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## **CATALYSING SUCCESSION CONVERSATIONS**

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## CATALYSING SUCCESSION CONVERSATIONS

### Abstract

*The topic of handing on the family farm to the next generation does not appear to become any easier. Many techniques have been used to aid discussions, tax and legal planning. The use of simulations with professional actors role playing difficult scenarios has been tried with success across four countries of the UK over a two year period. The presentations and workshops resulted in increased uptake up of professional services to discuss the details of succession planning. The events used a package of videos, powerpoint and discussion to catalyse succession discussion.*

### Introduction

The authors have been talking to family farming groups over many years about the joys and problems of farm business succession. This paper describes how we successfully employ the use of videos to emotionally engage audiences to think about the importance of succession planning.

From small farmhouse meetings to pubs, village halls to large town halls, a wide variety of venues were used successfully.

### Videos as a succession planning tool

The authors, many consultants, and professionals (lawyers, tax accountants, bank managers) have tried various ways to tackle the inter-generational issues of handing on the family farm, drawing on first hand research and case studies. We have not been surprised at the resistance to discussing the topic of family business succession. It is so easy to put it off for 'another day'. There always appears to be more pressing tasks.

"I'm not going to make a Will, as it's too difficult and won't be my problem when I'm gone" reflects one response, which routinely came up over a number of years of presenting the topic of succession to family farming groups both small and large.

## **The videos**

In order to bring the subject to life in a manner that is stimulating for members of farming families, our aim was to produce a series of short (2-3min) videos linked by a storyline of an elderly farmer. After 30 viewings to over one thousand farming families across the UK, informal feedback indicated that the use of videos had been successful in stimulating discussion on succession planning. Success was judged independently by the booking uptake of professional advice from both accountants and lawyers. Following each succession event a participant questionnaire sort requests for legal or tax advice from a 'professional'. These requests were compared with similar participant questionnaire requests after succession planning events without the use of videos.

## **Why use professional actors**

We chose to employ professional actors rather than produce animations because we wanted the audience to clearly 'recognise themselves' in the scenarios we presented. Feedback often includes 'that's me in that discussion' and indicates that viewers become more emotionally engaged than they would if it were animated characters were used. The videos were professionally produced and directed with a 'film crew and sound crew'. Sound production and volume were critical to convey the emotion in the videos. Five short videos with powerful emotional content were produced, tested and released.

## **The Storyline**

The five videos, each of 2-3 minutes follow an older farmer and his daughter through a series of 'difficult conversations'.

The first video set the scene, with a look at the farmhouse and an interview with Ernest the farmer, who has three children James, Robert and Sarah. Sarah his daughter has worked on the farm for over 15 years, and is married to a vet, David. James is farming in South Africa. Robert delivers luxury yachts around the world. Neither of the two sons wish to come home to the farm.

The second video is introduced as the day on which Sarah has finally plucked up enough courage to talk to her father (Ernest) about the issue of succession on the farm (she and her husband David frequently discuss it between themselves). She has four unsuccessful

attempts, not really knowing how to introduce and frame the discussion and being keen to avoid uncomfortable vocabulary (eg around death and dying). The participants at the presentations are invited to say why they believe the attempts are unsuccessful. We then use further power-point slides to discuss the issue of how ownership of the farm might be divided between the siblings on Ernest's demise.

The third video is billed as 'Equal or Fair?' and looks at the emotional elements of splitting the farm three ways regardless of the contribution that Sarah and her husband have made over the 15 years. This video normally provokes a good deal of healthy debate amongst participants.

The fourth video is set in the farmhouse kitchen some time later when father (Ernest) has just returned from the hospital with a terminal diagnosis. Much of his dialogue is about the time he has left and his regrets over his lack of planning, although even here he manages to ascribe some 'blame' to Sarah. He compares himself with the Jackson's next door who are in a worse situation.

The final video imagines a scene 10 years in the past *if* Ernest and Sarah had discussed, thought through and planned the succession issues and were off to their accountant and lawyer together following family discussions and agreements.

## **Conclusion**

A package of videos, (using professional actors) powerpoint and discussion has been shown to successfully catalyse succession discussion. The importance and difficulty of farm family business succession planning has been long recognised. That said, the topic of handing on the family farm to the next generation does not appear to become any easier, despite an increasing body of research on farm succession. Many techniques have been used to aid discussions with family members as well as the necessary tax and legal planning. The combination of videos, research-informed powerpoints and discussions has been tried with success across four countries of the UK over a two year period. The presentations and workshops resulted in greater take up of professional services to discuss the details of succession planning.