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Why intentionality matters

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



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What's next?

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