This book, *Timeout! To Retreat, Review & Renew* was created, in part, at the request of family, friends, and colleagues who have observed and been curious about our annual timeout: the time we set aside each year from our daily routine to focus on our personal/professional relationships and goals—with each other, and the world to which we are both individually connected.

Our annual timeout has provided the “breather” for us to move forward with a renewed sense of purpose, respect and joy—together and in our individual professions. TIMEOUT! is about the insights and practices we’ve gained and developed along the way. It’s also about defying the odds when it comes to melding families, businesses and strong-willed personalities…like us, and maybe, like you! These techniques have assisted us in creating a richer, happier, and more playful life together and we hope they’ll add richness to your life too.

**The TIMEOUT! 3-Step Success Strategy:**

***Retreat…*** Slow down the pace; Smile more; Stress less!

***Review…*** Assess goals and challenges; Dream Big; Reflect on possibilities!

***Renew…*** Map out the Journey; Plan for Prosperity; Celebrate your Accomplishments!

TIMEOUT! has also proven to be a great set of strategies and tools for individuals and organizations to develop and achieve your personal and professional goals with intention.

Timeout! To Retreat, Review & Renew, The 2012 Global Ebook Gold Award winning book is available for purchase at the following link: <http://retreatreviewrenew.com/buy-book/>

About the authors:

**Phyllis Campagna**, ChBC™, CBC, CEC is a pioneer in the emerging profession of business coaching, having coached businesses and individuals for over twenty years.

**Jerry Campagna** is the president of The MOST & MST Latino, Inc., a change management, capacity building, and Latino marketing/management consulting firm.

**Phyllis and Jerry (“PJ”)** melded their lives and businesses together in 1996 and have journeyed forth from their annual timeouts with renewed focus, joy and commitment ever since.

Sample Chapter from TIMEOUT!

**The Agenda—What It’s About and How to Use It**

*“I think in some ways we have allowed other people to set the agenda. Other people to define who we are.*”~Lee Scott

(Note: Phyllis & Jerry use the moniker “PJ” when referring to their relationship)

As with most other structured processes, the agenda will serve as your framework for the duration. Following it is very helpful to staying on target and serves as a running record of what’s on each partner’s mind. PJ talk about and suggest agenda items throughout the year; in fact, sometimes during the year, thorny issues are tabled by making the decision to put them on the agenda and address them during the annual Timeout. If there are “hot topic” issues that come up during the year that PJ feel can’t wait for the annual Timeout—then they might call a Table Talk right then (see the Tools Section of this book).

PJ’s annual agenda certainly isn’t fancy. Historically, it’s been a handwritten page each added to as they thought about it. It has evolved to a printed document of standard line items which is then added to by hand throughout the year. Generally, a couple of weeks before the annual Timeout, they begin honing in on issues to be addressed, asking one another what should be explored and discussed.

Most years, PJ arrive at their cabin Thursday evening and are ready to begin working on the review phase by Saturday afternoon, allowing themselves a two-day decompression cycle. By then, they’ve un-tethered from their electronics, had a couple good nights’ sleep, spent enjoyable time in front of the fireplace, played some board games, and allowed the outside world to fade into the background. Note:If your Timeout is of shorter duration, you’ll need to condense pacing. In anticipation of that, an outline for a three-day Timeout is provided at the end of this book. For now, we’re sharing with you what has evolved as an extended process for PJ.

From this relaxed place of mind and body, moving into review mode begins by taking a look at the agenda. PJ naturally begin chatting about what has happened recently and start reflecting on the past year, adding line items to the agenda as the day progresses. The intention is to settle on what new issues there are to address.

The agenda isn’t set or static, it’s added to as needed throughout the Timeout. In other words, discussing one issue often leads to other concerns that may need a separate resolution. It’s sometimes helpful to list and discuss related items as separate bullet points. Much like taking apart a pocket watch, one can observe and fix things more precisely by studying all the moving parts and examining how they are connected.

It’s also a rewarding approach for PJ, because they can experience forward movement on a complex issue by addressing and checking off some of the connected concerns. For example, when Phyllis decided to earn her Chartered Business Coach™ certification, PJ not only budgeted the related expenditure for coursework into her business plan, but also the time she was and wasn’t going to be available for clients, how Jerry was going to assume additional household duties, how her study schedule would affect family holidays and vacation plans, and so on. By storyboarding the movie frame by frame, they were able to plan for the inevitable ramifications of an encompassing lifestyle decision.

By design, the agenda contains topics but not timelines. PJ plan loosely structured “sessions” each day, lasting anywhere from one to three hours. Since they’re alone and in the same conversation space for a week, discussions take place constantly and organically, allowing PJ to go with the flow of the day most of the time. This isn’t a marathon of endurance and obligations; rather, the natural flow usually results in eight to ten hours of focused conversations each day.

For instance, if the agreement is to begin at 9:00 a.m. but one decides to sleep in, so be it. The exception to this is if one observes or feels that the other is procrastinating. In that case, simply call your partner on it, and that becomes the discussion to begin that session. In the beginning, timing was more of an issue because PJ allocated less time to their Timeout.

When they only had three days, following a schedule was necessary and helpful. The additional time they now allot (seven days) has allowed them to relax the scheduling aspect of their agenda. Any topic is fair game, the agreement being that each partner has full contribution rights—no issue is too big, too small, or too petty.

True story—one year PJ had a thirty-minute negotiation over who is responsible for gathering and recycling all the newspapers they get. Jerry was fully content to allow the papers to pile up, stating that he might want to read them later. Phyllis was aggravated because they were occupying one of the kitchen chairs, sometimes for months. The resolution ended up being that the papers could sit for up to a month on Jerry’s home office desk—and then, read or not, they would be disposed of. Plus, they reviewed their many subscriptions and decided to cancel two of them. Certainly this issue wasn’t on par with world peace, but it certainly made for peace at the kitchen table. As said earlier, it’s sometimes the repetitiveness of small annoyances that cause the most damage to a relationship. Like a little pebble in a shoe, it isn’t immediately crippling but can be very irritating and painful in the long run.

The agenda-building process has evolved for PJ over the years—frankly, in the beginning, it tended to be a list of grievances with a couple of household goals thrown in for good measure. These days, PJ’s agenda starts with standard discussions and activities (see below) that are helpful in maintaining continuity year to year. Of course, there is an ever-changing catalog of opportunities and challenges that make each year’s agenda unique. To give you a sense of the range of topics, here are some random sample line items from PJ’s Timeout agendas over the years:

*New computers, logo redesign, furniture for the living room, website*

*construction and content, daughter’s college choices, dog (whether*

*to get another one), new windows, auto repairs, which business conferences*

*to attend, dance lessons—when and what kind, the electric*

*bill, business brochures, refreshing the landscaping, finding a new*

*doctor, fee schedules, vacation plans, and defining target markets.*

Personal and business agenda items are given equal weight. Though the businesses are important, sustained success in that arena can’t happen if the personal side of life isn’t doing well. No one can realistically say that work is great and home sucks, or vice versa, and still claim to be happy with life—it’s one indivisible whole.

Sometimes there are underlying issues running through agenda items that are the actual root cause of feelings. PJ call these “the elephants in the living room”—they are so big, imposing, and disruptive that until they are “tamed” and sent on their way back to the African plains, real and sustainable resolutions to other line items simply can’t happen. Examples of these types of transparent but encompassing items from PJ’s agendas include: one of us not walking our talk, hidden manipulation, broken promises, hurt feelings, resentment, and recurring issues which seem to reach resolution, but show up again on next year’s agenda (ya think we’d eventually learn!). Addressing these “elephant items” during the review phase is where PJ both have had many “aha” moments and gained deeper trust and intimacy with each other.

Here’s a list of current boilerplate line items on PJ’s Agenda. Detailed explanations follow later in this section.

**PJ’s Agenda Template:**

• *Read previous Timeout notes*

• *JADE List (Joys, Accomplishments, Delights, and Entertainment)\**

• *Passings and losses list (not-so-happy events of the past year)*

• *101 List (experiences to do or have in this lifetime)*

• *Business plan—for each business*

• *Finances—for each business*

• *Finances—personal\**

• *Health—mental, physical, and emotional—for each partner*

• *New Issues—good, bad and ugly*

• *Interests—hobbies, vacations, etc.*

• *Goals—personal and professional \**

• *Write current notes for wrap-up \**

For your first annual Timeout, consider addressing the items marked with an asterisk (\*) and incorporate additional topics later—the important goal during the first few Timeouts is to establish a firm foundation of set processes for your Timeout to grow and expand from in years to come.

All these items wouldn’t have fit into PJ’s original three-day schedule. It’s likely that the same will be true for you. It takes time and practice to develop a rhythm and familiarity with each other’s perceptions and to honor and integrate them into the relationship. Personal issues (hurts, disappointments, anger) took much longer to work through in the beginning.

Intentions can be first-rate, but sometimes conflict resolution skills are not! For the most part, PJ address each agenda item in whatever order they’re in the mood for, though they do identify and give priority to the “have to” (family budget) over the “want to” (new patio set) line items. Each year, they begin by slaying the smaller “dragons” at the front of the cave—it’s always been a confidence-builder to bring resolution to some of the smaller items before venturing deeper into unexplored and potentially sensitive territory. For example, one year, two items on PJ’s agenda were: 1) replace a printer/scanner and 2) replace a particular employee. Obviously, the smaller “dragon” was the printer.

Similar to stretching and warming up before a workout or long run, doing it this way mentally prepares the mind to stretch and reach out for innovative solutions to address more complex issues.

Here are explanations of PJ’s standard Timeout agenda items.

***Notes from the previous Timeout:*** For your first annual Timeout, you obviously won’t have notes from the previous year, so PJ suggest you start with the JADE List (JADE is an acronym for **Joys, Accomplishments,** **Delights, and Entertainment—**see below).

On your second annual Timeout, you can then begin by reading the previous year’s notes. For PJ, this ritual reading is a never-ending surprise. They’re often amazed and occasionally chagrined at how much they did, or sometimes did not, get done. Timeout has been, and continues to be, a work-in-progress; sometimes goals are accomplished as planned, and sometimes they aren’t. The reality of those results is often enough by itself to set the tone for digging deeper and creating richer experiences to review for the following year.