

Investor Account Access

Investment Professional Sign In





PRODUCT FINDER

WEALTH STRATEGIES

INVESTMENTS

INSIGHTS

TAXES AND TOOLS

< 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.

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.

Before the meeting

Select an item			
Prepare a list of open-ended questions to lead a discussion with g			
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 hotter questions to convey genuine interest		
	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		
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	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

Select an item				
Select an item				
Select an item				
Select an item				
List the approaches to master				
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			
	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.			
<u>NEXT</u> .▶				

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	

₽ PRINT

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

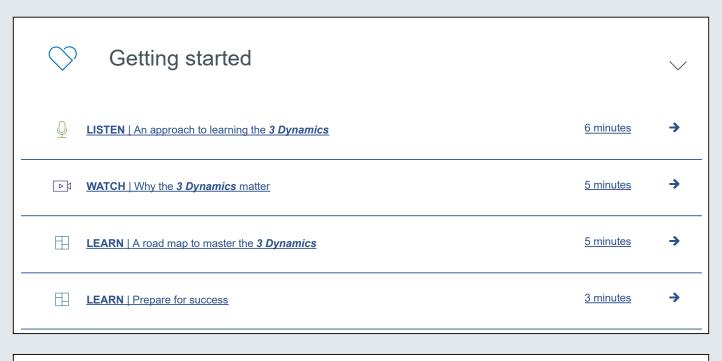
You are on your way to chase positivity by:

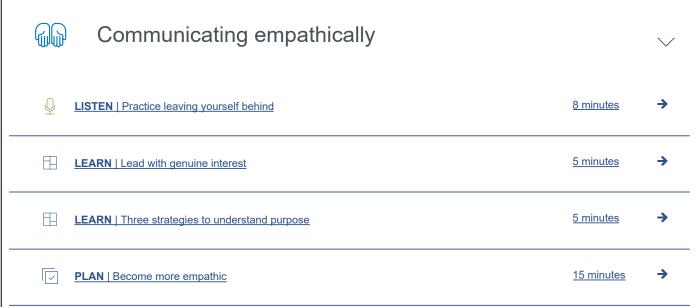
- Identifying ways to enhance how you build emotional connections with others
- Establishing goals for personal development and growth
- Creating an action plan to achieve results

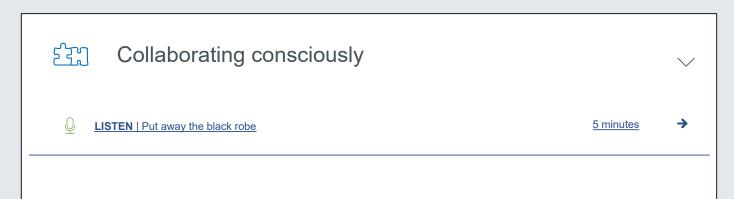
We encourage you to periodically review your progress against the plan and fine-tune your activities as needed.

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.







<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	→







HEADQUARTERS One Post Office Square Boston, MA 02110

<u>Investments</u> Eaton Vance Funds

Parametric Funds

Calvert Funds

Separately Managed

Accounts

Closed-End Funds and Term Trusts

<u>Insights</u>

Advisory Blog

The BEAT

Market Update Events

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 <u>Calculator</u>

Forms & E-Delivery

Resources

Mutual Funds & Abandoned Property

DST Vision

Active Advisor

Corporate Filings

Annual Reports

Press Releases

Diversity and Inclusion

Accessibility Business Continuity Privacy & Cookies Your Privacy Choices Terms & Conditions Careers <u>Contact</u> 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.

뎎 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: Tuesday, March 5, 2024 10:50 AM

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