



The Succession ALLIANCE

Supporting Farms, Businesses and Families

1st International Succession Symposium Learning Report

Reflections, themes and practical insights
from the Succession Alliance event

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Why this report exists

In January 2026 the Succession Alliance hosted the first International Succession Symposium, bringing together practitioners, researchers and on-farm voices from across the world. The intention was not to produce a formal academic paper, but to create a safe and practical space to share what really works when supporting farm families through change.

This report is written for farmers, successors, advisers and facilitators who want practical, real-world approaches rather than technical or legal theory.

This document captures the learning from that day. It draws together the main themes from our speakers, breakout rooms and open discussions. Rather than multiple short papers, this report presents the insights as one coherent narrative, organised into chapters.

Think of this as a working guide — a record of collective experience and a starting point for better conversations.

About the Symposium

The event combined short provocations from four international speakers with facilitated breakout discussions. Each speaker was asked to focus on the human and strategic dimensions of succession, rather than technical detail. The emphasis throughout was practical learning, honesty and peer exchange.

Insights from our Speakers

John Baker – USA: Business structure and management foundations

John reminded us that succession is fundamentally about management, not just asset transfer. Values, vision, goals and compensation systems must be clear long before ownership changes hands. He described the importance of teaching families how to plan repeatedly over time, rather than delivering a single plan.

Shane Conway – Ireland: The emotional and social realities

Shane's research highlighted that farming is identity as much as occupation. Reluctance to step back is rarely financial; it is emotional. He encouraged 'preventive intervention' and the use of neutral facilitators to support early, honest intergenerational conversations outside the family home.

Andrew Lawson – Australia: Evidence and professional capability

Andrew focused on the need for trained coordinators and transition specialists. Good intentions are not enough. Skilled facilitation, structured conversations and professional standards significantly improve outcomes.

Matt Lobley – UK: Patterns and progression

Matt shared international evidence showing that gradual delegation of responsibility — passing the baton step by step — leads to stronger outcomes than last-minute handovers. The career ladder approach, where management is transferred progressively, reduces risk for everyone.

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The Succession Alliance

The Succession Alliance is an independent network of practitioners, facilitators, researchers and on-farm voices working together to improve how farming families navigate long-term transition and business continuity. Founded to move the conversation beyond tax and inheritance planning alone, the Alliance focuses on the human, strategic and practical realities of succession — helping families start earlier, talk more openly and build resilient businesses for the next generation. Through events, shared learning, peer exchange and practical tools, the Alliance creates safe spaces where experience can be shared honestly and where better approaches can be developed collectively. Our aim is simple: to support farming families to remain both viable businesses and strong families over time.

www.successionalliance.com

Chapter 1 – Reframing the problem

From “succession planning” to long-term business strategy

If there was one theme that surfaced repeatedly throughout the International Succession Symposium, it was that we may simply be using the wrong word.

For decades, farms have talked about “succession planning” as if it were primarily a legal or tax exercise: something to be addressed towards the end of a career, something triggered by retirement or death, and something best handled by solicitors and accountants. The term itself often implies an event that happens at a single point in time.

Yet almost everyone in the room, regardless of country, scale or system, described a very different lived experience.

- When the conversation is framed as succession, families hesitate.
- When it is framed as strategy, they engage.

That distinction may sound subtle, but it has significant practical consequences. Language shapes behaviour. If the language feels heavy, final or threatening, people delay. If it feels constructive and forward-looking, they are far more likely to start early.

Setting the context

The symposium brought together over 70 advisers, facilitators, researchers and on-farm voices from twelve countries.



Legal frameworks differed widely. Tax systems, ownership models and cultural norms varied considerably. However, the human challenges described were remarkably similar.

Across breakout rooms and discussions, the same pattern emerged. Families generally understand that they should plan for the future, and most care deeply about the long-term viability of their farm and family. The barrier is rarely a lack of responsibility or goodwill. Instead, the subject itself feels emotionally loaded and difficult to approach.

Several participants described the word “succession” as something that immediately raises anxiety. It can suggest stepping aside, giving up control, dividing assets or confronting mortality. For many, it feels less like building for the future and more like managing an ending.

One attendee summed this up with disarming honesty:

“As soon as you say succession, people come out in hives.”

For a community whose mindset is typically about growth, resilience and continuity, that framing creates predictable resistance.

A simple but powerful reframe

Early in the event, a comment from a Canadian participant helped shift the tone of the conversation:

“We tend to use the term facilitator or transition coach. It’s a process, not a one-off event.”

That idea that transition is an ongoing process rather than a single event recurred throughout the day. Others spoke about “*continuity planning*”, “*progression*”, or simply “*good business management*”. Gradually, a common language began to emerge.

The phrase that resonated most strongly was “long-term business strategy”.

Very few farmers would say they are not interested in strategy. Planning for the next five, ten or twenty years is an accepted and respected part of running any serious business. When transition is described in those terms, the conversation shifts from inheritance and retirement towards capability, leadership and risk management.

As one adviser observed:

“Nobody argues with strategy. But plenty of people avoid succession.”

The work itself may be identical, but the framing produces a very different response.

What the speakers reinforced

This reframing was not simply a matter of semantics. It was reinforced, from different angles, by all four keynote contributors.

John Baker spoke about succession primarily as a management issue. He emphasised the importance of clarity around values, vision, goals, roles and compensation structures. These, he argued, are not end-of-life considerations but core business functions. Without clear management systems, transferring ownership simply transfers confusion.

Shane Conway highlighted the emotional dimension. Drawing on his research with older farmers, he described how farming is often deeply tied to identity, purpose and status. When succession is framed as “retirement” or “handing over”, it can feel like a personal loss rather than a business progression. Resistance in these situations is rarely financial; it is human.

Andrew Lawson focused on professional capability. He noted that farms routinely seek expert advice for finance, agronomy or diversification, yet often expect families to navigate generational transition without skilled facilitation. In his view, effective transition requires trained coordinators and structured conversations, not just good intentions.

Matt Loble presented evidence that gradual delegation of responsibility produces better outcomes than last-minute handovers. His work showed that when successors build experience step by step, transition is smoother and less disruptive. This approach looks far more like leadership development than a one-time transfer.

Although each speaker approached the topic differently, their conclusions aligned. Transition is strategic and organisational in nature. It is not simply a legal transaction.

The risk of treating succession as an event

When succession is framed as a single event, several unintended consequences follow.

It encourages delay. Families assume there will be a moment in the future when everything is “ready” and the issue can be addressed properly. Until then, there seems little urgency.

It also narrows the focus to paperwork. Wills, ownership structures and tax planning become the centre of attention, while the development of people and relationships receives less consideration.

Most importantly, it increases the likelihood that action is triggered by crisis. Many participants described starting only after illness, bereavement, conflict or external pressure from lenders. At that point, decisions are rushed and emotionally charged.

As one practitioner reflected:

“By the time they call us, something has already gone wrong.”

Planning under pressure is rarely conducive to thoughtful or fair outcomes.

A shift in practice

By contrast, when transition is treated as long-term business strategy, the emphasis changes.

The conversation moves away from “Who gets what when?” towards questions such as:

- How do we build leadership capacity in the next generation?
- How do we spread decision-making across the business?
- How do we reduce risk over time?
- How do we ensure continuity if something unexpected happens?

These are familiar management questions. They are also far easier to start discussing early.

In practical terms, this shift leads away from one-off meetings and late-stage legal transfers, and towards ongoing conversations, gradual responsibility sharing and regular reviews. In other words, it aligns transition with the same disciplined approach that most farms already apply to finance, production and investment decisions.

Closing reflection

The strongest takeaway from the opening discussions was not the need for new tools or complex frameworks, but for a change in perspective.

“Succession” suggests an ending.

“Strategy” suggests a future.

Farmers are naturally oriented towards the future. Framing the work as long-term business strategy planning simply aligns the language with that instinct.

If we change how we describe the problem, we make it easier to start solving it.

Chapter 2 – Start early: little and often

Building momentum before crisis forces your hand

If Chapter 1 reframed the language we use, Chapter 2 focused on timing.

One of the clearest and most consistent messages from the International Succession Symposium was that transition rarely fails because families start too early. Far more often, it falters because conversations begin too late. Across speakers, facilitators and breakout discussions, the same reflection surfaced repeatedly: most families know they should plan, but they delay starting.

This delay is rarely about denial or indifference. It is simply the reality of farming life. Seasonal pressure, operational demands and financial constraints mean that longer-term conversations are easily postponed. There is always something more immediate to deal with.

As one participant put it, *“Everyone agrees we need to talk about it — just not this month.”*

Over time, those small postponements quietly accumulate. What feels like a sensible delay of a year or two can quickly become a decade. By the time the issue returns to the surface, it is often no longer a strategic choice but a forced response.

A familiar timeline

When we asked groups when succession conversations typically begin in practice, very few people answered “early”.

Instead, most described the same sequence of events. Planning starts after something goes wrong: a health scare, a death, a family dispute, or pressure from the bank. In other words, transition is commonly triggered by crisis rather than design.

One contributor described it bluntly:

“We didn’t plan succession. Succession happened to us. Dad got ill and suddenly everything had to be sorted in six months.”

Starting from that position changes the tone of every decision. Emotions are heightened, time is short, and conversations that should have unfolded gradually are compressed into a few intense meetings. Even families with strong relationships can find themselves under strain.

Planning under pressure rarely produces good judgement.

The hidden cost of waiting

Waiting also carries quieter, practical consequences.

When responsibility remains concentrated with one person for too long, capability across the business does not develop evenly. The next generation may be highly competent in day-to-day operations yet have limited exposure to management, budgeting or strategic decisions. They understand how the farm works, but not necessarily how it is run.

At the same time, the older generation may struggle to step back. After decades of making every key decision, handing over control suddenly can feel less like progression and more like loss.

As one father explained during discussion:

“It’s not that I don’t trust them. It’s just that I’ve always done it. I wouldn’t know where to start stepping back.”

Without preparation on both sides, the eventual transfer becomes abrupt and unsettling for everyone involved.

From a business perspective, this is simply unnecessary risk. No other enterprise would deliberately leave leadership development until the final moment. Yet farms frequently do so, not through poor judgement, but through habit and cultural norms.

What “starting early” really looks like

Importantly, starting early does not mean complex documents or heavy legal structures years in advance. The symposium was notable for how practical and grounded the suggestions were.

Participants described something much simpler: normalising conversations about the future and sharing responsibility in small, manageable ways.

This often meant everyday actions such as involving younger family members in financial discussions, explaining the reasoning behind decisions, and gradually delegating real responsibility rather than keeping it centrally.

One contributor reflected:

“We didn’t write a big plan. We just started letting them take bits on. Accounts first, then suppliers, then bigger decisions. It grew naturally.”

Another added, half joking but entirely serious:

“Start with who orders the diesel. If they never order the diesel, how are they going to run the farm?”

The example raised laughter, but it captured an important truth. Confidence grows through experience, not observation. Responsibility has to be practised, not inherited overnight.

Small steps, taken consistently, build competence far more effectively than one dramatic handover.

Gradual transfer, not sudden handover

This idea closely echoed the evidence shared by Matt Lobley. His research showed that where responsibility is transferred progressively, what he described as a “career ladder” outcomes are more stable and relationships less strained.

Instead of moving directly from helper to manager, successors step up in stages. They take ownership of defined areas, build credibility and develop judgement over time. By the time formal ownership changes, much of the practical transition has already occurred.

Seen in this way, succession begins to look less like inheritance planning and more like leadership development.

It becomes a question of preparing people, not simply transferring assets.

Creating momentum through regular touchpoints

Families who reported positive experiences rarely relied on one big conversation. Instead, they built transition into their normal rhythm of business life.

This might involve an annual family review, periodic goal-setting discussions or regular check-ins about roles and responsibilities. These touchpoints reduce the emotional weight of the topic and create gentle accountability. When conversations happen routinely, they stop feeling daunting.

As one facilitator observed:

“If you only talk about it once every ten years, of course it feels huge. If you talk about it every year, it’s just part of running the business.”

Over time, this steady approach builds momentum. Change becomes incremental rather than disruptive.

Closing reflection

The collective experience from the symposium suggests that successful transition is rarely the result of a single decisive moment. It is usually the outcome of many small steps taken consistently over time.

Starting early is not about accelerating change. It is about reducing risk, building confidence and creating space for better decisions. In that sense, “little and often” is less a slogan and more a practical discipline.

Steady progress, made deliberately, almost always proves more effective than waiting for crisis to dictate the terms.

Chapter 3 – The human side

Emotions, identity and the conversations we avoid

If Chapter 1 reframed the language and Chapter 2 addressed timing, the third major theme of the symposium focused on something less tangible but no less important: the human dimension.

Across every session, regardless of country or professional background, one point returned again and again. Technical solutions alone are rarely enough. Legal structures, tax planning and ownership models can all be perfectly designed on paper, yet still fail in practice if the people involved are not ready.

As several contributors put it, succession challenges are rarely caused by spreadsheets. They are caused by relationships.

Or, more precisely, by the conversations that families struggle to have.

Beyond structures and paperwork

There was broad agreement that most farms (but not all) already have access to competent legal and financial advice. Wills can be written. Partnerships can be restructured. Assets can be transferred efficiently. From a purely technical perspective, many of the tools required for transition already exist.

Yet despite this, difficult outcomes remain common: stalled decision-making, unresolved conflict between siblings, successors leaving the business, or older generations unable to step back even when they recognise the need.

This disconnect prompted an important question during the symposium: if the technical solutions are available, what is really getting in the way?

Time and again, the answer came back to people.

As one participant observed:

“It’s never really about the land or the money. It’s about what the land and money mean to the family.”

Those meanings are emotional, not financial.

Farming as identity, not just occupation

This theme was explored most directly by Shane Conway, whose research into later-life transition in farming highlighted how closely farming is tied to identity.

For many older farmers, the farm is not simply a business asset. It represents a lifetime of work, personal sacrifice, family history and social status within the community. Stepping back can feel less like a change of role and more like a loss of purpose.

Shane described this challenge clearly:

“Farming isn’t just an economic activity. It’s a way of life. Asking someone to ‘retire’ can feel like asking them to stop being who they are.”

When viewed through this lens, resistance to succession becomes easier to understand. It is not necessarily about control or stubbornness. It is often about uncertainty: what replaces the role that has defined someone for forty or fifty years?

Several facilitators in the room recognised this immediately. They spoke about older farmers who intellectually accepted the need for transition, yet emotionally struggled to imagine their place once the handover had occurred.

Without acknowledging this dimension, even the best-designed plan can stall.

The cost of silence

If identity is one side of the equation, communication is the other.

A recurring observation from both advisers and families was that many tensions develop not through open disagreement, but through avoidance. Expectations go unspoken. Assumptions harden. Resentments accumulate quietly over time.

One speaker summarised it succinctly:

“People quit talking to each other. That’s when the problems really start.”

Several participants reflected that families can spend decades working side by side without ever having an explicit conversation about long-term goals. Children may assume they will inherit certain responsibilities. Parents may assume the opposite. Siblings may interpret fairness very differently. Yet none of these assumptions are tested until a trigger forces the issue.

By then, positions are often entrenched.

One facilitator shared a familiar scenario:

“By the time we’re invited in, they’re not really talking about succession. They’re talking about a disagreement that’s been building for twenty years.”

What appears to be a practical or financial dispute is often rooted in much older emotional dynamics.

Why these conversations are difficult

The symposium also explored why these conversations feel so hard to initiate.

Part of the answer lies in family roles. Unlike corporate settings, farms combine family and business relationships in the same space. Conversations that would be relatively straightforward in a boardroom can feel intensely personal around a kitchen table. Hierarchies developed in childhood may still shape interactions decades later.

As Shane Conway noted in his research, everyday communication patterns within families can reinforce power dynamics. Younger members may hesitate to challenge older ones. Older members may interpret questions as criticism rather than curiosity. Without a neutral environment, even simple discussions can become emotionally charged.

Cultural factors also play a role. In some communities, discussing conflict, wellbeing or emotional support still carries stigma. Several international participants commented that terms such as “therapy” or “counselling” would deter farmers immediately, even when support would clearly be helpful.

One contributor from Brazil explained:

“If we call it therapy, no one comes. If we call it a planning meeting, they come. But the need is the same.”

Again, language shapes behaviour.

The role of facilitation and coordination

For these reasons, many speakers argued strongly for the use of neutral facilitators or coordinators.

Andrew Lawson emphasised that transition is skilled work and should be treated as such. Just as farms seek professional expertise for finance or agronomy, they can benefit from structured support when navigating complex family dynamics.

A trained facilitator does not impose solutions. Instead, they create a safe environment in which conversations can happen more openly. They help clarify goals, surface assumptions and ensure

that quieter voices are heard. Importantly, they are not emotionally embedded in the family's history.

John Baker described his own role in similar terms:

"I'm not there to give them a plan and walk away. I'm there to teach them how to plan, so they can keep doing it themselves as life changes."

This ongoing, supportive approach reframes facilitation from a one-off intervention into a continuing relationship, much like any other trusted adviser.

Several participants reflected that simply having someone independent in the room often changes the quality of discussion. People listen more carefully. Conversations slow down. Difficult topics can be raised without becoming confrontational.

In many cases, that structure alone is enough to unlock progress.

Recognising that this is relational work

What emerged from the discussions was a growing recognition that succession work is fundamentally relational. It involves trust, expectations, identity and communication at least as much as it involves assets and ownership.

Ignoring those elements does not make them disappear. It simply allows them to surface later in more disruptive ways.

Conversely, addressing them early — even informally — can reduce the likelihood of conflict significantly.

This may mean:

- creating space for each family member to articulate their goals
- acknowledging differences in ambition or interest
- discussing fairness openly rather than assuming agreement
- recognising emotional attachments as legitimate, not irrational

None of these actions require legal documentation. They require time, patience and willingness to listen.

Closing reflection

A consistent message from the day was that transition succeeds when families feel heard, respected and prepared, not simply when documents are signed.

Legal and financial tools remain essential, but they are only part of the picture. Without attention to identity, emotion and communication, even the most elegant structure can fail.

Put simply, succession is not only a technical exercise. It is human work.

Recognising that reality and planning for it may be one of the most important steps any family can take.

Chapter 4 – Fairness, land and economics

Setting the context

If the earlier chapters explored language, timing and the human side of transition, the symposium inevitably returned to something more concrete. However open the conversations and however early the planning begins, succession eventually reaches the same practical questions: who owns what, who controls what, and how the business continues to function afterwards.

It is often at this point that progress slows.

Across breakout rooms, advisers and families described a shared tension. Almost every parent wants to be fair. Almost every family wants to avoid resentment or perceived favouritism. Yet farms are not simple financial assets that can be divided neatly without consequence. Land cannot be sliced into equal portions without affecting viability, and a business built over generations can be weakened surprisingly quickly by decisions that look fair on paper.

As one participant put it:

“You can split money. You can’t split a working farm without changing what it is.”

That simple observation framed much of the discussion that followed.

The instinct for equality

Many families begin with an understandable assumption that fairness must mean equality. Equal shares feel morally right and emotionally safe. They appear to reduce conflict before it starts.

But the lived experience shared at the symposium suggested something more complicated.

Equal ownership often led to:

- fragmented decision-making
- differing priorities between siblings
- pressure on one successor to borrow heavily to buy others out
- reduced reinvestment capacity
- or land becoming operationally inefficient

What was designed to protect relationships sometimes created fresh tensions.

One adviser reflected bluntly:

“Equal can be the quickest way to make a business unworkable.”

It was not said cynically, but pragmatically.

Equal is not always equitable

A phrase that surfaced repeatedly during discussions was simple but powerful: equal is not always equitable.

Fairness in family businesses often has to account for contribution, responsibility and risk, not simply headcount.

In many families:

- one or two children may have worked on the farm for decades
- others may have pursued careers elsewhere
- some carry day-to-day management and financial risk
- others have little operational involvement

Treating those paths as identical can overlook very different levels of commitment.

One successor described it candidly:

“I’ve given fifteen years to this place. My brother hasn’t worked here since school. Calling that equal doesn’t really feel fair to either of us.”

The room recognised the dilemma immediately. This was rarely about greed. It was about acknowledgement.

Andrew Lawson framed this as normal business logic. In any other enterprise, responsibility and reward are aligned. Farming businesses should not pretend those economics disappear simply because ownership sits within a family.

What the speakers reinforced

John Baker returned to a point he had made earlier in the day: the business itself must remain viable.

“The business has to survive first,” he said. *“Otherwise we’re just dividing up a problem.”*

That comment resonated strongly. Without a functioning enterprise there are no jobs, no resilience and nothing meaningful to pass on. A generous-looking division that weakens the farm may ultimately disadvantage everyone.

Several facilitators also noted that many conflicts stem not from the numbers themselves but from ambiguity. Expectations are often assumed rather than discussed. Parents believe everyone understands the plan. Children make quiet assumptions. Siblings interpret fairness differently.

By the time these assumptions surface, positions are entrenched.

Families who clarified roles early – who is employed, who manages, who owns, who invests – reported noticeably smoother transitions.

As one farmer observed:

“Once we treated it like a business with proper roles instead of just ‘family helping out’, everything got calmer.”

Structure, far from being impersonal, often protects relationships.

The role of realistic planning

Financial realism also proved essential.

Too many transition conversations, participants admitted, are shaped by optimism rather than evidence. Conservative cashflow forecasts and honest assessments of borrowing capacity helped ground discussions and align expectations.

One adviser joked:

“Sentiment writes the first draft. Spreadsheets write the final one.”

The humour landed because it felt true. Numbers do not remove emotion, but they anchor it in reality.

When families worked through scenarios together, conversations became less about opinion and more about what was genuinely sustainable.

Living with trade-offs

Perhaps the most important realisation from this chapter was that there is rarely a perfect solution.

Every approach involves trade-offs.

- Someone may receive less land.
- Someone may take on more responsibility.
- Someone may benefit financially while another gains stability or control.

Trying to avoid these realities entirely often leads to delay and avoidance. Addressing them openly, with clear reasoning, tends to build understanding even where outcomes are uneven.

As one experienced practitioner summarised:

“Fair doesn’t mean everyone gets the same thing. Fair means everyone understands why the decision was made.”

Closing reflection

By the end of the symposium, it was clear that questions of land and economics are not separate from the human side explored earlier. They are simply where those human values become tangible.

The challenge is not choosing between fairness and viability. It is designing solutions that respect both.

Holding those two truths together – family and function, emotion and economics – may be one of the hardest parts of transition. Yet when addressed thoughtfully and transparently, they create the foundations for farms that are both fair and functional for the next generation.

Chapter 5 – What actually helps in practice

From ideas to action

After a session spent exploring language, timing, emotion and economics, the final conversations at the symposium became noticeably more grounded.

Participants began asking a simpler question.

- Not what should happen in theory.
- Not what an ideal model looks like.
- But what, in practice, actually helps families move forward.

The answers were strikingly modest.

There was little appetite for complex frameworks or heavy documentation. Instead, the most experienced advisers and farmers described small habits and behaviours that, repeated consistently over time, reduced friction and built confidence.

Successful transitions rarely seemed to come from one dramatic intervention. They emerged gradually, almost quietly, from steady, deliberate action.

As one facilitator put it:

“There’s no magic trick. It’s just doing the simple things earlier and more often.”

Begin earlier than feels necessary

The clearest and most consistent message concerned timing.

Families who described smoother transitions almost always started conversations long before they felt urgent. They did not wait for retirement, ill health or external pressure. They began when relationships were stable and options were still open.

Starting early changed the tone completely.

It meant:

- less emotion
- less time pressure
- more room to explore options
- and fewer “all or nothing” decisions

Several farmers admitted they had waited years for the “*right moment*”, only to realise that it never really arrived.

One participant reflected:

“We kept saying we’d talk about it next year. Then suddenly twenty years had passed.”

By contrast, families who talked while nothing was wrong found the subject far less daunting. It became part of normal business planning rather than a looming life event.

Use a neutral facilitator or transition coach

Another theme that surfaced repeatedly was the value of independence.

Families who involved a neutral facilitator often described an immediate shift in the quality of conversation. The presence of someone external changed the dynamic in subtle but important ways. People listened more carefully. Interruptions reduced. Difficult topics were raised more calmly.

Andrew Lawson’s earlier point about professional capability returned here. Transition is skilled work. Expecting families to navigate complex emotional and organisational change entirely alone may be unrealistic.

As one adviser observed:

“Sometimes you don’t need answers. You just need someone to hold the space so people can actually talk.”

Facilitators were not there to impose solutions, but to:

- ask better questions
- surface assumptions
- ensure quieter voices were heard
- and keep conversations constructive

For many, this structure made the difference between avoidance and progress.

Separate family and business discussions

A number of participants noted how easily conversations derail when business issues are discussed informally at home.

Around the kitchen table, old family roles tend to resurface. Parents revert to being parents. Children revert to being children. Discussions become personal rather than strategic.

Families who created clearer boundaries reported better outcomes.

This often meant:

- dedicated meetings
- agreed agendas
- sometimes even meeting off-farm
- and treating the discussion with the same seriousness as any other business decision

One farmer described the change simply:

“Once we stopped talking about it after dinner and started booking it like a proper meeting, everything improved.”

The shift in environment changed behaviour.

Treat plans as living documents

Several contributors reflected that transition plans often fail not because they are wrong, but because they are static.

Farms evolve. Markets change. People’s ambitions shift. A plan written once and placed in a drawer quickly becomes outdated.

Families who reviewed their plans regularly felt more resilient and less constrained.

John Baker described his approach not as delivering a plan, but teaching families how to plan repeatedly over time.

The discipline of review proved more important than the document itself.

As one participant noted:

“The plan wasn’t perfect. But we kept coming back to it. That’s what made it work.”

Delegate responsibility progressively

Echoing Matt Loble’s research, gradual delegation emerged as one of the most practical and effective strategies.

Rather than waiting for a single handover, responsibility was passed step by step.

Successors took ownership of:

- budgets
- suppliers
- staffing
- enterprises
- or specific projects

Confidence grew through experience rather than entitlement.

By the time ownership formally changed, the practical reality had often already shifted.

One father smiled as he described it:

“By the time we signed the paperwork, she’d been running half the place for two years. Nothing really changed.”

That lack of drama was widely recognised as a sign that the process had worked.

Frame the work as strategy, not inheritance

Finally, the language introduced at the very beginning of the symposium resurfaced once more.

Families who treated transition as inheritance planning tended to postpone it.

Families who treated it as long-term business strategy integrated it into everyday management.

Instead of asking:

Who gets what?

They asked:

What does the business need to thrive over the next ten or twenty years?

That subtle shift made action easier. Transition became part of running a good business, not a future problem to avoid.

As one adviser summarised:

“Once we stopped calling it succession, we actually started doing it.”

Closing reflection

Taken individually, none of these actions feels revolutionary. Yet together they form a steady discipline that reduces risk, builds capability and protects relationships.

If the symposium revealed anything, it is that progress rarely comes from grand gestures.

It comes from starting, and then continuing.

Little and often.

Closing reflection

Overall Conclusion – From succession to strategy

Looking back across the symposium, what stands out most is not a single technique or framework, but a shared shift in perspective.

Despite differences in geography, legal systems and farming models, the same themes emerged repeatedly. Transition challenges were rarely technical first. They were human, organisational and strategic.

Families struggle not because they lack intelligence or goodwill, but because:

- the language feels heavy
- the timing feels uncomfortable
- the conversations feel emotional
- the economics feel complex

Left unaddressed, these pressures push planning into the future until crisis forces action.

Yet the stories shared throughout the symposium offered a more hopeful picture.

When families:

- start earlier
- talk more openly
- involve independent support
- clarify roles
- plan realistically
- and treat transition as part of normal business strategy

The process becomes calmer and far less risky.

What was striking was how ordinary these actions are. They do not require radical change. They require consistency.

As one participant reflected at the end of the day:

“There’s nothing here we couldn’t have done ten years ago. We just didn’t realise we should.”

Perhaps that is the most important lesson.

Succession is not a single event to be solved at the end of a career. It is a continuous process of leadership development, communication and business planning. In many ways, it is simply good management.

If we reframe the work as long-term business strategy — something farmers already understand instinctively — the barriers begin to fall.

The conversations start earlier.

The decisions feel less threatening.

The outcomes become more sustainable.

The aim is not perfection - It is preparedness.

Farms that approach transition steadily, deliberately and professionally are far more likely to remain both viable businesses and cohesive families for the next generation.

That, ultimately, was the shared ambition that brought everyone together.

And it is the reason this conversation continues...

APPENDIX 1: Reference List

- Succession Alliance – network, events and shared learning resources
<https://www.successionalliance.com>
- Centre for Rural Policy Research – University of Exeter (Matt Loble’s farm succession and rural business research)
<https://www.exeter.ac.uk/research/centres/crpr/projects/>
- Atlantic Technological University – Rural and social research (Shane Conway)
<https://www.atu.ie>
- University of New England, Australia – Rural transition and succession research (Andrew Lawson)
<https://www.une.edu.au>
- Farm Transition Planning Network and tools (John Baker and North American transition planning practice)
<https://www.farmtransition.org>
- Women in Farming – Health and Wellbeing research publications (University of Exeter)
<https://sites.exeter.ac.uk/womeninfarming/publications/>
- Creating an Age-Friendly Environment in Farming – The Farmer’s Yards Approach (Journal of Agromedicine paper)
Journal homepage:
<https://www.tandfonline.com/journals/wagr20>