

[< Back to overview](#)[Chasing Positivity®](#) > [The Charismatic Advisor®](#) in Conversation

PLAN | Become a better collaborator

15 minutes

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?

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Before the meeting



Commit to becoming completely “in the moment” during the conversation

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:

Commit to becoming “in the moment.”

Action items to embrace the approaches

Sample

Improve how I engage by:

Increasing direct eye contact in meetings

Calling each person by name in our discussion

Offering genuine compliments in meetings to foster positive emotions

[NEXT >](#)

During the meeting



Use powerful phrases to set a collaborative tone.

For example:

I welcome your comments and questions.

I view our relationship as a partnership.

What would have to happen for you to consider our relationship a success?

Lead discussions with questions to gain insights about the purpose of their wealth beyond goals and objectives

Solicit feedback on your recommendations

When you disagree with someone's point of view, probe to understand the reasoning behind his/her position

List the approaches to master

Sample:

Solicit feedback on my ideas.

Learn more about the reasoning behind someone's views when they don't align with mine.

Action items to embrace the approaches

Sample:

After sharing an idea or opinion, pause and ask the other person to offer his/her views on what he/she heard.

Instead of simply disagreeing with someone's opinion, ask, "Can you share with me what led to you to feel that way?"

[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.

Identify 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 a better collaborator.


You are on your way to chase positivity by:

- Identifying ways to enhance how you collaborate consciously 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









 WATCH 3 Dynamics to Overcome Client Inertia	NEW	1 minutes	→
 LISTEN An approach to learning the 3 Dynamics		6 minutes	→
 LEARN A road map to master the 3 Dynamics		5 minutes	→
 LEARN Prepare for success		3 minutes	→




Communicating empathically









 WATCH See the World Through Clients' Eyes	NEW	1 minutes	→
 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








	WATCH Engage Clients in the Decision-Making Process	NEW	1 minutes	→
	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	→
	LEARN Engage clients based on their coping style		5 minutes	→
	PLAN Become a better collaborator		15 minutes	→



Inspiring action



	WATCH Motivate Clients to Move Forward	NEW	1 minutes	→
	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	→



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