LEARN | Three strategies to understand purpose

One way to demonstrate empathy with prospects and clients is to seek to understand the desires that live underneath their goals. Gathering this type of information can help you position financial and investment advice in a manner that inspires action.

Prefer to save for later?

DOWNLOAD THE PDF

SHARE BY EMAIL

Select each of the 3 strategies to learn more about how it can help you understand your audience's goal.

1

Expand financial discovery to include questions about purpose

2

Diagnose real-world risk tolerance

3

Leverage pivotal moments to deepen client relationships

Bottom Line

Applying these strategies can help you position advice to inspire others to take actions to help them to achieve what matters most in their lives.

RELATED READING

Attracting Clients | **Chasing Positivity**

Go Beyond the Fee Conversation

By: David Richman | November 29, 2022

READ MORE

Attracting Clients | **Chasing Positivity** | Inflation

Engage Clients Based on Their Coping Strategies

By: David Richman | November 15, 2022

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

READ | Unleash the power of curiosity with genuine interest — 3 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

READ | 3 questions to foster collaboration — 3 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

READ | Transform conversations with a simple word — 3 minutes

	LEARN | Words and phrases to inspire action	5 minutes	➔
	PLAN | Inspire action in others	15 minutes	➔

HEADQUARTERS
Two International Place
Boston, MA 02110

Publication details: Thursday, June 23, 2022 11:21 AM
Page ID: 40237 - https://funds.eatonvance.com/learn-three-strategies.php