

SUCCESSFUL

GENERATIONS[®] COACHING

Coaching for the next generation of family business leaders

purposeful **VACATION**
PLANNING TOOL





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We plan our meetings and lunch appointments, but rarely do we plan our vacations. When we don't plan our vacations, at least one member of the family becomes disappointed because they *didn't get to do what they wanted to do*.

This simple purposeful planning tool allows you and your family members to stay on the same page even *before you go* on vacation, set boundaries for when you are going to work (if at all), and communicate your plan to those who need to know it.

Let's get started.

DIRECTIONS

- Step 1:** This tool is to be filled out by each adult going on vacation.
- Step 2:** Schedule 10-15 minutes to look over each other's vacation plan.
- Step 3:** Spend another 10-15 minutes discussing priorities for each person. Ask: Where are our priority activities aligned? Write these down first.
- Step 4:** Create an aligned plan where everyone's top 2-3 priorities are accounted for.

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NAME: _____

Where are you going? _____

When are you going? _____

Who is going? _____

#of nights? _____

ACTIVITY PLAN

What is the main purpose for this vacation (rest, reset, fun, family time, etc)?

What activities, if any, do you want to do and with whom? (read, hike, beach, walk, shop, zoo...) Please prioritize the activities in order of importance to YOU, starting at 1 as the most important.

_____ with _____ priority: _____

_____ with _____ priority: _____

_____ with _____ priority: _____

_____ with _____ priority: _____

_____ with _____ priority: _____

SLEEP/REST PLAN

How tired/exhausted/depleted are you on a scale from 1-10? (1 = depletion and 10 = full of energy)

1 2 3 4 5 6 7 8 9 10

How many hours of sleep do you want each night? _____

#of Naps you would like to take: _____

What rejuvenating activities will you do in order to refuel? _____

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YOUR PURPOSEFUL WORK PLAN WHILE ON VACATION

WORK PLAN

Are you checking in with work? Yes No

If YES, when will you be checking in to work?

Day(s): _____

Times: _____ until _____

What are the reasons you will check into work? (ex. Get updates on that big deal you are working on, make sure there are no emergencies, just to say hello, etc)

Which of the following will you check while on vacation:

Email

Phone

Texts

Which of the following will you RESPOND to:

Email

Phone

Texts

Why or why not? _____

Other:

EMERGENCY PLAN

In case of an emergency:

Work: _____

Home: _____

Other: _____

Did you communicate how to reach you in case of any of these emergencies? Yes No

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YOUR PURPOSEFUL WORK PLAN WHILE ON VACATION

PEACE OF MIND PLAN

While you are away, do you have a:

- Mail plan
- House plan
- Pet plan
- Kid plan (if staying home)
- Other: _____
- Other: _____
- Other: _____

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POST VACATION DOWNLOAD

Let's check to see how you did:

What were the top priority activities for the family?

Did you do them? Yes No

Did you do the top priority activities? *For You?* Yes No *For Your Family?* Yes No

Did you get the amount of rest and rejuvenation you wanted? Yes No

Did you follow your work plan? Yes No

Favorite Vacation Memory:

What really worked well on this vacation? (aka, let's do it again)

What didn't work so well? (aka, let's not do this again)

Is there anything else you would like to have done differently to try for next time?

NOTES/COMMENTS
