

Title: Master an Approach to Successful First Encounters

Hello. I'm David Richman, Managing Director of the Advisor Institute.

Networking events often present two awkward moments. Both, as it happens, can be mitigated with a strategic approach. The first awkward moment is greeting a stranger. Now, some of us are good at this; some of us are not and get uncomfortable in that moment. Rather than seeing someone's name tag and saying, "Hi, Jane, so nice to meet you," we recommend trying a simple phrase, "Do you mind if I join you?" Asking do you mind if I join you is quite deferential. The person will likely respond, "Not at all. I'm Jane Smith. It's nice to meet you," and then you can offer your hand and introduce yourself.

Now that you are in conversation, you have the opportunity to get to know Jane. Ask a question such as, "So, what brings you to this event?" As she responds, do your best to practice agenda-less listening rather than angle-based listening. Angle-based listening happens when you are thinking two to three steps ahead and shifting the conversation towards your desired outcome. This is a frequent habit of many advisors, especially during a first encounter with prospective clients. Advisors who practice agenda-less listening ask questions based on genuine curiosity and continue to ask follow up questions that are appropriate, that go deeper. In most conversations, the other person will eventually turn the attention to you and ask you a question. Our advice here? Answer their question and then gently bring the attention back to them. Remember, you already know all there is to know about you. Your goal here is to find out more about them, which they will appreciate.

Let's move on to the second awkward moment-the disengage-leaving a conversation. Have you ever found yourself at a networking event where you promised yourself to have 5-10 conversations and you only had one? That's probably because neither you nor that first person you engage with are skilled at the disengage. How can you avoid the potential awkwardness of the disengage? Let's go back to our conversation with Jane. Since you led the conversation by asking questions based on genuine curiosity and practiced agenda-less listening, you likely now know some things about Jane. Perhaps you've discovered that Jane has a 12-year-old daughter who is a really good tennis player and she's considering getting her a private coach. You happen to know a great tennis coach and say, "I know an excellent tennis coach in the area, yet not sure if he is taking on any new players. Would it be of value if I reached out to him and then circle back to you?" "Oh, that would be great," says Jane. Now, you take your phone out, get Jane's contact information, and say, "Great to meet you. Have a wonderful evening. Speak to you soon." So, instead of a goodbye, it's a goodbye for now.

Make first encounters count at your next networking event by:

- **One:** Practicing agenda-less listening and asking thoughtful questions that help you learn more about the other person.
- **Two:** Try connecting your encounters with someone or something of value to give you a reason to follow up.
- **Three:** Follow through on your follow up. The mere act of follow up will say all the right things about you.

These strategies can help you work a room without ever appearing as if you are working the room.

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