



[< Back to overview](#)

Chasing Positivity® > The Charismatic Advisor® in Conversation

LISTEN | Don't take the bait

5 minutes

Welcome. This is David Richman from the Eaton Vance Advisor Institute. As you know, collaboration with existing clients and prospective clients is essential for healthy and productive relationships. Yet, it's often a challenging balancing act to create and maintain a collaborative relationship where you successfully encourage the active input of existing and prospective clients without compromising your status as an expert in your field. Someone engaging your services might say early on in a conversation, "Hey, you're the expert, just tell us what to do." While there might be sincerity in that request, there are all sorts of dangers associated in just telling someone what to do or what we call in this case taking the bait. It's important to recognize that when someone is seeking guidance from an advisor whose expertise far exceeds their own, they still want to feel that their opinions are being heard. If someone senses you're not respecting them or understanding them then it's unlikely that they're going to want to work with you.

An advisor I had the pleasure to work with many years ago, shared with me how she's always collaborating consciously, or as we like to say today, with great intentionality. She accepts people for who they are rather than imposing what she believes to be the right course of action for them. Now, it's not that this advisor doesn't have an opinion to offer; quite the contrary. Rather, she sees her role as discovering what is most important to these people and then finding ways to advocate for that set of issues. Her observation is that when advisors try to modify the client's perception or the prospective client's perception of what they want or need, it likely becomes a barrier to establishing a true collaborative atmosphere.

So, to avoid taking the bait, consider these two strategies. First, strategy one, practice active listening. The most effective collaborators that we know happen to be the best listeners; isn't that interesting? They listen with intentional intensity. They're quite conscious of the activity because they work on these listening skills all the time. Strategy two, use powerful phrases to set the tone upfront. Effective collaborators realize words matter. They tend to try to set a collaborative tone literally right out at the gate so that they rarely hear a prospective client or an existing client say, "You're the expert. Just tell me what to do." Here are some of my favorite phrases that they use: "I welcome your comments and your questions." "If I present any information that's not clear to you, please let me know." "If I ask any questions and you're not certain why I'm asking, please ask me to explain." "I view our relationship as a partnership." Here's another one: "What would have to happen from your advantage point in order for our work together to be considered a complete success?" As you begin using a few of these in your discussions, you'll gain confidence in your ability to create positive emotions that inspire action and as you bring greater intentionality to the phrases that you use. In some way, to become an effective collaborator, make sure your prospective clients and your existing clients feel like their opinions are being heard by practicing active listening and setting collaborative tone right out of the gate.

If you would like to learn more about how to become an effective collaborator, we encourage you to fully explore the tools and the resources available on eatonvance.com/ChasingPositivity. Eaton Vance is committed to helping you build stronger and deeper relationships with your clients, your team members and your prospective clients. Until next time, wishing you all the best.



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: 39558 - <https://www.eatonvance.com/listen-advisor-institute.php>