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The Small Business Guide to Getting Ready for Vacation

Posted By [Susan Payton](#) On July 9, 2012 @ 2:00 pm In [Management](#) | [9 Comments](#)

Despite the often high levels of stress that come with small business ownership, [surprisingly few business owners actually take vacations](#) ^[1] - fewer than 50%. My theory on why is: they don't know how to set up their businesses to run smoothly in their absence. It's not a hard feat, though; it just takes a little planning and forethought.



Here is a checklist of items you need to complete to get out of the office and onto the beach, a far-off destination, or wherever you'd like to relax this summer.

Tip 1: Leave Someone in Charge

If you have employees, decide who's the best candidate to carry on business as usual in your absence. Give that person the ability to make decisions, and encourage them to do so confidently, so they don't call you for approval on every little decision. Recognize that mistakes may be made, but they're a small price to pay for a little down time with your family.

Tip 2: Plan Early and Get Ahead of Schedule

If you don't have an employee you can leave your business decisions to while on vacation (and even if you do), the best thing you can do to keep customers happy is finish as much work in advance as possible. This works best if you have a preset task list that you complete each month for clients, the way I do with blog posts. Finishing early keeps them happy, and usually keeps them from needing you or bugging you when you take time off.

Tip 3: Let (Almost) Everyone Know You're Leaving

Notify your employees, clients and vendors that you'll be taking a vacation about a month before you go. Send a short email reminder a week before you take off, and include contact information for people who can be reached in your absence. Here's an example:

Just a short note to remind you that I will be on vacation August 1-15, enjoying the blue beaches of Hawaii. If you have questions about sales, contact Stan at [phone number.] For any product-related issues, Ivan can assist you at [phone]. I'll touch base when I return.

I find that including a short mention of your plans for your vacation helps you connect to people better. They like hearing about your plans, and it makes you human, not just the owner of a business. I've often gotten travel advice from clients about destinations I mentioned in these emails.

Tip 4: Update Your Email Auto-response and Voicemail Message

You can also use the note in tip 3 as an autoresponder for your email. Google Mail lets you set up vacation responses for whatever period you want to set it up for. And don't forget your voicemail! Leave a recorded message directing callers to the appropriate people, and let them know when you will return.

Tip 5: DON'T Tell Your Social Network!

Tip 3 mentioned letting "everyone" know you are leaving — but there's a big exception: social media sites! It's tempting to tell everyone on Facebook that you'll be gone for several weeks, but resist that urge. There have been cases of [people's homes being robbed while on vacation](#) ^[2] just because someone saw their post about leaving town, on a social media site. This includes social media check-in sites like Foursquare. The site, [Please Rob Me](#) ^[3], demonstrates how easy it is to figure out where you've been, simply by looking at your check-in history.

Tip 6: Plan Ahead for the Problems

Don't automatically assume everything will go wrong in your absence, but do sit down with your employees to review potential scenarios that might blow up or become complicated while you're out. Explain what you would do in each situation and make sure they're comfortable taking action while you're out of the office.

Tip 7: Clear Your Calendar

Before you leave for your vacation, make sure your calendar doesn't have any forgotten-about appointments lingering. Also make sure you cancel any recurring meetings or teleconferences while you're out. Let other participants know you won't be there so they can plan accordingly.

Tip 8: Wrap Up Projects

You know how those lingering projects or tasks stay on your mind? All the more reason to take care of them before you go on vacation so you don't waste energy worrying about them while you're trying to relax. Finishing up everything before your vacation will also reduce the temptation to take work with you (and your family will be glad for that).

Make a plan the week before your vacation so that you have plenty of time to wrap up projects, from the most urgent to the less important ones.

Tip 9: Put Together an Emergency Contact List

Make a list of your emergency numbers to give to key employees who might need to reach you in case of an issue that can't be resolved without you. Also include important contacts that might be able to answer questions in your absence, like your business insurance agent, attorney, and key suppliers.

Tip 10: Review Critical Procedures and Processes

Make sure to go over important business procedures that you will be delegating in your absence, such as opening your shop in the morning or closing your office at night, setting the security alarm or turning it off in case it was accidentally tripped, running credit card transactions, running payroll, or any other processes the person is not used to handling.

Make sure the key employee you've assigned is well versed in completing the tasks without your assistance. Ask him or her to perform the procedure for you before you leave (memory is a tricky thing). Leave detailed instructions on the procedures as a backup.

Tip 11: Pay Your Bills

Leave for your vacation with a clean slate on accounts payable. Pay all invoices, credit card statements and bills that will come due while you're gone. Make sure payroll is set up to be processed while you're gone as well.

Tip 12: Don't Be Available

It's tempting to answer your phone on vacation, or peek at your email, but resist! **Do** respond to the channels you've set up for emergency contacts, however. I always give my personal email to key employees so I resist getting immersed in work email while on vacation, but I can still stay in touch should anything come up.

Tip 13: Have a Great Vacation!

Let us not leave the most important tip off the list: having a relaxing and enjoyable vacation! Sometimes small business owners forget how rejuvenating it is to step away from their companies for a short while. You'll likely find that you come back to work with fresh ideas and a new, positive attitude as a result of getting a little R and R.

Family time, too, is key. So many of us put in long hours each week, and sacrifice our family relationships. Use this vacation as the opportunity to reconnect with your spouse and your kids, and to create great memories for years to come.

[Vacation](#) ^[4] Photo via Shutterstock

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