

## Vacation wasn't that great

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I just took vacation. Didn't turn out to be as relaxing as I had hoped. Phone calls while I was on the golf course. Dealing with a client crisis when I should have been playing with the kids. Taking calls on a big proposal while I was trying to barbeque and entertain friends. This has to change!

Vacations for small-business owners can be an opportunity to get away and refresh, or just more work with a slightly lighter workload. This year has been especially challenging. Business owners are dealing with reduced staff, the need to press harder to get more customers and keep the ones they have, and financial challenges due to tight cash flow and tighter vendor demands. That turns into more stress on vacation, at a time when owners need a solid break to relax and refresh.

Plan for a different vacation outcome with short- and long-term action plans. Identify who will be in charge next year and the year after. Look at the cycles of the business and define what does and doesn't work when it comes to vacation time. During the year develop and test procedures and take baby steps with turning over projects and areas of responsibility. Practice with mini get-aways. Train customers and staff to rely on someone other than yourself.

### TAKE STOCK

If you want the business to run smoothly when you're away, you have to have in place trained talent who can take action on your behalf. Who runs your company when you're out? Do the people you leave in charge have ability but lack training? Do they know the company inside and out but lack the ability to make good, independent judgment calls? Or do they step up to the plate and get the job done right?

Who or what caused the most disruption? Were there big problems or just little ones that got out of hand? Were the problems internal to a specific department or related to stresses from the outside?

Look carefully at root causes, rather than reacting. Some employees become cyclones of trouble when the boss is away, getting into things they shouldn't or acting with poor judgment and not enough oversight. Other employees do their jobs, keep working to solve problems and deal with situations and wait to inform you when you get back. It's this second group you want in place long term.

You have to be careful because the ones who keep working to solve problems often take flak for the actions of the first group, the cyclones, as they inform you about how things went in your absence. When you get back from vacation, think about putting the cyclones under tighter management, reporting to someone other than yourself. Meet one-on-one and tell them their behavior wasn't appreciated and won't be tolerated. Start looking for replacements if you think the cyclones won't turn around.

### MARK THE CALENDAR

Many business owners make the mistake of thinking summer is a slow selling season. It certainly hasn't been slow this year for many businesses. Effort early in the year turned into summertime requests for proposals, updates to bids, presentations and negotiations, as buyers prepare for a more active year end. Customers, too, started gearing up, increasing demands as summer rolled along. Your best bet is to train someone to handle these activities in your absence, in preparation for next year.

Check the summer calendar. Too many new projects, too many people out at once - it all adds up. Put together a long-term project schedule. Don't initiate new projects between May and September. Set rules about how many people in a department can go away at once. Identify critical personnel who must be on hand when the owner is away.

Ask everyone to write out procedures for what they do and who covers for them when they're out - yourself included. Test coverage with mini-getaways. If there are breakdowns, don't rush in to fix things. Let the responsible people get stronger as they learn to deal with problems and implement fixes.

Many owners become indispensable to customers. Then they wonder why their phone is always ringing. Set up teams to handle customers. Only get involved when absolutely necessary. Refer customers to someone else who can handle their

needs, then follow up to insure they were satisfied. Discuss results and work on improvements throughout the winter. Empower the people around you to act.

A steady dose of preparation through the fall, winter and spring can mean that next year you shut off your phone and really go on vacation.

Looking for a good book? Try "Effective Succession Planning: Ensuring Leadership Continuity And Building Talent From Within" by William J. Rothwell.

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