and dreams for my future with a partner/family

Progress through the dairy industry, achieving my full potential

Values

I/we value (circle 4 to 6 high priority values)

achievement openness and honesty health and fitness
quality relationships stability and security
recognition respect reputation
spirituality creativity innovation
inspiring others integrity independence
leadership ongoing challenge competition
decisiveness freedom adventure privacy
helping others mental stimulation and growth
family focus positive attitude fun

Financial Planning

Instructions: 1. Choose two to four goals, and up to 7 actions. 2. Write these in the *My goals, My actions* column adding dates for completion. 3. Personalise in your own words. 4. Then transfer to the Planning Wheel

	Farm business	Personal finance	Equity growth
Goals	Support the farm business to achieve its financial goals eg profit goal of \$x/ha <input type="checkbox"/>	Develop my personal budgeting and saving skills <input type="checkbox"/>	To achieve financial freedom – i.e. enough equity to fund the lifestyle I want – by the time I am x years old <input type="checkbox"/>
	Have the necessary business skills so I can develop and monitor the farm's cashflow budget <input type="checkbox"/>	Lift my earning potential by building my skills and reputation <input type="checkbox"/>	Own our first herd / farm of x cows within x years <input type="checkbox"/>
	Reduce farm working expenses to \$x/kgMS <input type="checkbox"/>	Grow my equity by \$ x this year by saving \$ x per fortnight <input type="checkbox"/>	Build our equity to \$x over the next x years <input type="checkbox"/>
	Develop the skills to enable me to identify profitable opportunities for the farm eg use of nitrogen, wintering off options <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Discuss with farm owner relevant financial goals and targets for the farm, and how I may support these <input type="checkbox"/>	Complete personal budget and establish a savings target, then set up a direct debit into a savings account <input type="checkbox"/>	Develop 5 to 10 year financial plan, showing how we will grow our wealth <input type="checkbox"/>
	Build financial capability by using financial management tools and resources, attending industry events or completing a business qualification <input type="checkbox"/>	Focus on eliminating any credit card or hire purchase debt as soon as possible <input type="checkbox"/>	Calculate how much equity and borrowings are required to make our next investment eg sharemilking, stock, land, house <input type="checkbox"/>
	Use Dairy Connect to identify someone to coach me in farm budgeting skills dairyconnect.dairy.co.nz <input type="checkbox"/>	Find a way to prevent budget blow-outs e.g. pay cash only – no credit card or HP, realistic spending on cars and socialising, avoid speeding fines <input type="checkbox"/>	Learn to evaluate new business or investment opportunities eg how much can I afford to pay for cows / farm to ensure a good return? <input type="checkbox"/>
	Approach farm owner or sharemilker to ask them to involve me in the budgeting process so as to progress my budgeting skills <input type="checkbox"/>	To be more valuable as an employee I need to build my skills in the following areas over the next year e.g. pasture, stock, staff or financial management, budgeting, record keeping by... <input type="checkbox"/>	Attend DairyNZ Progression Groups (BIZ Start or BIZ Grow) or Mark & Measure seminar to build analysis and planning skills <input type="checkbox"/>
	Learn how to do a partial budget eg wintering off, applying nitrogen, timing of drying off, feeding palm kernel, rearing calves <input type="checkbox"/>	To build my reputation as an employee I need to: be at work on time, work to a high standard, support others on the farm team, treat the cows and farm as if they were my own <input type="checkbox"/>	Allocate specific time per month to investigate the next opportunity to grow equity e.g. promotion, sharemilking job <input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Administration

My family are adequately protected in the event of financial, physical or marital challenges eg wills, guardianship, insurance

Date: _____

Ensure we have the appropriate ownership structure for any assets we own or intend to buy in the future

Date: _____

To have efficient business administration systems to enable easy access to information eg diary, contact list, bank records, budgets and accounts

Date: _____

Date: _____

My goals

My actions

Develop appropriate professional contacts for my stage of career e.g. accountant, banker, solicitor, insurance adviser

Date: _____

Identify farming contact with excellent business administration system and visit to get ideas and then implement

Date: _____

Allocate time each month to review planning wheel, goal setting process and progress

Date: _____

Make a will

Date: _____

Date: _____

Date: _____

Production – profitable and sustainable

Instructions: 1. Choose two to four goals, and up to 7 actions. 2. Write these in the *My goals, My actions* column adding dates for completion. 3. Personalise in your own words. 4. Then transfer to the Planning Wheel

	Production	Pasture management	Animal husbandry
Goals	Develop competence in efficient pasture based dairy production <input type="checkbox"/>	Develop my pasture management skills to a high level. Build my skills in the following areas over the next year e.g. interpreting a feed wedge and feed budget, spring rotation planner, feed allocation <input type="checkbox"/>	Develop my stockmanship skills to a high level (milking management, animal health, reproduction, replacements) <input type="checkbox"/>
	Support the farm business to achieve its farming goals <input type="checkbox"/>	To increase the quantity and quality of pasture grown <ul style="list-style-type: none"> • Grow X tonnes DM/ha <input type="checkbox"/> • Cows eat X tonnes DM/ha <input type="checkbox"/> 	At calving, cow condition will be 5 (5.5 heifers) and pasture cover will be XkgDM/ha, and replacements to 90% of mature weight <input type="checkbox"/>
	Profitably produce X kg milksolids (X kg MS/cow and X kg MS/ha) <input type="checkbox"/>	Improve the quality and utilisation of supplements <input type="checkbox"/>	Achieve a grade free season <input type="checkbox"/>
	To have efficient filing systems to enable easy access to technical farm information e.g. FarmFacts, Dairy Exporter, Conference papers <input type="checkbox"/>	Achieve optimum soil fertility <input type="checkbox"/>	Minimise animal health issues on the farm through active observation <input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	Achieve a 78% in-calf rate in 6 weeks <input type="checkbox"/>
Actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Discuss with farm owner relevant production goals and targets for the farm, and how I may support these <input type="checkbox"/>	Approach farm owner or sharemilker to ask them what skills I need to learn in the pasture management area, and decide a programme to learn these <input type="checkbox"/>	Approach farm owner or sharemilker to ask them what skills I need to learn in the animal husbandry area, and decide a programme to learn these <input type="checkbox"/>
	Use Dairy Connect to identify someone to coach me in farm production skills eg matching stocking rate and pasture supply, planning calving date dairynz.co.nz/connect <input type="checkbox"/>	Download the spring rotation planner tool and feed wedge tool from DairyNZ website and use them <input type="checkbox"/>	Discuss with farm owner relevant reproduction goals and targets for the farm, and how I may support these <input type="checkbox"/>
	Visit top performing farms in the area to help focus on the basics of good pasture based farming <input type="checkbox"/>	Walk the farm weekly to generate a feed wedge and update grazing plan <input type="checkbox"/>	Identify all animals requiring specific attention e.g. cycling cows, animal health issues such as metabolic problems, mastitis, lameness, disease <input type="checkbox"/>
	Build capability by completing Primary ITO course <input type="checkbox"/>	Ensure pre-grazing and post grazing pasture covers are achieved eg residuals of 1500 to 1600 kgDM/ha for milking cows <input type="checkbox"/>	Establish set dates in the autumn when cows of a particular body condition score are dried off <input type="checkbox"/>
	Organise filing system for technical farm information <input type="checkbox"/>	Ensure I can calculate the economics and breakeven price for nitrogen, wintering off and supplement use <input type="checkbox"/>	Visit replacements regularly to check progress – weigh monthly against set target weights and take action if below target <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	



Environment & infrastructure

Develop my environmental management skills to a high level (effluent, minimising pasture damage, irrigation)

Date: _____

Manage and maintain the effluent system to ensure farm operates in a compliant manner

Date: _____

Maintain the farms vehicles, machinery, fences, races, water supply, farm dairy to ensure a smooth running farm

Date: _____

Enhance our farms natural environment (plantings, native bush protection, maintain waterways, biodiversity)

Date: _____

My goals

My actions

Ask to be involved in completing the farm's environmental 'Compliance Checklist' so as to increase my understanding of this area

Date: _____

Ensure I am well trained in the requirements for the effluent systems

Date: _____

Check effluent system regularly for malfunctions eg ponding, blockages, leaks, overflow etc

Date: _____

Follow farm maintenance schedule for the machinery, water supply and farm dairy. Assist in identifying jobs for the "to-do" list

Date: _____

Improve the aesthetics of the farm e.g. planting programme, tidy up around farm dairy and tanker track etc

Date: _____

Improve cow stand-off areas to minimise soil damage in wet conditions

Date: _____

Personal Development – teamwork / training

Instructions: 1. Choose two to four goals, and up to 7 actions. 2. Write these in the *My goals, My actions* column adding dates for completion. 3. Personalise in your own words. 4. Then transfer to the Planning Wheel

	Teamwork (with employer, manager, staff)	Networking	Training
Goals	Strong supportive relationships with employer, manager or staff leading to excellent team work and achievement of farm goals <input type="checkbox"/>	To maximise personal development and create opportunities for career development and investments <input type="checkbox"/>	Regularly identify skills and knowledge required to achieve my long term goals, and undertake required training <input type="checkbox"/>
	The farm is a safe working environment <input type="checkbox"/>	To work for farmers who offer excellent learning opportunities <input type="checkbox"/>	Continually upskill by attending relevant training e.g. Primary ITO, DairyNZ progression groups, University <input type="checkbox"/>
	Take personal responsibility for checking that I understand what is expected of me in my role <input type="checkbox"/>	Have a mentor who provides guidance on my life and career progression <input type="checkbox"/>	Continually build my knowledge through reading relevant news/ research/ educational articles and books. e.g. agriculture, business, personal development <input type="checkbox"/>
	Proactively look for ways to contribute more on farm and to the team <input type="checkbox"/>	Regularly create opportunities to meet motivated people and seek new ideas and opportunities <input type="checkbox"/>	Always be focused on a new challenge that makes me jump out of bed every morning <input type="checkbox"/>
	Develop an excellent reputation as a good employee so that employers seek me out <input type="checkbox"/>	Win farming competition <input type="checkbox"/>	Look for opportunities to raise my skill level <input type="checkbox"/>
Actions	Meet weekly/monthly/quarterly with my manager to ensure I have clarity around what is expected of me in my job <input type="checkbox"/>	Plan regular contact with positive and motivated people – leading farmers and sharemilkers, others wishing to progress in the industry, rural professionals <input type="checkbox"/>	Learn two new skills this season eg this season I will become competent in feed allocation and treating lameness <input type="checkbox"/>
	Look for opportunities to support other team members <input type="checkbox"/>	Utilise network to identify excellent farmers to work for. During a job interview ask appropriate questions to ensure it would be a suitable job for me <input type="checkbox"/>	Talk to my local Primary ITO, Training Advisor to build a learning development plan to match my needs <input type="checkbox"/>
	Focus on finding solutions to problems rather than complaining about issues or people <input type="checkbox"/>	Use Dairy Connect to identify a successful farmer to approach regarding being my mentor dairynz.co.nz/dairyconnect <input type="checkbox"/>	Attend discussion groups eg Farm Systems Group, Progression Group e.g. Biz Start group <input type="checkbox"/>
	Establish a staff orientation process and basic farm operations manual <input type="checkbox"/>	Attend discussion groups and field days to build knowledge and contacts <input type="checkbox"/>	Attend relevant training days e.g. Primary ITO courses, Health and Safety Training, veterinary seminars <input type="checkbox"/>
	Ensure I / staff know requirements around health and safety e.g. helmets on bikes, weed spray management <input type="checkbox"/>	Visit people one or two stages ahead of me in their career to seek guidance and inspiration for my career progression <input type="checkbox"/>	Read industry publications monthly, and regularly use information websites e.g. dairynz.co.nz <input type="checkbox"/>
	To build my reputation as an employee I need to: work to a high standard, support others on the farm team, treat the cows and farm as if they were my own <input type="checkbox"/>	Write up a list of all employers in my preferred location who employ the role I will next be looking for e.g. 50:50 or variable order sharemilking, and introduce myself to them <input type="checkbox"/>	Take the time to apply any new learning on farm, ideally within 14 days of attending the training, to get the most benefit <input type="checkbox"/>



Time management

Manage my time effectively so that I meet important job commitments and have a good work / life balance

Date: _____

Ensure I am working in a career or job that I am passionate about and enjoy, and is in line with my goals

Date: _____

Date: _____

Date: _____

Date: _____

My goals

My actions

Have a good diary, task list system and planning system and review monthly, weekly and daily to determine priorities and actions

Date: _____

Meet as a team every Monday morning to prioritise and plan the weekly tasks and delegate to appropriate people. Set up whiteboard in the farm dairy to record people's weekly jobs

Date: _____

Twice a year review whether what I am doing day to day and week to week is leading towards achieving my goals

Date: _____

Manage my spare time to achieve a balance between family, relaxation, sport, social and education

Date: _____

Ensure staff or relief labour are ready to step in and run the farm at short notice. Develop a simple farm procedures guide

Date: _____

If unhappy with current job or farming work, seek career guidance from mentor or independent person to consider your direction

Date: _____

Lifestyle – family / friends / health / leisure /

Instructions: 1. Choose two to four goals, and up to 7 actions. 2. Write these in the *My goals, My actions* column adding dates for completion. 3. Personalise in your own words. 4. Then transfer to the Planning Wheel

	Family	Friends	Health
Goals	To maintain strong relationships with parents, brothers, sisters and extended family <input type="checkbox"/>	To develop and maintain a close group of friends, who are positive and motivated <input type="checkbox"/>	To be healthy enough physically and mentally to undertake farm activities and enjoy family and leisure time <input type="checkbox"/>
	To maintain a strong relationship with my partner / husband / wife <input type="checkbox"/>	<input type="checkbox"/>	To be at the appropriate weight and blood pressure for my age <input type="checkbox"/>
	My children feel they have enough of their parents attention and time <input type="checkbox"/>	<input type="checkbox"/>	Develop good habits around healthy eating and sleep <input type="checkbox"/>
	Have a life partner to share the future with <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Plan to have dinner date with partner at least once per month <input type="checkbox"/>	Organise to catch up with friends regularly e.g. monthly dinners, pub night <input type="checkbox"/>	Plan ahead to ensure I have at least 2 good quality meals a day, particularly during busy times of the season <input type="checkbox"/>
	Have dinner around the table with the family each night <input type="checkbox"/>	Contact friends outside our region regularly e.g. phone, Skype calls <input type="checkbox"/>	Ensure I get 7 to 8 hours sleep each night <input type="checkbox"/>
	Organise one family day off the farm per fortnight <input type="checkbox"/>	Plan an annual holiday e.g. weekend away with friends <input type="checkbox"/>	Plan an annual GP health check <input type="checkbox"/>
	Schedule individual time with each child e.g. reading to children, sports events, fun activities etc <input type="checkbox"/>	Join Young Farmers Club, sporting or social club, DairyNZ Biz Start Progression Group <input type="checkbox"/>	Undertake exercise to maintain fitness, e.g. walking, running, cycling, sport, dancing <input type="checkbox"/>
	Plan at least one week per year away on a summer holiday <input type="checkbox"/>	Invite new people to the area over for a bbq or dinner <input type="checkbox"/>	Plan some personal free time <input type="checkbox"/>
	Plan to have contact with parents, brothers, sisters or extended family e.g. monthly <input type="checkbox"/>	<input type="checkbox"/>	Include more fruit and veges and water in diet, and avoid too much fat, salt and alcohol <input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	



Sport/leisure/community

My goals

To complete one significant exciting activity per year

Date: _____

Have an active involvement in some regular sporting or leisure activity

Date: _____

To have a contribution to our local community

Date: _____

Date: _____

My actions

My actions

Brainstorm ideas for an exciting activity for next year and make the booking

Date: _____

Allocate monthly time to leisure activities such as touch rugby, snowboarding, hunting, cooking classes, dance lessons

Date: _____

Participate in community activities e.g.involvement with schools, preschools, church, sports clubs, charities

Date: _____

Date: _____

Date: _____

Date: _____

Date: _____

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