



LEADERSHIP PLAYBOOK

Player on deck

How a legacy of leadership was passed to me (a second-generation perspective).

LYNDSI OESTMANN | JANUARY 2023

I believe my dad may have begun preparing me for business leadership when I was 12. He coached my youth softball team and trained me as a catcher.

In addition to catching pitches, the catcher is responsible for calling pitches, running the softball field and being an inspirational leader. The catcher engages in every play, makes real-time decisions and knows the other team's capabilities in order to call pitches that lead to a winning game. While playing in that high-level position, I gained a lot of skills that I'm not certain I would have otherwise.

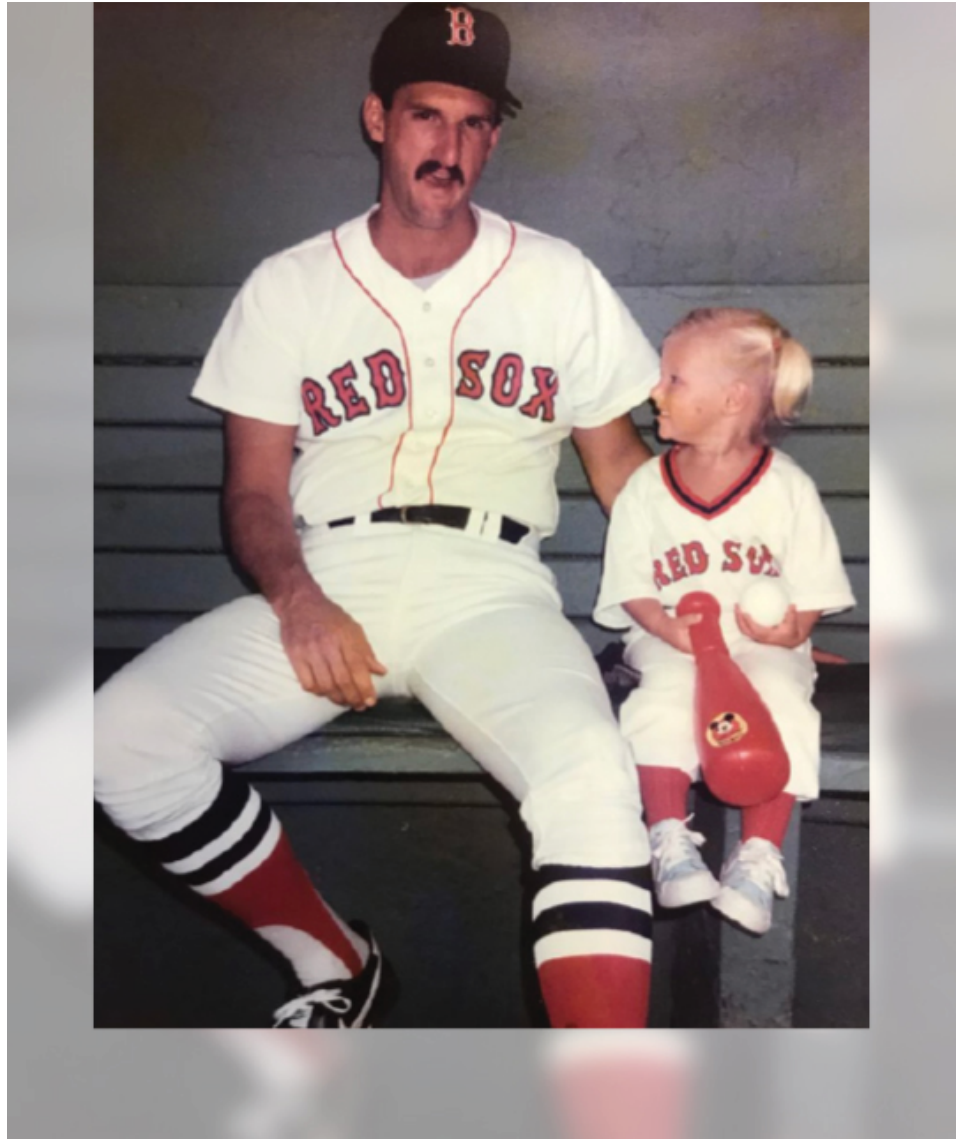
But of course, neither my dad nor I really knew then what we know now.

At the time, I just put on the gear and trusted my dad. So, when he came to me years later with plans to transition his successful wholesale nursery to me, I did the same. I trusted my dad and took on second-generation ownership of Loma Vista Nursery when he retired in 2019.

My dad, Mark Clear, is a former Major League Baseball (MLB) athlete with a passion for plants. He began building Loma Vista Nursery from the ground up in 1991. At our original facility in Olathe, Kansas, plants were grown for the wholesale market on the back of the property and sold to the trades in the front. The nursery filled an unmet need by exclusively serving professionals in the Kansas City metro area.

decades, Loma Vista Nursery has moved, expanded and evolved, working on every aspect from production to distribution. We sold the distribution division in 2016 and now focus solely on nursery production.

Today, our 310-acre container production facility in Ottawa, Kansas, and our 650-acre in-ground tree farm in Lawrence, Kansas, serves independent garden centers, landscape contractors and wholesale distributors. While we continue to grow plants for the Kansas City metro area, the nursery's central U.S. location uniquely positions us to serve clients throughout the Midwest.



Mark is a visionary leader and fearless. His willingness to take risks and his relentless pursuit of excellence served him well in MLB and in business. He designed and built the nursery in Ottawa during extreme economic uncertainty, resulting in a first-class growing facility with infrastructure to support changing market demands.

His sense of accomplishment came not from growing the best crops or being the market share leader. It came from running the business ethically and doing his best to take care of employees, customers and vendors.

Although I was raised in the nursery business, I went to work outside the company after college. That gave me experience in how corporate America thinks and works. I learned about managing people and business processes, as well as accountability and the importance of departmental cross training.

been my transition period.

In many ways I took full responsibility for leadership the very first day I walked in the door. Even when I was just learning or working in only one division, I always treated the business like I owned it and I worked hard to try to make the company better.

Mark Clear's tips to succession planning

1. Have confidence in the business you've built.
2. It's up to you to make your business marketable. Be hungry, never complacent.
3. Always look for ways to make yourself and your company better.
4. Do as much research as you can before you begin the process. AmericanHort and qualified industry experts are available to help guide you to the right resources.
5. A succession plan isn't just for owners. It also accounts for the success of employees.
6. Train team members to be leadership candidates regardless of their last name.
7. Ensure there are no red flags in your mind about your successor. This needs to be someone you trust to make the best decisions possible for the business you've built, its future and for the continued success of your employees.
8. Write down your vision for the company's future, your plan for transition and how it will be financially viable under the new leadership. Then, gather your financial and legal documents. You'll need them.
9. Hire financial and legal tax advisors, estate planners and legal professionals who have experience in the horticulture industry.
10. Empower your successor to make decisions and lead the company. Show you trust them by staying out of their way unless you're asked for advice.

1. Trust your mentors. Learn as much as you can from them.
2. Be in competition with no one but yourself.
3. Get experience in all company departments.
4. Ensure that your predecessor develops a succession plan that will set your leadership skills up for success.
5. Provide input that addresses your strategic plans as successor and demonstrates how you will grow the business under your leadership.
6. Educate, train and empower employees to succeed, demonstrate leadership behaviors and accept key roles.
7. Continue your own business education. Grow your leadership skills in areas that will directly impact the growth of the business.
8. Retain experts who will help you understand and make good decisions about investments, taxes and the legal requirements of doing business in your state.
9. Remember your neighbors. Giving back to your local community and our industry are sure ways to stretch your leadership muscle.
10. Grow your company with integrity, transparency and a belief in doing good for the right reasons.

Back to home base

Mark invited me back to the family business in 2004, to run the landscape distribution division while he focused on completing the Ottawa production facility. I also gained experience in product planning, production forecasting and managing the company's sales department. The process of transition had begun.

Transitioning ownership of a business is a lengthy process so those first conversations with Mark were casual. I could tell he was just wanting to take a step back. But when Mark presented me with a formal vision and plan, things started becoming "real."

While we began restructuring and planning for a transition that would work for everyone, I ran a parallel track by developing a business model that provided adjustments in the company's structure. Mark believes that if you want to run a successful company you have to have transparency. This was no different during the transition.



This photo was taken in 1996 at the original facility in Olathe, Kansas. Plants were grown for the wholesale market on the back of the property and sold to the trades in the front.

Loma Vista Nursery

for success well into the future. So as the player on deck, I didn't have a lot of concerns about infrastructure coming into my new role. My goal was and is to continue Mark's legacy of doing the right thing, focusing on systems and continuing to build the right team.

We hired advisors from our local office of KCoE Isom, now Pinion, a Top 100 accounting firm, to collaborate with us on the company's restructuring. They also made sure we met our goal of implementing a long-term strategy that would protect and preserve the nursery's assets and financial position.

Collaborating with experienced certified public accountants and tax professionals knowledgeable about the variables of tax and estate planning laws is beneficial. They helped us understand what was at stake and made Mark feel really comfortable with the decisions he made for the business and himself personally.

Managing the transition

As Mark's plan was set in motion, I spent a significant amount of time managing the transition and putting everything needed in place. Prior to the transition, Mark had been involved in tree production for our field operation and in procuring liners for our field work. Because he had great relationships with those vendors, communicating with them about the transition was one of my trickier roles. I made one-on-one visits, introduced myself and got to know them.

Thankfully, the transition didn't have much impact on the client-facing side of the business. I had been involved with that from Day One. Today, we have the most excellent company representatives among our regional sales managers. Their day-to-day involvement allows me to focus on strategic planning, staffing for the future and systems development.

During the first few months after my new role became official, Mark empowered me to make decisions and supported them without question. Today, he is my confidant and provides advice when he's asked. He also sometimes acts as company ambassador, occasionally hosting client golf outings, which is fun for him.

step back from day-to-day tasks and trust my team to execute the plan we have in place. Working day to day on tasks while managing the future of a business is a lot for one person to shoulder. Relying on the team allows me to focus on the future of the company.

Short- and long-term strategies

The short-term needs of a company's health are looked after by taking care of immediate priorities. As a business owner — whether first, second or third generation — it's easy to be



As a player on deck, my goal every day is to continue Mark's legacy of doing the right thing by focusing on systems and continuing to build the right team.

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consumed by short-term needs. We all worry about the same things. How much is needed to make payroll next week? Are we executing daily, weekly and monthly sales and meeting our goals? Are initiatives and construction projects on track, on time and on budget? Where do I find the best candidates to fill vacancies?

The long-term strategy for ensuring the health of your business includes succession planning. It prepares a business to pass leadership and team roles from one or more employees to other employees. There are a lot of regulations to consider. Some can affect the financial viability of the company if not considered and managed appropriately.

Because there is a lot of detailed work involved, we learned that you really must have your house in order before you can even start considering succession planning. The myriad of financial and legal implications alone can make it a daunting task. Companies have a lot of moving parts. Hiring a trusted advisor to walk you through the process is necessary.

One significant factor to consider is the relationship your business has with its lenders. We were in contact with Farm Credit before and during the planning process to make sure they were comfortable with our leadership transition and the leadership model.

In addition to learning about and understanding tax and estate planning rules, the process helped us gain a better understanding of the value of our company. This helped us finalize the transition and continues to inform our strategic plans.



Before he transitioned the business, Mark focused on completing the Ottawa, Kansas production facility as it is today.
Loma Vista Nursery

Benefits of succession planning

One of the benefits of succession planning is being able to sleep at night. It addresses unforeseen circumstances that could force an exit from the business, like an accident or illness. Frankly, I worried about that before Mark put his succession plan in place.

For Mark and me, Loma Vista Nursery's long-term health is paramount. Team members contribute to our business and trust the company's leadership for their livelihoods and well-being. We take that commitment seriously.

Having a developed succession plan takes worry off everyone's mind. We share the plan with employees so they can be certain the future of the company they work for is not at risk. We also work hard at cross-training for succession planning among team members.

Succession planning should be part of everyday thinking, not just for business owners but for employees, too. An organizational culture that is committed to education and training is a smart strategy. Teammates develop skills, operational knowledge and an understanding of all aspects of the business. This positions them for career success today and for future company leadership and managerial roles later on.

I plan on leading Loma Vista Nursery for many years to come, but I am already thinking about how I will exit the nursery. Not because I plan to retire early, but because I know there is always a clock ticking. Every day my intention is to lean into my leadership experience to build on Mark's contributions and grow the company for continued success. Training team members for leadership roles in all facets of the company consumes my focus.

leadership team and having the right advisors and partners in place are all crucial components in the game of business. In fact — no matter which generation calls the plays — they will determine how the team hits its home runs.



Lyndsi Oestmann is president of Kansas-based Loma Vista Nursery, a family legacy business founded in 1991 by her father, Mark Clear. Lyndsi is a member of the AmericanHort board of directors and she and her team are active participants in the horticulture industry.

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