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**TRAINING FARM MANAGEMENT CONSULTANTS:  
A CASE STUDY FROM NEW ZEALAND**

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## **TRAINING FARM MANAGEMENT CONSULTANTS: A CASE STUDY FROM NEW ZEALAND**

### **Abstract**

*New farm consultants can be expensive to train, both financially and in terms of the time required. The aim for new consultants is to develop a 'full book' of clients to become economically viable as quickly as possible. While research into farm consultancy processes can assist with training, trainees also need to develop expertise in farm consultancy. A case study of a consultant with four years' experience was conducted to gather information on the training of farm consultants. This paper reports on the consultants development of professional expertise and a 'full book' of clients.*

*The study found that there was an emphasis on 'learning-by-doing'. Developing expertise involved progressing from simpler to more complex problems and farming systems. This occurred while moving from supervised work to working with farmer groups and project work, before working independently with clients. The reputation of both the consultancy firm and the trainee and the trainee's social capital, within and outside the firm, were critical to building a client base. This study has made explicit the process of developing professional expertise, including key factors in building a client base, which maybe valuable for other trainee farm consultants and their firms.*

**Keywords:** farm consultants, training, social capital, farmers, expertise, farm management

### **Introduction**

Farm consultants are an important part of the New Zealand agricultural advisory system and play an important role in improving farm profitability (Gray et al., 2017) and integrating new technology into farming systems (Botha et al., 2008). However, New

Zealand's population of farm consultants is aging, with 49 percent over 50 years old (Kenny and Nettle, 2013). Trainee farm consultants are currently employed by farmer funded organisations (DairyNZ and Beef and LambNZ), and commercial consultancy firms. The main limitation to employing trainee consultants is the considerable time (approximately three years) and cost involved in their training (Gray et al., 2014).

Programs have been developed and consultancy processes investigated to help reduce the time it takes for a trainee consultant to reach a high level of competency. DairyNZ developed a Whole Farm Assessment and Planning (WFAP) program (Kenny and Nettle, 2011), that provides an information collection and benchmarking process that a trainee consultant can use to assess the important problems facing a farm business (Sankey, 2015). Research has also been undertaken to identify the key techniques an 'expert' farm consultant uses to diagnose on-farm problems (Gray et al., 2017). The aim of that study was to make explicit the processes used by the expert consultant so that they could then be used by trainees, thus accelerating their training program. These are just two means by which the industry is fostering the development of professional expertise in farm consultancy.

Professional expertise requires an individual to gain knowledge and competencies as well as a professional identity in a specific subject area (Klerkx and Proctor, 2013). Dreyfus (2016) described a five stage process, (1) novice, (2) intermediate, (3) competent, (4) proficient and (5) expert, that an individual moves through as they progress from a novice to an expert in their professional field. For example, Faucher (2011) reported that during undergraduate studies, medical students went through the novice, intermediate and competent stages, and then after graduation, they progressed through the proficient and expert stages.

The development of professional expertise has been studied in fields such as medicine (Eraut and du Boulay, 2000), business (Sonnentag and Kleine, 2000) and the military (Andrew and Fitzgerald, 2010), but not in the area of farm consultancy. The aim of this study was to report on the professional development of a trainee consultant along the path to professional expertise. The study sought to describe the training process used by his firm to develop his competency such that he could develop a full client book as quickly as

possible. Ensuring that a trainee such can acquire a full client book as quickly as possible is essential for reducing their training cost.

## **Method**

A single case study methodology (O'Leary, 2005) was used to collect in-depth information about the professional development of a trainee consultant (TC). A consultant with four years' experience was selected for the study because he had recently been a trainee and was now, after three years of development, working as a full time consultant. Semi-structured interviews (O'Leary, 2005), were used to collect data on the case consultant during three one hour interviews. The interviews were taped, transcribed and then analysed using qualitative data analysis techniques (Dey, 2003), written up as a case report and then compared to the literature (O'Leary, 2005).

## **Results**

This study described the process a consultancy firm used to develop a trainee consultant's professional expertise and the means by which he built a 'full client book'.

### **The development of proficiency in consultancy**

The TC completed a degree in agriculture before joining the consultancy firm. To develop the TC's proficiency in consultancy, the consultancy firm provided him with a mix of formal and informal training. To build on his skills and also earn income for the firm, the TC undertook project work for industry organisations and facilitated monitor farm programmes and farmer discussion groups. The TC was also mentored by two senior consultants who involved him in their work with farmer clients. As the TC became more proficient he was given some of the senior consultants' clients so that he could learn about working with his own clients. As his competency improved he was given more clients and also began to attract clients of his own. The following sections set out these phases of the TC's development.

### ***Training***

The TC's initial training period lasted for two weeks and it involved accompanying senior consultants on their client visits. This allowed him to see a range of farming systems and observe and discuss the processes that the senior consultants used when working with a client. A key characteristic of this period was that the TC completed small projects after

each visit, a valuable source of learning. Examples of these included: checking a feed budget or completing a partially developed financial budget. He reported that the two weeks of training was insufficient to ensure that he was competent to work on his own.

Following this initial training period, the TC assisted the firm's senior consultants by completing small projects for their clients. Two of the older consultants took the TC 'under their wing', provided support and mentored him. However the TC also had to be proactive and initiate contact with them to obtain work. The firm did not have a formal training process, however the TC noted that, despite the informal nature of the training, it "*worked well enough*".

Early on in his tenure, formal training was provided by DairyNZ, an industry funded organisation, and it involved five one-week training modules. These modules included farm financial performance, people management, farming systems, farm infrastructure and technical elements. The technical training included, for example, condition scoring and the winter management of cows.

### **Farmer group and project work**

To earn income whilst providing learning opportunities, early on in his tenure, the TC was asked by the firm to work with farmer groups and complete industry project work. The TC facilitated a range of farmer learning (monitor farms) and discussion groups. This allowed him to build his knowledge of farming systems and technical issues. The TC also undertook project work for industry organisations (e.g. an irrigation feasibility studies, land purchase appraisals). From this work he gained knowledge of integrated production systems as well as skills in financial budgeting. Often with this work in contrast to his on-farm work, the TC could not observe the implementation of his recommendations, so his learning was restricted to the initial planning process. This highlighted one of the limitations of this form of training.

### ***Learning through building a client base***

The final and most powerful form of learning for the TC was where he took on a new client in his own right rather than doing work for another consultant's client. He then learnt about managing and working with his own clients, observed the impact of his advice on a range of farm businesses and provided follow up work over time. This transition was

managed by the firm. Initially he worked with senior consultants on their clients' farms. As he gained competency, he was given some of the senior consultants' clients. These tended to be lower risk clients for both the TC to work with, and for the senior consultant to pass on, as the clients were relatively stable and only making small adjustments to their farming systems. The TC visited these farms on a regular basis, monitoring the progress of farm plans and suggesting improvements. He also undertook project work for these clients as required. At this stage, he mainly worked with the farmers on technical, rather than financial issues. The opportunity to review and evaluate farm plans at regular intervals provided excellent learning opportunities for the TC. They were particularly useful in helping him understand how farming systems worked and provided him with experience of a wide range of problems. The TC was also mentored in this early stage by the senior consultants that knew the clients and their farming systems well and this enhanced his learning. He also had access to specialist farm consultants within the firm and their resources, such as financial databases. This access further enhanced his development.

Once the TC became more proficient, the consultancy firm provided him with new clients that had been attracted by the firm's reputation, but could not be serviced by the senior consultants because their client books were full. Finally, the TC's proficiency became such that he developed a reputation in his region with his own clients. Building his reputation with existing farmer clients led to him attracting new clients via 'word of mouth'. The TC also increased the size of his client base indirectly through existing clients growing their businesses. As his reputation developed, he also obtained referrals from other rural professionals. Interestingly, the TC did not view the monitor farms and discussion groups as an important source of clients.

The process of building a client base started slowly for the TC and then gained momentum. In year four of his career, as his reputation grew, the number of clients he has increased rapidly and by year five he has built a client base of 40 to 50 farmers and in turn has greatly reduced his industry project and farmer group work.

### ***The role of ongoing training***

The TC stated that the ongoing training and networking opportunities provided by the consultancy firm are an important benefit of the position. He reported, "*the consultants in*

*the firm work together yet alone*". The training and networking opportunities are provided at bi-monthly staff meetings and an annual staff training and development meeting. The bi-monthly staff meetings can include presentations on technical information, such as an update on rural finance issues by a rural banker, followed by discussions on topical issues. At the annual staff training and development meeting, the consultants discuss their training and development plans to ensure that there is minimal overlap, yet the range of areas that the firm requires expertise in is covered. Both of these meetings provided the TC with valuable opportunities to learn from the expertise of the other consultants and invited speakers. They also provide the TC with the opportunity to network with other rural professionals from within the region. Staff attend a range of seminars, workshops, field days and conferences throughout the year. This included professional development opportunities that were run by the New Zealand Institute of Primary Management (NZIPM), a professional body that supports rural professionals.

## **Discussion**

This study provided insights into the process that a medium sized consultancy firm used to develop a trainee consultant over three years to the point where at the end of his fifth year he had a full client book. This section discusses the nature of the training process used by his consultancy firm to develop the TC's proficiency in consultancy. The means by which the case consultant also built his client book is also discussed as this is an important outcome of the training process.

### ***Building proficiency in a trainee consultant***

The training provided by the consultancy firm for the TC is similar to that reported in other studies (Kenny and Nettle, 2012; 2013). The TC received a combination of on-the-job training and more formal training through courses, workshops and attendance at field days and seminars which is similar to that reported by Kenny and Nettle (2012, 2013). During his initial training period, the trainee consultant worked under the supervision of more experienced consultants and completed industry projects or a components of work from a visit to one of the senior consultants' clients. Kenny and Nettle (2012) also reported that some firms employed trainee consultants to undertake industry-based projects to build up their expertise before they started working with clients. However, Kenny and Nettle (2012) did not mention the use of farmer discussion groups as another source of learning for trainee consultants, or as an income generating activity for the TC.



The consultancy firm also used formal training methods to develop the proficiency of the TC. These comprised formal DairyNZ courses, seminars and workshops that were designed to enhance the TC's technical skills, an important area for a new consultant who was trying to establish a reputation in the region. DairyNZ have developed their Whole Farm Planning Programme to help trainee consultants become more effective (Kenny and Nettle, 2011). Kenny and Nettle (2011) concluded that the framework provides the scaffolding to assist junior consultants learn about farming systems. As the trainee consultant developed proficiency, he was provided with on-going training opportunities. This included in-house training and attendance at seminars, workshops, field days and conferences to further develop his skills and knowledge. Kenny and Nettle (2012, p. 6) also reported that professional development opportunities were available for more experienced consultants and that these enabled the consultants to extend their knowledge, helping "*to sharpen the sword*".

As the TC became more proficient, he began working with senior consultants and their clients. During this phase, a lot of emphasis was placed on learning-by-doing and on-the-job training that was also supported by mentoring from senior consultants. This exposed the trainee to a range of farm system types and problem situations which he identified as critical for improving his competency. Kenny and Nettle (2012) also reported that this approach was very important for the development of trainee consultants in their study. However, they did not report a progression of this process where the TC moved from completing some of the work for a senior consultant's client to being given their own clients, albeit ones that had simple systems or were wanting to make relatively simple on-farm changes. This reduced the risk of the TC of facing unusual or uncommon situations which he did not have the proficiency to deal with. This transition by the TC to his own clients was managed by the firm through the careful selection of suitable clients that were not too challenging for the TC and the provision of mentoring support and guidance. The TC could also seek advice from specialist consultants in the firm if required. Mentoring by senior consultants is an important means of knowledge exchange for the development of expertise in trainee consultants (Gray et al., 2014; Klerkx and Proctor, 2013), but as Kenny and Nettle (2013) reported, it is expensive and some firms are reluctant to make this investment.

As the TC's proficiency improved and his reputation developed, he obtained referrals from his clients and other rural professionals. He then moved into a phase where he began to operate as an independent consultant with a high level of proficiency (Dreyfus, 2016). He still however had access to his mentors and the specialist consultants at the firm for advice if required. Importantly, the TC was a reflective learner and self-awareness was an important factor in building his expertise. Gray et al. (2014) also stressed the importance of making trainee consultants aware of the need for lifelong learning and reflective practice.

### ***Building a client base***

The case consultant's firm aimed to develop his proficiency in consultancy as quickly as possible so that he could build a viable client base. It took the TC five years to develop a full client book. The study identified three inter-linked factors that were important for building a client base. These were the reputation of the consultant that is a function of his competency and reputation, the reputation of his firm, and the social networks the consultant developed both within and outside the firm. The importance of a consultant's competency and reputation (Gray et al, 2014; Fisher, 2013; Kemp et al., 2000) has been reported as critical for gaining and retaining clients as has the role of social capital in obtaining referrals (Gray et al., 2014; Kemp et al., 2000; Klerkx and Proctor). However, these studies have not mentioned the role of the firm's reputation or the importance of a trainee consultant's level of social capital with his senior colleagues in accessing clients. Gray et al. (2014) reported the importance of discussion groups as an important source of clients for the consultant in their study, something not highlighted by the TC. However, this may reflect differences in firm size and reputation between the two studies.

### **Conclusions**

Due to the time and cost of training farm consultants, researchers have investigated consultancy processes and in this study, the development of professional expertise. The path to expertise involved the trainee working progressively with a wider range of farm types and more complex problems. Critical to the consultants training, and ultimately his ability to build a client base, was his social networks both within and outside the firm, and the reputation both of the firm and trainee consultant. For trainee consultants and those working with them, this is an example of the longer-term process of developing expertise, aspects of which they could include in their own training programs. A recommendation

from this research is that trainees and their trainers openly discuss where they believe the trainee is on the path to developing expertise to balance the need to develop ‘a full book of clients’ as quickly as possible with the need for this to be done at a sustainable speed for the trainee. Future research could be conducted to explore how similar the TC experiences reported in this study are to other trainee farm consultants. For future research, each stage in the development of professional expertise could be investigated and thus recommendations for improving specific stages of training made. There is a need for consultants with expertise in farm management and farming systems, especially with an increasingly turbulent environment and the next wave of new technology that will impact on agriculture.

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