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Chasing Positivity® > The Charismatic Advisor® in Conversation

PLAN | Become more empathic

We encourage you to complete this activity in one sitting since work in progress is not saved. You can print the output from this activity in PDF after completing the exercise. All fields are private and will not be shared with Eaton Vance.

Instructions

Evaluate how you build stronger emotional connections with others. Based on your assessment, use the space provided to identify the approaches you want to master and how you plan to embrace them.

Prefer to create a plan on paper?

 [DOWNLOAD THE PDF](#) 

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Before the meeting



Identify your goal for the meeting

Prepare a list of open-ended questions to lead a discussion with genuine interest

Shift your mindset to focus exclusively on the other person

List the approaches to master

Sample

Ask better questions to convey genuine interest.

Shift my mindset to focus exclusively on the prospect, client or team member before engaging with them.

Action items to embrace the approaches

Sample

Before each meeting prepare three to four open-ended questions that align with meeting goals and foster positive emotions.

Embrace daily meditation to help increase overall focus.

[NEXT](#) >

During the meeting



Avoid making assumptions without proper discovery

Validate what you hear even if you don't agree

Avoid making judgmental comments

Listen more than you talk

List the approaches to master

Sample

Validate what I hear even if I don't agree.

Talk less – spend more time listening.

Action items to embrace the approaches

Sample

Practice active listening – acknowledge what I heard the other person say.

Take breaks when speaking in order to ask the other person if he/she has questions. Allow others to express their points of view throughout the discussion.

NEXT >

After the meeting



Reflect on how you may have been perceived

Select an item

Make note of ways you might refine your approach going forward

Select an item

Send a note to client/prospect that details agreed-upon next steps

Select an item

List the approaches to master

Type your answer here.

Sample

Reflect on how I may have been perceived.

Action items to embrace the approaches

Type your answer here.

Sample

Candidly assess what went well in the meeting while also identifying areas for improvement.

Specify ways to better engage based on areas identified for improvement.

Print a copy of your worksheet for your records

 PRINT

Well done! You've created a personalized plan to become more empathic.


You are on your way to chase positivity by:

- Identifying ways to enhance how you build emotional connections with others
- Establishing goals for personal development and growth
- Creating an action plan to achieve results


We encourage you to periodically review your progress against the plan and fine-tune your activities as needed.








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	→
	LISTEN Leveraging positive emotions	29 minutes	→
	WATCH Why the 3 Dynamics matter	5 minutes	→
	READ The power of positive emotions	3 minutes	→
	READ Mindset + Intentionality: A powerful combination	3 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	→
	LISTEN Nurturing your resilience	29 minutes	→
	READ Listen with intentional intensity	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 | What you resist persists

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



LISTEN | Overcoming client inertia

33 minutes



LEARN | Words and phrases to inspire action

5 minutes



PLAN | Inspire action in others

15 minutes





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