



Farm Succession Checklist

This checklist ensures a smooth farm succession by documenting knowledge, systemising operations, and empowering successors for leadership. For tailored support in building resilient systems and reducing key person dependency, contact Enable Ag.

1. Start Planning Early

- Schedule a family or team meeting to discuss long-term goals and roles.
- Develop a shared vision for the farm's future.
- Hold consistent check-ins and stakeholder meetings to maintain alignment and address concerns.

2. Document Knowledge and Systemise Operations

- Create a farm calendar and record seasonal workflows for key activities.
- Centralise all documentation in a digital or physical repository for easy access.
- Leverage technology and develop Standard Operating Procedures (SOPs) for each task or enterprise. Example: Use [Smartsheet](#) to create and manage SOP templates. Use [Loom](#) to record video tutorials that demonstrate tasks step-by-step.
- Identify and address bottlenecks in current workflows to improve efficiency.

3. Delegate Tasks Gradually and Empower Your Team

- Begin with smaller, low-risk tasks and gradually progress to leadership responsibilities.
- Provide mentoring and constructive feedback to help successors build confidence and grow into their roles.
- Conduct training sessions to equip your team with versatile skill sets.
- Assign cross-functional tasks to reduce reliance on specific individuals and foster a resilient team culture.

4. Focus on Personal Transition

- Set a phased timeline for reducing your daily involvement, ensuring a smooth handover of responsibilities.
- Plan personal goals and activities to enjoy during your retirement years, aligning your transition with your aspirations.