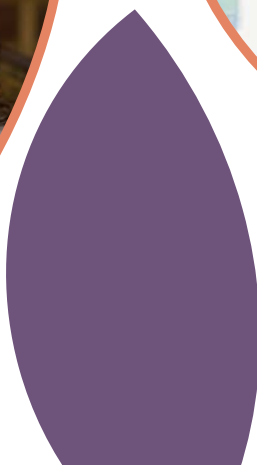
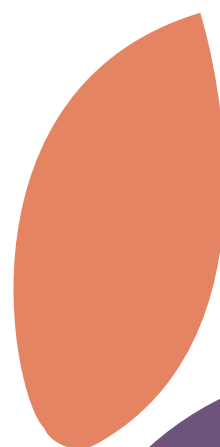
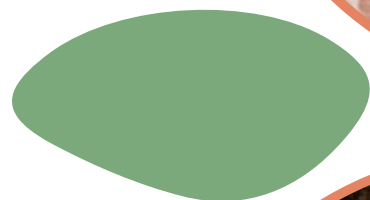




Boost Your Business *with a* **Mental Health Plan**

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Lag Indicators 1

WHEN YOU'RE "BREAKING DOWN"



- What is happening in your body?
- What is happening in your mind?
- How is your mood?
- What feedback are you getting from others?
- What are you doing?
- What are you not doing?



Lag Indicators 2

WHEN YOU'RE FEELING GOOD



- What is happening in your body?
- What is happening in your mind?
- How is your mood?
- What feedback are you getting from others?
- What are you doing?
- What are you not doing?



Lead Indicators 1

THREE PRINCIPLES OF STRESS RESILIENCE



Soothe

- What comforts your body and mind and helps you feel calmer?
- What are you already doing?
- What did you used to do and are missing doing?
- What one teeny tiny doable thing do you feel like adding in?



Lead Indicators 2

THREE PRINCIPLES OF STRESS RESILIENCE



Discharge

- How do you like to move your body and emotions?
- What are you already doing?
- What did you used to do and are missing doing?
- What one teeny tiny doable thing do you feel like adding in?



Lead Indicators 3

THREE PRINCIPLES OF STRESS RESILIENCE



Nourish

- What renews your spirit and fills your soul?
- What gives you the juice to keep going?
- What connects you to things “greater than you?”
- What are you already doing?
- What did you used to do and are missing doing?
- What one teeny tiny doable thing do you feel like adding in?



THREE PRINCIPLES OF STRESS RESILIENCE



- What are you already doing?
- What did you used to do and are missing doing?
- What one teeny tiny doable thing do you feel like adding in?



Lead Indicators 4

7 FACTORS OF RISK



Isolation

The hustle & systems of oppression

VUCA

Support

Self-worth / self-talk

Predisposition

Amplify

- Which of these usually affect me?
- What is their impact?
- Where do I need (more) support?



Using your mental health plan

ASSESS YOUR **LAG** INDICATORS



- How am I feeling?
- How is my mood?
- How is my CEO-self?
- How are my “symptoms”?



Using your mental health plan

ASSESS YOUR **LEAD** INDICATORS



- What is going on around me? (Which of the 7 factors were at play this week?)
- Did I or didn't I implement my 3 principles of stress resilience? To what degree?



Using your mental health plan

REVIEW



- What worked? (lead and lag indicators)
- What didn't work? (lead and lag indicators)



Using your mental health plan

CREATE A PLAN



As a function of both what worked and what didn't:

- Can I / will I change anything?
- What is my plan for this week's lead indicators?



Using your mental health plan

FORMATS FOR USE

SIMPLE FORMAT

The simplest way to do this is to make mental health a topic of every biz planning/check-in conversation you're already having with supportive others.

ENHANCED FORMAT

Amplify the conversations with supportive others by following this check-in outline.

1. What's working?
2. What's not working?
3. What is one lesson I'm taking from the answers to questions 1 & 2 above?
4. What do I need to change?

The answer to question 4 above becomes your lead indicator for the next period.

At your next check-in, apply the 4 questions above to it.

You can extend the integration by adding a mental health check-in to your weekly, monthly, quarterly and yearly reviews and plans as outlined in the strategic format below.

STRATEGIC FORMAT

This model below assumes you are already engaged in yearly, quarterly, monthly and weekly planning and reviews.

Once you understand your KPIs and build your initial mental health plan, your mental health planning can be easily integrated into your already-existing planning process, becoming a 5-10 minute process integrated into your weekly review.



Using your mental health plan

WEEKLY REVIEW

SET-UP

- Identify and record your lag and lead indicators

WEEKLY

Assess

Notice performance of lag indicators in relationship to lead indicators.

- What is going on around me? (IOW which of the 7 factors were at play this week?)
- Did I or didn't I implement the three principles of stress resilience?
- How am I feeling?
- How is my mood?
- How is my CEO-self?
- How are my "symptoms"?
- Can I / will I change anything? (as a function of what didn't work)
- What is my plan for this week's lead indicators? (as a function of both what worked and what didn't)

Review

- What worked? (lag and lead indicators)
- What didn't work? (lag and lead indicators)

Plan

- Can I / will I change anything? (as a function of what didn't work)
- What is my plan for this week's lead indicators? (as a function of both what worked and what didn't)

Quarterly and yearly

As part of your regular strategic planning, it's important to review and possibly revise your lag and lead indicators based on your current situation and external circumstances.

It's also important to review what worked and what didn't overall, in the same way you review all your strategic planning and goal outcomes.



RESOURCES

Right click here to download the handout on the [Three Principles Of Stress Resilience](#)

Link to article: [7 Factors of Risk to Business Owner Mental Health](#)

Link to article: [Research on mental health and entrepreneurship](#)

If you want on-demand guidance for working through this material, you can purchase the Mental Health Plan self-guided retreat [here](#).

If you want live, individualized support for working through this material, you can learn more about that [here](#).

ABOUT SHULAMIT

Shulamit Ber Levtov, MA, RSW, CCTP, CFSW is an award-winning business owner, speaker and she is The Entrepreneurs' Therapist. You can call her Shula for short. Her pronouns are she/her.

Shulamit helps women entrepreneurs prevent burnout and preserve their peace of mind as they ride the emotional rollercoaster of running a business.

Shulamit is also passionate about transforming the entrepreneurial ecosystem to include the whole human founder as a business priority. She fulfils this mission through speaking, consulting and teaching in private and university business programs, incubators and accelerators on the intersection of mental health and entrepreneurship.

Shulamit has been an entrepreneur since 1989. Since 2000, she has been working as a professional supporting women's mental health and personal growth. As a masters-level, licensed social worker, somatic trauma therapist--and a trauma survivor, herself--with certifications in Dare To Lead™, Trauma of Money, Financial Social Work and Nonviolent Communication, Shulamit brings a unique perspective and approach to supporting women in business.

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