

# Emotional Intelligence at Work

**Hendrie Weisinger, Ph.D.**

**[Hweisinger@msn.com](mailto:Hweisinger@msn.com)**



# THE EMOTIONALLY INTELLIGENT FINANCIAL ADVISOR

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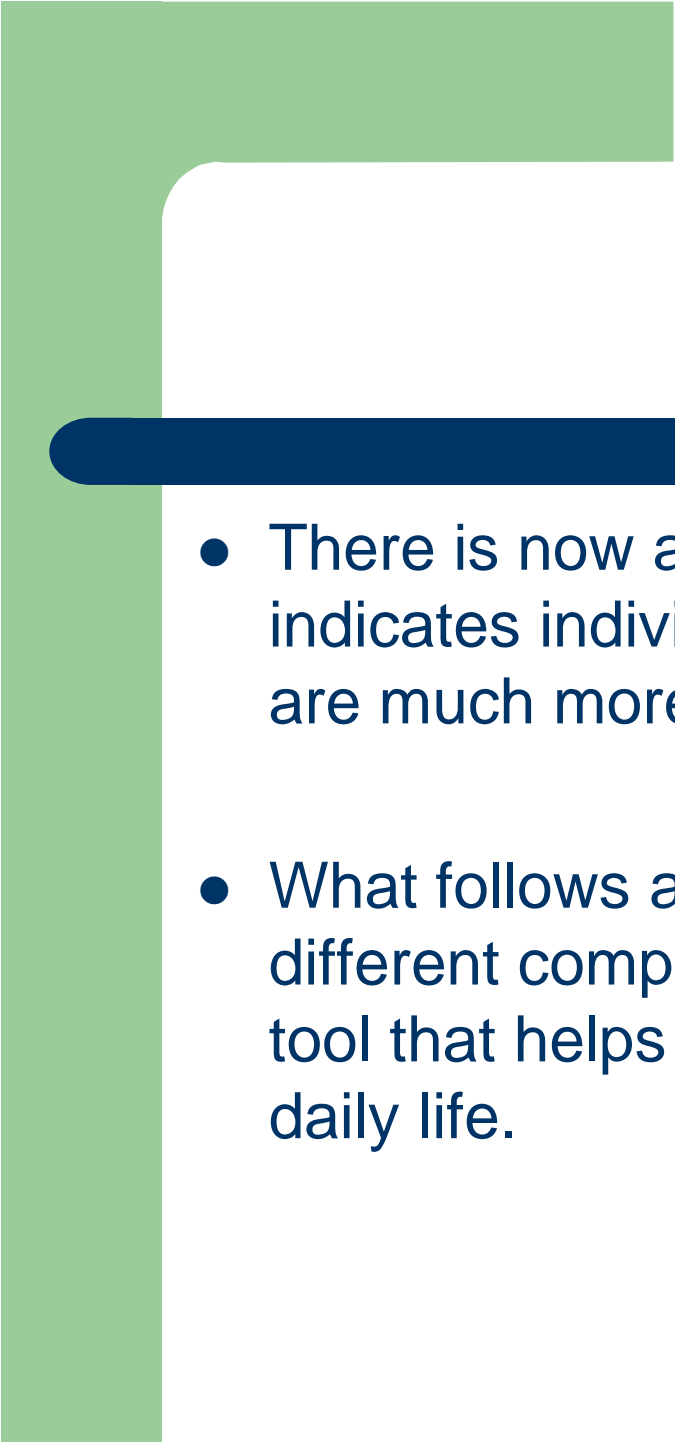

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# Overview of Emotional Intelligence

Emotional Intelligence (EI) refers to your ability to make your emotions work for you by using them in ways that produce the results you want. In essence, you use your emotions to facilitate your performance. An abundance of recent research indicates that this ability is perhaps the most important factor in determining our success at home and at work.

## Studies have identified that there are at least 5 key factors that make up emotional intelligence:

1. **High Self Awareness**: the ability to tune in to information about yourself and to use it to help you navigate through life successfully.
2. **Mood Management**: the ability to manage your emotions, to shake off bad moods and to put yourself in a good mood.
3. **Self-Motivation**: the ability to get yourself to do necessary tasks, to bounce back quickly from setbacks, to “psyche” yourself up on cue.
4. **Interpersonal Expertise**: the ability to relate well to others, workout conflict, give and take criticism, build consensus, enhance team communication.
5. **Emotional Mentoring**: the ability to help others manage their emotions, to help others learn to motivate themselves, to help others work out conflict.

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- There is now a good deal of empirical research that indicates individuals who demonstrate these factors are much more successful than those who don't.
  - What follows are ten tips that helps you demonstrate different components of emotional intelligence and a tool that helps you build these components into your daily life.

# APPLYING YOUR EMOTIONAL INTELLIGENCE

1. Learn to listen to how you talk to yourself
2. Use your thoughts as instructional self-statements
3. Be aware of your intentions
4. Observe your actions
5. Learn to Relax-on cue
6. Generate Humor
7. Become a good problem solver
8. Practice the power of Positive Criticism
9. Listen to the messages of emotions
10. Make Tasks Underwhelming

# MANAGING ANGER

- **Message: Something is wrong**
- **Effective Behaviors**
  - Acknowledge and validate feelings of anger
  - Clarify exactly what is wrong
  - Take time out to control explosive reactions
  - Clarify whether there are expectations that were not met-
  - Use appraisal skills to determine whether those expectations were realistic
  - Check for distorted thinking
  - Gain perspective in conversation with trusted colleague or friend
  - When possible, express what is wrong
  - Ask whether the impact experienced is what the other person intended
  - Use problem-solving skills to explore ways to change whatever is wrong

# MANAGING ANXIETY

- **Emotion: Anxiety**
- **Message of Emotion: Uncertainty**
- **Effective Behaviors**
  - **Acknowledge and validate feelings of anxiety**
  - **Clarify what you feel uncertain about**
  - **Get information from appropriate sources that reduce or clarify uncertain areas**
  - **Seek perspective or advice from trusted colleagues or friends**
  - **Remind yourself that uncertainty is a normal part of your work experience**
  - **Remind yourself how other periods of uncertainty evolved**
  - **Remind yourself about all the aspects of the situation about which you do have certainty to keep this aspect in perspective**
  - **Time lock and focal lock to remain productive**



# MANAGING DEJECTION

- **Emotion: Dejection**
- **Message of Emotion: Let down**
- **Effective Behaviors**
  - **Acknowledge feelings**
  - **Clarify and assess expectations not met**
  - **Tune into Self Statements**
  - **Use motivational statements**
  - **Generate Humor**
  - **Use Support System**
  - **Problem Solve**
  - **Reassess Goals**
  - **Action activity**

# MANAGING FEAR

- **Emotion: Fear**
- **Message of Emotion: There is a threat**
- **Effective Behaviors**
  - **Acknowledge and validate sense of fear**
  - **Clarify the nature of the threat**
  - **\*If appropriate, reframe the fear as a less intense feeling such as concern**
  - **\*Remind yourself of previous similar situations that at first appeared alarming, but where were less threatening as you gained more information**
  - **Seek data to make the nature of the threat more concrete**
  - **Move into problem-solving or action-planning**
  - **Evaluate the risk of alternatives or of not doing what seems threatening**
  - **Seek coaching or advice, if appropriate**

# MANAGING ENTHUSIASTISM

- **Emotion: Enthusiasm**
- **Message of Emotion: Excitement, ready to act**
- **Effective Behaviors**
  - Acknowledge, validate and enjoy the positive energy of enthusiasm
  - \*Slow down
  - Look for realistic limitations to any proposed actions- check your perspective with a neutral and trusted colleague or friend
  - Clarify long term intentions to check appropriateness of enthusiastic actions

# Blueprint for Applying Your Emotional Intelligence

- The blueprint for applying your emotional intelligence is a tool designed to help you integrate emotional intelligence into your daily functioning.
- The more you follow the blueprint, the more adept you will become in using your EI.

# El Preparation

- Doing it every day will yield results in a short period of time. For the blueprint to be effective, all of the steps are mandatory and must be implemented as prescribed.
- The following tasks are to be done the night before you go to work.

# First thoughts

On an index card, write down three statements that will help you start out the day on a positive note. Give the card high visibility on your night table and on your desk.

1.

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2.

---

3.

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# Practice Relaxation for 10 Minutes

When you practice relaxation, make sure that you conjure up a relaxing image and associate it with a key phrase.

- Relaxing image: \_\_\_\_\_
- Key Phrase: \_\_\_\_\_

# Intentions for day

Write down three intentions that you have for the next day such as calling certain clients, researching an investment, setting up a presentation. Prioritize them with the first being most important.

1.

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2.

---

3.

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# Behaviors To Do

Make a list of behaviors that you need to do to accomplish the intentions you have identified. Put them on an index card, take the index card to work, and put it on your desk so you can see it all day.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Time Lock

Identify several periods for doing the specific behaviors that will help you accomplish your intentions. Let people know you are time locking.

Time Lock Periods:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Focal Lock

Identify the necessary behaviors to do for each of your time locks.

Focal Lock content:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Anticipate Setbacks

- List three possible setbacks that you might encounter, such as a client leaving you, a cancelled meeting with a hot prospect, a barrage of negative thinking, or interruptions to your time locks.
- Take a few minutes and mentally rehearse how you would deal with each setback.
- Also be aware of what emotions setbacks evoke in you and how you manage these emotions.

Possible Setbacks and Responding effectively:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# Gather Emotional Information

- Make a list of emotions-anger, anxiety, fear, disappointment, enthusiasm, on an index card.
- Next to each, make a notation of how you will best manage that emotion when experienced.
- Put it on your desk. Several times a day, ask yourself what emotions-at that moment-you are experiencing.
- Check your immediate thoughts and examine your behavior to see if you are acting productively.
- If you are feeling anxious, for example, are you mentally paralyzed or are you engaged in activities that help manage the anxiety?
- If not, check your card to remind yourself that you have more effective ways of responding.

## Anticipate Interpersonal Encounters (phone calls, meetings )

- Make a list of each interpersonal encounter you are likely to have the next day and write down your intentions you have for each of your anticipated encounters.
- Mentally rehearse how you will conduct yourself so that you best might make the encounter productive and achieve your desired results.
- In addition, be sure to mentally rehearse how to conduct yourself and manage your emotions in interpersonal scenarios that are emotionally charged, such as your branch manager criticizing you at a staff meeting.
- Make sure you mentally rehearse effective responses in these situations.

# Identify your successes

- At the end of the day, identify your success whether it is completing your time lock and focal lock, or giving an effective presentation.
- Reflect on these successes and increase your awareness to how you conducted yourself to achieve your results. Be specific in your thoughts.

Successes for the day:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

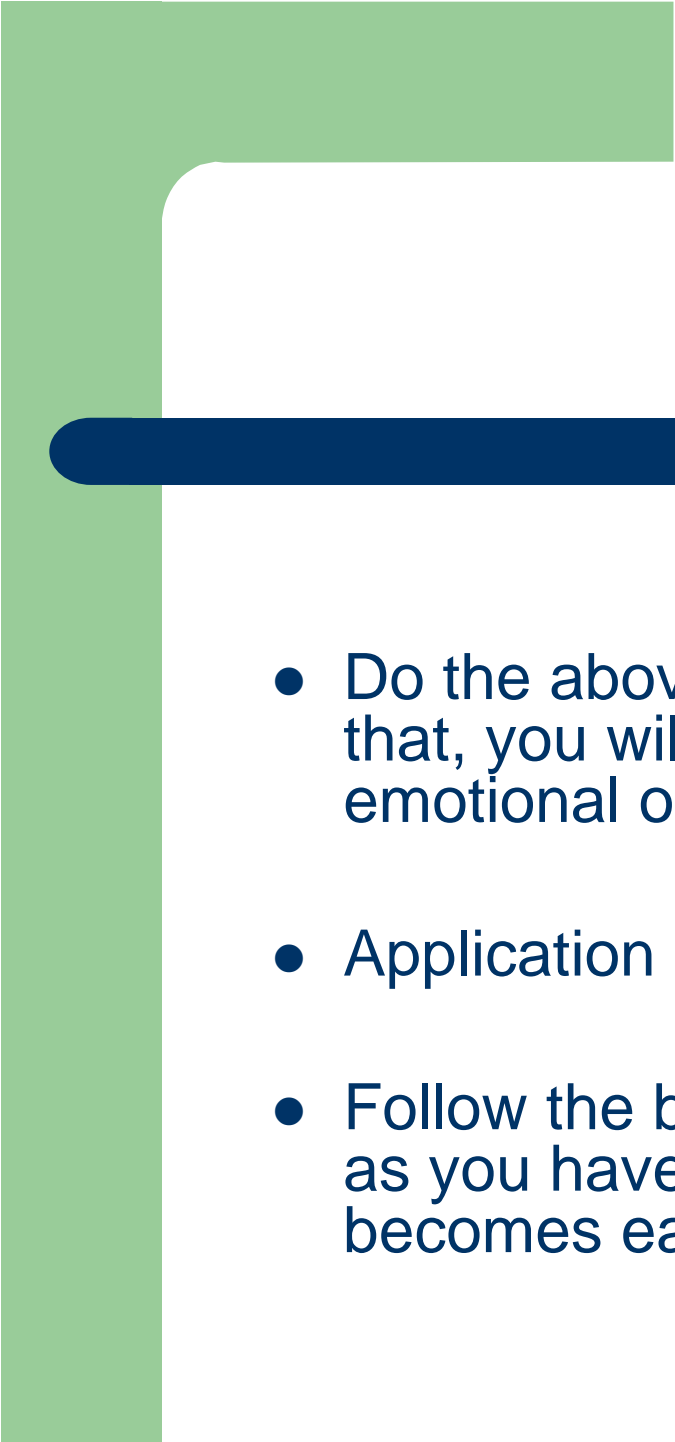

# Application

- When you get to work, build your day by following your blueprint, with emphasis on continually increasing the actions that make you successful and add enjoyment to your work.



## Troubleshooting: If your Blueprint isn't Working

- It might be too hard for you to follow. Simply write down one intention instead of 3; Time lock once a day instead of twice a day.
- It may also be that you are not effectively implementing the content of each step. Perhaps your intentions are too general; maybe you are not fully aware of your actions that are derailing. Skill development and increasing your awareness will help you construct and implement your blueprint so reread the pages on these subjects.

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- Do the above everyday for the next month. After that, you will have it blueprinted into your emotional operating system.
  - Application at work
  - Follow the blueprint: follow your blueprint exactly as you have planned it. Each day you follow it, it becomes easier to build your EI.