

PRODUCT FINDER

**WEALTH STRATEGIES** 

INVESTMENTS

INSIGHTS

TAXES AND TOOLS

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Chasing Positivity® > The Charismatic Advisor® in Conversation

## **PLAN** | Inspire action

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

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### Instructions

Evaluate how effectively you inspire others to take actions that you believe are in their best interests. Based on your assessment, use the space provided to identify the approaches you want to master and how you plan to embrace them.

# Foster a motivating environment

Select an item	
Advocate for what's most important to them	
Select an item	
Type your answer here.	Sample:
	Learn more about passions and interests.
Action items to embrace the approaches	O a marila
Type your answer here.	Sample
	Early in discussions, ask these types of questions:
	"What are you passionate about?"
	"How do you enjoy spending your free time?"
	"What motivates you to dedicate so much energy to your career?"

NEXT >

# Show how your recommendations are likely to improve someone's life

Select an item				
Select an item				
Type your answer here.	Sample:			
	Do a better job of framing recommendations.			
Type your answer here.	Sample:			
Type your answer hore.	When presenting recommendations, clearly explain two to three			
	benefits the client can anticipate by following your suggestions.			
<u>NEXT_</u> >				

### Intentionally prepare clients to cope with setbacks

Select an item	
Remind clients how you closely monitor investments,	
Select an item	
Recognize the client's coping style; then adjust your a	
Select an item	
List the approaches to master	
Type your answer here.	Sample:  Regularly keep clients up to date on likelihood of goal achievement.
	regularly keep clients up to date on likelihood of goal achievement.
Type your answer here.	Sample:
	At least once a year, have a conversation about progress toward goals.
	Conduct additional conversations about goal achievement during times of market disruption, personal setbacks or if new tax legislation is enacted.

Print a copy of your worksheet for your records

### PRINT

Well done! You've created a personalized plan to inspire others to take action.

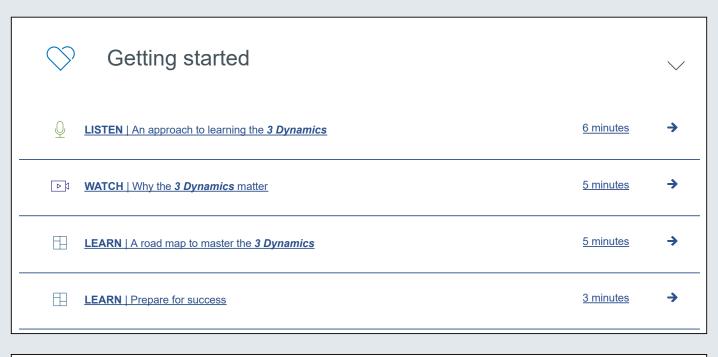
You are on your way to chase positivity by:

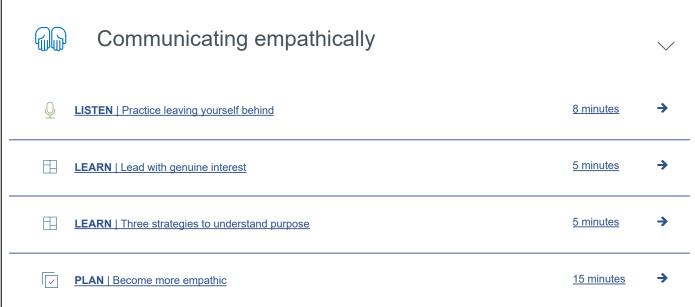
- Identifying ways to enhance how you motivate others to take actions that you believe are in their best interests
- Establishing goals for personal development and growth
- Creating an action plan to achieve results

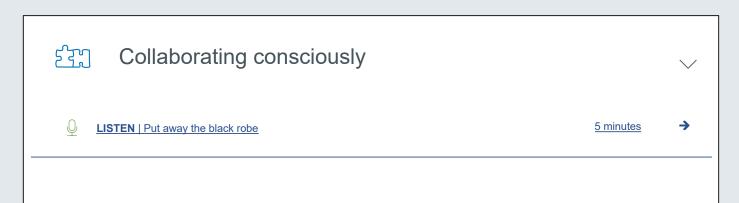
We encourage you to periodically review your progress against the plan and fine-tune your activities as needed.

### 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	~
LISTEN   A proven approach to increase engagement 10	minutes →
LISTEN   Align by deploying the joining technique	minutes →
LEARN   Words and phrases to inspire action 5 m	ninutes →
PLAN   Inspire action in others 15	minutes →







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