

Kendra:

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You are listening to the level up podcast, a podcast for high performing business women and I am your host Kendra James Anderson. I am CEO of the Finance Femme LLC and a Virtual CFO to several successful women entrepreneurs. Here I'll be sharing business tips and the occasional life hack that helped you get higher profits and business and more time to live your best life. Whether you want to scale your business to six or seven figures and beyond, have already hit millionaire status or if you're just getting your business started, this is the podcast for you. Hey guys, it is me Kendra, and I am in a very good mood this morning. My wife and I are just a couple of days away from taking a week long vacation to Hawaii. We planned this pretty last minute and we were just like, we need a vacation and let's just figure out a place to go and let's just go. And so in this podcast episode, I'm going to talk through what I did to prepare myself and to prepare my business for me to be out of it completely for an entire week. I was a little nervous about it, you know, when we decided to take a week off, but at the same time I know that I needed it. And so I was like, well, we just got to figure out how to make sure that the business is gonna run just fine. And so there were a couple of things that I did in preparation, so I definitely want to share those things with you.

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Now, this isn't like a, you know, bulletproof how-to-prepare-your-business-for-vacation episode because quite frankly, this is the first time that I've been out of the business for this. Well, no, let me take that back. It's not the first time. Our wedding and honeymoon, I was gone for this amount of time as well. But, the business was smaller, our team was more lean, we had less clients. So we've grown significantly. And so now with the size team that we have and the amount of clients that we have, it's, you know, a little scary to potentially walk out of the business for an entire week. But I can say for sure with just, what, a day and a half away before we actually leave that I am completely confident in the business running just fine with me being out of it for this entire week.

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So I just want to share a couple of tips on how I did it, basically, to prepare myself and my team and my business for me to be out for this week long vacation. So the first thing that I want to share, it might be a little weird to some people, but others are going to be like, 'oh yes, this makes complete sense'. So I will start off by saying I have a Myers Briggs personality type is an ISTJ. So some of you guys aren't going to know what that is. You can Google it. Some of you are, but I'm an ISTJ. So if you are a fellow ISTJ, this first point is going to make a lot of sense to you. I think most high performing people, probably this first point would make a lot of sense to you. But to me, I have to have a

goal while I'm on vacation It's not work-related. So it's very hard for me to like shut my mind off completely. So even when I'm watching like TV, if it's not like an engaging episode where I have to, you know, like a detective show or I have to solve for something, then a lot of times my mind kind of wanders off to thinking about something either business-related in my business or my client's business. So when people say, you know, just be free and don't think about anything, I'm like, okay, I can do that for a little bit. But then I got to start thinking about something. Right? So for me, I have to have this goal on vacation to be present and to be as clear minded as possible. Right? So I have a task for myself while I'm on vacation where every morning I want to make sure that I go out on the lanai, have my cup of coffee and journal about what I'm grateful for. For me having this like task, if you will, it's what's gonna, I dunno, what's going to kind of fulfill that part of my brain that feels like I have to make sure that I'm checking off something. And so I think that, you know, that one goal can be anything. It can be as long as it's not work-related, right? As long as it is not something related to your business then I think that that would be helpful. But again, everyone that doesn't apply to everyone because some people are perfectly good with going on vacation and being able to check out. But for me it's very hard to check out. So making sure that I am constantly thinking about what I'm grateful for and just constantly taking in the sights of Hawaii. I want to try, you know, the food, I want to go horseback riding and climb the mountains and do zip lining and all of these different things, parasailing, things that I wouldn't normally do because I am not a heights person. I'm going to put myself out there and try while I'm on this vacation. So I want to make sure that I'm very present in it, and so that's going to help. Additionally, what's gonna help is something that I've been doing a lot over the past couple of weeks is replacing a thought with another thought. So specifically for me, because again, I think about business all the time, whenever I start to think about a thought that I don't want to think about whether it's a negative thought about someone or whether it's a business related thought, when I'm trying to kind of check out of business, I will place that thought with something that I'm grateful for.

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So if I start to, let's say I'm, you know, taking a bath and I'm trying to relax for the evening and then my mind starts to wander how I can, you know, help this client do X, Y, or Z, I will intentionally shut that thought off and start thinking about how I'm grateful for the ability to take a bath in my home, how I'm grateful for this or grateful for that. And so that has actually been quite amazing over this past couple of weeks, honestly. So

that I'm going to be practicing while I am on vacation as well. So another thing is obviously prepping your calendar, preparing your calendar for you to be away for this week. So of course you have to, you know, move the necessary meetings or put your team in charge of leading the meetings that are on your calendar. And this one was actually one that I was a little nervous about because again, we planned this trip pretty last minute.

Kendra: [06:12](#) And so there were a couple of meetings that I had to move and I was like, ah, I don't like moving meetings. So I felt a way about it. But I will say this, don't feel away about moving meetings, particularly for vacations and time that you really need. And here's kind of like a funny little story of what happened. So one of the meetings that I had to move is a weekly coaching call that I have. So for those of you that don't know, I coach other accounting, finance and tax professionals on how to build their business. We have a course out there called Six Figure Firms. And then I also do very small group coaching where we have weekly trainings or monthly trainings. And so for this particular set, we have weekly trainings. And so we have a weekly training and next week. And so I, you know, went in and told the group like, Hey guys, I'm going on this trip to Hawaii.

Kendra: [06:59](#) I know it's kind of a last minute plan, but let's move this weekly call to another week because we're going to be gone for this entire week. And so I was like, Ugh, you know, they signed up for this weekly trainings and now instead of it being next week we're going to have it the week after. And the response was, Oh that's amazing Kendra. That's very inspirational. This is what we need to see is the ability for, you know, us as business owners to just last minute, make a last minute trip, pack up and go and still be able to have trust our businesses going to run fine. And so to them it was inspirational. And I'm sitting here worried like, Oh, I have to move this meeting. So I say that to say don't feel away about moving meetings. A lot of times, you know, we think we're worried about things that we don't have to be worried about, and so if you need this vacation, if you need this time off, plan in advance and be respectful and give people the time that's needed for them to adjust things as well.

Kendra: [07:56](#) If you have on a very important meeting that can't be moved, make sure that someone on your team can handle it. We'll talk about that in a second. But yeah, prepare your calendar. Right? Make sure that you are moving any necessary meetings and also inbox zero. So this concept of making sure that you clean out your inbox, right? Now, I will say that for me, I'm not inbox zero. I'm inbox four, I do have four emails in my inbox right

now. They've all been read, but I'm pending some information so I don't want to archive them just yet. But I am definitely on the camp of like, keep your inbox as lean and clean as possible. I just think from a, you know, mindset perspective when you're on vacation and you know that your inboxes pretty cleaned out, that you can just relax more than if you have 2000 unread emails.

Kendra: [08:46](#) But I will say that there are some people that I support, some clients that I have that have 2000 unread emails and they just don't, it doesn't bother them. So you know, whatever floats your boat. But, for those of us who need a clean and tidy inbox in order to just feel lighter, I would definitely suggest before you go on vacation, getting your inbox as close to inbox zero as possible. That definitely helped me out. So also I want to say that in order to really confidently be able to step out of your business for any period of time, whether it's just two, three days or a week or two or three weeks, you have to have trust in your team. You have to have trust in your team. This is whether you are a product based, service based, it does not matter. If you are a business owner and you have a team which you're going to have to have at some point, particularly if you want to ever be able to step out of it, right?

Kendra: [09:40](#) You have to be able to trust in your team. So let's talk about this for a second. Typically payroll is one of the largest expenses in a business. If you are a service based business, it typically is the largest. If you're a product based business outside of your actual costs of goods and your products payroll is typically your biggest. So you really want to make sure that it's right. If you're gonna spend the largest amount of your fines on your team, you want to make sure that your team is efficient, you want to make sure that you're able to back out of your business and your team can handle it, right. So here are a couple of things that I did in preparation for leaving that I think I'm definitely going to continue to do going forward. So we had one-on-ones.

Kendra: [10:26](#) I had one-on-ones with every single member of my team before leaving. It was actually earlier this week. So I'm recording this on a Saturday morning and all of the one-on-ones I believe were on Monday of this week. And now in full transparency, the one-on-ones were not scheduled for the sake of this vacation. Cause again, we planned this pretty last minute, but the one-on-ones were actually our Q4 reviews. So in a prior episode I talked about how it's a really good idea to have reviews, quarterly check ins with your team, right? And so that was actually our preplanned Q4 reviews were this Monday. But, I also use that time to talk about what our expectations, our goals and our

objectives are for the balance of this quarter. So I definitely suggest having one-on-ones with your team, especially right before you're about to leave and just, if you're going to be gone for a week, let them know what your thoughts are for them to be complete, what they should complete during that week. What your goals and objectives are for the overall business, for their department, for them individually. So in the one-on-one that we had on Monday, uh, we were talking about the goals and objectives of Q4 because we're starting off Q4 right now, we're in October when I'm recording this. And so we were talking about what those Q4 goals and objectives are. So they already kind of have their marching orders for the balance of this year. So me being gone for a week, it's not like they're going to be sitting there twiddling their thumbs because they already know what they have to accomplish for the balance this quarter. So I definitely suggest having those one-on-ones, before you leave so that they can understand exactly what they're supposed to be working on and there's no kind of confusion there. And also, if you have a virtual team, I definitely suggest having a virtual team meeting prior to your leaving as well. So again, we had one on I believe it was either Wednesday or Thursday morning. And again, in full transparency, this was not scheduled intentionally, but we had it for a different purpose. It was a group training that I was leading for my team and it ended up working out perfectly because once again we had just had our Q4 reviews. So everyone got their individual marching orders on Monday. And then we had a team meeting where we all came together on Wednesday and I kind of tied in, you know, here was this department's Q4 goals, this department's Q4 goals. And so everyone got to see the bigger picture. And then also in preparation for me leaving, I got to kind of sign off to everybody virtually before leaving. And so also just the benefit, you know, having that virtual team meeting, it encourages collaboration.

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So oftentimes if you have a virtual team, people work in silos, right? So the marketing team is kind of doing their thing. The accounting team is doing their thing. Everyone's kind of working separately. But if you have this virtual team meeting, you're encouraging collaboration between the different groups. And so that's really what I found ended up happening there. And so again, I can leave now knowing that everyone individually knows what they're responsible for. The team as a whole knows what they're responsible for and so I can just back out of the business. So one of the things that I'll say that I've seen a lot, you know, with people that I've just worked with, not even necessarily clients, but just individuals I've come across if they don't have trust in their team. And so if you don't have the trust

in your team that they can carry out whatever they need to carry out with your hands and not being in it, then you really need to reassess that team.

Kendra: [13:51](#) Because what good is it if you can't back out of your business for a day or two days or three days without confidently feeling like something is going to get done. I'll also say this, sometimes it's not the team, sometimes it's the owner, right? Sometimes the team can do all the things that you need them to do, but the owner, for whatever reason, is nervous about leaving that type of responsibility in the hands of their team. So if that's the case, then you know, and if that's you as the owner, then I would definitely encourage you to work through that and figure out what it is that is causing that blockage for you to be able to pass off that responsibility to your team. For some, I've seen that it's the fear that, you know, if you pass that responsibility off to members of your team that you're like letting go of a piece of your business and work through that.

Kendra: [14:43](#) I'm not the person to help you work through that, I'll tell you that. There are leadership coaches and leadership trainings and of that nature that are out there that I can suggest you take, but you want to be able to work through that. I've never had that concern personally. So again, it's hard for me to give advice on it, but you definitely want to be able to work through that because you have a team in place to help you build. And I can say maybe it's, you know, based off of past experiences as well. A lot of things that we do in our current present day is based off of our past experiences. And so for me, I've always had really bomb bosses. Like I've had one crazy boss, but aside from that one boss, all of them were amazing. From my very first boss, she was just amazing and taught me about, you know, team and collaboration.

Kendra: [15:32](#) And even in my most recent boss that I had when I quit corporate and left, he was absolutely amazing. And he was the reason why I stayed in corporate for the last few years. I would've left it quicker, but I really enjoyed working for him. And so I say that to say that I've always had people that were kind of leaders above me that lead in a way that helped me know how to lead. And so because of that, I think that I have so much trust in my team. So, you know, long story short, I guess that the bullet point on that one is to just have trust in your team. I definitely, you know, had that, those one-on-ones and have this virtual team meeting and that really helped. So, all right guys, I am going to leave it at that. I'm going to go finish this packing.

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By the time this episode is released, I will actually be just returning back from Hawaii so I can, you know, let you know how things really actually ended up shaking out. But again, I am fully confident that the business is going to be amazing and run just fine without me in it. And if you feel like you need a vacation, I definitely encourage you to take that vacation, take that time away, clear your mind as much as possible from business and, yeah, just enjoy yourself. Again, set up your business in a way that it's a business and not a job. Because if it's a job, it's going to be very hard for you to back out of it. But if it's a business that it can absolutely operate without you in it. So with that, headed out, to go finish packing and I'll talk to you guys next week. That's a wrap for this episode. Be sure to go to [thefinancefemme.com/podcast](https://thefinancefemme.com/podcast) to get the show notes and links mentioned in this episode, and if you heard any gems, be sure to share it with a friend and subscribe. Reach out to me on Instagram at [@thefinancefemme](https://www.instagram.com/thefinancefemme). That's femme and leave a comment. Thanks for listening.