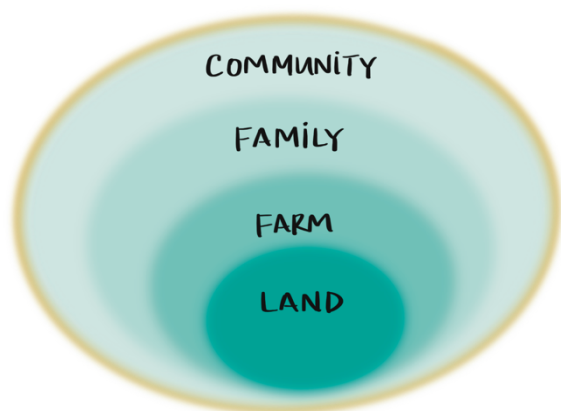


# STEP 1: DESCRIBE YOUR FARM BUSINESS GOALS AND CURRENT POSITION



This step invites you to gather and record information about your farm and family assets, including the goals and current status of your farm business, using two well-established farm business assessment and planning tools: the Holistic Goal and the SWOT analysis. Because these tools serve as a starting point or foundation for all subsequent management decisions, it is very important to invite family members and other farm stakeholders into this step so that you can make a Holistic Goal and a SWOT that everyone can support. You will complete this step in two parts.

## Part 1: Your Holistic Goal



The Holistic Goal is a holistic management practice that supports regenerative, whole-farm resilience thinking. This is because, unlike most goal-setting processes, the Holistic Goal explicitly recognizes that the long-term success of a farm business depends on the health and well-being of the land, people, and communities that support it. To complete your Holistic Goal, print out *Worksheet 1: Holistic Goal* (at the end of this section), go to the [companion website](#), and select a Step 1 resource to guide your work. Remember to complete your holistic goal before moving on to conduct a SWOT review of your farm.

## Part 2: Assess Your Farm's Strengths, Weaknesses, Opportunities, and Threats with SWOT

The effects of climate change on farm businesses will vary depending on various characteristics, such as geographic location, landscape, farm management philosophy, production and marketing practices, and the quality of farm assets under management. The purpose of a SWOT review is to identify internal and external conditions and whether they are positive or negative (helpful or harmful) to your operation. Once you complete a SWOT review of your farm business, you can more easily identify those aspects of your operation that will help you achieve your goals (strengths or opportunities) and those that will present obstacles to overcome or minimize (weaknesses or threats). To complete your SWOT analysis, print out *Worksheet 2: SWOT*, go to the [companion website](#), and select a Step 1 resource to guide your work. Remember to complete your SWOT before moving on to Step 2.

## Worksheet 1: My Holistic Goal

### Quality of Life

### Commitment or Forms of Production

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### Future Resource Base

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Find a completed version of this worksheet on [page 26](#) as part of the *Example Farm Plan*.

## Worksheet 2: SWOT Analysis Template

### State what you are assessing:

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#### STRENGTHS

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**Prompts:**

Advantages of proposition?  
Competitive advantages?  
USPs (unique selling points)?  
Resources, assets, people?  
Experience, knowledge, data?  
Financial reserves, likely returns?  
Marketing — reach, distribution, awareness?  
Innovative aspects?  
Location, geography? Price, value, quality? Accreditations, qualifications, certifications?  
Processes, systems, IT, communications?  
Cultural, attitudinal, behavioral?  
Management cover, succession?  
Philosophy, values?  
Mission, strategic plan?

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#### WEAKNESSES

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**Prompts:**

Disadvantages of proposition? Gaps in capabilities?  
Lack of competitive strength?  
Reputation, presence, reach?  
Financials?  
Your own known vulnerabilities?  
Timescales, deadlines, pressures?  
Cashflow, start-up cash drain?  
Effects on core activities, distraction?  
Morale, commitment, leadership?  
Accreditations, qualifications, certifications?  
Processes, systems, IT, communications?  
Management cover, succession?  
Mission, strategic plan?

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#### OPPORTUNITIES

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**Prompts:**

Market developments?  
Competitors' vulnerabilities?  
Industry or lifestyle trends?  
Technology development and innovation?  
Global influences?  
New markets, vertical, horizontal?  
Niche target markets? Geography, export, import?  
New USPs?  
Tactics (e.g., surprise, major contracts)?  
Business and product development? Information, research? Partnerships, agencies, distribution? Seasonality, weather effects? Philosophy, values?  
Mission, strategic plan?

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#### THREATS

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**Prompts:**

Political effects?  
Legislative effects? Environmental effects?  
IT developments?  
Competitor intentions — various?  
Market demand?  
Market interruption?  
New technologies, services, ideas?  
Vital contracts and partners?  
Sustaining internal capabilities?  
Obstacles faced?  
Insurmountable weaknesses? Loss of key staff?  
Sustainable financial backing?  
Economy — home, abroad?  
Seasonality, weather effects?  
Philosophy, values?  
Mission, strategic plan?

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