

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

PLAN | Become more empathic

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?

 [SHARE BY EMAIL](#)

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









 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	→



Investments

[Eaton Vance Funds](#)

[Parametric Funds](#)

[Calvert Funds](#)

[Separately Managed Accounts](#)

[Closed-End Funds and Term Trusts](#)

Insights

[Advisory Blog](#)

[The BEAT](#)

[The Advisor Institute](#)

Taxes & Tools

[Investment Tax Center](#)

[Tax Information](#)

[Investment Tax Calculator](#)

[Laddered Investing Interest Rate Scenario Tool](#)

[Concentrated Stock Position Calculator](#)

[Tax-Equivalent Yield Calculator](#)

Resources

[Forms & E-Delivery](#)

[Mutual Funds & Unclaimed Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

HEADQUARTERS

One Post Office Square
Boston, MA 02110

Accessibility	Business Continuity	Privacy & Cookies	Your Privacy Choices	Terms & Conditions	Careers	Contact
Investor Account Access	Morgan Stanley Investment Management Terms of Use					

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. One Post Office Square, Boston, MA 02110. Member **FINRA** / **SIPC**. Exchange-traded funds are distributed by Foreside Fund Services, LLC.

Publication details: Friday, July 5, 2024 11:38 AM

Page ID: 40000 - <https://www.eatonvance.com/plan-become-more-empathic.php>