

[< Back to overview](#)

Chasing Positivity® > The Charismatic Advisor® in Conversation

WATCH | Why intentionality matters

6 minutes

Hi, I'm David Richman with Eaton Vance Advisor Institute. Today, I'd like to explore with you how intentionality can help you inspire action. Being intentional is about being focused and bringing attention to something that's important to you. Perhaps it's a goal. Yet, to translate a goal into actual results, we need to first clarify exactly what we want to achieve with great specificity. Second, we kind of need to act upon it with a sense of purpose.

My all-time favorite definition of intentionality comes from a former coach in the NBA. His name is Coach Kevin Eastman. Kevin has this wonderfully poetic definition of intentionality: "What I do on purpose to fulfill my purpose."

Let's put this into context with client relationships and the goal of inspiring them to take actions that you believe to be in their best interest. Consider a hypothetical client, Mary Dexter. She's 71 years old. Unfortunately, her husband Harry died about five years ago. Harry left Mary a sizeable portfolio that he'd been taking care of for many years, and she's been living off of the dividends for most of her living expenses. Unfortunately, that dividend income is no longer sufficient to support her lifestyle. Yet, somehow she refuses to follow her advisor's advice to change that portfolio in any way. Her mantra, "Harry told me, never touch the stocks."

So, Mary perceives any recommendations from her advisors as potentially going against her deceased husband's desires, indeed his instructions. As a result, she adheres to the status quo. It can be so difficult for Mary to overcome that mindset. If you were the advisor, what might you say on purpose with great intentionality to lessen Mary's resistance to change? Keep in mind, virtually anything you say to Mary can be charged with emotion, negative emotion, that can make this a particularly tricky conversation to navigate.

Many people are trapped by what psychologists refer to as negative scripts. These are ongoing, counterproductive, often self-defeating ways in which we think and ways we act. Mary's thinking here, classic example of such a negative script. For a variety of reasons, negative scripts limit a client considering your alternative new idea.

Now, the good news is you can help clients overcome these negative scripts. How? By intentionally acknowledging these thoughts in a non-judgmental way and preparing the client to entertain an alternative way of thinking. In Mary's situation, no amount of data or analysis is going to help, is it? If you were her advisor, it's important to acknowledge that and act with great intentionality to handle the situation.

By communicating empathically and collaborating consciously with Mary, you just might be able to change her mindset. Now, communicating empathically means having conversations where you are truly seeking to see and understand her point of view. Collaborating consciously means you are partnering, conducting each and every conversation with great intentionality.

Think about Mary now. What if you just say something like this? "Mary, based upon everything you've told me about Harry, he seemed to

The views expressed in these posts are those of the authors and are current only through the date stated. These views are subject to change at any time based upon market or other conditions, and Eaton Vance disclaims any responsibility to update such views. These views may not be 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.

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



[LISTEN](#) | [An approach to learning the 3 Dynamics](#)

[6 minutes](#)



[WATCH](#) | [Why the 3 Dynamics matter](#)

[5 minutes](#)



[LEARN](#) | [A road map to master the 3 Dynamics](#)

[5 minutes](#)



[LEARN](#) | [Prepare for success](#)

[3 minutes](#)



Communicating empathically



[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



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](#)



WATCH | [Why intentionality matters](#)

[6 minutes](#)



LEARN | [Engage clients based on their coping style](#)

[5 minutes](#)



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

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, March 5, 2024 10:50 AM

Page ID: 39551 - <https://www.eatonvance.com/watch-advisor-institute.php>