PLAN | Become a better collaborator

We encourage you to complete this activity in one sitting since work in progress is not saved. You can print the output from this activity in PDF after completing the exercise. All fields are private and will not be shared with Eaton Vance.

Prefer to create a plan on paper?

DOWNLOAD THE PDF

SHARE BY EMAIL

Instructions

Evaluate how you build stronger emotional connections with others. Based on your assessment, use the space provided to identify the approaches you want to master and how you plan to embrace them.

Before the meeting

Commit to becoming completely “in the moment” during the conversation

Select an item

Prepare a list of open-ended questions to lead a discussion with genuine interest

Select an item

Shift your mindset to focus exclusively on the other person

Select an item

List the approaches to master

Type your answer here.

Sample:

Commit to becoming “in the moment.”

Action items to embrace the approaches

Type your answer here.

Sample

Improve how I engage by:

Increasing direct eye contact in meetings

Calling each person by name in our discussion

Offering genuine compliments in meetings to foster positive emotions

NEXT

During the meeting

Use powerful phrases to set a collaborative tone.

Select an item

For example:

I welcome your comments and questions.

I view our relationship as a partnership.

What would have to happen for you to consider our relationship a success?

Lead discussions with questions to gain insights about the purpose of their wealth beyond goals and objectives

Select an item

Solicit feedback on your recommendations

Select an item

When you disagree with someone's point of view, probe to understand the reasoning behind his/her position

Select an item

List the approaches to master

Type your answer here.

Sample:

Solicit feedback on my ideas.

Learn more about the reasoning behind someone's views when they don't align with mine.

Action items to embrace the approaches

Type your answer here.

Sample:

After sharing an idea or opinion, pause and ask the other person to offer his/her views on what he/she heard.

Instead of simply disagreeing with someone's opinion, ask, "Can you share with me what led to you to feel that way?"

NEXT

After the meeting

Reflect on how you may have been perceived

Select an item

Make note of ways you might refine your approach going forward

Select an item

Send a note to client/prospect that details agreed-upon next steps

Select an item

List the approaches to master

Type your answer here.

Sample:

Reflect on how I may have been perceived.

Action items to embrace the approaches

Type your answer here.

Sample:

Candidly assess what went well in the meeting while also identifying areas for improvement.

Identify ways to better engage based on areas identified for improvement.

Print a copy of your worksheet for your records

PRINT

Well done! You've created a personalized plan to become a better collaborator.

You are on your way to chase positivity by:

- Identifying ways to enhance how you collaborate consciously with others
- Establishing goals for personal development and growth
- Creating an action plan to achieve results

We encourage you to periodically review your progress against the plan and fine-tune your activities as needed.

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	→

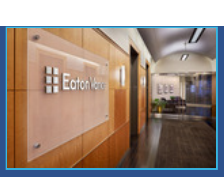
Collaborating consciously

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

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