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Chasing Positivity® &gt; The Charismatic Advisor® in Conversation

# PLAN | Inspire action in others

15 minutes

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.

## Instructions

Evaluate how effectively you inspire others to take actions that you believe are in their best interests. Based on your assessment, use the space provided to identify the approaches you want to master and how you plan to embrace them.

Prefer to create a plan on paper?

[↓ DOWNLOAD THE PDF](#) [Content for Investment Professionals only](#)[✉ SHARE BY EMAIL](#)

# Foster a motivating environment



Lead discussions with questions that help you understand the desires that live underneath the prospect or client's goals

Advocate for what's most important to them

List the approaches to master

## Sample:

Learn more about passions and interests.

Action items to embrace the approaches

## Sample

Early in discussions, ask these types of questions:

“What are you passionate about?”

“How do you enjoy spending your free time?”

“What motivates you to dedicate so much energy to your career?”

[NEXT >](#)

# Show how your recommendations are likely to improve someone's life



## Solicit feedback on the suggestions and recommendations you make

Select an item

## Position recommendations as enhancements to available alternatives

Select an item

## List the approaches to master

Type your answer here.

### Sample:

Do a better job of framing recommendations.

## Action items to embrace the approaches

Type your answer here.

### Sample:

When presenting recommendations, clearly explain two to three benefits the client can anticipate by following your suggestions.

NEXT >

# Intentionally prepare clients to cope with setbacks



**Keep clients up to date regarding the likelihood of achieving their desired financial outcomes**

**Remind clients how you closely monitor investments, global cross currents, and potential implications for their financial situations**

**Recognize the client's coping style; then adjust your approach for engagement when discussing potential setbacks**

**List the approaches to master**

### Sample:

Regularly keep clients up to date on likelihood of goal achievement.

**Action items to embrace the approaches**

### Sample:

At least once a year, have a conversation about progress toward goals.

Conduct additional conversations about goal achievement during times of market disruption, personal setbacks or if new tax legislation is enacted.

Print a copy of your worksheet for your records



**Well done! You've created a personalized plan to inspire others to take action.**


You are on your way to chase positivity by:

- Identifying ways to enhance how you motivate others to take actions that you believe are in their best interests
- 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







	<b>LISTEN</b>   An approach to learning the <b>3 Dynamics</b>	6 minutes	→
	<b>LISTEN</b>   Leveraging positive emotions	29 minutes	→
	<b>WATCH</b>   Why the <b>3 Dynamics</b> matter	5 minutes	→
	<b>READ</b>   The power of positive emotions	3 minutes	→
	<b>READ</b>   Mindset + Intentionality: A powerful combination	3 minutes	→
	<b>LEARN</b>   A road map to master the <b>3 Dynamics</b>	5 minutes	→
	<b>LEARN</b>   Prepare for success	3 minutes	→



## Communicating empathically



	<b>LISTEN</b>   Practice leaving yourself behind	8 minutes	→
	<b>LISTEN</b>   Nurturing your resilience	29 minutes	→
	<b>READ</b>   Listen with intentional intensity	3 minutes	→
	<b>LEARN</b>   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



**READ** | What you resist persists

3 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



**LISTEN** | Overcoming client inertia

33 minutes



**LEARN** | Words and phrases to inspire action

5 minutes



**PLAN** | Inspire action in others

15 minutes





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- [EventsContent for Investment Professionals only](#)
- [Eaton Vance on Washington](#)
- [Market Views](#)
- [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

- [Mutual Fund Sales Charges](#)
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