

Miami Herald

Middle-market business owners should learn to take real vacations

July 23, 2017

By James S. Cassel

Last month, [I wrote about the virtues of taking a gap year or a gap period](#). However, I recognize that not everybody might be able to do that right away or while still working. So, this month I am writing about the second-best option: taking a real vacation — i.e., time off.

Although it may sound impossible or scary to — get ready for this — disconnect by keeping your phone and all your devices turned *off*, it is healthy and important for your well-being as well as that of your family and your business.



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What does it mean to take a real vacation? Many middle-market business owners tend to forget. I qualify as one.

We all know the reasons this is important: mental and physical health benefits, family benefits, reflection and relaxation time, the list goes on. But we end up working more than we should on our vacations out of fear of losing customers or business opportunities.

Fact is, depending on your industry, taking vacations can lead to new client

opportunities. I know many people who have met some of their best clients or customers while on vacation or otherwise pursuing personal interests, such as golf or photography. Taking a vacation can also provide a good opportunity to test your succession plan.

In the financial-services industries, many of the big companies have policies requiring certain personnel to take off for two consecutive weeks without access to email. In part, they do this for security reasons in the highly regulated, closely scrutinized industries. Maybe this model should be considered across other industries for well-being not only for security reasons.

How do you check out without hurting your business? Following is some practical guidance.

- **Find the best time.** We all have times of year when our businesses are slower than others.
- **Plan for your time out of the office.** As best you can, handle items that require your personal attention before you depart. Determine who will take your place and have an internal system to ensure nothing slips through the cracks.
- **Ask your team to manage issues independently** and only contact you if absolutely necessary, such as a true emergency.
- **Decide whether to tell your clients in advance** that you will be out of reach. Often, the simple act of giving clients advance notice and telling them who to contact in your absence can minimize the likelihood of any issues. It is best practice to let them know.
- **Decide whether to have an “out of office” auto response message** or whether you should automatically forward your emails to someone who will respond in your place and notify you in case of emergency.
- **If you cannot check out completely during your time away,** you might consider allocating a limited time per day, let’s say one hour to checking your emails and responding to key items while delegating others. You might do this at the beginning or the end of the day. But you must stick to that, and keep your devices off the rest of the time.

I recognize this advice is easy to give but not as easy to follow. As I write this article, my office manager is offering to monitor her emails occasionally while she is on vacation, and I am not stopping her. I am not very good at practicing what I am championing, but I continue to try.

Life is all about balance. It all goes by too quickly. So, take the time to enjoy yourself, and you might find yourself — and your business — thriving more than you had imagined. Taking real time off gives you a change to reflect and plan. Use it!

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