



[< Back to overview](#)

[Chasing Positivity®](#) > [The Charismatic Advisor®](#) in Conversation

WATCH | Engage Clients in the Decision-Making Process

1 minutes

Engage Clients in the Decision-Making Process

Chasing Positivity®
Collaborating Consciously



Are you a skilled collaborator? Even when someone doesn't agree with you?

Collaboration requires conscious effort.

Collaborating Consciously is one of the 3 Dynamics of Chasing Positivity.

It is rooted in ensuring clients feel at ease and that they are active participants in the decision-making process.

Start by listening with intentionality. Shift your mindset from what can I say to look smart, to what can I ask to learn more.

Then use powerful phrases to set a collaborative tone. You can say things like:

"I welcome your comments and questions."

"Please let me know if I'm not being clear."

"I view our relationship as a partnership."


By listening with intentionality and setting a collaborative tone, you can help clients feel more open to working with you.

To learn more about how collaborating consciously can help you improve your conversations and inspire clients to act, visit eatonvance.com/chasingpositivity.












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	→



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](#)

[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](#)

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: Wednesday, June 5, 2024 12:03 PM

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