

The
RETAIL
ACADEMY

BUSINESS BUILDER
WORKBOOK

**Work Less &
Sell More**



LETTER FROM SAL

Hey there,

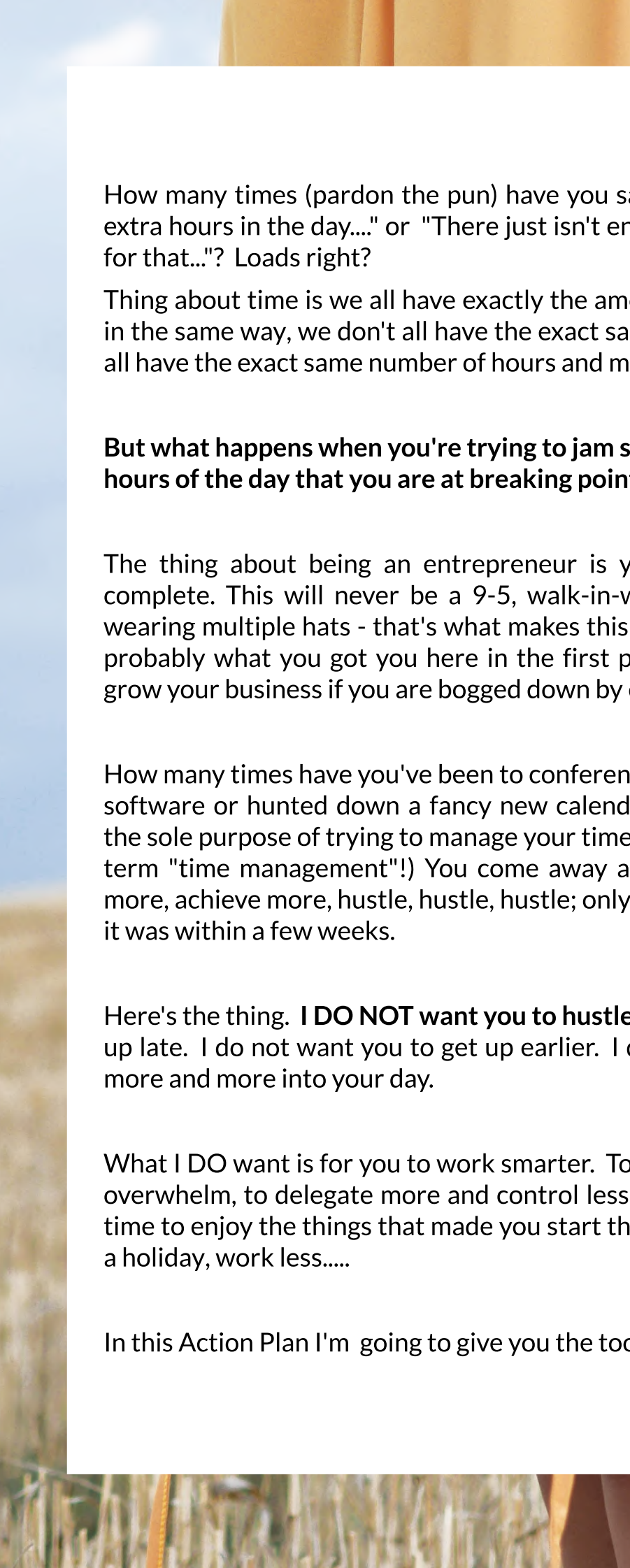
Working for yourself is 'the dream' and I'm grateful every single day that I have the flexibility to work when I want and from where I want, with no boss breathing down my neck (though I am probably harder on myself than a 'boss' ever was).

As I write this, I'm sitting in a trampoline play centre. We're nearing the end of school holidays, which seem to drag on interminably. I've already taken 8 days off work, but as these holidays drag to their end, carving out 60 minutes of time where I don't feel guilty comes at a cost. \$18 to be exact!

If you're anything like me, when you run your own business, the lines between family and work blur significantly. Trying to fit everything in and not be working 20 hours a day can sometimes feel impossible, right?

As a reforming workaholic, even I can get twitchy if my laptop isn't on my lap, or my phone isn't in hand. But it's taken a long time to realise that busy does not equal productive.

I'm in this business because I want to have that time for the people I love - not just be busy. So let's you & I, make a commitment to work less, ok?



How many times (pardon the pun) have you said to yourself; "I just need a few extra hours in the day..." or "There just isn't enough time..." or "I don't have time for that..."? Loads right?

Thing about time is we all have exactly the amount of it. Sure we don't all use it in the same way, we don't all have the exact same pressures on our time, but we all have the exact same number of hours and minutes allocated to us.

But what happens when you're trying to jam so many things into those 24 little hours of the day that you are at breaking point....?

The thing about being an entrepreneur is you never have just one task to complete. This will never be a 9-5, walk-in-walk out job. You will always be wearing multiple hats - that's what makes this such an exciting gig and honestly probably what you got you here in the first place. But, you will never scale or grow your business if you are bogged down by overwhelm and exhaustion.

How many times have you've been to conference or joined a webinar, purchased software or hunted down a fancy new calendar or diary or other resource for the sole purpose of trying to manage your time better (for the record I HATE the term "time management"!) You come away all fired up, ready to do more, be more, achieve more, hustle, hustle, hustle; only to find everything is as chaotic as it was within a few weeks.

Here's the thing. **I DO NOT want you to hustle harder.** I do not want you to stay up late. I do not want you to get up earlier. I do not want you to jam more and more and more into your day.

What I DO want is for you to work smarter. To free yourself from confusion and overwhelm, to delegate more and control less. I want you to be able to free up time to enjoy the things that made you start this business in the first place. Take a holiday, work less.....

In this Action Plan I'm going to give you the tools and strategies to do just that.



ACTION 1

GETTING OVER THE OVERWHELM

About a year ago I got this email in my in box;

Hi Salena,

I have had my on-line store for about eighteen months now. I knew when I first started it would be a steep learning curve and I fully anticipated it would take me hours to do what should take minutes. I was prepared to work long hours and I certainly was under no illusion being a business owner would be like having a 9 to 5 job. I thought things would get better over time, except they've got WORSE. I feel completely lost and overwhelmed. I have so many jobs to do and they just keep coming, it's relentless. I know I should delegate some to my staff or find other people to do them but I just don't know how to do do that. I feel I'm drowning and I don't know which way to turn. Do I give in? Do I keep going as I am and hope for the best?

I have to admit I get a bit emotional when I read emails like this (and believe me I get quite a few of them) because this was me about a year or two into running my retail stores. It absolutely did feel like I was drowning and this is about the point I thought it might be a good idea to give up.

I wasn't afraid of hard work. I was under no illusion I had a walk in walk out job. I knew I would need to be able to do a lot of things, juggle a lot of balls and wear a lot of hats (all the analogies!). I just wasn't prepared for how many things would be vying for my attention and how relentless it would be.

I was drowning. And I was overwhelmed. Do you know that feeling?

When you look down at your to do list and it feels like for every item you cross off you add three more to the bottom. You get up early, stay up late, put in extra hours and still it feels like you're in a tug-of-war with time.

But overwhelm isn't just about how many jobs there are on your to do list (we'll talk more about that in Action 2) it's also about how many other things are crowding your brain and vying for your time. It's all the ideas you have running around in your mind. All the "I shoulds". The strategies, the research, the learning.

On top of that many people running an independent business work another job. They have kids or a partner they need to work around. So often people start a business expecting they will be able to fit it around all the other things in their life but soon find out they're fitting everything else around their business.

Are you the CEO? Or a Slave?

Pretty soon the overwhelm and lack of control, lack of planning, jumping from one task to another, the feelings of drowning start to become a kind of **servitude** to your business. You are no longer in control of your business, it's in control of you.

I always ask my 1:1 coaching clients the following question;

If you were the CEO of a million dollar company what would you be responsible for each day? What would your day look like from the time you wake up to the time you go to bed?

Now it's your turn. What would YOUR day look like if you were the CEO...?

I know you're rolling your eyes and saying "but I'm NOT the CEO of a million dollar company, so this is irrelevant. But I can assure you, it's not. If you are serious about making your business **profitable, scalable and successful**, you cannot afford to think like a **slave**. You must think and plan and control your business like a CEO - no matter how much money you're bringing in.

The fundamental difference between being a slave to your business and being a CEO of your business, is control. CEOs are in control. Slaves have something controlling them. If you are overwhelmed and drowning in the responsibilities of your business you are at the mercy of your business. It's time to take control.

ACTION

Not sure if you're a Slave or a CEO? Take the quiz!

mark each question true or false and see how you scored at the bottom

I am pretty go with the flow and really good at reacting to things as they happen, making sure they're fixed and sorted out.	
I have really great sales but it frustrates me money seems to flow out as quickly as it flows in.	
I have the foresight to have some personal funds on hand to ensure my business stays viable during slow periods (or some other plan B)	
I started my business because I'm really good at whole lot of things. Anything I don't know I find out online and implement myself.	
My business would do better if it was in a different location or the economy of my local area was a bit more robust.	
An important part of my business is having the flexibility to work around my family / other job. Working late nights / weekends / early mornings or juggling work and home is the price I'm prepared to pay for flexibility.	
The tasks I do don't impact financially on my business.	
My days have structure, I set boundaries, communicate my expectations & know my value.	
I'd love my business to grow and evolve but I just don't have the energy or time for that to happen right now.	
I believe in providing exceptional service at all cost.	
There are tasks I could give my staff or outsource but I find it easier and I get a better outcome if I manage them myself.	
Most of my day is spent responding to emails and ensuring my social media is up to date.	

Were most of these statements TRUE for you?

sorry to say it but you are absolutely and completely a SLAVE to your business.

OVERWHELM BEATING TIP 1: KNOW WHERE YOU ARE FINANCIALLY

It's impossible to feel secure and in control of your business if you have no idea where you're at financially. CEOs constantly track their money and not in a knee jerk "ah crap I thought I would have enough sales to cover my bills this week" kind of way. They are constantly analysing their sales figures, they know exactly how much stock to have on hand to ensure their cash flow isn't compromised.

CEOs budget and strategize, they base their figures on forward planning and analysis. They know exactly how much needs to come in to cover all the outgoings PLUS they pre-plan (and create financial buffers) for future events such as slow periods, holidays, unexpected events or staff leave.

Being in control financially means having a constant handle on the following;

- ❑ Daily, weekly and monthly sales figures
- ❑ Monthly profit and loss
- ❑ Conversion rates
- ❑ Forward projections
- ❑ Cash flow

OVERWHELM BEATING TIP 2: DON'T CONFUSE CONTROL AND CONTROLLING

If I had a dollar for every retailer who says "I can't let other people do XYZ because I can't stand not being in control", I'd be on a beach in Bali 360 days of the year....

Being **in** control helps a business grow. Being **controlling** stifles it. It's important you don't mix the two. I'm no psychologist but in my experience business owners who micromanage their business and their staff usually don't have a handle on anything and are about as far from being **IN** control as they can possibly be.

Want to break free of the exhaustion and overwhelm? It's time to quit doing every single, tiny, minute thing in your business because you can't bear the idea of someone else doing them. No CEO has time to do every single job - they make decisions, lead, direct, communicate their ideas, and delegate or automate tasks away from them self that don't add value to their business.

BE the boss. BE in charge. BE in control. No more being controlling.

OVERWHELM BEATING TIP 3: HAVE STRUCTURE

Most people start their independent business because they want to enjoy the flexibility it can bring. But flexibility is NOT flipping here there and everywhere.

Erratic work patterns, no set start or finish times, no structured work schedule quickly moves from appealing to overwhelming if you don't manage it properly.

There's nothing stopping you from thinking outside the box when building some structure around your work; maybe it works better for you to start your day later so you can take your children to school, if you're balancing another job or are a stay at home parent you may need to make concessions to work in the evening. Working several long days may allow for a day away from your business.

Flexibility does not mean working without pattern or structure. Knowing when you are doing certain tasks in your week will allow you to arrange other aspects of your business and life accordingly. It will help eliminate constant interruptions and the exhaustion and confusion that comes from jumping from one task to another. Your hours may be longer than an employee but you can still work purposefully and calmly.

OVERWHELM BEATING TIP 4: LEARN TO SAY NO

Saying yes to every little thing that comes along is the thing that makes you really good at running a business in the early days. But as your business grows you will find saying yes to everything simply puts more and more pressure on you. It's time to say no!

Use this opportunity to look at ALL the things that are happening in your life. If you're doing **"everything"** in your business, it's highly likely you're doing **everything** everywhere else too. And, sorry to say, **you're probably not doing anything all that well.**

You need to start saying no to some things - maybe it's saying no to working 6 days a week, maybe it's saying no to the staff member who's there for an easy ride, maybe it's saying no to yet another school bakesale (gets me every time!), maybe it's saying no to staying up until 3am doing book work....

If saying NO is a bit confronting then start by saying "it's not a priority right now"!

OVERWHELM BEATING TIP 5: KNOW WHAT YOU DO THAT BRINGS VALUE

CEOs are really, *really* good at getting sh*t done! Like, really good. Please note I didn't say "CEOs are really good at getting 'everything' done"

I've worked with a few CEOs in my time and I've never, not once, known one of them to say "I'm sooooo overwhelmed I just feel like I'm drowning in all the ideas and the jobs and the to do list....I can't get anything done". That's because CEOs don't stuff around with the fluffy stuff I like to call "busy work". They know what they're good at. They know what they like doing. Most of all they know how to use their time productively doing things that **BRING VALUE** to their business.

Checking emails several times an hour, posting photos on Instagram 3 times a day, staying up until 1am responding to every comment on your social media accounts, constantly researching and planning without implementing is NOT a valuable use of your time.

So what are you good at? What do you actually do that will bring value to your business?

ACTION

Defining Your Role and The Value You Bring To Your Business

Step 1: Use the following pages to track the tasks you do over the period of one week.

List every task that you undertake, no matter how big or small and how much time you spent on that task.

If you predominantly feel overwhelmed in your business only, focus on work tasks (be sure to add tasks you do for your business away from your shop/warehouse).

If you are feeling overwhelmed with every aspect of your life make it more holistic and included home / social tasks also.

I think you're going to be pretty surprised at exactly what you do and how much time is spent.



ACTION 2

BUSY WORK OR PRODUCTIVE WORK?



Being busy seems to be a social norm these days. There's an unspoken belief if you're not busy busy busy all the time, you must be just sitting around on our butt doing nothing - and we can't have that! We're so obsessed with being busy we've invented things to do that make us appear to be doing things at every given moment. Busy has become the ultimate symbol of success.

How many times have well meaning people asked you "how's business?" to which you've felt compelled to reply "I'm *so* BUSY" . No need to tell them there's no profit, there's no customers, there's no growth, you're overwhelmed and exhausted - they'll think you're a failure.

But does busy really equal success? Of course not. In my opinion the NUMBER ONE thing that holds retailers back from growing their business is being BUSY as opposed to being PRODUCTIVE.

The thing about being productive is it usually doesn't mean burning ourselves out. It means working smarter, not harder. So why do we keep just filling our days with busy-ness?

Being Busy Is Safe

If you fill your day with busy work you don't have to start making big decisions which may be frightening or unfamiliar. If delegation or management don't come easily or naturally to you, it's way safer to stick with filling your day with the tasks you know how to do (or don't know how to do but aren't really adding value to your business). Being productive means saying no to some things. It means really stepping up and saying I'm in control of this situation.

Stepping up into the role of the CEO of your business can be an extremely confronting and challenging place to be.

Being Busy Is An Excuse To Stay Small

We have gotten so used to hearing busy as an excuse, we think we can use it for everything, including our business. When we use busy as an excuse for not doing the things that add value to our business **we are degrading our true value.**

Using busy-ness to justify not performing (or learning about) those tasks that add value to your store, is simply finding an excuse for lacking knowledge (or an unwillingness to learn).

Further more when you say things like "I'm too busy to show my staff how to do something, so I just do it myself", it devalues the contribution others want to make and monumentally stunts your ability to grow and develop your business.

Being Busy Legitimizes Our Choice To Leave The 9-5 Grind

When I left my 9-5 job and started my retail business, I was paralyzed with comparisonitis.... My friends had returned to their corporate jobs and were constantly rushing to drop their babies to daycare, racing to catch the train to the city, dashing off in their corporate power suits. They were BUSY.

I however had made the conscious choice to leave the rat race. Here I was was packing a few orders, sending out some newsletters, doing my monthly book keeping. I felt like a failure. If I was going to feel like I had a "real" business I needed to be BUSY. I mean you can't be successful if you're not working your guts out right? So I found things to do.

Pretty soon I felt **superior** to everyone else - I had my own business, I was doing all the things, I had all the balls in the air, I was so run off my feet, I was almost a wreck - I'd made it! BzzzBzzz - I was not the winner. I was stressed, exhausted, sick and more alienated from my family and friends than ever and my business was going nowhere.

If you feel you need to justify or legitimize your choice to have your own business - do it by **building an empire** - not filling your day with busy-ness.

NOW YOU KNOW WHAT NEEDS TO BE DONE....

Let's start working through some ways to use your time more effectively.

1. BATCH TASKS

We've been lead to believe multi-tasking is a skill we should have a degree in, in order to get ahead in business. Except research shows multi-tasking or jumping from task to task with no planning is actually a recipe for disaster and significantly impacts our productivity

Writing out four or five newsletters or blog posts at one time is far more productive than completing one on the day it's due. Paying all your bills one day a week is a far better use of your time than paying them as they come across your desk. Jumping on and off emails and social media throughout the day, is way less productive than making time to respond to everything at one or two points in the day.

ACCORDING TO THE AMERICAN PSYCHOLOGICAL ASSOCIATION PEOPLE WHO MULTI-TASK OR SWITCH FROM ONE TASK TO ANOTHER ARE 40% LESS PRODUCTIVE THAN THOSE WHO FOCUS ON A SINGLE TASK

2. PLAN YOUR TIME

Planning your work week in advance means you will always be on top of your tasks AND you can plan other aspects of your life around your business responsibilities (rather than making unplanned decisions and constantly chasing your tail). Planning helps to eliminate procrastination, stops time wasting and limits crisis when tasks are forgotten or not done.

If you know you can't do administration tasks whilst you're working the shop floor, or packing orders in the warehouse, put aside a day or evening a week away from your store to do that work. If you are working around family commitments, set up one day a week of care for your children so you can work on those tasks uninterrupted. If you love doing your store displays, arrange to stay back late one night a month to get them done. Planning to work on tasks regularly helps to eliminate the overwhelm of constantly reacting to deadlines.

TOP TIP: if there's a job you hate, do it on a Tuesday - you don't want to dread the first day of the week but it frees up the rest of the week to spend energy on things you love.

3. CHUNK UP YOUR DAY

Alongside planning and batching, learning to block out chunks of your day as "customer free" time means you can catch up on outstanding work without having to juggle people or being interrupted.

Even if you have an e-commerce store and don't deal with your customers face to face, it's easy to fall into the trap of dropping everything and attending to their order or email enquiry immediately - at the detriment of what ever else you are working on.

If you need to be out and about on a regular basis, for example to see clients or suppliers, set up specific days of the week to do this and stick to it. Make your employees aware of your diary to avoid clashing appointments

4. TIME IT

How often do you say to yourself "it will only take an hour" and next thing you know eight hours have passed and you're still not done...?! Make sure anything that goes on your Daily Action Plan has a realistic amount of time allocated to it.

If you reach that time limit you will need to work out whether you are able to free up the extra time by moving another task to a different day or if the task you're working on needs to overflow to another day.

Not sure how long something *really* takes. Time it. This is a great practice to get into as it will give you an idea if you doing the task is really the most valuable use of your time or if you would be better outsourcing it to someone else (for either less hourly cost or someone who can do it faster. Knowing how long something takes is also a valuable asset when looking to outsource or giving tasks to your staff.

Which is holds more value: spending 5 hours resizing 50 images to save \$10 not outsourcing it OR spending 5 hours writing and scheduling 5 newsletters that return \$100 each in sales. Use your time wisely.

**DOING TASKS YOURSELF BECAUSE YOU THINK IT COSTS YOU NOTHING IS A FALSE ECONOMY
YOUR TIME IS WORTH MONEY. YOUR TIME IS BETTER SPENT BRINGING INCOME & CUSTOMERS TO
YOUR BUSINESS THAN "SAVING" A FEW BUCKS DOING TASKS YOU CAN OUTSOURCE**

5. RESTRICT AND BE STRICT

It's so easy to blur the lines between business and home life. Restricting when and where you work goes some way to creating firmer boundaries around your personal / family time and your work time. I know most business owners (well anyone really) would rather lose their right hand than lose their phone, but your free time is your own.

Take work emails off your phone and remove notifications for business social media so you're not tempted to work 24 hours a day. Get in the habit of only checking your messages once you've arrived at work (or settled into your work space). If that feels impossible, at very least set strict boundaries around when and where you check your work email. Waking up first thing to check your messages or responding to a customer query in the middle of the night is never a good idea - that's when you get the worst complaint messages that ruin your entire morning!

If you run your business from home or need to work at home, carve out a space that is specifically for working in. If you can close the door even better! Avoid home based distractions like the kitchen or living room where it's tempting to start doing household chores when you're supposed to be working. If you have the capacity to set up an administrative space in your store you should - doing administrative work from your counter or sales area is very difficult (and usually pretty messy).

I know many people who successfully work from home set up "office hours" to ensure they don't continue working all day and night. It's also important to make it clear you WORK at home - you are not a drop in centre for all your friends (this goes for shop front drop ins too).

If you find yourself putting in hour and hour of "after hours" time you may find you need to review how long each task is taking you or consider reviewing what tasks you're giving yourself to complete.

BONUS TIP

These strategies are also effective when you're working on a long term project, such as a product launch or promotion. Tape a long piece of paper to the back of the door or a wall and plot out a time line with major milestones on it. Then work backwards to chunk out your time, batch tasks and plan your time in order to get everything done. Knowing how many hours you have each day / week to achieve all you need to means you won't get flustered or stressed and will be able to set realistic targets to achieve your goal.

ACTION

DAILY ACTION PLAN

Using the information you gathered in the "working out what needs to be done" action and combining it with my top 5 task management strategies, I want you to start planning what your week will look like. If you work in a brick & mortar store, add in the days you work the shop floor and tasks you can do whilst you're there as a starting point. If there are other responsibilities in your week add those into your plan also.

MONDAY FOCUS:	HOURS AVAILABLE:
TASK	TIME ALLOCATED

TUESDAY FOCUS:	HOURS AVAILABLE:
TASK	TIME ALLOCATED

WEDNESDAY FOCUS:	HOURS AVAILABLE:
TASK	TIME ALLOCATED

THURSDAY FOCUS:	HOURS AVAILABLE:
TASK	TIME ALLOCATED

FRIDAY FOCUS:	HOURS AVAILABLE:
TASK	TIME ALLOCATED

WEEKEND FOCUS:	HOURS AVAILABLE:
TASK	TIME ALLOCATED

MONTHLY FOCUS:	HOURS AVAILABLE:
TASK	TIME ALLOCATED





ACTION 3

SHARING IS CARING

THE FINE ART OF DELEGATION

Whether you're a Sole Trader or you already have several staff working for you, learning how to delegate tasks to others is key to cutting the overwhelm, making more productive use of your time and growing your business.

There aren't a lot of retailers who don't know this. I mean it's a no-brainer really isn't it? You're over worked. You can't manage all the tasks you have in the time you have. You're not doing half the tasks you need to do well. It's so obvious delegating some of those tasks to someone else is the answer. So what's stopping you?

FEAR. Many store owners are fearful of becoming "the boss". It's almost as if there's a universal code between retail business owners that says "I just want to be liked by everyone". Newsflash - you can be the boss AND still be liked!

LACK OF KNOWLEDGE. Doing is easy - you just get on and do it. Managing takes a whole new set of skills that don't necessarily come easily to everyone.

WHO. Who do you delegate to? Who will do the tasks you need doing? How do you arrange to outsource?

TRUST. We've all heard the horror stories about dreadful staff - some of us have even experienced it. But what about the stories of staff who are passionate, savvy & committed.

CONTROL. We talked about this in Action 1. The perception that you need to have control of every single aspect of your business is a mindset that's difficult to break, especially around delegating tasks to others.

This week we're going to look at how to successfully take some of the pressure off you by delegating to others.

ACTION

PREPARING TO PASS TASKS ON TO SOMEONE ELSE

This week I want you to think of a task you resent doing in or for your business. It might be cleaning your staff toilet, posting to social media, picking up stationery or stock. Now I want you to ask yourself the following questions;

TASK: _____ TIME IT TAKES: _____

1. Who can do this job instead of me? It might be your existing staff, another family member, new staff, a contractor, outsourcing.

2. Who can do this job better than me? You should continually be looking for people who can do things in your business better than you. I always bring on team members who can do certain things better than I can - because my time is best spent doing what I'm great at (which is working directly with my customers and building strategies to grow their businesses)

3. Who can do this job at a lower cost than me? Remember your time IS NOT free. Outsourcing tasks to companies or individuals who specialize in that area means the job is generally done cheaper and faster than you doing it yourself

4. Can this activity be eliminated or automated? It is amazing how many activities go on in business and private life that could be quite easily discontinued completely, with no loss or inconvenience to anyone. There are also tasks we continue to do manually that we can automate to happen without our input simply by using our time to explore the technology.

THE RULES OF ENGAGEMENT

It doesn't matter if you're outsourcing one task or one hundred. It doesn't matter if you're passing work to your existing team, getting your family or a friend to help out, employing a cleaner or a book keeper or interviewing for a whole new staff member. There are some simple rules you need to follow when it comes to delegating work;

Match the Person to the Job

One of the great time wasters when it comes to delegation is giving the task to the wrong person.

Communicate Your Expectations

Once you have selected the right person for the job, take the time to discuss the job with that person and agree upon what must be done.

Explain How the Job Should Be Done

Explain to the person your preferred approach or method of working. Explain how you would like to see the job done and how you or someone else has done it successfully in the past.

Ask To "Feed It Back"

Ask the person to feed your instructions back to you in his or her own words. Have him or her explain to you what you have just explained and agreed upon. This way you will know the person you've asked to do the task understands what needs to be done.

Set a Deadline or Advise When the Work Should Be Completed By

Set a deadline or schedule a time the task should be completed by and clearly communicate it with your staff or contractor.

NEED SOME HELP EMPLOYING STAFF OR OUTSOURCING?

THE ULTIMATE HIRING GUIDE

IS AVAILABLE IN THE RETAIL ACADEMY PORTAL

CAN'T HIRE HELP?

If you don't have the capacity - financially or logistically - to hire staff, that doesn't mean you can't find exceptionally qualified people to help with your work load.

Outsourcing to professionals for one off adhoc jobs through UpWork and Fivrr are great for administrative task, but what about if you need someone to physically come and help you in your business?

Swapsies!

Some years ago I worked with a retailer who needed to have time off to have major surgery. Whilst she was going to be available to do the "thinking" work she couldn't physically work in her store. Financially she didn't have the capacity to employ staff to cover her leave so she arranged for a friend who was a savvy sales person to come and work processing her orders several times each week.

In exchange she did all the marketing work for her friends business. The arrangement worked out so well they continued to do it well after the recovery period!

Knowing there's someone you can call on to help takes the pressure off you - having a back up plan and a back up person to cover your workload if you're sick or unable to work will put your mind at ease.

**RESEARCH SHOWS THE MAJORITY OF EMPLOYEES ARE WORKING AT ONLY HALF THEIR CAPACITY
THAT'S A 50% RETURN ON YOUR INVESTMENT - IT'S TIME TO START MAKING THAT 100%**

THE IMPORTANCE OF DOCUMENTING YOUR PROCEDURES

"If you can't give your job to someone else, you'll never be able to leave....".

When you work in your business day in day out, you'll find you often take shortcuts or have management policies or procedures in your head that you need to share with other people. I'm convinced the reason so many retailers do all of the everything is because they dread the idea of writing down all the things they might need someone else to know.

Developing systems, documenting your processes and recording them in an Operations Manual means your staff will always know how to handle an issue, without coming to you for guidance. Not only will this take the pressure off you when you're at work it is imperative when you're not there. If you have staff working in your absence (be it a day a week for for a month whilst you go on a buying trip - or a holiday (gasp)) you will appreciate knowing they don't have to interrupt you for small trivial matters and you won't be confronted with chaos on your return.

There are three significant benefits far taking the time to create an Operations Manual for your business; efficiency (things get done in a way you know best uses the time available), accountability (with clearly documented processes your staff can't use the excuse 'they didn't know' and are completely accountable for their actions) and knowledge retention (you no longer need to rely on one staff member passing the information onto someone new).

There are many different ways to document this information. You can produce a folder or printed document, which will require regular updating, you can use an online process writing tool or you can save your booklet to your Dropbox or Google Docs file so all staff can updated and access the material.

Ensure your Operations Manual includes the following:

- Processes and Procedures for customer service & administrative tasks
- Business policies (ie what is your policy on refunds, do you offer discounts etc)
- Roles and hierarchy within your business (flow chart)
- Contact details for all suppliers, staff and other important contacts
- Job Description and Role
- Emergency Procedures

When creating your document be sure to cover off the important information but don't provide so much detail employees refuse to read or refer to your document.



ACTION 4

**STEP AWAY WITHOUT
LOSING MOMENTUM
(OR MONEY)**



BEFORE YOU START PACKING YOUR BAGS

How many times a week do you say to yourself "I need a break"? Or "I wish I could escape for a few days"? But feel like it's impossible to leave your business for an extended period of time?

I know it can feel impossible to take time off when you are the only employee of your business, or you are so entrenched in the day to day of your operation that you risk losing money or momentum if you take some time away. Thing is, if you never take time off you will simply reach a point where you are so burnt out or disconnected from the other things you love your business is likely to fail anyway.

Time away from work looks different for everyone; for some it means working a 4 day week instead of 6 days. For others it's working 3 days in store and 2 from home. Some people want to step away from their business at 3pm and not think about it until 9am the next day. Others want to take a long weekend every now, others want to spend their entire Summer break at the beach.

The reality is there are also retailers who HAVE to spend time away from their business, due to illness, other responsibilities or even the crazy notion of going off to have a baby!

This chapter is about finding freedom in your business for it to be what ever you desire..

**ACCORDING TO UK STATISTICS 30% OF ENTREPRENEURS DON'T EVER TAKE LEAVE
HERE'S 5 GREAT REASONS YOU SHOULD!**

1. LET GO OF THE EGO

Taking a holiday is an opportunity to see how your business fares without you - it's an excuse to write out your Operations Manual and do some much needed delegating!

2. DISCOVER NEW IDEAS

Time off gives you the opportunity to see your business from afar - the big picture. This gives you the perspective to see where you can improve or change.

3. PRACTICE FOR AN EMERGENCY

If you're a solo trader or one-man-band with no staff, taking leave gives you the opportunity to find people to support and assist you that you could fall back on in a time of emergency

4. REBALANCE

Retail and e-commerce entrepreneurs work longer hours than most people, which as we've talked about in section 1, creates stress and overwhelm. Taking a holiday is often the only way to ensure you spend time with family and friends and have the chance to re-balance your life.

5. SET A GOOD EXAMPLE FOR YOUR STAFF

Your staff look to you to determine the culture of your business. Working day after day will create a toxic culture where your staff feel unable to take time off. Show your team you are committed to work life balance by ensuring the same for yourself.

BOOKING IN YOUR VACATION - SOMETIMES YOU GOTTA BE BRAVE!

I love nothing more than hearing retailers say to me "when I first drew up my business plan I factored in 4 weeks vacation every year...." or "Christmas is so slow for us so we just close the shop and everyone gets 2 weeks off".... or "after working every Saturday for a year I decided I never wanted to do one again because I want to go to the beach instead" Love love love love love! But for most people trying to decide on a vacation time is fraught with worry and stress about lost sales, upset customers or coming home to 100 times more work than you're leaving.

Planning ahead means you recognise the importance of being able to step away from your business and have put measures in place to prioritise that. Easier said than done I know. The reality is sometimes you just have to jump in and decide to carve back some time for yourself. There may never be a perfect time.

FINANCIALLY PLANNING FOR TIME OFF

If you plan to close your store or increase your staffing in order to take leave, you need to factor that lost revenue into your financial projections across the entire year to cover the decrease to your income or the increase to your overheads. Good financial planning will ensure you have sufficient cash flow to keep paying your bills even when you're not there. Obviously from a financial perspective it makes more sense to take leave when your store is quiet or sales are down - this in itself requires forward planning and tracking sales trends to know when those periods are.

Think of your time off as an investment, you wouldn't leave machinery unserviced or in need of repairs. A holiday is investing in yourself in the same way.

COMBINING BUSINESS WITH PLEASURE

Combining business with pleasure is one of the most successful ways of enjoying some time away whilst actively growing your business. Many retailers take their families on overseas buying trips and combine a holiday with visits to manufacturers and suppliers. Next time you're heading to a conference or a trade show, can you book a couple of extra days away so you feel you've had a break. The benefit is most of your trip can be written off to your business!

Combining business and pleasure doesn't even have to involve travel. Next beautiful sunny day, grab your lap top and go sit in the park to work or get out of the four walls of your work space and go work in a co-working space, your local cafe or library. As they say; a change is as good as a holiday (I've never believed that, but it sounds good!)

KEEPING YOUR CUSTOMERS HAPPY

Time and time again I hear retailers say "I can't go on holidays because my customers just won't cope...!". Well you know what, they will.

If you're offering the kind of products and service I feel confident you are. If you work all year to make deep lasting connections with your customers. If you share your plans openly with your customers. They'll come back.

If you're doing your job right, they know what they get from you is better than what they'll find anywhere else. And if they don't? Well at least you had some great cocktails or saw some awesome sights, or at very least got to finish that book you got three Christmases ago. And that's important too.

Give lots of notice

If you plan to close your store or delay your shipping until you arrive back, give your customers lots of notice. Send out an email and post on social media your last shipping day (giving about a week notice) and then your first shipping day when you arrive back.

If you have regular staff in your store, it should be business as usual, but it's good practice to mention it to customers if they are expecting to return and see you about something specific. A simple "I'll be on holidays until XYZ but you can chat to ABC about that" is great.

Be honest

Most reasonable people understand as a sole trader (or even if you're not) you can't work every day of the year. Always be honest that you are closing your store for a period to take time off to be with your family or take a vacation or what ever (play into their emotions if you must!). Don't pretend you're there - unless you have staff 100% onboard to run business as usual

Offer an incentive to wait

Make it really clear BEFORE your customers check out, that you are on leave and will have modified or delayed shipping. Offer an incentive for them to fulfill the order despite having the wait for the goods. Most customers appreciate the gesture and are happy to wait for your return.

KEEPING YOUR STAFF HAPPY

It doesn't matter if you're taking one day a week off or a month to travel overseas - make sure your manager knows exactly how they can contact you and in what circumstances. When you walk out the door saying "call me if there are problems", do you mean that or do you really mean "call me only if there's an absolute emergency"....?

Ensure your Operations Manual is up to date with emergency contact details and information regarding your insurance policies so you don't have to take that information with you - just in case. If you're traveling, provide details of a second contact person or your hotel in case of emergencies.

Give lots of notice

Don't assume your staff will all be available to be on board when you decide to take leave. If you are relying on staff holding the fort whilst you're away, ensure you give them a lot of notice. Likewise, don't assume because someone once worked a Wednesday for you, their availability will stand forever. Communicate with your staff early about your intentions to change your roster or take leave.

Putting someone else in charge

If you have multiple team members working whilst you're away, make sure you designate a specific person to be in charge in your absence. Think carefully about who you want to make your decisions for you and who will be the best to take on that role - it won't always be the team member who has worked for you the longest or the oldest person on staff. It's important your entire team knows **you** have requested that person take on the role and you expect their full support.

Having a specific person designated to be in charge will ensure customers and staff have a specific person to handle things and you're not left dealing with things when you're trying to have some time away. Worse still - no action at all gets taken at all.

That being said, your entire team will benefit from knowing you appreciate and need their support too. Give them the latitude to make decisions without you. A strategy I've seen work many times is to set a base financial amount, under which staff can make their own decisions about how to rectify an issue. If you're to ever take time off or away, it's easier to have staff that think for themselves and can work independently of you, well before you plan to take time off.



Check in regularly

If you're taking time away ensure you set times to check in with your manager or people taking over your business in your absence to give them the opportunity to discuss any issues and to keep you up to date with what's happening.

Set aside an hour a day to check your message and emails but don't spend your entire holiday micro-managing your business from afar. You are supposed to be getting away!

Get major tasks off your to do list ahead of time

There's only so much you can expect someone else to manage in your business. Finish off any major tasks ahead of time. This may take some planning. Ensure you have done as many stock orders as possible ahead of time (be sure to document everything so staff know what will arrive in your absence), restock popular items and ensure you have sufficient shipping or postage supplies.

Forward plan and schedule your marketing

If you are in charge of marketing your business, you can help things run smoothly by pre-planning and scheduling your marketing so you continue to post on social media and send out email marketing even when you are on leave.

Don't plan any large promotions

As obvious as it sounds, make sure you don't have any major sales or promotions planned for the time you are away. It also pays to check in with your suppliers and ask ahead of time if they are planning any major promotions that you may want to know about.

I went on extended leave overseas during that time one of my wholesalers ran a huge sale event that I ended up missing out on - a quick phone call to tell her I was going to be away would have given me the opportunity to take advantage of her sale in advance.

Make sure everyone gets paid

This one is kind of a no-brainer but you'd be surprised how many people don't realise it's pay week until they're somewhere they can't access their payroll....

Your team get paid every week/fortnight/month and just because you're on holidays, doesn't mean you can shirk your responsibilities. If you're not going to have access to your online banking, or you don't want to be tied down to completing a payroll then work out who is going to be paying your staff and communicate the decision with everyone.

Confirm your roster

Not all stores have a set roster. To avoid having a situation where you're shop is not being staffed correctly – a crisis that you won't be able to fix if you're not there, make sure everyone is confirmed for their shifts **before** you leave, and have back up team members for specific shift, put in place, in case of an emergency.

PREPARE YOURSELF

Will you have phone service and/or wifi

You can get wifi on a plane now but trust me you can't always get it where you want it. One of my team travelled to Europe for six months and in that time could only work for a few days because it was almost impossible to get reliable wifi in the places they were staying. Don't assume. Do your research

Will you actually want to work

There's nothing more deflating than getting somewhere and wishing you didn't have a bag full of work to do. If you do take work make sure you give yourself permission for it to be optional (unless you are officially combining business and pleasure). Don't make any wild promises to yourself, your staff or your business that you can't keep!

Allow some downtime after you get home

There's nothing more deflating than arriving home from holiday and having to go to work the very next day and be straight back into the grind. Factor a day or two to get on top of your home chores and get everyone settled before you launch back into the chaos of work. A good way to ease yourself in is arrange to meet with your manager or the person doing your work the day after you arrive home so you can go in well prepared.

