

## **Jim Rose**

Retail marketing of Alberta processed foods

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You've perfected your Alberta-based packaged food product and proven it sells through your own shop, online, or at farmers' markets. You've expanded production capabilities to a point where you can look at moving into a larger retail account to increase your sales. Now is the perfect time to call on Jim Rose for help in analyzing your current business and assessing what is required to get to that next level.

As Marketing Manager with the Alberta Agriculture and Rural Development (ARD) Processing Industry Business Development Branch, Jim Rose is helping Alberta food manufacturers put their products on the shelves at outlets ranging from independent storefronts to convenience stores to major grocery chains.

Having spent more than 40 years in the food industry, first with Canada Safeway, then brokering iconic brands to major retailers across western Canada, Jim has the expertise to position food processors for success at whatever rung of the retail ladder they're ready to climb. Besides offering in-depth knowledge of the retail grocery business, he holds the trust of a huge network of buyers and decision-makers across western Canada's retail scene.

As a first step, potential clients will be asked to fill out a questionnaire with a New Venture Specialist or Development Officer describing their current operations and future intentions, to really see what level of market readiness they are at. "We try to make the process easy by asking the right questions up front," Jim says. Some may benefit from working with other ARD staff such as experts in financial assessments, value chains, labour recruitment or productivity enhancement measures. Those looking to sell beyond Alberta borders will work with Jim's counterpart Darcy Peters, a veteran of both Save-On-Foods and the Little Potato Company, who has his finger on the pulse of the domestic export market. Jim and Darcy also team up on internal workshops to give others in ARD a behind-the-scenes understanding of the retail food industry.

A key question involves production capacity. Can you produce enough hot sauce or flavoured honey or beef jerky to fill orders consistently? "Most retailers will give you one opportunity to meet their supply needs," Jim says. "If you don't measure up to their standards, you will have a very difficult time convincing them to look at doing business with your company again."

Uniqueness is also crucial. What differentiates your product from others already out there? Calgary's CadCan Marketing and Sales Inc., for example, is capitalizing on growing demand for gluten-free and low-fat snack products with CheeCha Puffs. After earning shelf space at Safeway, Shoppers Drug Mart, and many other major grocery retailers, the company began talking with Jim about what it would take to appeal to a convenience chain such as Mac's, Husky, and 7-Eleven.

Once certain a client has a unique and exciting product that can really grow a particular category, Jim helps devise a plan for presenting to those new markets. That may involve picking up the phone to alert a buyer that he's found a good match. Knowing that Jim is careful to do his homework before calling, the category managers responsible for choosing certain products pay attention. "I understand what retailers need, so I can help them see how they might partner with suitable Alberta-based manufacturers to fill their product or service needs," Jim says. "It's a win-win for retailers and manufacturers alike."

Jim's path into food sales began in high school, with part-time work at Safeway. That experience evolved into a seven-year full-time stint with the grocer, in increasingly responsible positions. Intrigued by the complex system that moves products into grocery stores, he joined a dynamic young food brokerage company and over the next 30 years helped it expand west from Manitoba, Saskatchewan, and northwestern Ontario into Alberta and British Columbia. In a field rife with mergers and acquisitions, the company saw the need to go national and sold to a major broker based in Toronto that was intent on doing just that. Jim left five years later, after introducing the new owners to western networks. As a result, he was open to new challenges just as Alberta Agriculture and Rural Development began

searching for new staff with frontline expertise to work with the province's growing array of food processors.

Joining the food processing market development team in 2005, Jim Rose has been expanding his job description ever since. "Basically, I'm applying the same skill set I used as a retailer and broker with multi-national companies and brands to coach and mentor Alberta-based companies," he says. "As an entrepreneur myself, I understand that for the people I work with, their homes and lives are tied to their businesses. So I take it very seriously when I talk to them about their business and how to grow it on many varied levels."

Jim is also active in related grocery associations, helping to connect the ARD with industry, spot trends and promote the intrinsic value of Alberta-made goods. He's involved, for example, in an initiative that would identify Alberta products all throughout participating major grocery and convenience stores.

Reflecting on a job that keeps him fueled and challenged every day, Jim says, "It's a perfect opportunity to give back to Alberta and help smaller companies grow profitably – without making costly mistakes."

## Jim Cooper

Business planning and accessing capital for Alberta food processors

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“It’s like a help desk.” That’s how Jim Cooper describes his work as Manager of Business Planning and Capital Sourcing for the Processing Industry Business Development Branch of Alberta Agriculture and Rural Development (ARD).

Some of Alberta’s top food processing executives credit Jim with helping to whip their planning or operations into shape and find the capital they need to thrive and expand. Colleagues within and beyond the department also turn to Jim for skills and insights to enhance their ability to drive the competitiveness of Alberta’s food processing sector.

Joe Doef, president of Doef’s Greenhouses and Pin-N-Pak Produce Ltd., is a case in point. “When we have financial needs I’ll phone Jim right away, because he has my trust – and I can’t say that about a lot of financial people,” Joe says. “He’s done a good job of lining us up with different financial organizations over the years, and he makes us aware of things to watch out for. And one other thing: whatever he promises, he comes through.”

Jim Cooper joined Alberta Agriculture and Rural Development’s agri-processing business development team in 2006 after nearly two decades as commercialization manager at Agriculture Financial Services Corporation (AFSC), the Ministry’s lending agency. His roots in the banking industry stretch back to 1969, when he began working as a messenger in the mailroom of a bank north of Toronto. Sixteen years of increasing responsibility with the Bank of Montreal and Scotiabank honed his ability to spot a good business case, recognize excellent management and coax money out of deep pockets. Along the way, a year as controller of a telecom company in Lloydminster opened his eyes to financial issues from the other side of the desk.

“My dad was a commanding officer in the military, so I was brought up in a regimental environment,” Jim muses. “I have no agricultural experience other than what I’ve learned myself, and no advanced degree. I just take my past experience and leverage that to come up with innovative programs and ideas. I call it street smarts.”

The Nossack Food Group has benefited from Jim’s smarts for decades, says Ingrid Nossack, manager of administration and finances. “It has been a longstanding relationship. That’s what’s so special about Jim; he’s not here today and gone tomorrow. That really brings a lot of value to us. He is always able to connect us with knowledgeable people to give us advice, and he always gives updates and suggestions. We appreciate that Jim takes personal pride in working with companies. And if we’re successful, he’s successful.”

Jim’s success is due in part to trust built up over the decades with a vast array of food processing coaches and funders, from consultants to bankers to private investors. “It’s a matter of knowing who really wants to lend into this industry,” he says. “I can help agri-processors understand what the decision-makers will look for, and I can point to likely places to go for money.” In the early stages, the best source of cash might not be the bank, but rather your network of friends, business associates or others who respect where you’re taking the industry, he adds. They don’t need to become shareholders, but could sign on as creditors who play the same role as a bank.

Jim spends considerable time helping to spur processing improvements in Alberta operations through a *lean manufacturing* initiative. At client request, he hires consultants to do one-day assessments of existing operations and prepare action plans for driving out waste and inefficiency. Companies that agree with the plans receive coaching in lean thinking principles and can apply to recoup 80 per cent of their investment through Growing Forward dollars.

On Jim's recommendation, Nossack took advantage of "green" education offered by ARD's Productivity Improvement Growing Forward project. "It was a real eye opener about small ways we can make changes and save the company money," Ingrid says. "Jim knows how tight our timing is – that we can't take advantage of everything. He has a good head for what will bring us value."

Each year, a few food manufacturers benefit from an Industry Solutions Den, one of Jim's many coaching innovations. Each chosen company works with consultants to prepare a half-hour overview of challenges for presentation to an expert panel. Based on panelist feedback, the companies work with consultants to build and then implement a strategic plan. "I don't have all the answers, but I do know who can add value," Jim says. "Part of my role is to facilitate access to all this information."

As chair of an Agri-Value Business Facilitator Group, Jim urges lenders to cross-refer clients. Toward that end, he has given every member a box with brochures about other members' programs. "We all work with the same clients, but we have different solutions," he says. "Now when we can't help, we can reach in the box and say 'Here's someone else who can.'"

To help his own department make the most of its resources, Jim works with industry development officers to analyze applications for provincial Workforce Strategy dollars. "By reviewing the financials, I'm able to give them a pretty good idea what's happening in the business," he says. "There's always a story behind the numbers."

Besides working one-on-one with department colleagues, Jim has developed workshops and tours that equip staff to identify best practices and address weak spots in their clients' operations and plans. For example, he is promoting the value of visual management – being present on the shop floor rather than hidden away in an office. Some Alberta processors are kick-starting that approach by inviting in dozens of representatives from other food companies to observe their operations and suggest improvements.

In addition to building a resource library, Jim led a team that developed "Starting and Growing a Business" ([agric.gov.ab.ca/bizinfo](http://agric.gov.ab.ca/bizinfo)), an educational website combining his experience with links to other credible information. The site is proving useful to both internal and external clients.

If you're an Alberta agri-processor with existing or projected sales of \$1 million-plus looking to increase your competitiveness, sales and profitability, consider turning to Jim Cooper. His coaching on feasibility assessment, business planning, access to capital, operational management, productivity improvement and business risk management promises the boost you need to reach the next level.

"It is a unique job," Jim says, "and I'm pleased to be able to do it in my own unique way."

Smaller firms can turn to commercialization and productivity specialist Ron Lyons for similar support.

## **Scott Dundas**

Labour Recruitment Manager to Alberta food manufacturers

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Are labour issues keeping you awake at night – and limiting the success of your Alberta food processing company? If so, you'd be wise to dial up Scott Dundas, Labour Recruitment Manager with Alberta Agriculture and Rural Development (ARD).

Scott welcomes labour-related questions from any Alberta food processor, commercial or industrial – whatever your initial ingredients and no matter what you make. In particular, he knows the rules, regulations, programs and supports available for recruiting staff.

Scott also serves as an internal resource for colleagues within and beyond ARD. He sits on cross-ministry committees and shares knowledge with counterparts in other industries so that everyone benefits.

A member of Alberta's Processing Industry Business Development team since 2007, Scott has been involved in agriculture-related work since 1974. He gained first-hand experience in the anxieties of a scarce labour market while working for the Sunterra Meats pork processing plant at Trochu. As Human Resources manager, he learned all about recruiting foreign workers from necessity, on the job. Prior to that, he was head instructor in the Olds College meat processing program.

"The experiences I gained in the meat industry definitely gave me the tools to do this job," Scott reflects. As a result, he is able to field questions that range from "Where do I find enough workers to keep my doors open?" to "How do I access the foreign worker program?" to "Can I find Albertans to meet my labour needs?"

Depending on where a business is located in the province, options for finding workers might include partnering with local Alberta Employment and Immigration offices and/or with immigrant serving agencies whose clients are looking for work. Besides helping to explore those options and more, Scott makes employers aware of their responsibilities throughout the recruitment and hiring process.

"We offer a suite of suggestions and ideas; then it's up to clients to make decisions based on their business needs," he says. "We let them think over the conversation and ponder which direction they want to take, and then we work with them to make that happen."

If you're interested in tapping the federal Temporary Foreign Worker program or the Alberta Immigrant Nominee Program, Scott will make sure you have the necessary applications and know how to fill them out. He'll also connect you with the people you need to know, including partner agencies in a source country.

Choose labour recruitment partners with care, Scott advises. "Any time you enter into a relationship, whether with an immigration consultant or a recruiter, you have to do it from a business sense. Don't just sign on the dotted line. Ask for several references, so that you can choose who to call. And ask questions. If you don't like the answers, go elsewhere." Find out, for example, how well past partnerships worked, and how any negative situations were resolved, and whether the people were top quality. Were employers involved in the interview process or did the agency control the process?

Scott urges employers to treat incoming workers well. "Imagine you're going to work in another country; what would you expect?" he says. "Do nothing less for the people you're bringing here. Be the employer of choice, because everything you do from the start will help the employee to stay." Purchase airline tickets, meet workers at the airport, pay a fair wage, help them find places to live, bank, and socialize. In short, help those workers feel truly welcome.

Serving the entire province, Scott accomplishes much of his coaching virtually, often by phone. “But there are times when we just need to sit down across the table from each other,” he says. “That way, we can feel their angst, pain and excitement – and they get the sense that we really are there to help.”

Although Scott concentrates on recruitment, he also helps employers with settlement and retention concerns, as does Alan Dooley, his counterpart in Edmonton. Either can point to appropriate tools and resources for building a human resources or retention program, including links to grants and consultants.

“Our advice is free, but it’s not ‘no obligation,’” Scott says. I want clients to feel obligated to follow the right path. I’m coaching you because I’ve lived on your side of the desk. I know doing it this way works – and doing it a different way doesn’t work as well. If I’m going to work with you to bring in workers, I want it to be successful – for you and for the workers. Fortunately, most folks listen to what I coach. The majority of the credit for that goes to our employers. They’re compassionate human beings who know they’re dealing with people’s lives.”

Scott’s work is part of a provincial Workforce Strategy aimed at making sure Alberta has enough of the right workers with the right skills to meet current and future needs. For some food processors, the program has been essential to survival, especially during times of extreme labour shortage, he says. “Clients say if it wasn’t for you and the workforce program, we wouldn’t be in business, which makes you feel good at the end of the day – that you’re doing the right work.”

## **Nicole Schroth**

Foodservice market development specialist

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Since 2007, more than 80 new Alberta products have found foodservice markets with help of Nicole Schroth. As foodservice market developer with Alberta Agriculture and Rural Development (ARD), Nicole works to expand the presence of Alberta food processors in restaurants, hotels and institutions, at deli counters, with major distributors – really, anywhere food is served away from home.

Working with ARD's Value Chain Initiative in the early 2000s, Nicole saw a need to expand marketing efforts beyond grocery stores and other retail outlets into the foodservice market. Not only is the foodservice market worth \$60 billion a year in Canada, but it ranges from independent restaurants to small chains to conglomerates with hundreds of outlets across the country, Nicole notes. "Companies of all shapes and sizes can target different restaurants, so it's a really good fit for our clients."

Step by step, Nicole began filling the foodservice gap, building up connections and expertise. Within five years, she had created what she terms "my own dream job." In that role, she beats the bushes for opportunities with foodservice companies adding new products to their menus – and then finds Alberta processors able to meet those needs.

"Nicole is actually out listening to customer problems and then trying to match up solutions," says Mike Calverley of Kitchen Partners, a rapidly growing Edmonton firm that creates proprietary soups, frozen entrees and sauces for foodservice chains across Canada. "I'm the guy responsible for all the selling here, so having somebody else out there with an ear to the street means more opportunity for us to grow the company. We've had a lot of projects with Nicole, and I think every one has actually gone to market. It really works out well for everybody that she plays this interesting role of matchmaker."

"Our program is very unique in Canada," Nicole says. "We're not just brokering existing products, but uncovering brand new opportunities. Restaurants, institutions, even retailers are ready and willing to work with us. They really like the fact that we do the prequalifying."

A meeting with Panago Pizza, for example, resulted in a list of 15 needed products, from pizza toppings to new dessert ideas. Nicole's team identified a shortlist of companies capable of providing each of those products in sufficient volume and with the required attention to food safety. The executive chef and procurement manager flew out to Alberta, met with a number of companies and selected new products to feature on the next cycle of their menu. "We're involved until they start negotiating a price," Nicole says. "Then we step away."

A consummate coach, Nicole makes it her business to know who's launching and growing on Alberta's food processing scene. Spotting a need for help, she's quick to offer support, often pulling in other experts from ARD's multidisciplinary agri-food development team. "We don't really have any cookie cutter templates," she says, "because every client is so different."

Flexibility is key to Nicole's marketing toolbox. "A lot of our restaurants want a customized product. For clients in a growth stage, it's not about walking into a restaurant and saying 'Here are my 10 products,' but rather, 'What can I produce for you?' Alberta companies are really well positioned to do that – they're flexible and able to adapt."

Focus is equally important, she says. "Oftentimes entrepreneurs have a million things on the go, they're talking to a lot of potential customers – and it's all very overwhelming. I'm a real believer in the targeted approach. Do your homework and make sure you're targeting the customer that needs your product and has a similar set of values and business focus. You'll have more success than if you're knocking on every door."

The west is seen as a growth market for foodservice, which opens new opportunities, Nicole says. “Companies expanding here are looking for western products to reduce shipping costs, and we’re doing some of the legwork for them.” Alberta has much to offer, with 300 manufacturers creating frozen food, bakery, cereals, granola bars, chocolate, coffee, bottled water and more. The development team works regularly with about a third of those processors and knows they have the food safety expertise, volume, quality and management to enter new markets.

“We’re looking for ways to help the next level of processors grow,” Nicole says. “A lot of these companies are very entrepreneurial. They usually have one or two leaders that are doing sales, marketing, operations, human resources – and janitorial. So to have us as coaches at that first stage of growing the business, when they can’t afford to hire a full-time sales person – that’s where I see a lot of value for our team to come in.”

For Siwin Foods, a five-year-old manufacturer with a focus on retail, Nicole offers a window into the foodservice world. “We sat down with her, showed her our products and within a week she came back with a list of people we could consider, with contact information,” says Doug Gordon, director of marketing and sales at Siwin Foods. What’s more, she happily gives potential clients such as Sunterra a heads-up that Siwin will be calling, “a great foot-in-the-door for a startup company.”

A career highlight (and learning experience) put Nicole at Alberta House during the 2010 Vancouver Olympics, alongside Executive Chef Brad Smoliak. Besides procuring all the Alberta products used in the house, Nicole was quick to pitch in wherever staff were scarce, the chef recalls. “I can honestly say Alberta House wouldn’t have been a success without her. She’s enthusiastic, fun to work with, diplomatic – and she knows her stuff. They need more visionaries like her in government to get our food production and food processing industry going.”

A part of ARD since 1991, Nicole says she is still learning about the complexity of the processed food chain. “I love the food industry. It’s so dynamic – there’s always something new,” she says. “And then I love translating that into something our clients, the food processors, can work on, whether that’s new product development or ramping up for a new client. Really, I’m just helping companies grow their business.”

## **Margurite Thiessen**

Agri-foods value chain specialist

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“Collaborate to compete.” That’s the principle underlying Margurite Thiessen’s work as value chain specialist with the Alberta Agriculture and Rural Development (ARD) Processing Industry Business Development Branch.

“Value chains are about partnering strategically across different segments of an industry to help all members in the chain advance their business goals,” Margurite explains. In agri-foods, value chains typically link producers, processors, marketers, foodservice companies, retailers – and supporting groups such as shippers, researchers and suppliers.

Margurite has served as Alberta’s agri-foods value chain ambassador since 2001. She promotes the wisdom of this customer-focused approach to business, offers training to companies that want to learn more and provides hands-on support for those who decide to create a value chain. In addition, she keeps abreast of national and international best practices in the field so that she can alert clients of concepts that could be adapted to the Alberta scene.

Margurite played a significant role in the birth of Producer Select Lamb NGC Inc., a value chain involving Sungold Meats (western Canada’s only federally inspected lamb abattoir), more than a dozen producers and Sunterra retail stores. Needing a steady supply of top-grade animals, in 2008 Sunterra invited producers to a meeting in Airdrie to consider an alliance. More than two dozen attended, and most joined in a new generation cooperative representing all aspects of the lamb supply chain – birth to finish to slaughter to retail.

“We realized we needed to find ways to bring sustainability to all sectors of the chain,” says Stefan Kaiser, a producer who now coordinates Producer Select Lamb. Toward that end, the partners agreed to follow strict protocols for genetics, nutrition, care, traceability, food safety and management efficiency with the goal of earning premium retail prices, increasing production and providing predictable volumes. “At the end of the day, our intent is to work together a bit less as competitors and more as partners,” Stefan says. “We don’t want to just split this pie tighter and tighter and tighter; we want to grow this pie.”

Margurite helped tremendously with the hard work of laying the co-op’s corporate and governance foundation, Stefan says. She arranged and scribed meetings, provided coaching on the business plan and funding proposals – and continues to provide advice at each step of the way.

“What I really, really appreciate about Margurite is that she’s got no biases,” Stefan says. “We’ve worked with people in government, and private consultants, who have their own agendas, and that can be frustrating. But Margurite will say, ‘It’s your business; how do you want to make this work?’ She’s open-minded and wants to tailor to our needs.”

Margurite is deliberate about facilitating rather than dominating. “A big part of my role is just bringing people together, asking questions and really listening to identify their strategy for moving forward,” she says. “Then I’ll link them with resources for the specific thing they want to target first.” Often she’ll point to colleagues in her own department – specialists in foodservices, or retail markets, or planning, or capital acquisition. She may suggest ways to fill missing links in the value chain, or point out potential funding sources, or connect clients with comparable value chains elsewhere in the world.

Building a value chain takes time and commitment; Producer Select Lamb was in gestation for more than two years before its first lambs were ready for slaughter. Success depends on like-minded partners with united goals – but also on internal champions, Margurite says. “Changing your business design and culture to be more aligned and customer-focused takes vision and strategy as well as time. Someone

from within the business needs to keep the plan on track. And you need some short-term wins – things you can celebrate as you're going forward."

Margurite joined Alberta Agriculture and Rural Development in 1990, after earning a B.Sc. in human ecology from the University of Manitoba. She served first as a district home economist in the northern community of Manning. Later tapped to do organizational development, she looked for collaborative business models and realized how much value chains could accomplish. As ARD began promoting value chains, she jumped at the chance to lead the charge. "If you're collaborating, you make better use of resources, time and energy," she says. In Alberta alone, value chains stand behind such innovations as canola, little potatoes and baking barley.

Training is essential to advancing value chains, and Producer Select Lamb is a case in point. In working with Margurite, Stefan caught wind of an opportunity to pilot a Lean Manufacturing program in his own lamb operation as part of a provincial Growing Forward initiative. "For us, it was really neat to learn how to break a big problem into smaller answers and attach financial numbers to them," he reflects. "And it's actually quite accurate – if your records are accurate. We were in the process of changing our nutritional balance, and working through the lean process gave us the assurance it was the right decision to make." Impressed by those results, the entire value chain is now learning lean management techniques.

Besides taking advantage of discrete programs, businesses interested in value chains can find a wealth of information, tools and case studies on the following website: [www.valuechain.alberta.ca](http://www.valuechain.alberta.ca).

"The more you learn about value chains, the more you know you have to learn," Margurite muses. "That's one of the most interesting aspects of being innovative and customer focused. New ideas and new challenges get us excited again about reinventing what we're doing. And when you create synergies together, that also adds new energy."