



# Protecting & Promoting Mental Health: A Toolkit for Mentees in Entrepreneurship

presented by **canada** *life*™



**rise**

Empowering people  
Launching ideas



“[My mentor] has been a blessing. He’s just been the most positive person I could have hoped for to help me reach my success.”

— Krista, Rise Small Business Lending Program client

**Congratulations on making the leap into entrepreneurship—one of the most dynamic, challenging, and fulfilling professional journeys an individual can embark on! And congratulations on taking the important step of seeking a mentor. Whether you’re a new entrepreneur in search of guidance or are an experienced small business owner in search of new inspiration to grow your enterprise, this is one of the most important professional relationships you will ever have.**

Mentorship is a trust-based, non-hierarchical partnership that is founded in a shared desire to see you achieve your personal and professional goals. This toolkit has been created to enhance that relationship from a mental health perspective. It is full of questions and exercises to help you navigate and benefit from a successful mentorship experience. Of course, no two mentoring partnerships are the same, so follow what feels right to you and your view of relationship building, personal comfort, etc. The goal of this toolkit is not to solve mental health challenges, but rather give you the skills to foster relationships that are considerate of the mental health and wellness of all parties involved.

Based on feedback from Rise mentees and mentors and a cumulation of research and experience, *Protecting & Promoting Mental Health: A Toolkit for Mentees in Entrepreneurship* has been created in partnership with [Workplace Strategies for Mental Health](#), compliments of Canada Life (Workplace Strategies).



**Workplace Strategies  
for Mental Health**



# CONTENTS

SECTION

1

**What Makes  
A Great Mentee?**

page 1

SECTION

2

**Relationship First:  
Building Trust &  
Setting Expectations**

page 3

SECTION

3

**Defining Success:  
Goal Setting & Tracking**

page 10

SECTION

4

**Critical Communication:  
Navigating Difficult  
Conversations**

page 14

SECTION

5

**Mental Health Matters:  
Self-Care & Mindfulness**

page 20



## What Makes A GREAT MENTEE?

Your mentoring partnership, like any relationship, requires investment—of your time, energy, respect, and enthusiasm. The most successful mentoring partnerships are driven by the mentee, which means, despite the mentor’s advisory role, your actions will determine the pace and depth of the relationship.

While there is no school for how to be a great mentee, there are certain traits and skills you can exercise and develop that will help make your mentoring experience as positive and productive as possible.



“A mentor  
is someone who  
allows you to see  
the hope inside  
yourself.”

— Oprah Winfrey

## WHAT MAKES A GREAT MENTEE?

A great mentee:

- **LISTENS** actively and engages with their mentor's thoughts, feedback, and advice.
- **COMMUNICATES** openly and honestly about their needs, their boundaries, and concerns.
- **TAKES ACCOUNTABILITY** for their role in the mentoring partnership and their business, maintaining responsibility for decision-making and for their motivation to learn and grow.
- **PREPARES** adequately for meetings, ensuring they have fulfilled deliverables and are equipped to facilitate positive and productive time with their mentor.
- **RESPECTS** their mentor's time and energy as a volunteer, as well as the personal and professional boundaries and expectations established at the start of the relationship.
- **IS CURIOUS** about all perspectives of business and self-care and evaluates advice with an open mind.
- **PRACTICES VULNERABILITY** as they are comfortable with it, to build trust and expand the partnership.



## EMOTIONAL INTELLIGENCE

The term “emotional intelligence” (EI) refers to how we manage our own emotions and our ability to identify and deal with others’. A low EI can lead to communications challenges and increased stress. A high EI can make you more aware of your emotions, more empathetic of others’ and reduce stress.

**TRY THIS EXERCISE:** To evaluate your own emotional intelligence, try completing *Workplace Strategies'* [Emotional Intelligence Self-Assessment](#).

This tool will help you identify your strengths and opportunities for growth across four key areas: self-awareness, self-management, social awareness, and relationship management.

Once you've reviewed your self-assessment report, decide which of the four areas you want to focus on improving in first, and write down how you will measure your progress. If comfortable, share this with your mentor and add it to the agenda for your check-ins.



### HONE YOUR SKILLS

Here are some activities to better understand your own traits and characteristics to help strengthen your insight and skill set as a mentee:

- Get insight into your best qualities with the [VIA Survey of Character Strengths](#) self-assessment.
- What's your personality type and how does it affect your relationships? Try the 16Personalities [Personality Test](#) to learn more.
- Find additional activities for communicating with emotional intelligence on the [Workplace Strategies website](#).



## RELATIONSHIP FIRST: Building Trust & Setting Expectations

The most important factor to the success of a mentoring partnership is trust. Because you are the driver of the relationship and responsible to set its tone, it is important that the first meeting(s) between you and your mentor focus on building trust by getting to know each other and defining the parameters of the relationship.

**"If you cannot see  
where you are going,  
ask someone who has  
been there before."**

— J. Loren Norris

# BUILDING TRUST IN A MENTORING RELATIONSHIP

## Getting to Know Each Other

It's your prerogative whether or not to share personal information with your mentor. Their top priority from the onset of the relationship is to understand your needs and establish how they can support you to achieve your goals, so the more you are prepared to share, the better.

## Discuss your values.

We do not discuss values enough as a society, yet they fundamentally influence our decision-making, shape our priorities, and affect our behaviour. Sharing your values with your mentor will help them to best gauge what of their experience, ideas and advice might be most beneficial to you and your business.

**TRY THIS EXERCISE:** Before your first meeting, take some time to think about what you consider your core values and ask yourself how each one factors into your role as an entrepreneur.

For example: *I value \_\_\_\_\_ in my life/business because...*

- Autonomy
- Family
- Quality
- Cooperation
- Growth
- Stability
- Creativity
- Power
- Tolerance

- *I value stability in my business because I have a precarious financial background and knowing I can reliably provide for my family is my priority.*
- *I value quality in business because I want to provide a superior product.*

Also consider how your values play out in your work. For example:

- *Valuing stability may mean I am risk averse and more interested in slow, steady growth, than in pushing the limits of my business.*
- *My commitment to quality means a superior product, but it may also mean long timelines and a lesser quantity.*

Come to your first meeting prepared to discuss values and identify where yours align with your mentor's. It's important to also articulate what values you feel are important for your mentor to uphold.





## Share your motivations.

Motivation is the force within that drives ideas into actions, but it's not self-sustaining. It requires support and nurturing. Share your business motivations and your hopes for the relationship with your mentor. This will give them a clearer picture of your motivation, so they can determine the best way to motivate and encourage you, especially during difficult times.

**Remember:** Mentorship is a partnership, and all learning and conversations are a two-way street. To understand your mentor's motivations, ask questions such as:

- "What motivated you to become a mentor?"
- "What are your goals for this relationship?"
- "What do you consider your biggest strengths as a mentor?"
- "What do you hope to learn/improve about yourself during the course of this relationship?"

## Check your bias.

As you get to know your mentor, it's important to check in with yourself to identify any prejudices you hold which may affect the relationship. Intersectionality, implicit bias and microaggressions all affect how people interpret and internalize their experiences and can impact both mental health and approaches to entrepreneurship.

- **Intersectionality** refers to the various places that people's identities intersect (i.e., gender, race, ethnicity, etc.).
- **Implicit biases** are unconscious attitudes and stereotypes that we hold against a particular group of people.
- **Microaggressions** are subtle, often indirect and unintentional forms of discrimination.

**PRACTICE IMPLICIT CURIOSITY:** We all have biases; the important thing is to be aware of them so we can avoid assigning them to others. Rather than making assumptions about your mentor, ask respectful questions about their preferences and opinions.

- For example, if your mentor is female, ask how gender has influenced her business experience.



Want to learn more about addressing intersectionality, implicit biases and microaggressions? Check out resources from [Workplace Strategies for Mental Health](#).

## SETTING EXPECTATIONS & BOUNDARIES

Clarifying expectations and boundaries at the start of the relationship leads to more successful mentorship by creating a reliable, referenceable framework for managing the partnership. During your first meetings, work to come to an agreement on how your partnership will operate.

### Define success in your own words.

Every entrepreneur has their own definition of success, and yours is the one you are working towards—not your mentor's. Particularly for entrepreneurs managing mental health challenges, your business success can be as much about recovery as it is about revenue. To define success, ask yourself:

- **What are some of my proudest achievements?** Are there patterns? Did you take a risk each time? Overcome fear? Patterns lend insight to what makes you feel successful.
- **What is my timeline for success?** Success for you may be defined as a singular long-term vision or may be characterized by producing reliable results daily.
- **What are some examples of success so far in my business?** Providing your mentor with specific examples of success to date will help them to understand the size and scale of your ambition.

### Set expectations.

It's important for you and your mentor to understand each other's learning, working and communication styles. There is no "right way" to work or do business, and your approach is informed by the knowledge and expertise that you've gained through your lived experience, personal and professional.

Define your expectations for how the relationship will operate according to your current state of wellness, acknowledging that your needs may change as the partnership evolves.

### Here are some important areas in which to set expectations:

- **LEARNING.** Define your preferred learning style and agree to facilitating two-way education (i.e., *Do you learn best by processing information independently, or discussing it in real time?*)
- **COMMUNICATION.** Establish best practices for communicating with your mentor. (i.e., *Do you prefer face-to-face meetings or email? How will you structure feedback? Is your style direct?*)
- **DIFFERENCES OF OPINION.** You will inevitably experience them, so share how you prefer to manage conflict and outline a process for how you'll address it together. (i.e., *Do you prefer feedback discussed verbally first, or in writing? Delivered as it arises or on a set schedule?*)
- **EXPERIMENTATION.** Adopt a mindset of experimentation for new ideas and approaches, without taking credit or laying blame. (*Even your mentor's best advice is not guaranteed.*)
- **LIMITATIONS.** Embrace "I don't know" as an acceptable response from your mentor and commit to finding answers together. (*Remember, this is a partnership of shared learning.*)
- **COURTESY.** Inform each other if you must miss a meeting or need to step away from the relationship at any point. (*You're both volunteers, so mutual respect and transparency are key.*)
- **PROJECT MANAGEMENT.** Structure the relationship according to your working style, with active input from your mentor. (*Do you live by your calendar, or prefer to prioritize demands on the fly?*)





## Set boundaries.

Setting boundaries is the practice of placing guardrails around your relationship to ensure shared expectations can be upheld and personal lines are not crossed. These include:

### Time boundaries:

- Your mentor is a volunteer. Work with them to set a regular schedule for face-to-face meetings (in person or virtual), and set limitations around their schedule otherwise, such as:
  - Availability evenings and weekends.
  - Frequency of communication between meetings and appropriate communications for email, phone calls, text, etc.
  - A time threshold before which you will try to inform each other if a meeting needs to be cancelled/rescheduled. (There's no set rule, but we recommend giving each other 2-3 days' notice, acknowledging that there may be extenuating circumstances.)

### Professional boundaries:

- At times you may need tactical business support, especially if you experience distress and/or mental health challenges. It's important to understand that your mentor supports the business; they're not part of it. They should not provide direct business support.
- Your mentor is not a therapist or a counsellor. They will support you through mental health challenges from the perspective of achieving your entrepreneurship goals but should not provide health advice.
- Understand how your mentor will use their network to support you and what asks are off limits.

### Privacy and confidentiality:

- All personal information, especially sensitive information such as finances or mental health, must be disclosed voluntarily and remain confidential between the mentor and mentee, unless explicit consent is given to share it.
- While the degree to which you share personal information may change as trust in your relationship grows, you and your mentor may want to have a conversation early in your partnership about any topics that either of you consider "out of bounds."
  - For example, you may consider specifics about a medical diagnosis or a family situation out of bounds. Express any such limits to your mentor, so they can be conscious of and respect them.

## MAXIMIZE MEETINGS



The habits you bring to your meetings will determine how valuable the mentorship experience can be for both you and your mentor.

- Be on time.
- Set and share an agenda ahead of the meeting to demonstrate commitment, and give your mentor time to prepare for the discussions you're planning.
- Set aside time for goal tracking and a mental health check-in to measure progress.
- Come prepared to talk openly, listen actively, and engage fully.
- Seek clarification and ask questions to ensure you understand your mentor accurately.
- Fulfill the deliverables you commit to.

## MENTORSHIP AGREEMENT

Trust isn't just about honesty; it's about following through on what you say you'll do. Work with your mentor to draft an agreement that formally outlines the shared expectations and boundaries discussed. This will act as the framework of your mentoring partnership.



Try filling out our [Mentorship Agreement template](#).

This agreement captures:

Code of Conduct | Roles & Responsibilities | Communications Expectations | Personal & Professional Boundaries

The Mentorship Agreement template is an example of one way you might outline the parameters of your relationship. Use it verbatim or adapt elements to create a personalized agreement format that best serves you and your mentor.



## QUICK REVIEW:

### Setting Expectations & Boundaries

Dedicate your first meeting(s) to getting to know your mentor, exploring your needs and definition of success, and setting expectations and boundaries for the relationship.

- In order to get to know your mentor, get to know your own values. Ask yourself about the skills/characteristics you value and how they affect your business:
  - *I value quality because I want to provide a superior product, but it slows my production timelines and efficiency.*
- Share both your business motivations and your expectations for the relationship. But also remember that this partnership is a two-way street. Ask your mentor: *What motivated you to become a mentor?*
- Be aware of your implicit biases and employ implicit curiosity to explore how your mentor's identity and lived experience affect their approach to business.
- Write your definition of success by considering patterns observed during your proudest moments, the timeline of your vision, and successes already achieved.
- Clearly express your needs to your mentor and begin setting expectations according to factors such as learning and communication style, project management and meeting structure.
- Together, set expectations around conflict management, experimentation, limitations, and courtesies.
- Set boundaries around factors such as time, qualifications, and confidentiality.
- Capture your agreed upon roles and responsibilities, expectations and boundaries in a Mentorship Agreement that can be referenced throughout the relationship.



## DEFINING SUCCESS: Goal Setting and Tracking

Setting and tracking goals are among the most important activities you can undertake as an entrepreneur and are an area where your mentor's knowledge and experience can be a great asset. Bringing a fresh outsider's perspective, they can help you to connect your goals to a broader context, but also help you to make sure your ambition is grounded in reality.



"My mentor said,  
'Let's go do it,'  
not 'You go do it.'  
How powerful when  
someone says, 'Let's!'"

— Jim Rohn

## Start small. Be specific.

While it is important to define an overarching vision for your business, focusing on the “big picture” can create unintended performance expectations and unnecessary pressure for you and your mentor. As such, it’s important to define goals that give you a sense of positive accountability and control. One of the easiest ways to do that is by focusing on micro-goals—those small, often daily, achievable goals that help build confidence by fostering a sense of progress and accomplishment.

Micro-goals can help to keep you grounded in the present, prevent the feeling of being overwhelmed and reduce stress. They’re also fundamental building blocks to your larger, macro-goals.

While goal setting is your responsibility, your mentor can help you to translate and narrow your ambition into specific, practical, and actionable outcomes.

For example:

- You have set a goal to sell \$10,000 of product in the next 12 months.
- In discussing factors such as your market share, advertising budget, etc. with your mentor, you agree that there are numerous smaller steps that can be taken to ladder up to that sales goal.
- Recognizing a fundamental need to expand your customer base, you set a micro-goal to spend 15 minutes each weekday cold calling prospective clients.

As you build confidence through manageable micro-goals, you’ll see your progress accumulate and you can begin to set larger, more specific business goals. (i.e., Now that you’re comfortable cold calling, how many prospective clients will you aim to convert to sales each week?)

Because by their nature micro-goals are attainable over the short term, use your meetings to measure, assess and set new ones regularly throughout the mentoring partnership.

### UNSURE OF WHAT A MICRO-GOAL IS?

Here are some examples to help you to start thinking small:

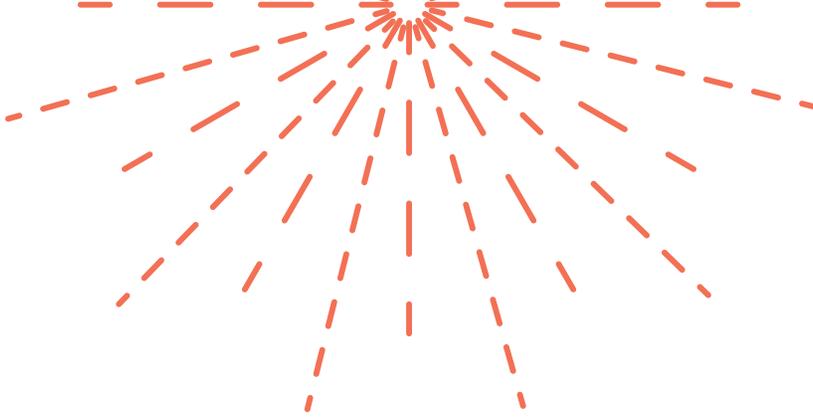
- Register your business for a GST/HST number
- Set up a dedicated business bank account
- Register for social media profiles
- Post three images/week to your business Instagram
- Respond to all emails within 24 hours
- Learn how to use a new software
- Research a new customer profile each week
- Limit meeting time to four hours daily
- Write a mission statement
- Transfer your paper planner to a digital diary
- Learn to use an online tax management app
- Register for an extended learning course
- Reach out to a new LinkedIn connection weekly
- Attend one networking event per month

### NOT ALL GOALS NEED TO BE BUSINESS DELIVERABLES.

It’s also important to set micro-goals that address your mental health and wellness. For example:

- Exercise for 20 minutes each day
- Eat breakfast every morning
- Reserve time weekly to organize your workspace
- Take 10 minutes each day to meditate
- Volunteer in the community once a week
- Drink two litres of water each day
- Sleep eight hours per night
- Start each day with an inspirational quote
- Reduce coffee/alcohol intake
- Read one book per month for pleasure





## Demonstrate & respect vulnerability.

There is much to learn from your mentor's experiences—especially their failures and mistakes. For them to share their hardships requires a vulnerability that must be supported by trust. Even though you may not always agree with your mentor's advice, it's important to always consider it with an open mind.

- Use your empathy and curiosity to contribute to a positive and supportive space where you and your mentor both feel safe to share, reflect and learn.
- Instead of rejecting advice, ask clarifying questions to make sure you understand it correctly, before making a judgement:
  - *What I heard is... Is that what you meant?*
  - *I'm having some trouble picturing it. Can you explain how you see this applying to my business?*
  - *I'm not sure I understand, can you explain the idea to me again?*

### **YOU MENTOR'S FEEDBACK IS ADVICE, NOT INSTRUCTION.**

Listen to it, understand and evaluate it, but only implement it if you decide that it's right for you.

**These are your goals for your entrepreneurial journey, and ultimately, you are accountable to yourself.**

## **RECORDING & TRACKING GOALS EFFECTIVELY**



It's important to record your goals so you can measure progress against them.

Engage your mentor as a sounding board, to help you refine the "big picture" into a series of smaller, more manageable micro-goals. Invite their advice and ask clarifying questions that help you to add detail to your goals, making them easier to track and measure. But remember, your goals should be articulated in your voice and stay true to your vision and definition of success.

To create habit around managing your goals, set a regular schedule and replicable process for reviewing and reassessing them throughout the relationship to ensure they remain responsive to your evolving needs and business realities.

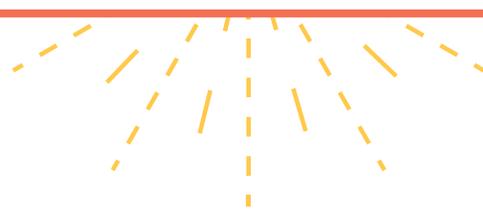
Try using our [Goal Planning & Tracking worksheet](#).

The Goal Planning & Tracking worksheet is an example of one way you might capture your goals and measure progress throughout the mentoring relationship. Use it verbatim or adapt elements to create a personalized goal tracking format that best serves you and your mentor.



## QUICK REVIEW: Setting Goals

- Start small with clear and achievable micro-goals that strengthen your skills as they build up to larger, longer-term objectives—the more specific your goals are, the better!
- Micro-goals can help to keep you grounded in the present, prevent the feeling of being overwhelmed, and reduce stress. Consider creating them for both business and wellness. For example:
  - Setting up a new business bank account
  - Learning a new software
  - Researching target audiences
  - Sleeping eight hours a night
  - Exercising for 20 minutes each day
- Keep an open mind about your mentor's feedback and advice, but remember that ultimately, decisions are yours to make in accordance with what is best for you and your business.
- Goal setting is informed by the lessons of past failures and mistakes. Work with your mentor to create a trusting space where you both feel safe to share the stories and lessons of past struggles.
- Use tools such as the Goal Planning & Tracking worksheet to record your goals and establish a process for measuring and reviewing them regularly.



## CRITICAL COMMUNICATION: Navigating Difficult Conversations



“Once you’ve figured out what you want to do, find someone who has done it before. With the right mentor, don’t be afraid to expose your vulnerabilities.”

— Howard Schultz

# COMMUNICATING THROUGH EMOTIONS

## Identify your triggers.

Certain stimuli can illicit automatic emotional responses in us, known as triggers. They can be caused by almost anything—people, sounds, smells, even other emotions. They're connected to our thoughts, memories, and experiences, and can often be closely tied to our mental health.

By identifying your triggers, you can begin to understand and manage your reactions.

### TRY THIS EXERCISE:

What behaviours illicit a strong emotional reaction in you?

Here are some examples:

- Arrogance
- Blaming
- Criticizing
- Crying
- Deceit
- Dismissiveness
- Entitlement
- Hostility
- Manipulation
- Sarcasm
- Touching
- Yelling

For each trigger identified, ask yourself, "How do I typically react to this behaviour?"

- For example, displays of entitlement may make you feel defensive or aggressive. Dismissiveness may make you feel insecure or overwhelmed, while yelling may cause panic or fear.

**Identifying your triggers is important to your mentoring partnership because if you don't understand the reason for your reactions, you're more likely to blame someone else for them.**

For the benefit of both your mentoring partnership and business, practice reacting more objectively:

- Next time you feel an emotional reaction, ask yourself:
  - Have I been triggered?
  - What are the thoughts/memories that are immediately influencing my reaction?
  - How can I take my emotional reaction and channel it into a more appropriate response?

You may choose to share your triggers with your mentor so they can not only be considerate of them, but also help you cope with them from a business perspective. You may also choose to keep your triggers to yourself—do what feels right and safest for you.

(Adapted from *Workplace Strategies'* [Emotional Triggers.](#))





## Prepare yourself for difficult conversations.

When you know that a conversation may become emotional, plan ahead for how you want to manage your emotions and behaviour. For example, if you start to feel angry or want to cry, how will you continue to communicate with your mentor clearly?

Here are some tools to help you prepare for and participate in difficult conversations:

- **Write down the frustrations and/or concerns you want to address.** Often the act of writing helps to dissipate anger and expand perspective.
- **Consider the source of tension and how it affects your needs.** Are you responding to assumptions or facts? Are you rehashing an old grudge, or focused on new solutions?
- **Ask yourself, “Am I in the right frame of mind for this discussion?”** Don’t feel pressured to address a conflict if you do not feel resilient enough for it mentally.
- **Ask clarifying questions to avoid misattributing emotions/intention.** It’s easy to read an email and interpret it as angry or critical. However, you’re likely making assumptions about the sender’s tone and intentions and assigning emotions that are more reflective of your own fear.
- **Try to address difficult conversations in person.** It may feel less stressful to put it in writing, but talking in person creates accountability, which can help temper accusations and reactions.
- **Consider your desired outcomes.** Are you looking for a long-term solution, or short-term result? Is this a one-off discussion, or will it require follow-up? What does that look like to you?

## INTERPRETING FEEDBACK CORRECTLY

To be effective in their role, your mentor will have to deliver honest feedback in order to help you achieve the personal and professional growth you seek. That means sometimes delivering negative or critical feedback. Particularly during times when you feel mentally and emotionally vulnerable, these conversations can lead you to feeling threatened or defensive.

Our reaction to criticism not only affects the way we think our mentor sees us, but it influences the story we tell ourselves about our own worth. **What’s important is that you change the story you tell yourself about negative feedback to focus on what you can learn from it.**

Here’s how the shift in thinking can look:

- **FEEDBACK: Your results fell short of expectations.**  
Instead of berating yourself for being a failure, ask:
  - *Were the expectations realistic, and how can I adjust them to be attainable in the future?*
  - *What factors impeded my progress? What can I adjust to eliminate/overcome them?*
- **FEEDBACK: You seemed nervous presenting to a prospective client.**  
Instead of telling yourself you don’t have the confidence to lead your company, ask:
  - *What was the root of my nerves? Personal insecurity? Lack of preparedness?*
  - *What resources are available to me to improve my confidence public speaking?*

If it’s not clear to you, ask your mentor to clarify their feedback. Do so as many times as you need until you feel that you’re understanding the same message they’re delivering.

- Ask for specific examples of the behaviour in question so you can reflect on the emotions and/or circumstances that may have influenced it.
- If you’ve clarified and evaluated the criticism and still disagree with your mentor’s assessment, that’s okay. Express your disagreement respectfully and try to cite specific counter arguments.

## Keep your own feedback constructive.

You can also help your mentor learn and grow by delivering constructive feedback:

- Make your feedback specific to something that can be adjusted, such as behaviour or strategy—not your mentor’s personality traits, character, etc.
  - For example, it’s the difference between calling someone “controlling” and working together to find effective strategies for delegating/sharing responsibility.
- Give a clear, concrete example of the behaviour being criticized and explain how it is affecting you and/or the mentoring partnership.
- Always try to frame the feedback as a positive opportunity:
  - **Less constructive:**  
*“I don’t feel like you helped me with that problem at all.”*
  - **More constructive:**  
*“I feel I could have benefited from more support on that challenge. I’d appreciate if you could help me find other approaches to address the issue further.”*
  - **Less constructive:**  
*“You don’t understand my business or what I’m trying to do.”*
  - **More constructive:**  
*“I know my field is new to you, so I’d love to take some time to walk you through it in more detail. I think I could benefit from you having more context.”*

### LET’S GET TALKING

Explore Workplace Strategies’ comprehensive [Supportive Conversation Library](#) for tips, techniques and guidelines for managing a wide variety of sensitive scenarios.



### RESILIENCE PLANNING

Discuss and complete the [Resilience Planning: Preparing for Disruptions to Business](#) worksheet with your mentor. If this format is not right for your relationship, feel free to adapt the content to best suit your needs.



## PLANNING AHEAD FOR RESILIENCE

It’s important to plan for the possibility of disruption to your business. You may experience feelings of extreme burnout that require you to step away, or at times, challenges in your personal life may demand more attention. Particularly if you experience mental health challenges and/or episodic illness, it’s important to plan for the likelihood of disruptions to your business.

With your mentor’s support, develop a business resilience plan. Knowing a plan is in place to mitigate damage/disruption will help alleviate stress. Discuss:

- Who are your emergency contacts and backups? Note that your mentor should not be included on this list. They are a support to the business, not a part of the business.
- Outline what must happen for the business to keep going in your absence.



## QUICK REVIEW:

### Difficult Conversations

The nature of human relationships is such that you and your mentor will be faced with difficult conversations.

- It is entirely your prerogative whether you disclose the details of your mental health to your mentor. But you must also remember that they cannot know what you haven't told them.
- If you are not yet prepared to discuss your mental health with your mentor, give them examples of relevant challenges that affect your work and how they can help:
  - *I only have the capacity to work three or four hours per day and need guidance on how to scale my business relative to those parameters.*

### COMMUNICATING THROUGH EMOTIONS

- **Identify your triggers:** Consider what types of behaviour illicit an emotional reaction from you, reflect on how that reaction typically manifests, and work to control it in a more objective way.
- **Prepare yourself for difficult conversations:** Use tools such as writing out your concerns, contemplating the source of the tension, clarifying to avoid misattribution, and thinking through your desired outcomes to prepare you for a respectful and productive (ideally in-person) conversation.

### INTERPRETING FEEDBACK CORRECTLY

- **Make the story you tell yourself one about learning opportunities:** Instead of allowing yourself to interpret negative feedback with an emotional reaction, work to examine the reason for the feedback and the opportunity it contains for professional growth. For example:
  - **MENTOR:** "You seemed nervous presenting to that prospective client."
  - Instead of telling yourself that you're not equipped to lead your company, ask: *Was the root of my nerves insecurity or lack of preparedness? What resources are available to me to improve my confidence public speaking?*
- **Deliver feedback constructively:** Help your mentor learn and grow through feedback that is respectful and specific, accompanied by clear examples, and positioned positively. For example:
  - **Less constructive:** *"You don't understand my business or what I'm trying to do."*
  - **More constructive:** *"I know my field is new to you, so I'd love to take some time to walk you through it in more detail. I think I could benefit from you having more context."*

### PLAN FOR RESILIENCE

- With support from your mentor, create a business resilience plan that prepares you to manage the disruptions to business that may arise due to your mental health.

**SUPPORT DURING CRISES:** This resource is not intended as a mental health intervention.

If you require immediate medical support, please dial 9-1-1. If you seek professional mental health support, visit: **Crisis Services Canada** <https://www.crisisservicescanada.ca/en/looking-for-local-resources-support/>



## MENTAL HEALTH MATTERS: Self-Care & Mindfulness

Even at the best of times, balancing the demands of business ownership with mental health can be difficult. It is made worse by the mindset that stress and exhaustion are all a part of an entrepreneur's "hustle," and that to complain is a sign of weakness.

**We're here to tell you that there is no shame in prioritizing self-care and wanting for a healthy relationship with your work.** Particularly from the perspective of your mental health, it's not only brave to be mindful, it's necessary. Studies have found that 62% of Canadian entrepreneurs felt depressed at least once a week and that mental health issues interfered with work for nearly half (46%) of them.<sup>1</sup>

Lean on your mentor to help you identify the effects that stress and burnout are having on your life. Often, the objective input of someone who cares and is invested in your success can help unearth the hidden toll entrepreneurship is taking on your mental health, and vice versa.



"Self-care is giving the world the best of you, instead of what's left of you."

— Katie Reed

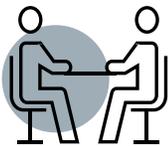
<sup>1</sup> <https://cmha.ca/wp-content/uploads/2021/07/GoingitAlone-CMHA-BDCReport-FINAL-EN.pdf>

## PUT SELF-CARE ON THE 'TO DO' LIST

Dedicate a few minutes of every meeting with your mentor to a mental health check-in. This is neither a one-way conversation, nor a time to try to diagnose or fix issues; it's a chance to talk about shifting priorities between life and work, stressors affecting your business and mental health, and ways to cope.

### MINDFUL MEETINGS

Both you and your mentor should commit to a buffer of time before and after all your meetings in order to prepare and be present. This is an easy but critical step because your mental health and the daily pressures you experience can impact meetings with your mentor. It's important to clear your head, relax, and try to let go of any negativity from your day beforehand.



- This means not scheduling back-to-back meetings, not bringing other demands into your shared time and space, and eliminating distractions.
- Try taking a short walk immediately before meeting with your mentor to clear your mind.
- At the end of the meeting, don't just jump to the next thing. Take time to debrief with yourself, observe your emotions, prioritize next steps/deliverables, and to simply decompress.

## Identify common stressors.

### TRY THIS EXERCISE:

With your mentor, discuss common stressors you experience. Because the stress of personal life affects work life (and vice versa), make it a broad discussion including topics like:

- Childcare
- Disappointment
- Financial concerns
- Feeling underappreciated
- Conflict at home
- Slow/stalled progress
- Loss
- Physical wellness (i.e., illness, injury)

- Ask yourself: *What about these situations cause me stress?* Make your answers as specific as possible.
- Reflect on when you've experienced each of your stressors previously. How did you react? What did you have control over? What helped?
- Reminding yourself of how you coped in the past can be a helpful tool when you experience that stressor next.



## Deal with the stress you have.

The goal is not to avoid stress, but rather to manage it, learn from it and overcome it.

Experienced in the art of juggling work and life, your mentor can help you to identify strategies for managing stress without sacrificing the health of your mind, body, or business.

Here are some suggestions:

**Eliminate unnecessary stress** by learning to say no, prioritizing responsibilities, putting all the “nice to have” items on your “to do” list on ice, and simply accept that you can’t do it all.

**Take care of yourself** by keeping good sleep habits, eating well and exercising, getting together with loved ones, and making time to relax and recharge.

**Change the way you think about stress** by focusing on the positives where they exist (i.e., *That new project is going to put me at max capacity, but it will also be great experience*).

**Accept imperfection** and let go of the time-wasting activities that accompany perfectionism.

**Organize** your office, or do whatever you can to create a sense of control.

**Unplug** from your phone, your computer and whatever you’re working on for a brain break.

We asked  
Rise clients how  
they take care of their  
mental health.

Their answers?

**Sleep. Hydrate.  
Rest. Exercise.  
Mindfulness.**

## IDENTIFY BURNOUT & TRY TO PREVENT IT

A normal level of stress is expected in entrepreneurship. It can even be healthy and enhance your performance; but chronic work-related stress left unmanaged can result in burnout.

Though not a mental illness, burnout is a significant mental health concern, which often manifests as emotional exhaustion, negativity and ineffectiveness. The likelihood of burnout increases when you expect too much of yourself, feel underappreciated or incompetent, or feel out of place in your work.

The first line of defense against burnout is learning to recognise its signs and symptoms. Are you:

- Neglecting your basic needs, such as nutrition and sleep?
- Experiencing low levels of energy, efficiency, and motivation?
- Letting poor performance and uncharacteristic errors slide by?
- Working longer hours but producing less?
- Feeling particularly cynical, negative, or aggressive?
- Fatigued, irritable, and suspicious?
- Ignoring your values or editing them to make allowance for growing indifference?
- Lying to yourself about why you feel the way you do, using statements like: “I’m just tired,” “No one else can do the work,” “I’ll be fine once this project is over,” or “People depend on me.”

Left unaddressed, burnout can take a dramatic toll. It affects physical and mental health, can breed self-doubt, dissatisfaction and depression, decrease productivity and cause communications breakdowns.

## Feeling at risk of burnout? Act to prevent it.

The worst thing you can do for yourself is ignore burnout or accept it as inevitable. As soon as you begin to recognize symptoms, implement strategies to help you prevent it, and engage your mentor to help you navigate how it may affect business.

Change the way you live and work:

- **Assess and reprioritize your workload** — List your work demands and determine what are high priorities, what can be delegated to others, and what can be put on hold or dropped altogether.
- **Stop multitasking** — Focus on one thing at a time, break down overwhelming projects into manageable tasks, and work at a consistent, reasonable pace.
- **Set boundaries** — Set boundaries on your time and energy by learning to say no and creating a replicable daily workplan with set hours (no overtime!) and built-in breaks.
- **Make self-care the goal** — In your regular reassessment of goals, elevate self-care by creating goals that you can measure for progress alongside your business milestones.
- **Prioritize health in and outside of your work** — Get proper sleep, exercise regularly, eat healthy, avoid alcohol and caffeine, and try to find a creative hobby.
- **Give yourself some credit, and a break** — Celebrate your daily accomplishments, try not to be self-critical, and focus on what you enjoy and are grateful for each day.
- **Avoid negative influences** — Stay away from toxic people in your life and avoid the draining influence of media/social media. Instead, connect with family, friends, and your community.

## Step away if you need to.

The reality is, recovering from burnout might require you to step away from work pressures altogether. Your mental health is too precious to sacrifice, and sometimes business has to take a backseat. In that case, mentorship may have to be put on hold too—and that's perfectly acceptable.

If you feel a need to step away from the relationship, be honest and respectful of your mentor by letting them know. Together you can sketch out a plan for reconnecting, or simply agree that you will get back in touch when you're ready to resume the relationship.

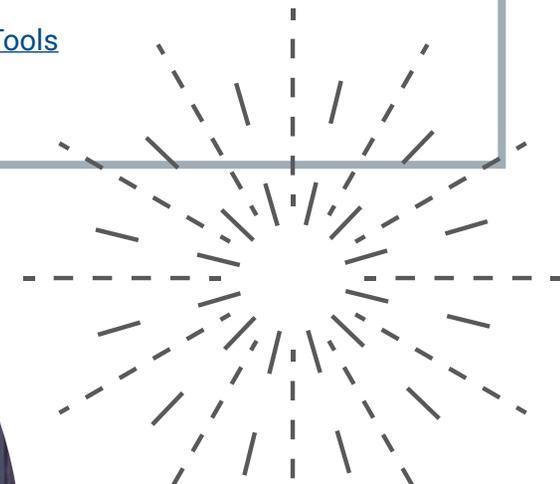
Either way, you can count on your mentor to support your decision and be ready to pick things back up when the time is right.

### RESOURCES FOR MANAGING STRESS & WORK-LIFE PRESSURES



Interested in more activities to assess and/or enhance your self-care and mindfulness?

- Take the Canadian Mental Health Association's (CMHA) [Work-Life Balance Quiz](#)
- Explore Workplace Strategies' resources:
  - [Assessing your Current Situation](#)
  - [Work-Life Balance Tips](#)
  - [Self-Assessment Health Tools](#)
  - [Mental Health Apps](#)





## QUICK REVIEW:

### Self-Care & Mindfulness

Entrepreneurship can be an intense endeavour and elevating self-care and mindfulness equal to your business priorities is an important factor for success.

- **Put self-care on the “to do” list:** Set aside time each meeting to do a mental health check-in with your mentor and embrace mindful meeting strategies.
- **Identify common stressors:** Discuss the things that commonly cause you stress and drill-down by asking yourself, “*What is it about these situations that causes me stress?*” Then, reflect on and learn from how you’ve coped with those stressors in the past.
- **Explore different strategies for managing your current stress levels:** From taking care of yourself to accepting imperfections, unplugging, changing your mindset and eliminating the unnecessary, uncover the different ways you can address your stress.
- **Identify burnout and try to prevent it:** Learn the signs and symptoms of burnout, such as: neglecting basic needs, decreased energy and motivation, poor performance, and a cynical, negative attitude.
  - Use strategies to address burnout, such as reprioritizing workload, setting boundaries, putting health first, and making self-care a goal.
  - Recognize that you may need to take a break from work—and mentorship—altogether to recover. In that case, be honest and respectful of your mentor by letting them know.





**rise**

Empowering people  
Launching ideas

Do you have any feedback you  
would like to share with us?  
Send your questions and  
comments to [info@risehelps.ca](mailto:info@risehelps.ca)

You can also reach Rise at  
647-232-7473

**RiseHelps.ca**

