

Ep #5: Purposeful Vacation Planning



Full Episode Transcript

With Your Host

Ellie Frey Zagel

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You are listening to episode five where I talk about purposeful vacation planning. Enjoy.

Welcome to *The Family Business Leader Podcast*. A podcast for multigenerational family business leaders who want to become the leader they were meant to be. If you're ready to learn how to develop your own authentic leadership style, successfully lead your family business and create your own lasting legacy while still honoring theirs this is the podcast for you. I'm your host, Ellie Frey Zagel, family business leadership coach and third-generation family business leader. Let's get to it.

Hello my friends. How are you? Have you ever thought I need to take a vacation from my vacation? Yeah, we've all been there. We've taken what we thought would be a rejuvenating time away from everything but instead of returning rested and recharged we come back to our day-to-day feeling tired and frustrated. It does not have to be this way. Instead of thinking that's just the way it is, I invite you to try purposefully planning your vacation with the whole family. I know. It's going to be so much fun.

Each of us plans our meetings, lunch appointments, personal care appointments but rarely do we purposefully plan our vacation and that ends now. I have included a download free of course, with this podcast called purposeful vacation planning tool to help you and your family members get on the same page on your next vacation.

When you're aligned in your plans, magical things happen, fewer family arguments, more family fun together, there is a plan, everyone knows the plan, it has been communicated and everyone has helped create the plan in the first place so no one is left out. Make it the vacation your entire family wants, not just what the person with the loudest voice wants. And I know you know who that person is in your family.

So I invite you to download that tool, the purposeful vacation planning tool now. We're going to go through it in this podcast. You can also find it on successfulgenerations.com/purposeful-vacation.

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Before we get started I would like to share a review that I've just got on The Family Business Leader Podcast iTunes site from Katie. The review says, "My girl, Ellie is extremely knowledgeable in family business and philanthropy. I'm looking forward to listening and learning with the intent to understand how to run my business better." Katie, thank you so much for leaving a review. I am so honored that you listen to the show and I would love to hear more from you. Let me know which episodes are your favorite.

This is what we do. We want to help people become more knowledgeable around family business, family philanthropy, leadership topics. And anyway, I'm just so glad that you are listening.

Alright, my friends let's get started in this purposeful vacation planning tool. Hopefully by now you have downloaded the tool which I've got to give a shout out to my friend, Gretchen from Tiny Blue sky. She is just the most amazing graphic designer. And everything that I ask her to do she sends back to me and it's perfect. I hope that you all have graphic designers that you love as much as I love Gretchen.

Alright, so what I want to talk about first is what this tool is not. And it's not for a way for one person to insert their will onto everyone else. And you know who these people are if you have them in your life. They're the ones that plan the vacation from start to finish every single minute as planned. You had no say whatsoever. And if you decide that you want to do something else they look at you like you're a terrible person and they try to shame you. And they guilt trip you like, "Well, I planned this and this took a long time," and all of that.

So that is not what this tool is for. That is a conversation that you need to have with the person that does that and that's a separate podcast episode. That is not what this tool is for. This tool is to align those going on vacation with each other, align other each other with each other's top priorities. So we want to come back from a vacation exactly how you want to come back from a vacation. So if you want to come back from vacation relaxed and rested, we want to make sure that that happens.

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If you want to come back from vacation energized and because you've just explored and learned all these new things, then that's how I want you to come back from vacation. It doesn't just happen though. There needs to be some intentionality, some purposefulness to it. So here are the steps for purposefully creating an aligned vacation.

Step one; ideally have each person going on the trip fill out at least the activity portion of the vacation planner to the best of their ability. It doesn't have to be perfect. This first step is for each person to get their thoughts out so therefore the group can have a conversation about what they want to do on vacation. So often I've headed out onto vacation just thinking we're going to Mexico. And that's about all I think about. That's it. How do I get down there? Do I have my passport? Do I have the right clothes?

I don't necessarily think about the things that I want to do on vacation. So this is what we're trying to do, just kind of really start switching your brain into what would make this vacation good for me. And then you'll be able to communicate that with everybody else to see if there's some alignment, to see how that can happen.

The step number two is you're going to schedule some time on your calendar with the group to discuss what everybody wrote down as their top priority. In the plan I have written down about 30 minutes for the conversation. But depending on your friends and family, or whoever you're going on vacation with, this discussion might take more time or less time, probably more time. The reason that we're scheduling this is because it is something that you may think I can do that later, or does that really need to get done? Is this really important?

And when you put it on your schedule basically like you would any other meeting it signifies that this is important. This does need to get done. So, if they want something done, to actually physically write it down, if you have an analog planner like I do, or digitally put it into your calendar. You know exactly when you're going to do this. So at dinnertime on Tuesday we are going to talk about our next vacation and what everybody wants to do.

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Step three is, identify what each person's top number one priority is. So in the planner there is space for each individual to do their own work and there's space for kind of the family, or the group of people going together to kind of create the plan. If there's not, I would just encourage you, everybody prints off the purposeful vacation planning tool for themselves. And then you print off an extra copy. And then really the activity plan is you utilize the activity plan on the extra copy to figure out what group activities you're going to do together.

And I like the framework of if this is the only thing you got to do on vacation it would be amazing, it would make the vacation worthwhile, what would that thing be? It could be napping every day. It could be all you can eat buffet. It could be fishing, or visiting the ruins, or whatever it is, going to that particular museum. I want people to kind of use this mindset as they are writing down their list of priorities and then talking about what they really want to do because there is going to be some give and take if a group of people go together.

Unless everybody's cool with everybody doing their own thing the whole time there's going to be some overlap like I want to go to the ruins too and then the group can go together. But oftentimes when you go in a group and you actually want to hang out together as a group some people are going to be able to get their priorities met and some people aren't. But if we can just get that top one to two priorities, to me that makes a good vacation.

I just kind of led into step number four which is to get curious, what are each person's top one to two priorities. Are there any similarities between what other people have? And then really why are they the priorities? Sometimes we put priorities down that's kind of like I want to have naps every day because I am exhausted. And I really just want to take this time to make sure that I get two hour naps every single day from two to four, that's what my goal is.

But it could be like I want to go shopping in a couple of markets and I don't really care which ones. And I don't know what I want to find, maybe some souvenirs to take home. And if you really dive deep into it, really they don't

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necessarily need to go to; the hotel gift store will just be fine. So their number one priority may not actually be their number one priority. And by the way when we're having these discussions we're coming at it from curiosity, not judgment. You want to go shopping, of course. There's no place for that here.

There is just like what we're trying to do is we're trying to create a vacation where everyone is heard. And everyone gets to do at least one thing that they want to do. And if you do this I want to hear from you. Please send me an email, reach out to me, I want to know if you do this, you and your family, or you and your friend, you do this really well.

So number five is, create an aligned plan where everyone's top priority is accounted for. And you may not know what day, what time these things are happening but this is kind of your game plan. You're going to; ideally this is what would happen on our vacation, everybody's top priorities. And then who's going to engage in those top priorities.

And then the next step is managing expectations. What are the reasons you wouldn't be able to do this top priority? There's a rain event and you're not able to go to that beach that you want to because it's just been raining the whole time. So that was your number one priority. What's your backup plan? Is there a backup plan? So in the planning tool I have sections for how much do you want to sleep, rest. And I start off with how tired and depleted are you right now? Scale of one to ten.

I also have a work plan, as part of a kind of an intentional or purposeful vacation I want you to also consider purposefully planning when and if you're going to work and how really. So are you going to work at all, yes or no? I want you to choose that before you go on your vacation. If yes, when are you planning on checking in? I want you to choose that, even communicate that with your team, I will be checking in on these days. You'll have me for this hour.

Even if it's like I am checking email from this time, if you need me this is when I'll be checking email. I'll be able to respond to your email pretty quickly. What are the reasons you will check in for work? Maybe it's just to

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get updates on a big deal you're working on. Maybe it's just to make sure that there are no emergencies. Or maybe it's just to check all of your email.

I just want you to be very clear of when you're going into vacation when it comes to work, are you going to be working? What are you willing to do? What times are you willing to do it? What are you going to respond to? What aren't you going to respond to?

So I think that that planning tool, it's just really helpful. So work doesn't just bleed into your entire vacation. And a lot of times people think that's a good thing. I'm saying right now it's not a good thing. And they come back from vacation not very well rested. Their family's grumpy because they worked the whole time. So unless you choose to work the whole time and communicate that and so everybody's bought into that, I invite you to create your work plan when you go on vacation.

There's also an emergencies and peace of mind plan. Those are just basically making sure checklists. I have a kind of a checklist brain. And they are there for you to fill out and to make your own.

So really the majority of this work is to kind of create a plan for the activities that you want to do together as well as that work plan and sleep plan that you want to do for yourself.

And then be able to communicate that with the people with whom you're going on vacation so everyone's aligned. So somebody doesn't go, "Ellie is going to be my partner in crime." And meanwhile I'm, me being Ellie, "Thanks, no, I want to sleep the whole time. I don't want to explore the ruins, and the museums, and the shops with you all the time. I just want to rest by the pool." So we don't have those types of things happening.

And then the last thing that I have in this planner is a post vacation download. And I have been learning and doing this myself, but learning the value of having evaluations of basically my week, or anything I've set out to do. And so the kind of the simplest yet very effective tool that I use that my coach has shared with me is what worked, what didn't work, what do I want to try differently next time?

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So the post vacation download has a couple of questions to start out with. But then it really asks what worked on this vacation? Did this planner work? No, it didn't work. Okay, what would we want to try differently next time? What didn't work so well? How do we want to do this differently next time? So I really like the post vacation download at the end of your trip just to kind of quickly highlighting some memories, what worked, what didn't work, what I want to do differently for next time. And then I can carry that with me for the next vacation.

My mom and I it really worked when we did this x, y and z together. It did not work when we did this a, b, c together. So next time we're going to try something different.

So hopefully that makes sense. I invite you to download this purposeful vacation planning tool. I have been asking my clients to do this tool to various degrees of success. Many of them say, "We're good, it's fine. It's fine. We don't need to do it." But when they do, do it they realize how getting on the same page with your family, getting aligned as you go on vacation just makes everybody feel more calm and relaxed, there's fewer fights, the expectations are aligned for what people are doing or not doing.

So one more thing before I go, I would be remiss if I didn't talk to you about The Family Business Leader Mastermind that I'm launching in June. And we are accepting applications right now. So join us at successfulgenerations.com/family-business-leader-master-mind. I cannot work on that one. That is our URL right now. So if you work with your family this is the mastermind for you. So you work and you lead in your family enterprise. We will be doing both a sounding board with each other but also group coaching. And we're going to meet weekly. It is going to be awesome.

Alright, have a great week.

Well, there you have it. Thank you so much for listening to *The Family Business Leader Podcast*. If you've enjoyed today's episode, be sure to share it with someone who needs it. If you'd like more information about family business leadership development, please visit

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[successfulgenerations.com](https://www.successfulgenerations.com). I can't wait to connect with you again next week, until then.