

[< Back to overview](#)

Chasing Positivity® > The Charismatic Advisor® in Conversation

# WATCH | Why the **3 *Dynamics*** matter

5 minutes

Chasing Positivity®

# Why the 3 Dynamics matter



David Richman  
National Director, Advisor Institute



THE ADVISOR  
INSTITUTE



Welcome. I'm David Richman with the Eaton Vance Advisor Institute. Today we'd like to explore a paradigm that might be able to help you consistently have even better conversations to convert prospects into lifelong clients and to convert those customers that might be masquerading as clients into real clients. This paradigm, which we call the 3 Dynamics, will also help you in conversations with your colleagues and with your team members.

How many times have you had a prospective client say to you, "Let me think about. I'll get back to you," after you made what you thought was a brilliant recommendation? Perhaps this comment took you by surprise as their tone kind of signaled a nice no rather than a sincere maybe. These words connect to a question I frequently ask advisors, "What, not who, is your number one competitor?" How would you answer that question? I'll give you a hint. You learn that word for the first time in a physics class. Yes, you got it – inertia. Inertia. Things in motion tend to remain in motion. Things at rest tend to remain at rest.

There are so many reasons why people tend not to change. Change is difficult, maybe one of the most difficult things for any humans to confront. So many reasons. Maybe fear of the unknown, physical or emotional exhaustion, or uncertainty about their actual ability to do something different. It leads them to remain fixed, to remain like deer in the headlights, frozen in their present situation.

As you know, behavioral finance experts have a phrase for this – called status quo bias. The status quo is often so appealing because it's exactly what they're doing right now. It takes such a compelling reason for someone to make change. Inertia is such a formidable adversary. This is where the 3 Dynamics might help. They can serve as guideposts for you in chasing positivity and helping you minimize the gravitational pull of inertia.

Together with my long-time colleague and friend, Dr. Robert Brooks, we developed a paradigm, a paradigm for you to hopefully have these better conversations. The 3 Dynamics that we explore - communicating emphatically, meaning starting every conversation from the vantage point of seeking to see the world through that other person's eyes. Next, collaborating consciously, and we use that word consciously rather consciously. We're trying to have you think about what are you doing with great intentionality in every conversation to master the art of collaboration. Then third, Inspiring Action. Ultimately, words matter. What are the words and phrases that you are using that may just help inspire that person, help that literal light bulb go off to have them think about why they perhaps should make change, why they should move forward. Words matter. These 3 Dynamics provide a genuine approach for having conversations that will help you inspire others to take actions that you know or at least believe to be actions that will be in their best interest. Your ability to create motivating environments, environments in which people actually feel more at ease and receptive to listening, rests in your approach to your conversation.

Our hope is that you will invest the time and the energy to master these 3 Dynamics so that you can become increasingly intentional and consistent in your conversations. By doing so, you're more likely to inspire intentional outcomes and position yourself as a source of strength in the lives of the clients you serve and the clients you aspire to serve.



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 & Unclaimed  
Property](#)

[DST Vision](#)

[Active Advisor](#)

[Corporate Filings](#)

[Annual Reports](#)

[Press Releases](#)

[Diversity and Inclusion](#)

<a href="#">Accessibility</a>	<a href="#">Business Continuity</a>	<a href="#">Privacy &amp; Cookies</a>	<a href="#">Your Privacy Choices</a>	<a href="#">Terms &amp; Conditions</a>	<a href="#">Careers</a>	<a href="#">Contact</a>
<a href="#">Investor Account Access</a>	<a href="#">Morgan Stanley Investment Management Terms of Use</a>					

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>