

# Coach's Corner

Our latest commentary 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.*

[Teams](#)

## Harmonize Your Team Messaging

By: David Richman | March 9, 2023

Winning teams are teams in harmony. They form when a culture and construct optimizes the synergistic potential of all team members.

Consider an orchestra analogy—each musician has a well-defined part and they all play from the same musical score. The byproduct is one, harmonious sound that pleases anyone within earshot. As our ears can detect harmony in music, clients and prospective clients can detect whether it's present on a team.

Here are two ways to test whether your team is in harmony.

**1. "Cocktail party test."** If I meet you and a colleague separately at an event:

- Will it become obvious to me that you are on the same team?
- Does your messaging harmonize?
- Do you describe your team similarly; perhaps deploying the same vocabulary?

**2. "Client perception test."** Put yourself in the shoes of your clients. When they walk into your office, what do they see, hear and feel? Is there a sense of harmony?

Scoring poorly on these tests is usually a result of inconsistent, misaligned messaging.

One way to address misaligned messaging is with isms—timeless, pithy sound bites that communicate your team's foundational beliefs in a memorable, repeatable way. Isms are a valuable part of team messaging for three reasons:

1. They connect the dots between your team's belief system and the financial advice you provide to clients.
2. They ensure consistent messaging across team members.
3. They can help generate referrals as you organically pop up in conversation between clients and their acquaintances when you are not in the room.

Have a working session to establish your team's isms. You will likely have different isms for investment strategy, financial planning, estate planning and other themes.

Imagine your team comes up with this message about your core investment strategy: "We practice active asset allocation and tactical rebalancing." While this explains what you do, it is not an ism. With further refinement, perhaps this insight turns into an ism, such as: "Buy and hope is not a strategy."

Once you have developed your isms, be sure each team member understands how they should be deployed in conversations with clients and prospective clients.

**Bottom line:** Isms can help your team have consistent messaging and ensure clients and prospective clients experience a team in harmony.

---

At the Advisor Institute, our goal is not to shape your opinion or provide investment advice, rather to share this viewpoint as an example of what we believe to be a superb display of thesis articulation.

Related Content

RELATED RESOURCE: Stimulating Powerful Referral Conversations Workbook



David Richman  
Managing Director  
Advisor Institute

"As our ears can detect harmony in music, clients and prospective clients can detect whether it's present on a team."



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. Two International Place, Boston, MA 02110. Member [FINRA](#) / [SIPC](#). Calvert exchange-traded funds are distributed by Foreside Fund Services, LLC.