

# Using the Online Ag Business Planning Tool “AGPLAN”



Rodney Jones

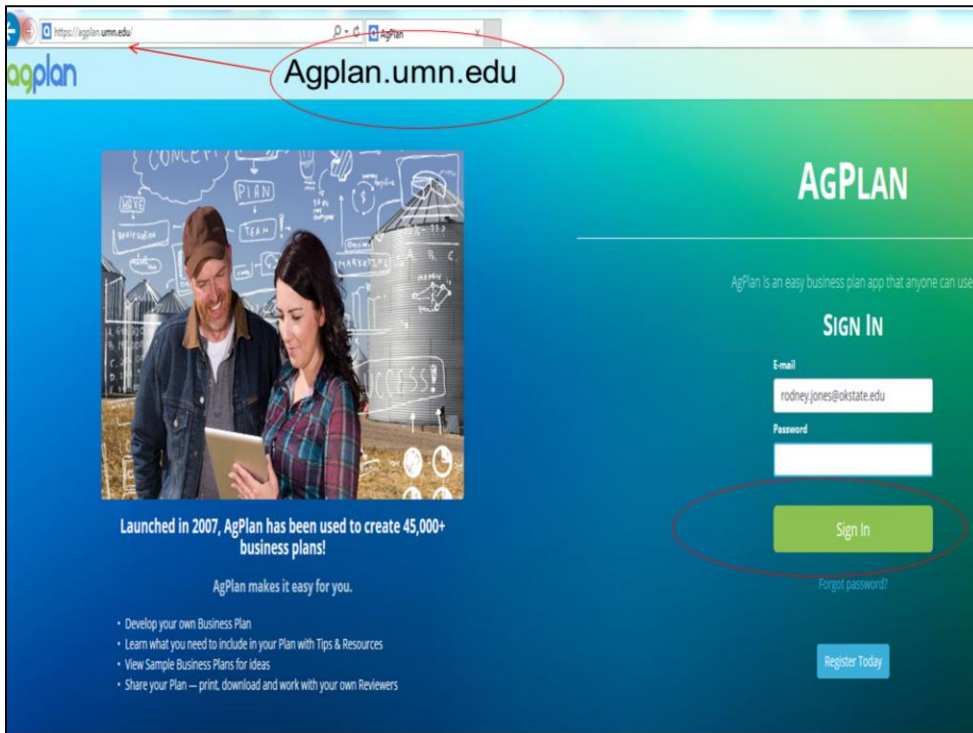
[Rodney.jones@okstate.edu](mailto:Rodney.jones@okstate.edu)

405 744 6173



In this short session I will introduce you to “one” of the many tools that are available to assist farm business stakeholders in the business planning process. I want to emphasize that there are a lot of really good tools out there, all the way from outlines, to templates, to example plans some focused more generally, and some focused on agricultural businesses. This particular tool has some interesting and in my opinion attractive features. AGPLAN is an online tool that allows the stakeholder team to build a business plan over time with as much cooperation, and collaboration as desired, and also allows the plan developers to ask for input from whatever outside stakeholders that they want.

Another attractive feature is that the tool is designed to interact with a couple of financial management tools to streamline the process a bit when developing the financial component of the business plan.



To get started, simply visit the AGPLAN website at agplan dot umn (for university of minnesota) dot edu. Before beginning to work on an actual plan you will need to register (the first time you log onto the sight), which as usual involves setting up a password, etc. Once registered, you simply sign in using your email and the password you selected.

# Once Signed In

The screenshot displays the agplan web application interface. At the top, there is a navigation bar with the agplan logo on the left and links for 'About', 'Account', and 'Log Out' on the right. Below the navigation bar, a welcome message reads 'Welcome, Rodney Jones!'. There are two buttons: 'Start a New Plan' (green) and 'Help' (white). A 'Sort' dropdown menu is set to 'Last Updated Date, descending'. The main content area is titled 'My Plans' and contains a table with the following data:

Plan Name	Last Update	Updated By
Sample Oklahoma Farm	12/19/2016 9:21 AM	Rodney Jones

Below the table, there are links for 'Reviewers', 'Tools & Settings', and a 'View Plan' button. A section titled 'Plans for Review' contains the message: 'You are not currently assigned as a Reviewer on any Plans.' The Oklahoma State University Extension logo is visible in the bottom right corner.

Once signed in you will be directed to either start a new business plan, or work on one that has already been started, which will be listed according to the name you selected. Obviously, what is correctly implied here is that you can be involved in formulating as many different plans for as many different agricultural businesses as you want, providing a lot of flexibility in using this web based tool.

For each plan on your list, right from the start you can either click on the plan and begin working on whatever component you choose at that time, or you can choose to share that particular plan with others so they can either work on it, or provide you with a review and suggestions.

**Reviewers**

agplan About Account Log Out

Manage Reviewers: Sample Oklahoma Farm [Return to My Plans](#)

Plan Reviewers		
Name	E-mail	Allow to Edit?
Brent Ladd	brent.ladd@okstate.edu	<input checked="" type="checkbox"/>

[Revoke Access](#)

Add a Reviewer

Reviewer Email Address

Reviewer Access

Comment Only

Comment & Edit

[Add Reviewer](#)

If you have other people who are helping or advising you, you might want to give them permission to review and even to edit your plan. We take our commitment to protect the confidentiality of your business plan very seriously.

Add a reviewer by entering their email address, then setting their access. When you add a reviewer, they will receive an email instructing them on how to access your business plan.

**Comment Only** — Reviewers can read and add comments to your business plan.

**Comment & Edit** — Reviewers access can read, add comments, and edit your business plan.

OK STATE UNIVERSITY EXTENSION

If you click on the “reviewers” option, a list of people you have already given access to will come up. Here notice that I have given Brent access to this particular plan, and I granted him the ability to not only look at and comment on the plan, but to go ahead and edit himself if he so chooses. Since I am the “owner” of the plan, I have the option right here to remove Brent as a reviewer if I so choose. Of course I am not going to do that because I want a lot of stakeholder and reviewer input as I develop my plan to make it better.

To add additional reviewers you simply type in their email address, and then indicate whether you want them to only be able to view your plan and provide comments, or whether you want them to be a part of the plan writing team and as such can actually edit the plan. The comment only option might be appropriate if you were sending a draft of your plan to your lender, or your accountant, or some other business advisor for feedback, but you did not want to portray the expectation that they needed to help write the plan. Once your have typed In the reviewer’s email address and indicated their role, a click of the button adds them to your planning team, and they immediately get an email indicating such.

# Main Entry Screen

Welcome, Rodney Jones!

[Start a New Plan](#) [Help](#) Sort: Last Updated Date, descending

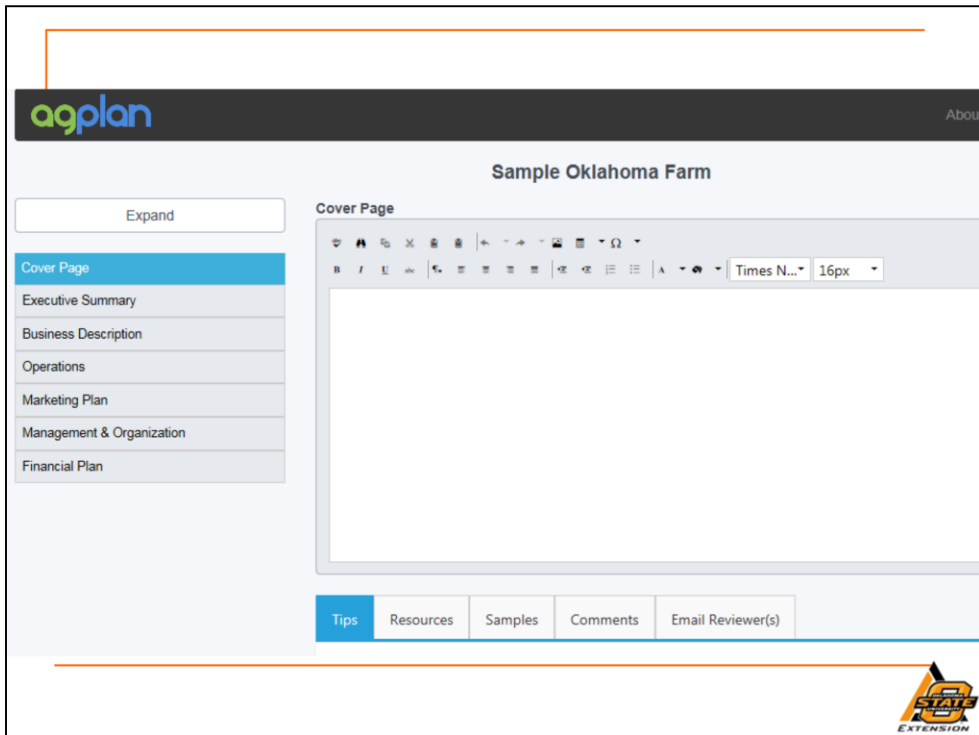
My Plans

Plan Name	Last Update	Updated By
Sample Oklahoma Farm <a href="#">Reviewers</a> <a href="#">Tools &amp; Settings</a>	12/19/2016 9:21 AM	Rodney Jones <a href="#">View Plan</a>

Plans for Review

You are not currently assigned as a Reviewer on any Plans.

Back to the main entry point for the tool, I am going to view and start working on the only plan that happens to be in my list at the moment.



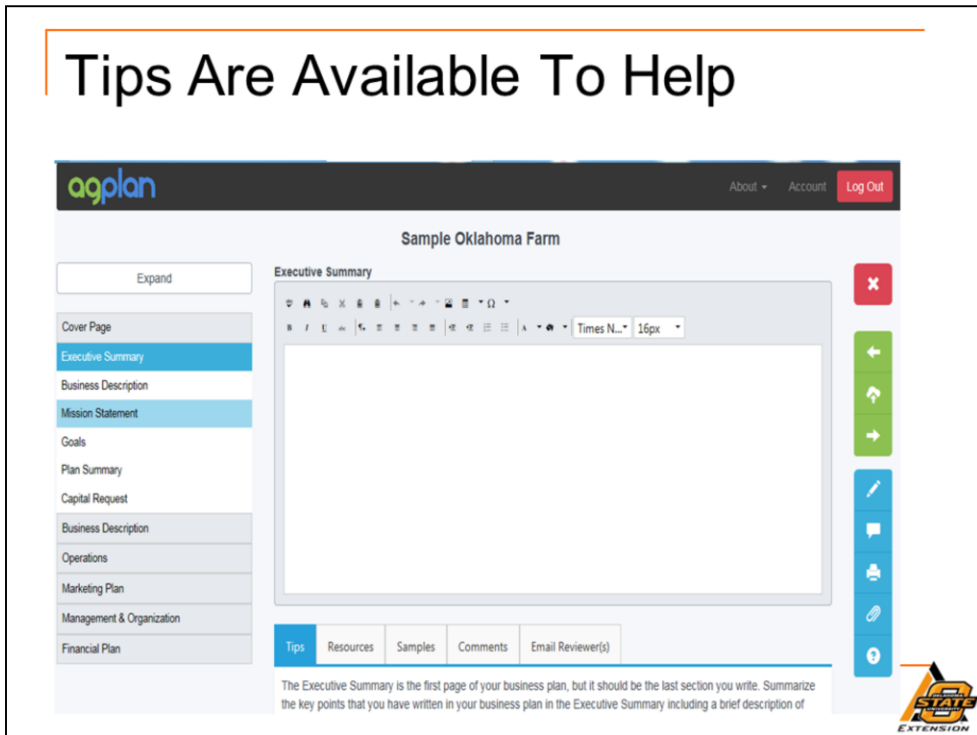
I am immediately taken to the plan, with the general outline listed down the left side and what is currently a “blank slate” to begin working on the plan to the right. The user can chose to go anywhere they want to in the outline to begin. In other words, the plan does not have to be developed in any sequential order. This first outline category, the cover page, does not of course have any sub components. Here one would simply develop a cover page for their plan.

# The General Outline Topics Lead to More Specific Sub Topics

The screenshot displays a web-based business plan editor. At the top, the title "Sample Oklahoma Farm" is centered. On the left, a vertical navigation menu lists various sections: Cover Page, Executive Summary (highlighted in blue), Business Description, Mission Statement, Goals, Plan Summary, Capital Request, Business Description, Operations, Marketing Plan, Management & Organization, and Financial Plan. The main workspace is titled "Executive Summary" and contains a rich text editor with a toolbar and a text area. The text area contains the following instruction: "Type or paste relevant information for each respective section of the plan. Comments can be inserted to remind the plan drafting team of needed information, or to request feedback from plan reviewers who can be contacted on the fly by using the email reviewer tab below. The buttons at the right can also be used to navigate the plan, send drafts to a printer, or to attach additional documents, spreadsheets, or other files to the plan. The tabs below provide tips, resources, and in many instances examples." Below the text area are five tabs: Tips, Resources, Samples, Comments, and Email Reviewer(s). On the right side of the editor, there is a vertical toolbar with icons for back, forward, home, search, and other functions. At the bottom of the page, there is a small logo for "STATE EXTENSION".

Choosing other elements of the general outline will on the other hand bring up sub components that can be worked on. The blank slate is for typing or inserting relevant information for the various sections of the plan as it comes together. The buttons to the right allow several “on the fly” options such as inserting a comment to remind yourself or others on the plan drafting team of needed information. Other button options can be used to navigate to other places within the plan, send drafts to a printer, or to attach supplementary documents or files (like spreadsheets for example) to the plan.

# Tips Are Available To Help



At the bottom of the screen there are several additional buttons that can be used to assist in drafting the plan. For example, the default “button” is the tips button, which simply reveals some instructions, or important points to keep in mind when drafting the particular section of the plan that is being worked on. Due to space on the screen here I am only showing a small sample of the written tips that are associated with this section of the plan, however, when working in the tool one can scroll down through a fairly extensive list of tips for many of the specific sections.



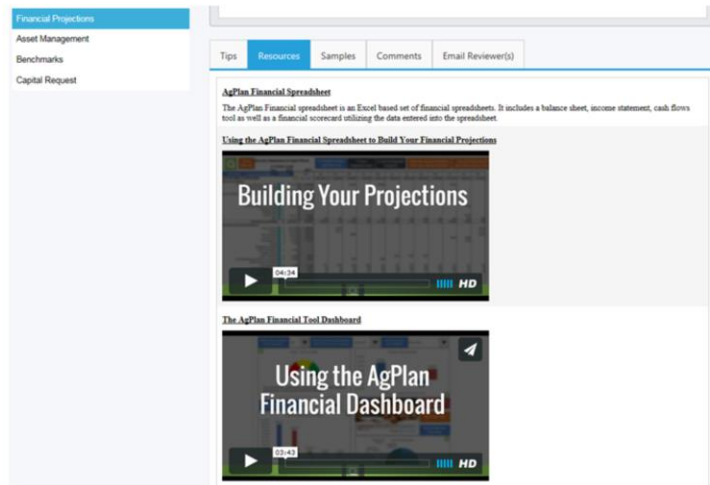
# The Financial Plan Section

The screenshot displays the 'agplan' web application interface. At the top, there is a navigation bar with the 'agplan' logo, 'About', 'Account', and 'Log Out' links. The main header reads 'Sample Oklahoma Farm'. On the left, a sidebar menu lists various sections: Cover Page, Executive Summary, Business Description, Operations, Marketing Plan, Management & Organization, Financial Plan (highlighted in blue), Financial Position, Historical Performance, Financial Projections, Asset Management, Benchmarks, and Capital Request. The central area is titled 'Financial Plan' and contains a large, empty text editor with a toolbar at the top. Below the editor are tabs for 'Tips', 'Resources', 'Samples', 'Comments', and 'Email Reviewer(s)'. A small text box at the bottom of the editor provides instructions: 'Use this section to document and communicate how your plan will be financially successful. You should describe your financial situation by discussing your financial history, current position and by benchmarking your business compared to similar businesses. Include financial projections that accurately project how your business will perform if you...'. On the right side of the editor, there are several utility icons: a red close button, a green back button, a green forward button, a blue edit button, a blue comment button, a blue share button, and a blue refresh button.



I don't its necessary to take time to highlight each and every section of the plan outline in this tool for you here today, since most of them function fairly similarly. However, I do want to point out in the Financial section of the plan specifically, there are links to online tools that can be used to help assemble both the historical performance component of the plan, as well as the financial projections for the future. This online business planning tool was developed and is hosted by the Center for Farm Financial Management at the University of Minnesota, which has a long history of and continues to be a leader in developing farm financial management tools.

# Example Resources



For example, under the financial projections sub topic if one were to click on the “resources” tab at the bottom of the working screen, you would be directed to resources such as spreadsheets, along with short video clips regarding how to use those resources, along with many other useful resources to assist in your plan development.

At any point if you “log out of” or “exit” the AGPLAN tool, your plan is saved in the cloud (cyberspace) for you, or other stakeholders to go back and view or work on at any time.

I know that is a very short overview of the AGPLAN tool, but my hope is that I have given you enough information to try this tool out if you so desire.