

[Attracting Clients](#) | **Chasing Positivity**

[Replace the Commonplace: Start Client Conversations Without "How Are You?"](#)

By: [David Richman](#) | April 30, 2024

Consider the cost of asking this question rather unwittingly, without a moment's reflection at the start of your follow-up phone calls: "How are you?" While cordial and somewhat deferential, it's oh so commonplace.

When you ask that question, you step past the opportunity to learn something more important about the person. Do they remember you? Do they seem receptive to hearing from you? We think learning the answers to these questions is far more valuable.

There's one question suited for virtually any situation that may be able to get you those answers. It has an important place in everything from an initial call with a prospective client, to a quarterly review with a longtime client. That "question" is a well-placed pause. Imagine if you ended your opening statement with a pause—now you're in learning mode. Let's consider the effect a well-placed pause can have on the following three follow-up scenarios.

A First Encounter

Advisor: "Good afternoon, it's David Richman from XYZ. It was great meeting you last week at the Save the Bay event. [Pause.]"

Prospect: "David, so great to connect last week and I'm glad you followed up and would love to continue our conversation about [Magnificent Seven complacency](#)."

What did you learn? Seems the person not only remembers you; she's also interested in continuing the conversation you started.

A Referral

Advisor: "Good afternoon, it's David Richman from XYZ. Bill Jones suggested I call. [Pause.]"

Prospect: ""Bill Jones, how is he? I haven't spoken to him in a while. Do you know if his daughter got accepted to her first choice?"

What did you learn? Appears he knows Bill rather well. Seems like Bill is a strong referral into this potential new client relationship.

A LinkedIn Connection

Advisor: "Good afternoon, it's David Richman from XYZ, I have enjoyed our back and forth on LinkedIn. [Pause.]"

Prospect: "Yes, I was intrigued by your recent post regarding the current state of the municipal bond market."

What did you learn? This person is interested in municipals and perhaps open to advice.

Bottom Line: Yes, the question "how are you" is deferential. Yet, consider whether leveraging the power of a pause might open doors to a more productive follow-up conversation.

"Imagine if you ended your opening statement with a pause—now you're in learning mode."



relied upon as investment advice and, because investment decisions for Eaton Vance are based on many factors, may not be relied upon as an indication of trading intent on behalf of any Eaton Vance fund. The discussion herein is general in nature and is provided for informational purposes only. There is no guarantee as to its accuracy or completeness. Past performance is no guarantee of future results.



HEADQUARTERS

One Post Office Square
Boston, MA 02110

Investments

[Eaton Vance Funds](#)

[Parametric Funds](#)

[Calvert Funds](#)

[Separately Managed
Accounts](#)

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

Insights

[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
Calculator](#)

Resources

[Forms & E-Delivery](#)

[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	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: Tuesday, April 30, 2024 2:10 PM

Page ID: 39559 - <https://www.eatonvance.com/read-advisor-institute.php>