

Learning and Development

Eaton Vance offers employees a broad range of learning and development programs. Continued professional development of our workforce strengthens our organization and contributes to the Company's long-term health and sustainability. Professional development also enhances the lives of our employees by providing them with new knowledge, new experiences and new opportunities for advancement within the Company.

Entry-Level Training Programs

Eaton Vance provides formal training programs for a number of entry-level roles, including call center representatives and research associates. These training programs provide recent college graduates with the knowledge and skills they need to be successful in their new roles.

Call Center Representative Training Program

The Call Center Representative Training Program incorporates a curriculum built specifically for new call center representatives, whose role is to respond to information requests made by financial advisors and fund shareholders. The program is designed for new hires of all backgrounds, including those with no prior industry experience or without business or finance degrees. The program includes live classroom training, job shadowing, regular assessments and real-time practical application. By the end of this six-week training program, participants are prepared to begin fielding calls from financial advisors and fund shareholders.

Research Associate Training Program

The Research Associate Training Program is designed for new research associates entering the Company's investment groups. Eaton Vance partners with a leading financial services training firm, Wall Street Prep, to provide the curriculum for the program. Online coursework topics include accounting and financial statement analysis, corporate finance and bond analysis. Live instruction covers financial modeling, valuation and credit analysis. Including both online and in-person segments, the program provide new research associates with skills needed to perform their job functions.

Leadership Development Program

Employees identified as rising leaders within the Company are given the opportunity to enhance their management and leadership capabilities through the Leadership Development Program. This intensive program blends individual development and group learning over a 12-month period, preparing managers for advanced leadership roles. The Leadership Development Program has four key components:

- 360-degree feedback on leadership and management competencies
- Executive coaching
- Development workshops
- Group learning through an Action Learning Project

Management Training Programs

New Manager Training Program

Eaton Vance offers a dedicated training program for new managers with less than two years of experience managing people. Our program series, Management 101: The Successful Manager, runs over 10 months and consists of nine individual training sessions designed to familiarize new managers with their role and responsibilities and to equip them with the management skills necessary to be successful.

Advanced Manager Program for Excellence in Development

The Advanced Manager Program for Excellence in Development is a targeted program for experienced managers to help them evolve from managers into leaders. This development experience allows participants to debate complex managerial topics and provides participants with advanced tools to lead successfully.

Digital Learning

Every Eaton Vance employee has access to a digital learning library that includes over 1,800 courses. Made available through our core human resources system, the digital learning library enables employees to take courses anywhere, anytime. Courses offered cover a range of employee development topics, including communications, financial literacy and software skills.

Skills Training

Complementing our formal training programs and digital learning offerings, Eaton Vance also offers a full catalogue of live courses that employees may participate in each fall and spring.

The courses cover a range of identified areas of interest and topics for professional growth, including:

- Presentation skills
- Developing executive presence
- Five choices to extraordinary productivity
- Strategic applications of emotional intelligence
- Mutual fund industry overview

New Employee Training

Entry-level training is available to new employees as part of their onboarding process.

Tuition Reimbursement

Employees who choose to further their academic studies while employed at Eaton Vance may be eligible for tuition reimbursement.

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Publication details: Tuesday, April 13, 2021 12:22 PM

Page ID: 35876 - <https://www.eatonvance.com/learning-development.php>