



TRAINER'S BOX®

How to Achieve Work/Life Balance

as a Small Business Owner



Infusionsoft®

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Introduction

“Work/Life Balance” is a phrase we hear a lot in the small business world, but actually finding the perfect balance between the demands of work and life can be tricky. Two things seem certain:

1. Small business owners desperately seek harmony between the requirements of work and the satisfaction of living.
2. Balance does not come without a great deal of intention and effort.

The facts:

For small business owners, work, passion and life overlap. **70% have sacrificed family or vacation time for work.** Even on vacation, entrepreneurs find it hard to completely unplug from their businesses; 63% report that they are still checking their smart phones once or twice each day, and **58% feel guilty about taking any time off at all.**

Money fears further complicate things. More than **half of small business owners surveyed have gone without** paychecks, a quarter of those for longer than a year.

Small business owners are working longer days, more hours each week—including more weekends—and taking less vacation time than they were five years ago.

Only **29% of business owners** report feeling satisfied with their work/life balance, and 48% have suffered from **work-related stress in the past year**—to the extent that their stress had an impact on the lives of others. In fact, 44% of entrepreneurs believe that the **stress of business has damaged their health.**

Despite a **growing body of evidence** about the benefits of vacations, shorter work hours and self care, small business owners are struggling to turn the suggestions of the experts into workable solutions that can be incorporated into the reality of their business.



Unique Businesses Demand = Unique Solutions

The demands of small business ownership are unique, so it makes sense that the real experts on work/life balance for entrepreneurs are small business owners themselves—people who have been in the trenches, and who well know the exhausting hours, the overwhelming demands and pressures and the very real challenge of finding harmony between work and life.

In this e-book, you'll meet the owners of three small businesses who are no strangers to the difficulties of combining their work with their lives, families and passions. They share their stories about what it was like for them to start a business, the challenges they met along the way and the solutions they found that brought them closer to balance. In addition, you'll find several resources for stepping away from your phone, planning an unplugged vacation, saving time with productivity tools and easing the stress on your overloaded brain.

Defining your
family values is the
first step toward
intentional living.

thehappyfamilymovement.com/blog





01

Case Study One:

Sarah Hubble
Emma Magazine

Sarah Hubble

Editor in Chief – [Emma Magazine](#)





Sarah Hubble | Emma Magazine

What if Martha Stewart was an urban twenty-something?

This is the question that Sarah Hubble asked herself prior to starting *Emma Magazine*, an online and print publication aimed at “the modern domestic”. After a stint in Hollywood on MTV’s *The Real World* and preliminary conversations with an agency in New York City for television hosting jobs, Sarah decided to return to Arizona, where she was expecting her first child. She found herself searching for creative solutions for home décor and entertaining on her limited twenty-something budget, and, predictably, came up empty.

Sarah had always felt an innate desire to create, and gathered several like-minded, young, urban creatives to brainstorm. From this gathering, *Emma Magazine* was born—a publication devoted to food, fashion, DIY and entertaining from a fresh and modern perspective. The magazine officially launched a teaser issue, and the project seemed charmed from the beginning; they landed important contributors and community support from the very first issue.

Sleep deprivation, pressing deadlines, and the realities of combining new motherhood and a new magazine.

Adjusting to parenthood can be a challenge. The combination of parenthood and a new publication was an even greater adjustment for Sarah.



Though she had taken classes and attended conferences to learn about the art of heading up a print and online publication, this was still Sarah's inaugural journey as an Editor in Chief. Adding a new baby to the mix made the issue of balance immediately relevant to Sarah, as she took on the roles of business owner and mother all at once.

Sleep deprivation and deadlines can easily equate to pressure and resentment. Sarah recalls a highly anticipated road trip with her closest friends to a cabin out of town for some much needed R&R. As the weekend drew nearer and the stack of work grew larger, she made the decision to stay home and catch up on her workload. Sarah realized the irony of working so hard to help others create beautiful memories while missing out on creating her own. After that weekend, she made the decision to make more time for fun, even if it meant leaving work for later.

Align your choices with your priorities

Sarah quickly realized that things had to change. Her first step was learning to prioritize differently. At the end of the day, family came first for Sarah and her husband, and finding balance was a matter of shifting other obligations to reflect this focus.

Value completion over perfection

It is easy to fall prisoner to the belief that every detail has to reach a level of perfection. **Although high standards are imperative, perfectionism without flexibility can actually keep projects from moving forward, and create levels of stress that are not conducive to balance.**

Reconsider expectations

One of Sarah's solutions to counter the pressures of constant deadlines and new motherhood was the decision to move *Emma* from a monthly publication to one that published quarterly. The issues are larger and more demanding, but there is less rigidity and far fewer deadlines to meet. Additionally, although the magazine is available in print format, she chose to maintain focus on the digital publication. This



I don't have it all figured out, but I do know that done is better than perfect. One of the benefits of being your own boss is that you can move your own deadlines back if you need to, or release anyway, even if something is not quite at the level of perfection that you desire. Give yourself the grace of letting things not be perfect."



shift allowed her to have a level of flexibility that does not exist for an exclusively print magazine. Even with these changes, *Emma* has grown to a readership of 1-2 million views per issue in less than two years.

Think outside the box

Along the way, Sarah realized that there was potential for *Emma* to create income in ways that didn't fit inside the traditional box of advertising revenue. Because of Sarah's background in television and journalism, she was already comfortable in front of a camera. Sarah created a beauty-focused web series for the lifestyle website [ULive](#) as a natural extension of the brand and culture that *Emma* epitomizes. She entered into current discussions with retail giant Anthropologie to have *Emma* sold in stores across the United States, which would further free Sarah from the stressful and time consuming need to sell advertising space in the magazine. This would allow her to focus on the quality of the publication and free up time for her to spend with her family.

Sarah Hubble's Work/Life Balance Tips

1. You don't have to do it alone

Seek help. Hire a sitter and collaborate with other creative and entrepreneurial minded people. Do not be afraid to ask for support or seek inspiration in others.

2. Get mobile and embrace available time

Invest in the technology and programs that will allow you to take your work anywhere, and embrace the windows of time that are available, such as while your child sleeps. Something as simple as a new laptop gave Sarah the ability to be mobile and maximize the times she was able to work.

3. Leave behind parent guilt

Almost all working parents experience guilt at some point. Remind yourself how important it is for your children to see their parents pursue passions outside of the family. It is possible to be a well-rounded, engaging, hard working parent who also happens to make a mean PB&J.

4. Prioritize time for friends and time for you

It can be hard to take time for yourself when parenting and work are all-encompassing. Make time for the people who bring you joy and the things you most love doing. Sarah discovered that regular time with her closest friends and weekly cooking classes were the key to feeling more balanced.



5. Get moving

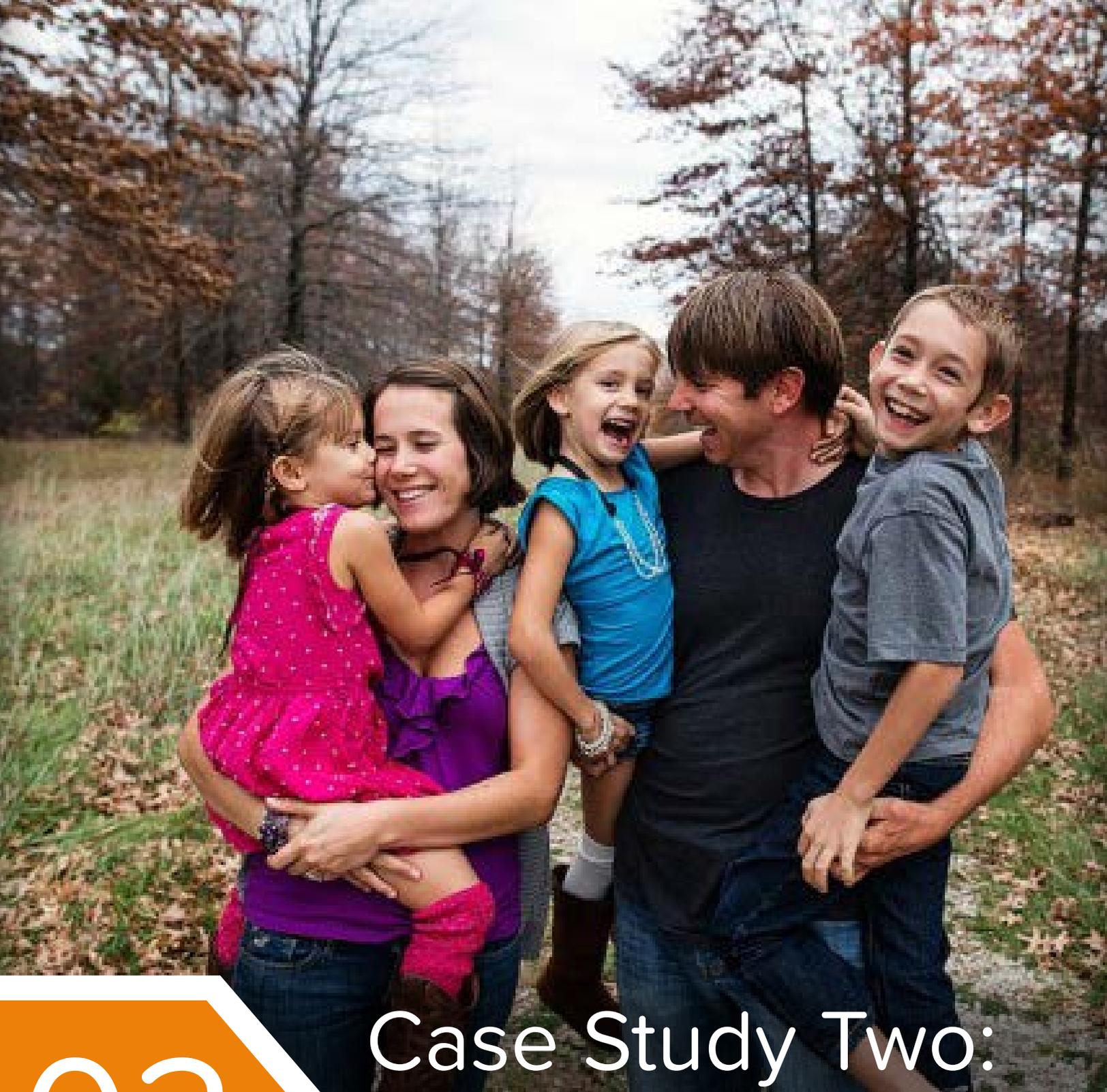
Physical activity can make all the difference. Sarah makes time to hike before her son wakes up, and conquering a mountain before 7 a.m. makes her feel as if she can handle whatever the day brings.

For many people, finding balance is about learning to say no. For Sarah, it was learning to say yes: yes to a glass of wine with friends, yes to a playdate, yes to coffee. All work and no play left her feeling empty. Saying yes to activities that that didn't belong on a meeting agenda allowed her to find the things that filled her up.



If I need to push a deadline back or ignore my inbox, I'm good with that. The perk of owning your own business is being able to call the shots. You may as well call them in your favor.”





02

Case Study Two:

Josh and Jenny Solar The Happy Family Movement

Jenny and Josh Solar

[Solar Photographers](#) | [The Happy Family Movement](#) | [Phone Monsters](#)

 [Happy Family Movement](#) | [Phone Monsters](#)

 [Josh](#) | [Jenny](#)



Josh and Jenny Solar The Happy Family Movement

Jenny and Josh Solar were once high school sweethearts. They are now partners in work and life, parenting three young children and combining family life with multiple business ventures.

They started [Solar Photographers](#) in 2005, photographing weddings and portraits. The photography business took off, and they both left their jobs to pursue their small business full-time. In 2011, they launched the [Happy Family movement](#), a website and blog dedicated to encouraging family togetherness. In 2014, they brought their newest business venture, Phone Monsters, into the world. The flagship product, Ned the Phone Monster—a landing place for smart phones that helps families create better habits around technology usage—has already been featured on [Good Morning America](#), and will go into production later this year.

In the beginning, Jenny and Josh fell into the overworked and overwhelmed trap common for many entrepreneurs. They took every job that was offered because they were unsure if or when the phone might stop ringing. During their first year in business, the Solars shot 35 weddings, worked full-time and raised their three small children while Jenny completed her master's degree. It was too much—when Jenny becoming chronically ill, it was a much needed wakeup call for the young family. Then the economic crash taught them another important lesson: they could survive without a crushing workload. When work slowed down, they learned they could still pay their bills. They started intentionally limiting their workload.



So many projects, so little time

When two creative people, like Josh and Jenny, join forces, magic is made. Work, art and passion overlap and can often overshadow the very real demands of life. The challenge becomes pausing the creative flow long enough to focus on everything else. Decisions like knowing which project to focus on next, carving out time as a couple, and creating dedicated family time are all things that easily become unbalanced. Over time, Jenny and Josh discovered some simple guidelines that allow them to keep their lives and their work in alignment.

Embrace reality and redefine balance

Working for yourself and with your spouse is both amazing and overwhelming. Jenny and Josh have created businesses that allow them to both be at home with their kids, attend field trips and be present for school parties. On the flip side, they know it also means staying up until the wee hours working after the kids are in bed, acknowledging task management reminders and balancing soccer games, client consults and photo sessions on the weekends. Sometimes squeezing in just enough time to grab a takeout burrito and call it dinner seems like an accomplishment. That is simply the reality of being a small business owner and parent.

To Jenny and Josh, balance once meant the ability to do it all. There was time for the gym and the house cleaning and blog post writing and answering client emails and spending time with friends.

Now, The Solars have learned to embrace a new definition of balance. They focus on doing what is possible, and refuse to feel stressed or guilty about the things that need to wait.

Get organized (and stay that way)

One complaint that many small business owners echo repeatedly is that there is never enough time. It is easy to resist the task of organizing, but it is organization that frees up that desperately needed time.

The Solars suggest making a list of the activities you do that take too much time, in both life and in business. For each activity, focus on figuring out the underlying problem and work to find a solution. Once you've discovered that solution and the organizational system that will help, stick to it! Regardless of your solution—whether



it's sophisticated software or a white board on the office wall, it won't work unless you use it.

Have clearly defined roles

Whether you have employees, interns, partners or children, being clear about roles and responsibilities is essential to create expectations. When expectations are clearly set and communicated, everyone can be a part of the movement toward balance. Sit down with your team (in work AND in life) and make a plan that accounts for everyone's talents, abilities and requirements, and work together to create a more efficient system.

Get help

Admitting you cannot do it alone can be one of the most difficult things for a small business owner to do. Whether you focus on hiring an assistant, investing in automation, outsourcing or inviting your friends over to help prepare a week's worth of dinners, getting the right help can be a game changer.

Self care

A very real danger of self-employment is burnout and the feeling of being overwhelmed; for the typical small business owner, being stretched too thin may feel like business as usual. It's easy to get into the habit of staying up late, waking up early, not eating right and staying plugged into work mode far longer than is healthy. Caring for yourself gives you the strength and tools to handle the chaos that can sometimes be a reality of the entrepreneurial life.

Get comfortable with NO

It is easy to fall into the trap of always saying yes because small business owners do not want to

Jenny's Tips From The Trenches

Interns

One of the best decisions we ever made was to get an intern. It was incredibly rewarding to teach someone how to start and run an effective business and even better to have assistance from someone to help me pare down my endless to-do list.

Double Duty

I often schedule client meetings for 5 p.m. on a Friday night, just so we'll have childcare already arranged. That makes it even easier to squeeze in a date night.

Hire Out

Adjust other expenses to allow yourself to hire the help that will make a real difference in your life. Hiring a housekeeper and lawn service frees me to focus my time on the things I want to do. When money has been tight, we've made the choice to trade cable TV and a new pair of shoes for a spotless home.



disappoint their employees or let down their customers. They are also often wary of turning away potential business, even when it directly conflicts with demands in the rest of their lives. Part of balance is learning to listen to your instincts about when to turn away jobs that will add to your stress level without advancing your business goals.

Be intentional

The Solars sat down and wrote a list of their family values. Once they had that list in place, they began a practice of ensuring that every decision they made was in line with those values. Because family time is their top value, they now schedule their work around their children's schedules and carve out weekends that are devoted completely to the family. Every summer they create a family bucket list, and are intentional about spending time together and creating memories.

Be open to the journey

To the Solars, balance means living the life they want and being open to where the journey takes them. This means road trips with no itinerary or destination, indoor water gun fights and even a five-month trip to Europe with their three children.

This fall, the Solars will travel, live, work and study in Europe. Jenny and Josh will use their laptops to work remotely on their individual and joint projects, while the children utilize iPad minis and a combination of homeschooling and telecommuting to continue their education while abroad. The family will share their journey with friends at home via their own blogs and tumblr accounts.

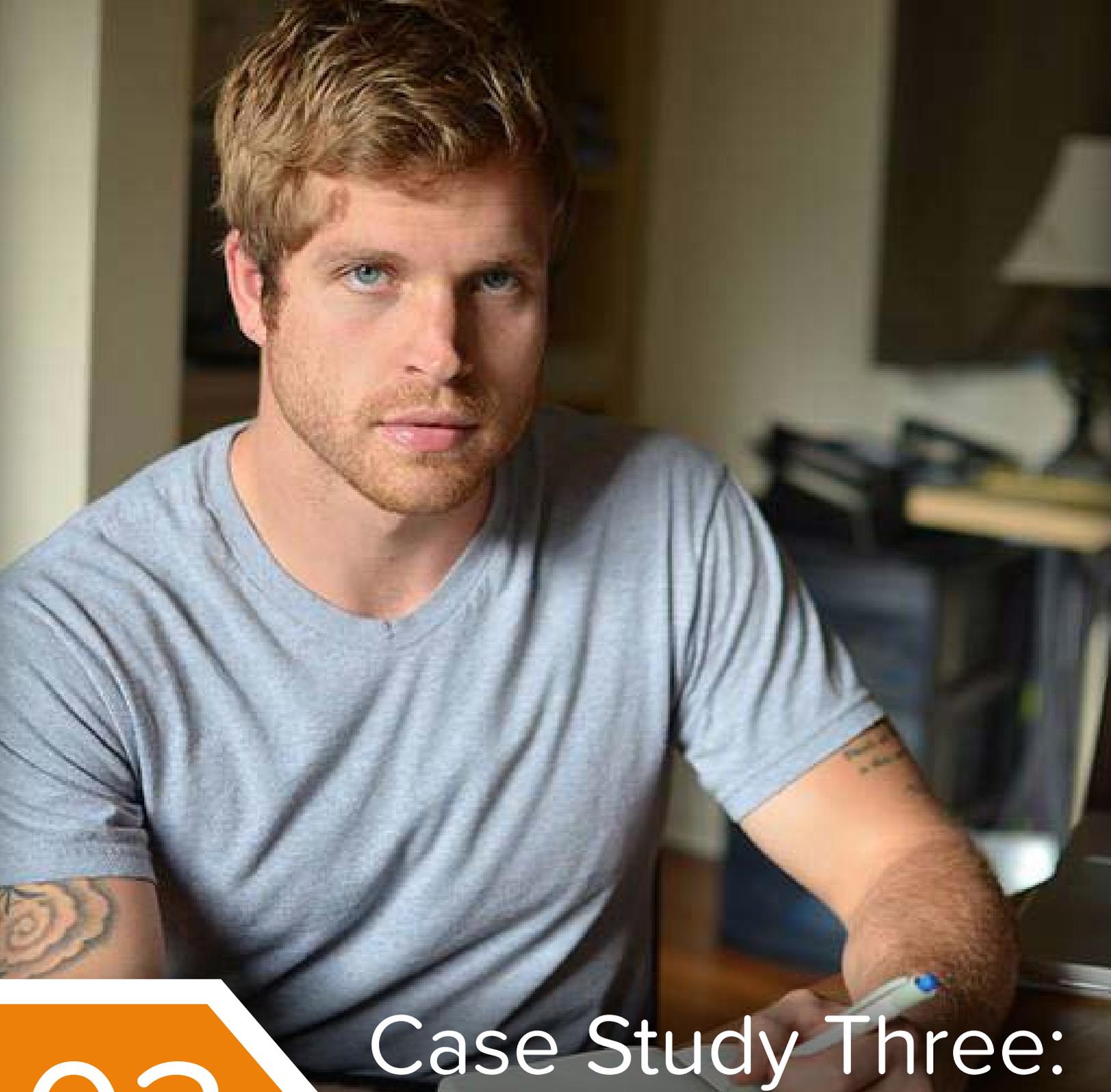
Although many people might call this impossible, or even reckless, Jenny and Josh know that it is the result of careful prioritization and a deeply intentional focus on creating a balanced life on their own terms.





We want to raise our kids to know that life is supposed to be fun, to say yes to adventure and to know that if you believe in it and love doing it, you can find a way to do exactly that. We believe in using our creativity and skills to buy ourselves the freedom to do what we want to do.”





03

Case Study Three:

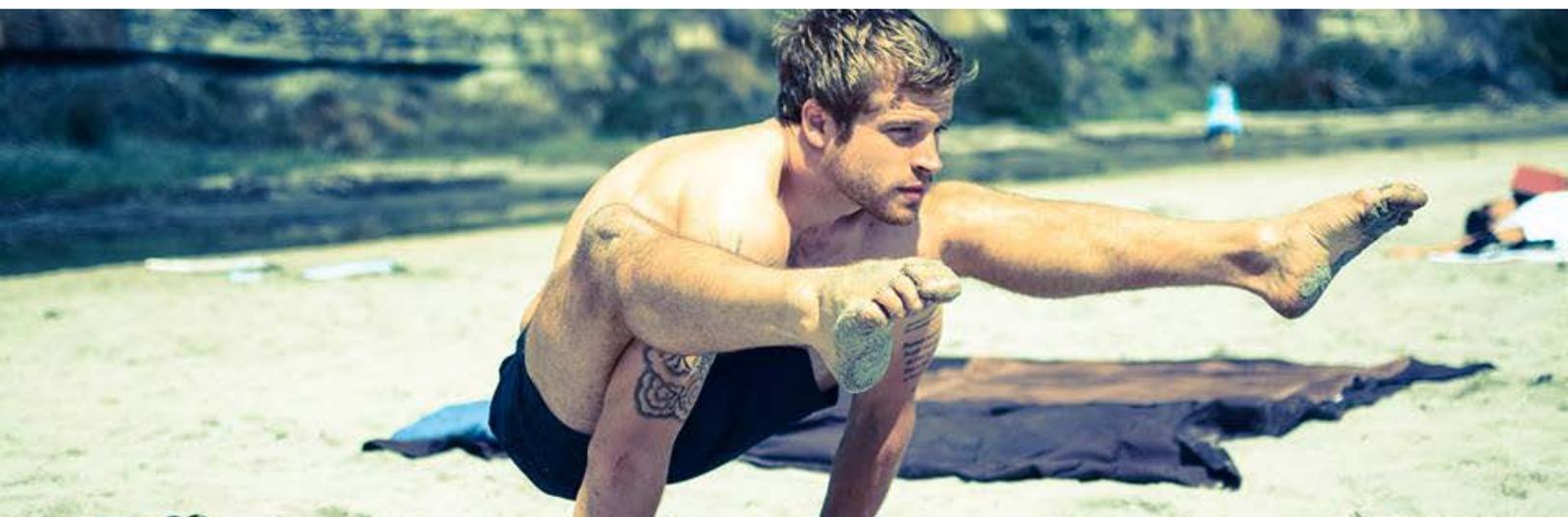
Kirk Hensler | Hale Holistic

Kirk Hensler

[Hale Holistic](#) | [Kale & Cigarettes: be a contradiction](#)

[The Hale Foundation](#) | [Seeds Training](#)





Kirk Hensler | Hale Holistic

Kirk Hensler is a modern renaissance man.

He owns a [yoga and kickboxing studio](#) in San Diego, and is the co-founder of The Hale Foundation, a non-profit that offers yoga, martial arts and creative arts to at-risk youth. He is also a [writer, business development consultant](#) and creator of the soon-to-launch course Organizing Inspiration – What To Actually Do With Your Brilliant Ideas. Lastly, Kirk is the Director of Media for [Seeds Training](#), the world's number one provider of social, emotional and leadership youth training, which involves shooting and editing videos across the globe. This year alone, he will travel 120 days and rack up 75,000 miles in the sky.

With Kirk's multiple talents and business projects, he regularly works at least 65 hours each week. Although he seeks balance, Kirk views things a little differently than most. For him, there isn't a moment of time where there is a noticeable difference between working and living; his life's work is his life.

Like many entrepreneurs, Kirk struggles knowing that he has so many projects to juggle, and that there is no room for error. The smallest slip could be disastrous, and cause the entire operation to tumble. This pressure can be crushing, especially when it gets high and all Kirk really wants to do is relax, watch TV or take two weeks of vacation.

How, then, does one very busy man find balance in the midst of all this?



Let's make a deal

Kirk has learned to set specific expectations and establish rewards when he achieves them. If he can focus and complete a portion of his to-do list by a set time, he takes time for himself to read, meditate or take a walk. During this time, he puts his phone and computer away, concentrating seriously on his breath and physical body—something he knows he tends to neglect while in the work zone.

Don't avoid the hard stuff

When you are a small business owner, the less appealing tasks often fall on you, and getting something done means doing it yourself. Kirk has learned that avoiding these issues and tasks isn't an option, so he has to face them head on.

To help avoid feeling overwhelmed, he gave up control and perfectionism, and chooses to delegate when possible. He eliminated the tasks that he dislikes most by assigning them to others. This allows him a unique sense of freedom; instead of having to be the one doing all the work, he can be the one delegating the work and shaping his life the way he wants it.

Sweet dreams

Although this may seem counterintuitive to regular work/life balance advice, Kirk says he's been successful with taking his work to bed, especially his finances. Like many entrepreneurs, Kirk has taken his profits and reinvested them in the business. This creates a lot of pressure and worry that one of his projects may fail, leaving the others in jeopardy. He's learned that 12 daytime hours are not enough time to work through all of these situations. He often finds creative solutions while he sleeps, working through these concerns in vivid dreams and arriving at outside-the-box solutions that rarely arise during the hustle and bustle of daily life.

Stay out of the dark

Many small business owners launch their business because they possess a particular skill or passion, but without the necessary financial skills and education required for small business success. Kirk eventually hired an accountant to work more closely with the financial side of his business so that he does not feel left in the dark. Anxiety, he has found, often comes from avoiding things. By getting a thorough financial statement every month, he has a clearer picture and a better sense of where he needs to focus his work efforts.



Practice what you preach

Although Kirk is in the health and wellness business, he sometimes gets so caught up in work that he does not take the time to exercise, which deteriorates his ability to stay sharp and energized. He also noticed a tendency to put personally rewarding creative projects on the back burner if there is not an immediate and measurable return on the time.

Combating this has required reprogramming so that time spent on exercise and creative pursuits are seen as valuable to Kirk. He now treats yoga practice as just as important as writing a blog post, and tries to take one new dance class each week so that he generates new ideas through new experiences. It is important to create a schedule in which he is not working on his business.

Presence

Kirk's life is filled with driven, entrepreneurial and creative people, and he seeks ideas and inspiration in everything. Because he is in a critical phase of business growth that requires him to push, he seeks balance by creating a meditation routine and a conscious focus on being present and developing listening skills. He uses the time he spends connecting with others as a break from himself and the demands of his business, and focuses on feeling the benefits of putting his energy into other people.

The search for balance

In the end, Kirk understands that perfect harmony is a rare thing. Even though balance is not something he experiences regularly, he still considers it valuable to spend time searching for it.

A yogi's tips for work/life balance

Create a system

Write down all the things that are necessary to run your life and your business, and put them on a weekly schedule.

Schedule time to be creative

Every week I take a dance class (usually hip hop), even when I don't feel like it. It gives me fresh perspective and access to the full capacity of my left and right brain.

Spend time with inspiring people

Talking about your ideas and even your struggles with other experts or entrepreneurs gives fresh life to everything I'm involved in. Working with people that are extremely good at what they do, even if it has nothing to do with my work, gives me motivation to be better.





The search for balance it's not often I find myself in perfect harmony. But the search for balance reveals a lot of holes in my life that I can work to improve, and working towards getting better is the most satisfying work a person can do.”



Tips From The Pros

5 Ways to Reclaim Balance: Putting Your Smart Phone in its Place



Jenny Solar

thephonemonsters.com

1. Make a commitment

Make a commitment and make it public. Communicate to family, friends and colleagues that you are instituting some phone-free time.

2. Switch off notifications

Head into the settings for your phone and shut off notifications for every app, including social media and email.

3. Plan scheduled times

Are you “Just going to check email quickly”, or will you likely respond to some work messages, take a quick peek at Facebook, and then head to NPR for some news updates? Instead of getting sucked in at random times through the day, plan specific, connected times when your phone won't compete with more important things in your life and work.

4. Customize

Custom ring tones and text tones for the most important family members, friends and clients can help you distinguish important texts and calls from those that can wait.

5. Out of sight, out of mind

Remove the temptation to pick up the phone by tucking it out of the way when you truly need to focus on work, family and life.



Tips From The Pros

5 Quick Ways to Simplify your Life:



Anna Kunnecke

Master Life Coach

DeclareDominion.com



1. The Power of White Space

If the 12 inches around your keyboard and monitor are clear, you'll feel better, even if your inbox is bulging. A 3-second quick tidy of your workspace will help you feel more focused, and calm.

2. Get It On Paper

Any time you feel frantic and overwhelmed, sit down and do a brain dump. For three minutes, write down every single thing that's on your mind, from big-picture strategy down to the exact brand of donuts you need to buy. Circle the 3 most important and do them first.

3. Delegate

Hire people to clean, run errands, buy groceries, and do your laundry for you. Someone will be happy to have the job, and your time is more wisely invested in doing your work: the things that generate revenue and contribute real value.

4. Let Your Calendar Do The Work

Put birthdays and anniversaries in your electronic calendar as repeating annual events. For important ones, put a recurring reminder on your calendar two weeks ahead, and you'll never have to buy a midnight present again.

5. Put Your Fun on Autopilot

You have to be proactive scheduling in fun. If you wait until you have extra time, it won't happen. Whether it's a regular golf game, a monthly book club, or weekly family pizza night, add it to your calendar, set it and forget it.



Bio:

Anna Kunnecke is a writer and a master life coach who helps women make discriminating choices in their careers, relationships and daily lives. She draws on her deep study of personal growth, mysticism and beauty, to help women transform their lives from crazy and chaotic to streamlined and gorgeous.



Tips From The Pros

10 Things You Can Do in 15 Minutes to Improve Your Work/Life Balance



Samantha Bennett

Creator of [The Organized Artist Company](#)

theorganizedartistcompany.com



Do yourself a favor and skip your next Facebook session in favor of one of these easy-to-do activities that yield BIG results.

Pick one you like, set your kitchen timer or the alarm on your phone, and see what a quarter of an hour can do for you today.

1. Breathe deeply

As little as 2 minutes of deep breathing can change your whole outlook on your day, and a full 15 minutes **might just change your life**. There are some great guided meditations available [online](#) and on [iTunes](#) if you want some additional structure.

2. Make art

Write a short poem, sing a song, play a bit of guitar or just **doodle or draw**. **Connecting with your creativity** is a sure-fire energy booster and a great way to stay in touch with your own inner wisdom. No need for fancy equipment or big ideas here. Try using index cards to make sure you keep your creations both short and casual.



3. Journal

A quick daily check-in with yourself can be the key to a whole new future. Pick a theme so that you stay focused. Record one thing about your kids each day (it's wonderful to capture those cute stories and exasperating moments) or try a [gratitude journal](#). Vent, whine, cry, celebrate—this writing is just for you.

4. Walk

Our bodies are designed to walk, and [even a short daily walk has profound health benefits](#). I like to walk because it makes my brain work better; I always get good ideas when I'm walking, and I love my unplugged time outside. Experiment with different times of day and change up your route from time to time.

6. Connect with someone you like

Our true wealth lies in our relationships, and our wired world makes it easier than ever to reach out. Make it a priority to check in on old friends, coworkers, community members and colleagues. They'll be delighted to hear from you when you call for "no reason", and you never know where some of those conversations might lead.

7. Daydream

Space out. Let your mind wander. Some people have more success daydreaming when their hands are busy, so feel free to make a paper airplane, shuffle cards or twist pipe cleaners. Giving your mind some calm, unhurried time to noodle around allows you to tune in to your intuition and can lead to [some truly great ideas](#).

8. Eat your broccoli

By this I mean spend 15 minutes working on an unpleasant task that you know must be done. Whether it's doing your accounting, filling out your expense reports or tending to some other pesky item, breaking it down into small daily chunks will help you get it done before you know it. The feeling of having made even a little progress is SO much better than the feeling of having it hanging over your head.

9. Dance break

Get your boogie on. While this can have obvious [health benefits](#), I'd rather see you dance for joy, dance for fun, dance to get your optimism going. If you have kids, it can be enormous fun to all dance together. Moving your body in new ways and really feeling the rhythm in your bones will keep you young, no matter how old you might feel some days.



10. Read a poem

There are so many wonderful classic poems, and spending a little time each day exploring them will both stimulate your imagination and deepen your humanity. You can get daily poems delivered via email through [The Writer's Almanac](#) or [Bentlily](#).

Bio:

Originally from Chicago, Samantha Bennett is a writer, actor, teacher, creativity/productivity specialist who has counseled hundreds of artists on their way to success. She is the author of the book [Get It Done, From Procrastination to Creative Genius in 15 Minutes a Day](#).



Tips From The Pros

4 Time Saving Tools For Work/Life Balance



Ian Cleary

CEO of RazorSocial

razorsocial.com



1. **Focusbooster**

Focusbooster is an app based on the **pomodoro technique**, where you set a timer for 25 minutes to finish tasks. Creating a timeframe for tasks makes me much more productive.

2. **TextExpander**

How often do you type the same information? With TextExpander, you create any information that you enter regularly and with a shortcut you can recall that text anywhere on your computer.

3. **Edit Flow**

Edit Flow provides an editorial calendar and a workflow connected to your email system. The calendar and workflow help you build a process that can shave at least 30% off your blogging time.

4. **Lastpass**

How much time do you waste thinking up and remembering passwords? With Lastpass you remember one password and it does the rest. It will give you secure passwords for any applications you use and then automatically log you in to those apps.





The more ruthless you are with your time management, the more time you will have to spend doing the things you love and spending time with the people you miss.”

Bio:

Ian Cleary is the CEO for [RazorSocial](#), the world leading source of independent advice for social media tools and social media technology. Ian provides content and training to businesses and works directly to top brands and agencies to help them select the best tools for their companies and customers.



Tips From The Pros

Unplugged Vacation Checklist



Jenny Shih

Business Coach

jennyshih.com



No matter how much we love our businesses, we all need an unplugged vacation to recharge our bodies and reignite our creativity. However, many business owners worry that everything they've worked so hard to create will fall apart in a few short days.

It is possible to take an unplugged vacation and not lose everything you've built. Use this checklist to make sure you're ready to go.

1. Are my systems active and running well?

Systems help your business to run on autopilot when you're lounging on the beach or climbing Mt. Everest. Technical systems automate tasks, like an online scheduler for client appointments and a glitch-free shopping cart to manage e-product sales. Situational systems define how certain common issues and events in your business are handled, including addressing customer service concerns and handling new clients.

TIP: Be sure to implement, test and refine your systems before they go on vacation!

2. Are my social media and blog posts prepped and ready to go?

If you run an online business, social media and blogging are a big part of your daily and weekly activities. To keep business going even while you're gone, prepare your social media shares and schedule blog posts before you leave. This also includes preparing and queuing your newsletter in advance so it's set to go, even when you're on vacation.

TIP: Social media tools like [Hootsuite](#) can make scheduling a breeze.



3. Have I notified clients and prepared an out-of-office autoreply?

If you work with clients one-on-one, it's important that you let them know you will be unplugged and will not be replying to emails while you're gone. Make sure your email account is set up with an autoreply that indicates you're on vacation and when you expect to return, as well as any emergency contact information.

TIP: Pad the date of your return to give yourself a few days to readjust and navigate your post-vacation inbox.

4. Do you have a trained assistant and/or team you trust?

You're going to need an assistant to address customer concerns and keep the day-to-day operations running. Depending on the size and scope of the products and services you offer, you may also want a tech or web person on call.

TIP: If you don't yet have an assistant or technical support person, spend additional time researching tools and systems that can handle some of those tasks for you while you are away

5. Have you let go of control?

The most important step of preparing for an unplugged vacation is releasing control. If your team and systems are running smoothly, your social media and blog are ready and your clients have been notified, it's time to take that trip!

TIP: The only thing left is you. Now take that vacation!

Bio:

Jenny Shih is a coach and consultant for small business owners. Her clients are “idea factories” with growing businesses who need help planning, strategizing, streamlining and systematizing. She helps new entrepreneurs define their niche, learn the basics of marketing, and start making money. She helps experienced entrepreneurs set up systems so they can get out of the daily grind and spend more time doing what they love. Jenny is the author of **The System Flight Kit, everything you need to create effective systems in your business**, and **The Idea Flight Kit, a step-by-step guide for turning your ideas into something real**.



STOMP Out Time Wasting.

Stop it. Tools. Outsource. Manage. Prioritize.

Jeanette LeBlanc

Content Specialist

Stop it

Technology is a gift that lets us be more efficient, powerful and productive...except when it's not. If your smart phone or your social media accounts are preventing you from using your time wisely, it's time to use that same technology to help you quit your bad habits and make the best use of your time.

[Self-Control](#) (for IOS), [Leech Block](#) (for Firefox) can help you by limiting your time on the sites that tend to suck you into the void. [RescueTime](#) will track the time you spend on various sites and block the distracting ones. Simply using the do not disturb function or switching your phone to airplane mode during times when focus is required can also help.

Tools

Tools don't have to be boring. In addition to all the other online and mobile tools listed here, focus on finding tools that meet your business and life needs that also let you have a little fun along the way. Try getting your [inbox under control](#) with a game, or [give your to-do list a personality](#) (and a healthy dose of attitude) with a fun to use app.

Outsource

Part of what keeps small business owners in the cycle of overwork and overwhelm is a stubborn insistence on doing everything themselves. Sites like [fivver](#) and [TaskRabbit](#) provide a simple option for those tasks that you simply dislike or that fall outside of your expertise. You can also look into hiring a [Virtual Assistant](#) who can take over your office related tasks and improve efficiency.



Stop hiring the cheapest person—yourself.”

—Seth Godin ICON 2014



Manage

We often hear about time management, but studies have shown we can actually impact our lives and work more by focusing on energy management. Use an app like [Sleep Cycle](#) can help you get in touch with your physical rhythms or [Omvana](#) to provide tools like guided meditations to assist with stress management. Apps like [Crunchtime](#) and [Lift](#) combine life balance and goal setting with a social format—allowing you to connect with friends on similar paths.

Prioritize

As a small business owner, the list of things to do can often seem overwhelming. Simple services like [My 1-3-5 List](#), [TeuxDeux](#) or [Todoist](#), apps like [WorkFlowy](#) or a more robust project management tool like [Trello](#) can help you determine not just items, but priorities, and help you work toward your goals. The important thing is to pick one and use it.

Conclusion

For small business owners work/life balance can often feel like a daunting task. Because of the shifting nature and challenges of entrepreneurship, the lines between work and life are not as hard and fast as they are for traditionally employed individuals. Luckily, entrepreneurs also have the advantage of increased freedom and flexibility to adjust to the changing requirements of life, both at work and at home.

By devoting your time and attention to the sort of life you want, you will be able to blend what you love about your work and what want for your life, creating a vision for the future that aligns with your goals and dreams. By clarifying realistic expectations, instituting the correct tools and systems and carefully defining roles and priorities, work/life harmony is more possible than you may believe.



About the Author

As Infusionsoft's Content Specialist, Jeanette strategizes and crafts relevant content for the modern day small business owner. As a long time entrepreneur, Jeanette leverages her experience and passion for small business to help guide and elevate her entrepreneurial minded peers. Jeanette's writing and photography have been published internationally, both in print and online. When she is not madly typing the draft of her next blog post, Jeanette can be found helping other entrepreneurs unleash their writing voice, sipping almond milk lattes in downtown hipster coffee shops, enjoying early morning desert hikes and spending time with her family.

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