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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.

Prefer to create a plan on paper?





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.

Commit to becoming completely "in the moment" during the conversation Select an item Prepare a list of open-ended questions to lead a discussion with genuine interest Select an item Shift your mindset to focus exclusively on the other person Select an item List the approaches to master Type your answer here. Sample: Commit to becoming "in the moment."

Sample

NEXT >

Improve how I engage by:

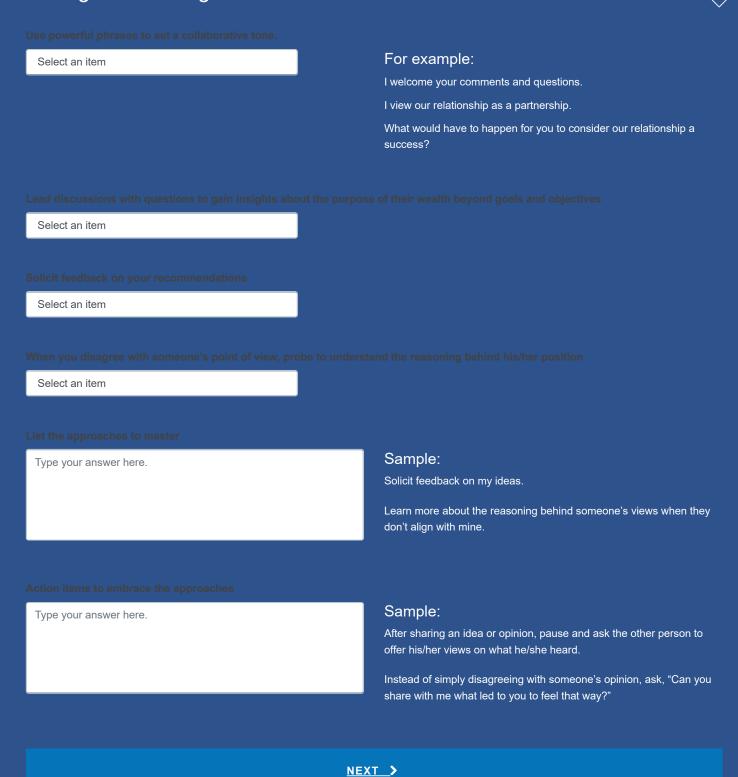
Increasing direct eye contact in meetings

Calling each person by name in our discussion

Offering genuine compliments in meetings to foster positive emotions

Type your answer here.

During the meeting



After the meeting

Select an item	
Select an item	
Send a note to client/prospect that details agreed-upon next step	
Select an item	
List the approaches to master	
Type your answer here.	Sample:
	Reflect on how I may have been perceived.
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.

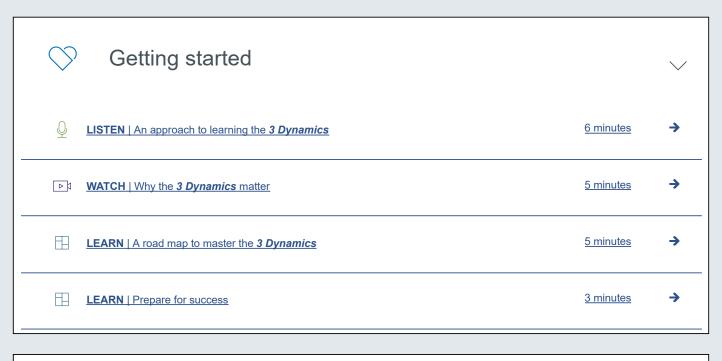
You are on your way to chase positivity by:

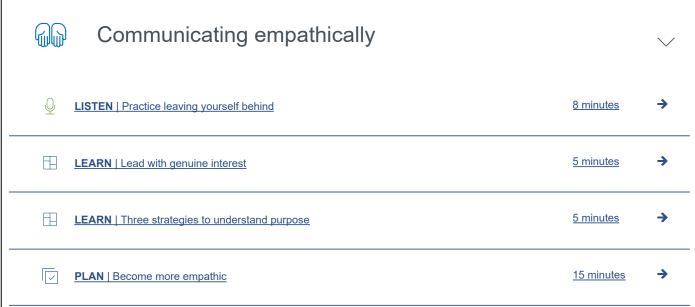
- Identifying ways to enhance how you collaborate consciously with others
- Establishing goals for personal development and growth
- Creating an action plan to achieve results

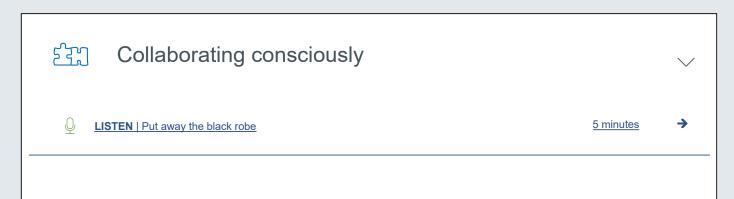
We encourage you to periodically review your progress against the plan and fine-tune your activities as needed.

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.







<u>Q</u>	LISTEN Beware of painting with a broad brush	5 minutes	→
<u></u>	LISTEN Don't take the bait	<u>5 minutes</u>	→
D)	WATCH Why intentionality matters	6 minutes	→
	LEARN Engage clients based on their coping style	<u>5 minutes</u>	→
V	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	→







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