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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.

Prefer to create a plan on paper?

- ▲ DOWNLOAD THE PDF Content for Investment Professionals only
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#### 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.

# Before the meeting

Select an item				
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			
	Ask better questions to convey genuine interest.			
	Shift my mindset to focus exclusively on the prospect, client or team member before engaging with them.			
Type your answer here.	Sample			
Type your answer here.	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.			
NEYT \$				

# During the meeting

	· ·		
Select an item			
Select an item			
Select an item			
Select an item			
Type your answer here.	Sample		
	Validate what I hear even if I don't agree.		
	Talk less – spend more time listening.		
Type your answer here.	Sample		
Type your answer here.	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

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.
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	



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

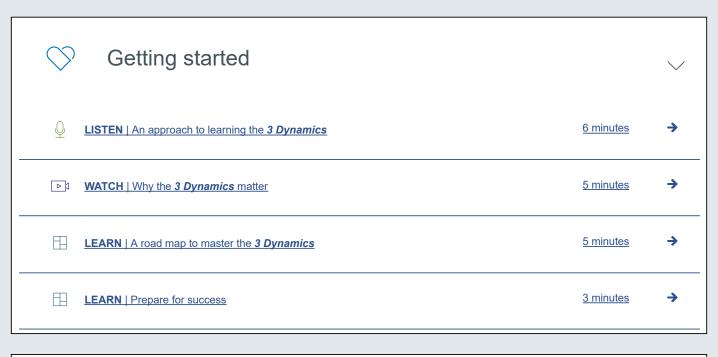
You are on your way to chase positivity by:

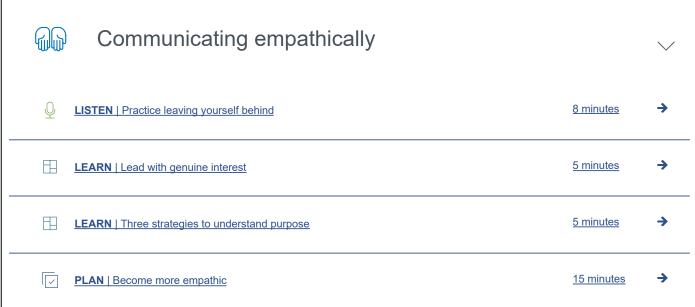
- Identifying ways to enhance how you build emotional connections with others
- Establishing goals for personal development and growth
- Creating an action plan to achieve results

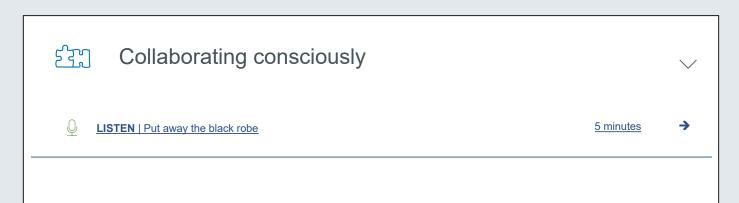
We encourage you to periodically review your progress against the plan and fine-tune your activities as needed.

#### 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.







<u>Q</u>	LISTEN   Beware of painting with a broad brush	5 minutes	<b>→</b>
<u> </u>	LISTEN   Don't take the bait	<u>5 minutes</u>	<b>→</b>
	WATCH   Why intentionality matters	6 minutes	<b>→</b>
	LEARN   Engage clients based on their coping style	<u>5 minutes</u>	<b>→</b>
<u></u>	PLAN   Become a better collaborator	15 minutes	<b>→</b>

Inspiring action	<b>&gt;</b>
LISTEN   A proven approach to increase engagement	minutes →
LISTEN   Align by deploying the joining technique 11 m	ninutes →
LEARN   Words and phrases to inspire action 5 mi	inutes →
PLAN   Inspire action in others 15 n	ninutes →







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