

Coach's Corner

Latest commentary from David Richman and Dave Gordon to help you elevate the success of your practice

Disclosure

The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness. Past performance is no guarantee of future results.

[Attracting Clients](#) | [Chasing Positivity](#)

Be careful what you ask for

By: David Richman | May 13, 2021

A typical ask that unfolds during role-plays in our prospecting workshop is, "What if we schedule a time to get together to further discuss that?"

It is understandable that you believe an in-person meeting is more likely to help you convert a prospective client into a client. Nonetheless, given where we are with COVID-19, is this a smart ask?

In a recent survey from the American Psychological Association as part of a program called "Stress in America," almost half of the respondents (48%) said they were "uneasy" about returning to in-person interactions once the pandemic is over.

This unease has significant implications. If you ask for an in-person meeting, there is a good chance your prospective client may balk at saying yes. Perhaps try modifying the ask to:

"It would be great to explore this conversation further. What next steps feel most comfortable to you? Shall we schedule a follow-up call, a video conference or would you prefer a socially distanced face-to-face meeting?"

Bottom line: Leave yourself behind when discussing next steps with prospective clients.

Related Content

[RELATED POST: You're already in a meeting](#)



David Richman
National Director
Eaton Vance Advisor
Institute

"If you ask for an in-person meeting, there is a good chance your prospective client may balk at saying yes."

To report a website vulnerability, please go to [Responsible Disclosure](#).

Eaton Vance is part of Morgan Stanley Investment Management, the asset management division of Morgan Stanley.

 This image indicates content designed specifically for Financial Advisors / Investment Professionals. This material is not to be used with the public.

Before investing in any Eaton Vance fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. For open-end mutual funds, the current prospectus contains this and other information. To obtain a mutual fund prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). Read the prospectus carefully before you invest or send money. For closed-end funds, you should contact your financial advisor. To obtain the most recent annual and semi-annual shareholder report for a closed-end fund contact your financial advisor or [download a copy here](#). Before purchasing any variable product, consider the objectives, risks, charges, and expenses associated with the underlying investment option(s) and those of the product itself. For a prospectus containing this and other information, contact your investment or insurance professional. Read the prospectus carefully before investing.

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance does not provide tax or legal advice. Prospective investors should consult with a tax or legal advisor before making any investment decision.

The information on this Web page is for U.S. residents only and does not constitute an offer to sell, or a solicitation of an offer to purchase, securities in any jurisdiction to any person to whom it is not lawful to make such an offer.

© Eaton Vance Management. All rights reserved. Eaton Vance open-end mutual funds are offered through Eaton Vance Distributors, Inc. Two International Place, Boston, MA 02110. Member [FINRA](#) / [SIPC](#)