

Facilitator

Module 11

There are fewer rules than you think!

Business Etiquette



BPW/USA Individual Development Program
Facilitator's Guide
Module 11: Business Etiquette Overview, Activity

Module 11 Purpose:

1. Review elements of etiquette
2. Provide up-to-date information on new technology use
3. Provide guidelines for decorum in business settings
4. Provide information on dining and gratuities
5. Review protocol for business meetings

Module 11 Outcomes:

1. Participants will learn the importance of following etiquette procedures in business
2. Participants will learn current rules for use of electronic technology
3. Participants will learn the protocol for dining, tipping, and responding to invitations.
4. Participants will review protocol for what not to do in business settings.
5. Participants will practice a business situation where knowledge of etiquette rules is important.

Module 11 References:

1. Pat Cornish, Past BPW/USA President, PowerPoint
2. Do not be a Cell Phone Boor. Fitzgerald, Michael.
http://story.news.yahoo.com?tmpl=story&u=/ttzd/20040219/tc_techtures_zd
3. E-Mail and Instant Messaging. Fitzgerald, Michael
http://story.news.yahoo.com?tmpl=story&u=/ttzd/20040219/tc_techtures_zd
4. The Little Book of Etiquette. Long, Sheila M. Barnes & Noble Books. ISBN 0760720193

Module 11 Time

Class activity – Etiquette Faux Pas 10 minutes

Handout - Overview of Business Etiquette 50 minutes

Other Recommendations:

This module was designed around the power point presentation developed by BPW/USA Past National President, Pat Cornish. It is highly recommended that you use this power point for this module.

Place sample “thank you” notes, copies of e-mails received or sent with correct information and grammar, a sample menu (or actual menus), business cards, and items from the discussion on the tables for review.

Begin the module by having participants write on a 3x5-index card the one etiquette faux pas that bothers them most. Pass the cards to the person on their left and read aloud.

If you have the luxury of additional time, you may choose to offer Activity A, Module 11, “What Would You Do?”

Business Etiquette

Business Etiquette Why?

- ✓ Must be aware of more rules of behavior than you expect to encounter in most social situations.
- ✓ Need to be aware of the sort of behavior that is expected in the world of work so you can move with confidence and ease.

Knowing

- ✓ What to say
- ✓ How to react in various situations



Understanding the corporate culture

Success in getting, keeping, and advancing in a job depends 85 percent on people skills - and only 15 percent on technical knowledge and skills.

Business Boobos

What are some other Business Boobos you can name?

- ✓ Complimenting
- Greetings & Introductions

Self-Introduction

- ✓ Hugs and Kisses
- ✓ Rise to the occasion
- ✓ The proper handshake
- ✓ Opening the door

Visiting Do's and Don'ts

Workplace Etiquette

- ✓ Electronic -Email
- ✓ Telephone
 - Answering
 - Placing Calls
 - Closing a call
 - Telephone Tag
 - Voice Mail
 - Cell phones and beepers
 - Answering Machines

The Boardroom and Dining - The Ten Commandments

Tipping

Strategies for a Successful Meeting

- ✓ Speak Up
- ✓ Have an agenda

Business Cards

Correspondence



What Do You Do?

It is your first week on the job as a mid-level manager of XYZ International. Your boss (a D behavioral style) asks you to come to her office. When you arrive she says, "Mr. Yamamoto, head of Tokyo's division and Mr. Abdul Shareek-Osan from the Mid-east division will be here on Friday. Arrange a luncheon meeting and get audio-visual to set up the presentation area. By the way, they are both bringing their wives, so plan to keep them entertained while we do business. I know you can handle this, now I have a meeting to get [to]. Let me know by tomorrow what you plan."

You are on your own. You need to arrange:

- ✓ Meeting room
- ✓ Meal(s)
- ✓ Audio-visual presentation
- ✓ Something for the spouses to do...

Your considerations:

Your plans:

Class Discussion:

Meal planning – two cultures are involved. A luncheon salad, fruit plate or vegetarian-style dish would be the most appropriate in this setting of diverse cultures. Plan to escort the spouses to a light lunch in a local restaurant (where they can order from a menu), then on a tour of your city's museum, art center, or historic site. Allow the class to brainstorm ideas and come to a consensus.

PowerPoint Slides Script

(Slide 1) Module 11

This module is on Business Etiquette. We're going to have fun with it - and you might even pick up some new etiquette habits!

We've used information for this module that was gathered and presented by Past National President, Pat Cornish.

(Slide 2) Module 11 goals

- Review elements of etiquette
- Provide up-to-date information
- Provide guidelines for business decorum
- Provide information on dining & tipping

(Slide 3) Business etiquette why?

Career-conscious people entering the business world must be aware of more rules of behavior than they would encounter in most social situations.

You need to be aware of the sort of behavior that is expected in the world of work so you can move within that world with confidence and ease.

The rules of business etiquette are unique, as is the entire approach to etiquette in the business world.

And you must understand this special way of thinking about relationships and behavior and how it applies to your dealings with your superiors, your colleagues, and your subordinates.

(Slide 4) Knowing accepted ways of doing things

Knowing the accepted ways of doing things is vitally important and becomes even more important the higher you rise in the ranks.

Technology like cell phones, teleconferencing, and e-mail require people to learn new rules of civility.

Management today values manners in the workplace as never before. More and more firms are organizing in-house training in etiquette for their employees. Career-minded executives are finding a connection between civility and success.

(Slide 5) The corporate culture

If you think it would be nice but not necessary to know the rules of corporate etiquette, consider this remarkable statistic from three separate research projects by Harvard University, the Carnegie Foundation, and the Stanford Research Institute: Success in getting, keeping, and advancing in a job depends 85 percent on people skills and only 15 percent on technical knowledge and skills.

Needless to say, then, mastering the rules of business etiquette can help your career.

The first thing you should know is that these rules do not have the same foundation as those you may have learned as a child. Your childhood rules evolved from the code of chivalry which called for deference to others not on the basis of gender and/or age.

However, relationships in the business world have always been based primarily on rank, much like any military system. Rank, the degree of power vested in different individuals, gives a business organization the structure it needs to function effectively.

(Slide 6) Business booboos

Let's go over some Business Booboos....Expressing Negative attitudes: If you are feeling and thinking negatively, your mindset will find expression in surliness, bad temper, and general unpleasantness.

Wearing inappropriate clothing: Although we like to think that we judge others by their behavior and not their appearance, it remains true that we base our opinions of others, to a large degree, on what we see.

Failing to make introductions: allowing someone to stand without introducing him or her can make everyone present feel uncomfortable.

Disregarding social courtesies: Forgetting to say please, thank you, and excuse me and failing to perform other common civilities makes colleagues and supervisors doubt your judgment.

Taking messages carelessly – well that speaks for itself.

When someone criticizes another in public (politicians all get failing marks here), the criticizer comes off looking worse than the person being criticized.

Don't make people wait – it is frustrating and discourteous.

Using vulgar and inappropriate language is a definite no-no.

Giving someone the run-around gives the impression you like ducking responsibility and giving vague or conflicting answers.

(Slide 7) Complimenting

Complimenting people on their appearance is perfectly correct if the compliment is sincere.

At the office, however, you are best to compliment the work not the clothes. When giving or receiving a compliment, keep in mind the following points: (read from slide)

The most important thing to remember about business etiquette is that so much of it is based on rank. If you remember this, common sense and a cool head should get you through most situations.

(Slide 8) Greetings & introductions

- When making introductions the old adage of introducing the woman to the man is no longer valid.
- Introduce the more prominent to the less prominent.

When making an introduction, introduce the person who is being presented last. Also, keep in mind that social etiquette is based on chivalry. Business etiquette is based on hierarchy. Gender and age play no role, but rank and authority do.

(Slide 9) Greetings & introductions

(Read first bullet from slide)

- Include something of interest that would start a conversation if the situation permits.

Governor (insert your governor's last name), this is (_____), BPW/USA President.

_____, I don't know if you knew that Governor _____ has been a BPW member for 25 years.

(Read second and third bullet from slide)

- When you have been introduced try and use the persons name three times.
- Ask to have the name repeated if it was not clear.

(Slide 10) The name game?

Coming up blank...how many times has this happened to you? If you are the one being introduced and the introducer seems to have forgotten your name, help them out – extend your hand, smile and offer your name. People wince inwardly when you mispronounce their names. It is a serious breach of business etiquette. If you don't know the correct pronunciation of someone's name, ask. If you are still in doubt, ask apologetically for the person to repeat it.

Jokes or wisecracks about a person's name are not funny and are offensive. If you own name is difficult to pronounce, help the person who is trying to pronounce it. You can smile and say, "It's a tough one, isn't it?"

(Slide 11) Hugs & Kisses

This issue has different reactions from different parts of the USA. In general, hugs and kisses are inappropriate in any *business* environment. It is acceptable at a business/social function to kiss your spouse – if you happen to be getting along that day.

Touching others in the workplace, whether they are of the same gender or not, is impolite. No patting someone on the back (or other body parts – this isn't a sporting event). No putting your arm around someone. And no putting your hand on his or her back.

(Slide 12) Rise to the occasion

(Read from slide)

- If you don't rise to the occasion, you will sink in the estimation of others.
- Everyone should stand when being introduced.

If you are introducing yourself in a situation where everyone is seated around a table, stand, regardless of whether people before you stood or not.

(Slide 13) The proper handshake

(Read from slide)

- Involves eye contact
- Is firm but painless
- Lasts about three seconds
- Takes only two or three pumps
- Starts and stops crisply
- Doesn't continue through the entire introduction

You shake hands when someone offers his/her hand to you, when you first meet someone, when greeting guests, when greeting your host/hostess, when renewing an acquaintance, and when saying "Good-bye."

(Slide 14) What about doors?

For such simple things, doors can cause a lot of confusion. Let's simplify matters. (Read from slide)

- If you reach the door first, open it, go through it and hold it.
- Men no longer hold doors for women just because they are women.
- Allow senior executive to reach door and go through it first.
- If someone's arms are laden, hold the door regardless.

These rules are set aside when you are hosting others, in which case you open the door for your guests and motion for them to precede you.

For a revolving door, you go first and wait for the others to come through after you.

In any case, always thank a person who holds a door for you.

(Slide 15) Visiting

Your role, when visiting someone else's office is that of a guest whether it is within your company or without. Don't walk in and settle down as if you were entering your own office.

Here are some guidelines:

(Read slide)

- Don't be late
- Present business card
- Ask where to hang coat, if you have one
- In the office, wait to be told where to sit
- Don't lay papers on desk or floor
- Put briefcase/handbag on floor next to you
- Don't fiddle with or touch anything on desk
- Leave promptly when business complete
- Send thank you note within 24 hours

(Slide 16) Workplace etiquette

In the next section we are going to cover workplace etiquette – electronic, telephone voice-mail, cell phones, and answering machines.

(Slide 17) Electronic etiquette

Miss Manners first wrote about e-mail etiquette in 1992, not that long ago, but long enough for this “new” technology to have developed some poor etiquette habits!

(Read slide)

- E-mail is easy and fun to use
- Casual in our approach
- Doesn't go away when you hit delete
- Can be retrieved and traced

Always use a subject line; be brief and to the point; use proper grammar & punctuation; and put your name at the end. Do not type in all caps (it is considered “screaming” at the recipient); Emoticons (smiley faces, etc.) are not appropriate for business e-mail, and should be used sparingly on personal e-mail.

E-mail is acceptable for informal invitations; informal thank you and RSVP.

Most experts recommend avoiding e-mailing about emotional topics. Don't tell family and friends about a death or serious illness via e-mail. Don't fire someone, or resign from a job via e-mail. Never declare your love for someone for the first time in an e-mail. Such subjects should be handled in person unless it is simply not possible. In that case, use the telephone.

Remember, your company owns your computer and is free to examine any functions you perform and any material you download. If you wouldn't want it posted on the office bulletin board, don't put it into an e-mail.

(Slide 18) Business telephone etiquette

Everybody knows how to use the telephone, but very few people know how to use it to their best advantage.

(Read Slide)

- Vocal quality counts for 70%
- Words spoken count for 30%
- What you say and how you say it are important
- Be sure listener gets message loud and clear
- Don't chew, eat or drink while on the phone

Speak unto others as you would have them speak unto you. It's up to you, the speaker, to make sure the listener gets the message.

When using the telephone, use your mouth for speaking only.

Answer the telephone no later than the second ring if you can. “Hello” is better than “Hi.”

Identify yourself with both your name and company or department. Don't let a phone call pre-empt an in-person visit.

For example, if it's 2 pm – the person with the 2 pm appointment has priority over the person you are speaking with on the telephone.

Place your own call. If the person you are calling has to wait for you to come on the line, he or she is apt to think you consider your time more important than theirs.

If you call a business just before closing time, you will be rushed and given half-hearted attention at best.

If you get another call, the first caller has priority. Tell the second caller you will get back to him or her and resume your first conversation. Of course, if you have the luxury of having a receptionist or secretary, they can manage that detail for you.

Make sure you have a good reason to make a call, and deal with your business in a prompt, organized way. Don't be trivial or long-winded. Chatty calls with no real purpose send a message to the receiving party that you have time to make unnecessary calls.

(Slide 19) Closing the call

People remember the way telephone conversations end.

If you have a chatty caller who is droning on too long, say something like “I’ll have to hang up now. My 2:00 appointment is here,” or “Much as I’d like to chat, I’m on a deadline at the moment. Is there anything else I can help you with?”

After the call, do your homework. Everybody appreciates a follow-up and follow-through. Keep any agreements you make. If you have promised to provide information or data, get that material to the other person promptly.

(Read slide)

- Thank the person for the call
- End on a positive note
- Don’t say “See ya”, “Bye-Bye” or “Later”, say “Goodbye”

(Slide 20) Telephone tag

Telephone Tag is annoying, frustrating, irritating and inescapable.

Part of a secretary’s job (or office manager/AA) is to give the boss a chance to get some work done.

Establish a cordial relationship with that person over the telephone...this can be very helpful in getting information, such as when Mr. Jones is apt to be free, when the best time to call him is, and what time he returns from lunch.

When you get the “best time”, make it clear that you will be calling then.

If you are asking that Mr. Jones return your call, tell the secretary the best time to reach you. Be as specific as you can. If you are not available for the return call, you will have to begin the whole process again.

(Slide 21) Voice mail etiquette

Leaving voice mail is another business fact of life that is here to stay. It’s a good & useful tool for conveying information within your company. However, clients or others calling in from outside may find it annoying.

The message for voice mail should give the caller some choices – leave a message, call another extension or switch to the receptionist. However, few things are more annoying than messages with too many, mostly irrelevant options.

The message you leave should embody the journalist’s five W’s.

(Read Slide)

- Who
- What
- When
- Where
- Why

(Slide 22) Cell phones & beepers

A mere decade ago, a ringing cell-phone was an exotic annoyance. Now we barely notice people chatting away into space as they walk down the street. High-tech has rules of etiquette, too.

Technology creates new ways for people to communicate, but also new opportunities for embarrassment. Ask yourself if your electronic behavior respects the person with whom you are communicating.

Do not treat your devices as if they’re more important than people. Turn your cell phone off when you enter a meeting; go to lunch or dinner, at movies, museums, job interviews, worship services, funerals, and when you are driving.

Talk quietly on your cell phone in public.

If you must take a call during one of the afore-mentioned, place the phone on vibrate so it will not interrupt others in attendance. Excuse yourself from the table or room.

The same principle applies to beepers. Be prepared to be out of touch in certain situations or get a beeper that can be switched to vibrate.

(Slide 23) Answering machine greeting & messages

Answering Machine – Recording your greeting.

Write out your specific words & make several practice tries.

Smile when you speak so that you sound enthusiastic & approachable.

Forget about sound effects or other gimmicks; cute is unprofessional.

Briefer is Better: “This is _____ speaking. At the sound of the tone please leave your name, telephone number, and the best time to reach you. I’ll return your call as soon as possible.”

When leaving a message on a voice mail or answering machine, be sure to leave your full name, why you are calling, mention the best time for you to be reached, and leave your complete telephone number. Giving your telephone number is important because the person receiving the call may be retrieving it from another location and won’t know how to reach you.

(Slide 24) The boardroom & the dining room

Don’t be misled about meetings. The fact remains that important things do happen at meetings, and perhaps the most important of these is that people learn about – and form judgments about – each other.

Many of us go into meetings without being fully prepared and make the wrong impression by what we don’t say and by gestures we make unknowingly. Think of meetings as opportunities to impress your colleagues and superiors and to meet others.

(Slide 25) Strategies for successful meetings

Make sure you read all the materials provided in advance, including the agenda, before going into the meeting

Nobody takes a latecomer seriously. It doesn’t convey the message you are busy, only that you are disorganized.

Make sure you take along the agenda, papers, pens, and notebook. Have them at hand so you don’t have to fish around while others wait.

Leave the paper clips alone. Don’t stretch the rubber bands or doodle on your notepad.

If you do expect an urgent call, let the chairperson know when you enter the meeting and sit near the door so you can leave & return with the least disruption.

If you must cross your legs, do so at the ankles. Otherwise, you look inattentive and altogether too casual.

Crossing your arms in front of you communicates hostility. Sit straight and don’t slouch. You will look alert and attentive.

No matter how much your mind wants to roam, remember that meetings are a place for team players and enthusiasm.

Unless you are certain about how the seating arrangements work, ask where you should sit. Shake hands with your colleagues, introducing yourself to those you don’t know and calling those you do know by name.

Do these preliminaries while you are still standing. If you are seated and a new introduction is made, stand up.

(Slide 26) Speak up

Think before you speak and keep what you say as brief and to the point as possible. Avoid confrontational language and public criticism. Establishing battle lines helps no one. Say, “I disagree because it seems to me that...” instead of “You’re wrong. If you took time to read the report, you would know that...”

Don’t interrupt someone who is speaking. No matter how much you disagree, wait for the speaker to make his or her point before interjecting your opinion.

Remember it is better to make recommendations & suggestions than to give orders or take inflexible positions.

(Slide 27) The agenda

The agenda should include all items to be discussed along with the amount of time to be devoted to each. It should be written so that the most important items are handled first, in case the meeting runs short. Make sure that everyone has a copy of the agenda well in advance of the meeting.

(Slide 28) Business meals ten commandments

(Read slide)

1. Thou shalt not jump straight into business talk. Wait until the main course is removed before discussing business.
2. Thou shalt not be late. If you are the host, arrive early.
3. Thou shalt not table-hop.
4. Thou shalt not talk politics, diet, or family.
5. Thou shalt not dominate conversation.

The host should suggest menu items if others are unfamiliar with the restaurant's fare. Order something easy to eat – lobster or BBQ ribs, for instance, can be very messy. No doggie bags if you are the guest.

(Slide 29) more Ten Commandments

- 6. Thou shalt not dawdle over ordering or eating
- 7. Thou shalt not drink too much alcohol
- 8. Thou shalt not fight over who pays the bill
- 9. Thou shalt not neglect thy table manners
- 10. Thou shalt not forget to show appreciation

The person who makes the invitation pays. To reduce confusion by the wait staff, leave credit card with the Headwaiter, or indicate, "Please take my guests orders first."

(Slide 30) Tipping

Wait staff & bartenders – 15-20% before tax

Head waiters only if extra service provided

Washroom if helped - .50

Bell Staff & Sky caps \$2 per bag

Chambermaid - \$5-10 for 1 first class hotel; \$3-5 for a moderate hotel; based on service; family maybe more; one night not necessary

Room Service – 15% before service charge

Calling a cab - \$1-3

Taxi - .50 minimum should be 15% of fare

Plan ahead – get small bills to use. Have money in pocket or placed for easy access.

(Slide 31) Business cards

Business cards provide information about you – your name, your company, your title, and how you can be reached.

(Read bullets two and three from slide here)

Present you business card type side up

Be selective, don't give to everyone. If your cards are soiled, damaged, or out of date, get new cards.

Carry to social functions. You never want to miss a networking opportunity.

(Slide 32) Correspondence

Be sure to proof read, even if you've run spell check!

Sign it –

Be sure to verify spelling of names – get a name if you only have a company

To Whom It May Concern - not dear Sir/Madame

If you are unsure to gender or title, use first and last name

Use first name only if you would do so in person

Sentences should be 12 – 15 words long

Letters should be one page
Signature should not contain titles.

(Slide 33) Thank you

Thank you for sharing your time with me today. It has been a pleasure to enlighten you about the business of etiquette.