

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

PLAN | Inspire action in others

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?

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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



Lead discussions with questions that help you understand the desires that live underneath the prospect or client's goals

Advocate for what's most important to them

List the approaches to master

Sample:

Learn more about passions and interests.

Action items to embrace the approaches

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

Solicit feedback on the suggestions and recommendations you make

Position recommendations as enhancements to available alternatives

List the approaches to master

Sample:

Do a better job of framing recommendations.

Action items to embrace the approaches

Sample:

When presenting recommendations, clearly explain two to three benefits the client can anticipate by following your suggestions.

[NEXT](#) 

Intentionally prepare clients to cope with setbacks



Keep clients up to date regarding the likelihood of achieving their desired financial outcomes

Select an item

Remind clients how you closely monitor investments, global cross currents, and potential implications for their financial situations

Select an item

Recognize the client's coping style; then adjust your approach for engagement when discussing potential setbacks

Select an item

List the approaches to master

Type your answer here.

Sample:

Regularly keep clients up to date on likelihood of goal achievement.

Action items to embrace the approaches

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.




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	→



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