


[< Back to overview](#)

Chasing Positivity® &gt; The Charismatic Advisor® in Conversation

# LEARN | Engage clients based on their coping style

Life events or market volatility can disrupt a client's sense of financial security. When you understand clients' specific coping styles, you can adjust your approach to help them manage uncomfortable emotions, increase their personal control and chase positivity.

Prefer to save for later?

[↓ DOWNLOAD THE PDF](#) [✉ SHARE BY EMAIL](#)

## Two common client coping styles



### Dragon

- Places others on the defensive
- Prone to expressing anger and sarcasm
- Displays a confrontational demeanor, sometimes in a muted fashion

Dragons can make you feel anxious if you have not yet figured out how best to manage their combative behaviors, lessening the likelihood you can help minimize their inertia.

[Strategies to engage a dragon](#) 🔍

or



## Ostrich

- Uses denial to deal with financial anxiety
- May not open financial statements or check on his/her portfolios or extended periods
- Unlikely to contact you when his/her anxiety is high
- Likely to put off responding to your calls or emails

A lack of contact does not mean the client isn't worried about his/her portfolio. Taking such a stance will only intensify client frustration and anxiety.

Strategies to engage an ostrich 🔍



## Bottom Line

By becoming a source of strength, not a silent partner, you can help dragons and ostriches cope with financial uncertainty, reinforce resilience in your clients and ensure an ongoing productive relationship with them.

### RELATED READING

[Attracting Clients](#) | [Bridge to Referrals](#) | **Chasing Positivity**  
[Seize Opportunities Presented by Volatility with a Thesis](#)

By: [David Richman](#) | April 22, 2024

[READ MORE](#)

**Chasing Positivity**  
[Turn Reflections into New Year's Actions](#)

By: [David Richman](#) | December 19, 2023

[READ MORE](#)

## What's next?

If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.



### Getting started



**LISTEN** | An approach to learning the **3 Dynamics**

6 minutes



**WATCH** | Why the **3 Dynamics** matter

5 minutes



**LEARN** | A road map to master the **3 Dynamics**

5 minutes



**LEARN** | Prepare for success

3 minutes



### Communicating empathically



**LISTEN** | [Practice leaving yourself behind](#)

[8 minutes](#)



**LEARN** | [Lead with genuine interest](#)

[5 minutes](#)



**LEARN** | [Three strategies to understand purpose](#)

[5 minutes](#)



**PLAN** | [Become more empathic](#)

[15 minutes](#)



### Collaborating consciously



**LISTEN** | [Put away the black robe](#)

[5 minutes](#)





**LISTEN** | [Beware of painting with a broad brush](#)

[5 minutes](#)



**LISTEN** | [Don't take the bait](#)

[5 minutes](#)



**WATCH** | [Why intentionality matters](#)

[6 minutes](#)



**LEARN** | [Engage clients based on their coping style](#)

[5 minutes](#)



**PLAN** | [Become a better collaborator](#)

[15 minutes](#)



## Inspiring action



**LISTEN** | [A proven approach to increase engagement](#)

[10 minutes](#)



**LISTEN** | [Align by deploying the joining technique](#)

[11 minutes](#)



**LEARN** | [Words and phrases to inspire action](#)

[5 minutes](#)



**PLAN** | [Inspire action in others](#)

[15 minutes](#)





## HEADQUARTERS

One Post Office Square  
Boston, MA 02110

## Investments

[Eaton Vance Funds](#)

[Parametric Funds](#)

[Calvert Funds](#)

[Separately Managed  
Accounts](#)

[Closed-End Funds and  
Term Trusts](#)

## Insights

[Advisory Blog](#)

[The BEAT](#)

[Market Update Events](#)

[The Advisor Institute](#)

## Taxes & Tools

[Investment Tax Center](#)

[Tax Information](#)

[Investment Tax Calculator](#)

[Laddered Investing Interest](#)

[Rate Scenario Tool](#)

[Concentrated Stock  
Position Calculator](#)

[Tax-Equivalent Yield  
Calculator](#)

## Resources

[Forms & E-Delivery](#)

[Mutual Funds & Abandoned  
Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

<a href="#">Accessibility</a>	<a href="#">Business Continuity</a>	<a href="#">Privacy &amp; Cookies</a>	<a href="#">Your Privacy Choices</a>	<a href="#">Terms &amp; Conditions</a>	<a href="#">Careers</a>	<a href="#">Contact</a>
<a href="#">Investor Account Access</a>	<a href="#">Morgan Stanley Investment Management Terms of Use</a>					

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.

For USA PATRIOT Act Disclosure Notice please click [here](#).

 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, Calvert or Morgan Stanley Investment Management Inc.-advised fund, prospective investors should consider carefully the investment objective(s), risks, and charges and expenses. Read the prospectus carefully before you invest or send money. For **open-end mutual funds**, the current prospectus contains this and other information. To obtain an **open-end mutual fund** prospectus or summary prospectus and the most recent annual and semiannual shareholder reports, contact your financial advisor or [download a copy here](#). 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](#). To obtain an **exchange-traded fund**, ("ETF") prospectus or summary prospectus, 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. One Post Office Square, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Tuesday, March 5, 2024 10:50 AM

Page ID: 40239 - <https://www.eatonvance.com/learn-engage-clients.php>