Business Etiquette

Participant Guide

Columbus Technical College
Economic Development
Corporate Training Materials

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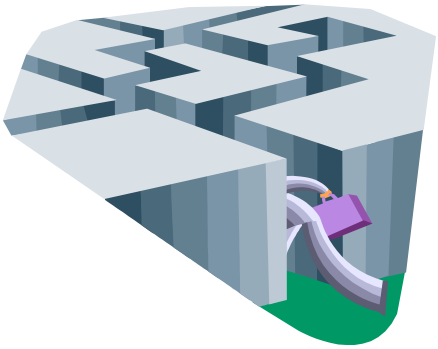
Manners are more important than laws. Manners are what vex or soothe, corrupt or purify, exalt or debase, barbarize or refine us

Edmund Burke

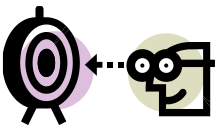
Module One: Getting Started



Welcome to the Business Etiquette workshop. Success in any industry relies on relationships, whether with co-workers, clients, suppliers, or investors. When you're well-mannered and considerate in dealing with others, you create engaging, productive, and long term business relationships. As such, it is important to learn, not just the technical side of a business, but how to conduct one's self in the company of others.

This is where business etiquette comes in. This workshop will introduce participants to business etiquette, as well as provide guidelines for the practice of business etiquette across different situations.

Workshop Objectives



Research has consistently demonstrated that when clear goals are associated with learning that the learning occurs more easily and rapidly. With that in mind, let's review our goals for today.

By the end of this workshop, participants will be able to:

- Define etiquette and provide an example of how etiquette can be of value to a company or organization.
- Understand the guidelines on how to make effective introductions.
- Identify the 3 C's of a good impression.
- Identify at least one way to minimize nervousness while in social situations.
- Understand how to use a business card effectively.
- Identify and practice at least one way to remember names.
- Identify the 3 steps in giving a handshake.

- Enumerate the four levels of conversation and provide an example for each.
- Understand place settings, napkin etiquette, and basic table manners.
- Understand the protocol in ordering in a restaurant, handling alcohol in a business meal, paying the bill, and tipping.
- Understand basic guidelines when it comes to the proper form of address, grammar standards, and use of acronyms in e-mails.
- Understand basic guidelines in the use of the telephone, voicemail, and cell phone.
- State the difference between a formal and an informal letter.
- Create an effective 'Thank You' note.
- Understand the meaning of colors in dressing for success.
- Differentiate among the dressy casual, semi-formal, formal and black tie dress code.
- Understand basic guidelines in international etiquette.

Pre-Assignment Review

The purpose of the Pre-Assignment is to think about etiquette principles you are already practicing, and situations where you could use greater awareness/ practice of business etiquette.

As a pre-assignment, think of 3 business activities you conducted in the past 7 days. Focus on activities where there's interaction with other people. It doesn't have to be a big activity; it may be routine work like meeting with a client or replying to queries online.

After coming up with 3 activities, write how you had practiced good manners or professional courtesy for each activity; as much as possible, express the response in behavioral terms.

Lastly, what else could you have done in that situation to express good manners and professional courtesy?

The following table could be of help for this activity:

3 Business Activities I Did in the Last Week	How I showed good manners/ professional courtesy in this situation	What else I could have done to have expressed good manners/ professional courtesy.

Take a moment now to look at your responses and reflect on what it says about your current practice of business etiquette. Keep your responses in mind during the day as they provide the context for the etiquette guidelines that will be discussed later on.

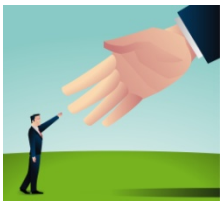
Good manners can open doors that the best education cannot.

Clarence Thomas

Module Two: Understanding Etiquette

Before we look at etiquette rules across multiple business-related scenarios, it's best to level off everyone on what etiquette means. We would also look at the many ways business etiquette can improve a company or an organization's bottom line.

Etiquette Defined



Josy Roberts, author of *'Business Etiquette Your Questions and Answers'*, defines etiquette as 'conventional rules of polite behavior.' They are guidelines on how to behave befitting good manners while in the company of other people. They show sensitivity to the needs and feelings of the person or people that you are with.

Etiquette covers most aspects of social interactions, including self-presentation, communication, courtesy, and hospitality. Business etiquette, in particular, covers expectations in the interactions between co-workers, the company and their clients, as well as the company and their stakeholders.

Etiquette guidelines are many and can be quite complicated. In this workshop we will focus on basic etiquette guidelines for situations typically found in most business settings.

The Importance of Business Etiquette

Etiquette can help businesses improve the following areas:

- **Branding**: Everything we do will reflect on our company and our products. By acting professionally, we send the message that our business is credible and trustworthy. Personalized care may very well be your edge against the competition.
- **Customer Care**: The best way to show customers that their patronage is valued is to treat them with respect and consideration. This in turn can inspire customer loyalty and positive feedback.
- **Employee Engagement:** Good manners will help improve morale and confidence between employees and team members.
- **Team Synergy**: Good manners will help establish smooth working relationships within a team, which contributes to greater productivity.

Case Study

Jordan couldn't understand why his meetings weren't going well. He dressed nicely, and always prepared his notes beforehand. He got through his information, answered questions people had, and finished quickly. He decided to ask his friend George in the PR department to attend one of his meetings to give him feedback.

After the meeting, George understood where Jordan was going wrong. "You come off as cold", he told Jordan. "You don't shake hands with anyone and you seem very robotic when you talk, as if you're just going through the motions. Next time, try being more warm and open, and treat your clients like potential friends." Following George's advice, Jordan's meetings went much smoother in the future.

Module Two: Review Questions

1) Recognize the definition of business etiquette:

   a) Business etiquette is group of informal rules of general behavior.
   b) Business etiquette is a group of conventional rules of polite behavior.
   c) Business etiquette is a group of informal rules of polite behavior.
   d) Business etiquette is a group of non-conventional rules of behavior.

2) Which of the following IS NOT something that business etiquette covers?

   a) Courtesy
   b) Hospitality
   c) Self – presentation
   d) Self – confidence

3) Which of the following IS NOT an area covered by the business etiquette?

   a) Employee engagement
   b) Team synergy
   c) Reconciling the feuded team members
   d) Customer care

4) Which of the following is one of the areas covered by the business etiquette?

   a) Product placement
   b) Product design
   c) Branding
   d) Advertising

You've only got one chance to make a good first impression!

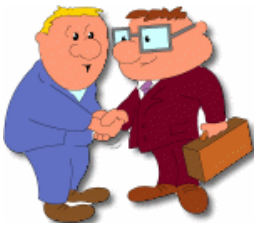
Anonymous

Module Three: Networking for Success

When you're networking, it is important to make the most of the first meeting. In this module, we'll discuss how to create an effective introduction, make a good impression, minimize nervousness, use business cards effectively, and remember names.

Creating an Effective Introduction

Three steps to introducing yourself effectively:



1. Project warmth and confidence.

   Many people size you up even before you say a word, which is why it's important to mind your body language. When you introduce yourself, stand up straight, relax, and establish eye contact.

2. State your first name and your last name. Depending on the situation, you may also state your affiliation or your position in the company.

   Example: *"Hello. I'm Jill Smith. I'm the Quality Control Officer."*

3. When the other person has given their name, repeat it in acknowledgment.

   "It's nice to meet you, Mr. Andrews." or *"It's nice to meet you, Joseph."* Repeating their name is an acknowledgment that you heard their introduction.

When you are networking is not just about presenting yourself. You may also find yourself introducing two strangers to one another. Here are some guidelines to introducing others:

- **Take note of the pecking order**. In business, introductions are made based on a person's seniority in a company. This is regardless of age and gender. When you make an introduction, present a person with the lesser status to the person with the higher status.

  Example: *"Caroline Daniels, I would like you to meet President Andrews. Caroline is the head of the Public Relations Department."*

- **Introduce strangers first**: If you are introducing two persons of equal rank to one another, start with the person that you don't know. This way you can use the introduction to make the newcomer feel welcome.

- **Mind titles**: Unless invited otherwise, stick to using formal address such as "Mr. Gallagher" or "Attorney Louis Harris".

Making a Great First Impression

If you want to make a good impression, know that you need to project 3 C's:

- **Confidence**
  - Having a straight but relaxed posture. Hold your head high and steady. Don't slouch or slump.
  - Moving in a natural, unaffected manner.
  - Maintaining eye contact with the people you are talking to.

- **Competence**
  - Exhibiting knowledge of your craft. Know your way around the agenda. Being prepared for the meeting. Bring supportive materials to emphasize your points.
  - Answer questions in a clear and professional manner, avoiding the use of slang or technical jargon.
  - Asking relevant questions.

- **Credibility**
  - Arriving on time.
  - Being presentable (well-groomed and mindful of dress codes.
  - Keeping true to your word.

Minimizing Nervousness

Meeting people can be anxiety-provoking. The need to impress another person can be a lot of pressure.

Here are some ways to minimize nervousness while in a social situation:

- **Be informed:** If possible, take time to research about the people you're going to meet: their work, values, and preferences. Knowing what is expected from you can prepare you adequately. Nervousness is amplified by going into a situation blind.

- **Practice! Practice! Practice:** Networking is a skill, which means that you can develop it with practice. Practice your introduction in front of a mirror and note what you need to improve. You can also practice with peers. Get feedback from others about the kind of impression you give. Try to meet as many people as you can! The more you do it, the easier it gets!

- **Learn relaxation techniques:** There are many activities that can help relax a nervous person. These activities include:
  - Meditation
  - Self-talk
  - Visualization
  - Breathing exercises
  - Listening to music.

- **Identify your triggers:** If nervousness is a real problem for you, it is recommended that you identify what triggers your nervousness. Is it lack of confidence? Is it fear of authoritative people? Awareness can help you catch yourself in time and respond accordingly.

- **Believe in what you have to offer:** It's easy to get intimidated by how successful or famous the other person is. But remember, they're people--- just like you! They would be willing to listen to someone who can offer them something that they want or need. Have faith in your business. Have faith in your personal worth. Adopt the mindset that you are doing them a service, and it's your duty to not let them miss the opportunity of meeting you!

Using Business Cards Effectively

Networking is not complete without receiving or giving a business card. The business card is a way for you to follow up on the people you have met. Likewise, it is a way for them to contact you for further meetings.

More than that, your business card is a way to brand yourself. Professional-looking business cards send the message that you're professional. Adding your company

motto or tagline in your business advertises you and what you're all about.

5 Tips on Using Business Cards Effectively:

1. Never be without your business cards! (Make sure there's always a stack in your office desk, and in your wallet. You'll never know; even a trip to the grocery story can present an opportunity to network.

2. Follow the protocol on hierarchy. Cards should not be given to senior executives that you meet, unless they've asked for one.

3. Time the presentation of your card.

   Don't just hand over your business card at any random moment. Handing a business card in the middle of a discussion can be an interruption, as parties would need to take a moment to give it a look. You also want to make sure that your card is perused at point when the other person can give it his or her full attention.

   The best moments to hand a card is when you're asked for one, when you're asked to repeat your name, or when someone offers to send you something.

   If the two organizations that you represent are well-known to each other, although you haven't met your host before, offering your card is probably best left to the end of the meeting. If your host is unfamiliar with your company, offering your card at the beginning of the meeting is good practice.

4. Accompany your business card with an explanation of what you can offer them.

   When you hand another person your card, give a brief "action recommendation." This can increase the likelihood of them contacting you again. For instance you may say: "I think I can help with your PR concerns, Mr. Johnston. Here is my card."

   You may also ask for referrals. Invite the other person to send your contact details to anyone they know who can use your services or products.

5. When receiving a business card, show the other person that you value their card.

   Look at the business card for a few seconds. Comment about the card. Let them see that you take care in storing their card as well, instead of just jamming it in your pocket.

Remembering Names

Remembering names may be difficult for some people, but it's not impossible. It's a skill: something that you can improve with constant application.

Here are some ways to remember names:

- **Repeat:** When someone is introduced to you, repeat their name. "It's a pleasure to meet you, Mark." This can help reinforce your memory of the name. You may also introduce them to someone else so that you can create an opportunity to use their name.

- **Use mental imagery:** We think in pictures, therefore associating an image with a name can help in assisting recall.

  For example, after meeting Bill the plumber, imagine the word Bill spelled with pipes. If Jason Smith is marathon runner, imagine Jason running on a treadmill in a gym called Jason's. Or just imagine a person's name written on their forehead. Pick an imagery that works for you. The more striking or exaggerated your mental picture, the bigger are the chances of recall.

- **Put it on paper:** Write the name down as soon as you can. Or write their details on the business card they give you so that you would remember them the next time you see them around. (Just make sure you don't let the person see you writing on their business card.)

- **Use their name in creative sentences:** Mentally construct sentences that are fun and a bit frivolous, to make name recall less stressful. Alliterations, or repeating consonant sounds in succession, are a great way to remember names. For example, to remember Jane who sells kitchen ware, you can repeat in your head: *Jane makes jam and juice in January.*

- **Be genuinely interested:** Remembering names begin with attitude. If you are sincerely interested in a person, then they would make an impact on you. If you adapt the attitude that everyone is interesting, and are a potential ally in business, then remembering names would come as second nature.

Case Study

Bill, a public relations specialist, was at a networking conference representing his company. While at the conference, he ended up meeting someone who represented a soft skill training company. Bill learned his name was Billy, and made a joke about the coincidence. Bill told Billy that his company had been looking for a group to hold training sessions, and it was fortunate that they had met. They exchanged cards, and went their separate ways.

After Bill got back from the conference, he told his manager about his new connection and they ended up hiring someone from Billy's training company to hold a training session focused on successful networking tactics.

Module Three: Review Questions

1) Which of the following IS NOT recommended as a part of an effective introduction?

   a) Projecting warmth and confidence
   b) Stating your position in the company
   c) Repeating the other person's name after the introduction
   d) Doing something memorable, e.g. making a certain gesture

2) In business, introductions are usually made based on:

   a) A person's seniority
   b) A person's seniority in a company
   c) Alphabetical order
   d) It is usually random

3) For making a great first impression, you should avoid:

   a) Asking questions
   b) Making eye contact
   c) Using technical jargon
   d) Having a relaxed posture

4) The three C's for making a good impression stand for:

   a) Confidence, Contrasting, Care
   b) Confidence, Competence, Credibility
   c) Confidence, Contrasting, Credibility
   d) Confidence, Competence, Care

5) Which of the following IS NOT a method of minimizing the nervousness?

   a) Visualizing
   b) Self-talk
   c) Being informed
   d) Being domineering

6) When it comes to the nervousness triggers, we should:

   a) Ignore them
   b) Suppress them
   c) Identify them
   d) None of the above

7) When should you have your business cards with you?

   a) When you are at work
   b) When you are at work and when you are somewhere business related
   c) All the time
   d) When you remember to bring them – there's no rule

8) Which of the following statements is true?

   a) You should give your card to the senior executives as often as you can, so you could get opportunities for a promotion
   b) You shouldn't give your card to the senior executives, unless they ask for one
   c) Giving a card to the senior executives is the same as giving it to anyone else
   d) There are no rules or limitations when it comes to giving the cards to the senior executives

9) Which of the following IS NOT among the common ways of remembering a name?

   a) Using mental imagery
   b) Being genuinely interested
   c) Using name in a creative sentence
   d) All of the above are good ways of remembering a name

10) Which of the following statements IS NOT true?

   a) Remembering names is a skill
   b) Remembering names can be improved
   c) If you have troubles remembering a name, it's practically impossible to change it
   d) None of the above

Ideal conversation must be an exchange of thought, and not, as many of those who worry about their shortcomings believe, an eloquent exhibition of wit or oratory.

Emily Post

Module Four: The Meet and Greet

An introduction is almost always accompanied by a handshake and conversation. In this module, we would discuss the three steps that make an effective handshake and the four levels of conversation.

The Three-Step Process

A handshake is a part of many social interactions. It's a way to introduce one's self, offer congratulations and even a way to conclude a business deal. A handshake is a gesture of goodwill.

The Three-Step Process to Handshake:

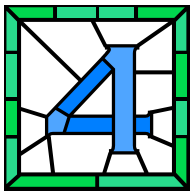
- **Facial Expression:** Start non-verbal's that show openness and sincerity. Maintain eye contact. Smile.

- **Shake Hands:** Your handshake gives an impression. If your grip is too lax, you send the message that you're hesitant and possibly indecisive. If your grip is too tight, you might come across as too brash, even intimidating. Go for a grip that's in between. It sends the message that you're confident.

  For most occasions, two or three pumps of the hand are appropriate. Longer handshakes can make some people feel uncomfortable. But there are people who do prefer longer handshakes. If uncertain, go with the flow, and follow the lead of the other person. If you feel that it's time to let go, just relax your hand to signal the other person.

- **Greet the Person:** Talk to the person whose hand you are shaking. A simple 'hello' or 'how do you do" is appropriate.

The Four Levels of Conversation



The real art of conversation is not only to say the right thing at the right time, but to leave unsaid the wrong thing at a tempting moment. It requires sensitivity at this stage of a relationship, the context of the conversation and the comfort level of the person you are talking to depend on it.

There are four levels of conversation based on the degree and amount of personal disclosure. They are:

1. **Small Talk:** This is commonly referred to as the 'exchange of pleasantries' stage. In this level, you talk only about generic topics, subjects that almost everyone is comfortable discussing. These subjects include the weather, the location you're both in and current events.

   The small talk stage establishes rapport; it makes a person feel at ease with you. It's also a safe and neutral avenue for people to subtly 'size up' one another, and explore if it's a conversation or relationship that they'd want to invest in.

   If the small talk goes well, you can proceed into the next level: fact disclosure.

2. **Fact Disclosure:** In this stage, you tell the other person some facts about you such as your job, your area of residence, and your interests.

   This is a 'getting-to-know' stage, and it aims to see if you have something in common with the other person. It's also a signal that you are opening up a little bit to the other person while still staying on neutral topics.

   If the fact disclosure stage goes well, you can proceed to sharing viewpoints and opinions.

3. **Viewpoints and Opinions:** In this stage of the conversation, you can offer what you think about various topics like politics, the new business model ---or even the latest blockbuster. It helps then to read and be curious about many things, from politics to entertainment to current events.

   Sharing viewpoints and opinions require the 'buffering effect' of the first two stages for two reasons:

   First, a person needs rapport with another before they can discuss potentially contentious statements, even if they're having a healthy debate.

   Second, sharing viewpoints and opinions opens a person to the scrutiny of another, and this requires that there is some level of safety and trust in a relationship.

The controversial, and therefore potentially offensive, nature of an opinion exists in a range; make sure that you remain within the 'safe' zone in the early stages of your relationship.

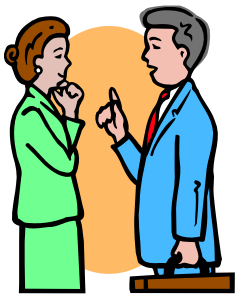
4. **Personal Feelings:** The fourth stage is disclosure and acknowledgment of personal feelings. For instance you can share about your excitement for the new project, or your worry about your son's upcoming piano recital. Depending on the context and the level of the friendship, you can disclose more personal subjects. This stage requires trust, rapport, and even a genuine friendship, because of the intimate nature of the subject.

Different people have different comfort levels when it comes to disclosing feelings, and there are cases when you'd need several conversations before they would trust enough to open themselves. In some cases, you never get to this stage. Just make sure to be sensitive and test the other person's readiness before opening an intimate topic.

Listening is vital in all stages of the conversation but especially so in this fourth stage. Listen with empathy and understanding to acknowledge that you heard the feeling that they have shared.

Case Study (I)

The case study provides an opportunity to experience the flow of an average conversation.



Patrick: Hi. I've seen you looking at the golf display. You must be a golfer.

Mindy: (laughs) Oh, no! I was just admiring the display. Hi, I'm Mindy.

Patrick: I'm Patrick. Pleased to meet you… This is a great assembly we're having.

Mindy: Yes, it is. And the Continental seems like a good place for it too. Is this your first time in the assembly?

Patrick: Yes, it is. I wanted to go last year but our company felt the venue is too far for me. I work with DataCorp, based in San Diego.

Mindy: DataCorp? Yeah, I saw your company name by the registration table. I think we're going to the same conference. I am with ManualWorks, in Maine. This is our third time; we went last year and the year before as well.

Patrick: Oh, so you're the veteran to these things! I'm new, but I like it so far. The registration was well-organized and the program they sent looks comprehensive. It's good the committee is taking the conference seriously.

Mindy: Yes, it's well-organized. I think they're getting better as they go along. And the program looks more interesting. Last year wasn't as good, to be honest.

Patrick: Oh? How so?

Mindy: The topics are a bit outdated. In fact when I heard that we're going again, I was a bit annoyed. I didn't want to waste another week with a bad conference. But I am delighted I did, it promises to be different this time.

Go back to the conversation and identify which ones are:

a) small talk
b) fact disclosure
c) viewpoints and opinions
d) personal feelings

Case Study (II)

Patrick as at an assembly and saw a woman admiring the golf display. He golfed in his spare time, and decided to approach her. He made eye contact and said, "Hi, you've been here awhile. Are you a golfer too?" The woman laughed, saying, "No, I'm just admiring the display. Hi, I'm Mindy." Patrick extended his hand and replied with his own name.

Patrick commented on how well the assembly was organized, and Mindy agreed. She mentioned she had been here the past two years, and it had really improved. "To be honest, last year wasn't so great. The topics were very outdated." Patrick and Mindy continued their conversation for several minutes, and ended up exchanging information.

Module Four: Review Questions

1) Which of the following IS NOT a part of the three-step process of handshaking?

   a) Facial expression
   b) Greeting the person
   c) Friendly tapping the shoulder
   d) All of the above are a part of the process

2) A good handshake should be:

   a) Lax
   b) Tight
   c) In between
   d) It doesn't matter

3) The 'small talk' stage implies:

   a) Telling some facts about you, such as your job or interests
   b) Exchange of pleasantries
   c) Exchange of the opinions
   d) Sharing viewpoints

4) Which stage is the hardest to get to?

   a) Small talk
   b) Fact disclosure
   c) Viewpoints and opinions
   d) Personal feelings

5) In case study presented in the previous module, Patrick and Mindy start their conversation with:

   a) Small talks
   b) Fact disclosure
   c) Mix of those two stage
   d) Undefined stage

6) Decide the stage of the following Mindy's line: "In fact when I heard that we're going again, I was a bit annoyed."

   a) Fact disclosure
   b) Viewpoints and opinions
   c) Personal feelings
   d) Small talk

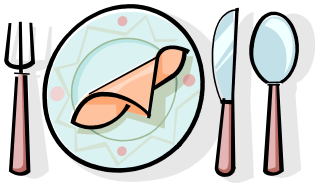
Whoever one is, and wherever one is, one is always in the wrong if one is rude.

Maurice Baring

Module Five: The Dining in Style

Conducting business over meals is a great way to build business relationships. Meals make for a more casual atmosphere compared to offices, and are therefore more conducive for a relaxed discussion. In this module, we would discuss some of the etiquette rules when dining with business associates such as understanding place setting, etiquette rules while eating, and ways to avoid sticky situations.

Understanding Your Place Setting



Place setting is the arrangement of the drinking vessels (glasses, mugs), food receptacles (plates, bowls, and saucers), and utensils (spoons, forks, knives) that will be used during a meal.

Place settings differ depending on the menu and the formality of the dining event. The more informal you intend your meal to be, the less rigidly you have to adhere to the rules of place setting.

Here are a few basics to remember:

- Solids on the left, liquids on the right.

  Plates are always placed on the left, while glasses are on the upper right. This guide can help you find which place settings are yours.

- Forks are on the left, knives, and spoons on the right side of the plate.

  In general, forks are placed to the left of the plate with the exception of the oyster fork which is placed on the right.

- Work your way inwards with the utensils.

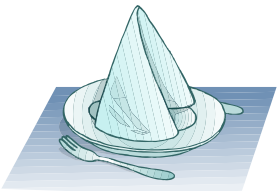
The rule for utensils is to work inward toward your plate as the meal progresses. Place settings are organized so that, with each new course presented, the guest can use the outermost utensil(s). For instance, the salad fork would be leftmost, before the dinner fork, as the salad comes before the main course.

- Follow the 'rule of three's.'

  If you're hosting the dinner, don't clutter the table with too many implements. Set at most three of anything (e.g. three glasses, three forks etc.). If more than three would be used, then the additional implement would come as the new meal is presented.

Using Your Napkin

Here are some etiquette guidelines to using your napkin:



- When everyone is seated, gently unfold your napkin and place it on your lap. If the napkin is large, fold the napkin in half first.
- Your napkin remains on your lap throughout the entire meal. If you need to use your napkin to clean something on your lips, just dab it lightly.
- If you leave the table during a dinner, place your napkin on your chair to signal to the server that you will be returning.
- When you are finished dining, place your napkin neatly on the table to the left side of the plate.
- If you drop your napkin on the floor, discreetly ask the waiter or host for another one.

Eating Your Meal

Basic etiquette guidelines when eating:

- Don't talk business during the meal proper, unless the senior members want to do so. Otherwise, business matters should be addressed either before the meal or after it.
- Take a cue from the host, or the most senior in the table, where to sit yourself.
- Take your cue from the host, or the most senior in the table, when to begin eating.
- Keep elbows off the table while eating. Elbows on the table are acceptable in between meals.

- Don’t talk with your mouth full. Chew quietly. Don’t slurp your liquids.
- Don’t apply make-up or comb your hair while dining.
- Don’t pick your teeth at the table.
- If you need something that is not within your reach, politely ask the person next to you to pass it to you. Food is typically passed from left to right.
- Try to pace yourself so that you can finish at the same time as everyone else. When you have finished eating, you can let others know that you have by placing your knife and folk together, with the tines on the fork facing upwards, on your plate.
- Don’t forget to thank your host for the meal!

Sticky Situations and Possible Solutions

Here are some awkward dining situations and how to deal with them:

- Having put something in your mouth that doesn’t agree with you: Ask the waiter for a paper napkin and discreetly spit the food out. Crumple the napkin and place it under the sides of your plate. Keep the food you had spit out away from the other’s view.
- You accidentally spilt food or drinks on a guest: Don’t panic. Apologize sincerely first. Use the cloth napkin and water to gently wipe the spill. You may also guide the guest to the wash room.
- A guest commits a faux pas: If you notice that a colleague or a subordinate is using the wrong utensil, the best way to let them know is by using the right one yourself. Don’t correct them, it would just cause embarrassment.
- You’ve noticed a bug in your food: Discreetly send it out to the server. You don’t have to tell everyone as it might ruin their appetite.
- You have dietary limitations: If you cannot eat a certain type of food or have some special needs, tell your host several days before the dinner party. This can help avoid awkward situations like not being able to eat what was served because of a health issue or religious conviction.

Case Study

Mary was hosting a dinner with her colleagues to celebrate a recent and very profitable business deal. Several days before the dinner, she checked in with everyone to see if there were any dietary restrictions she'd need to keep in mind.

At the dinner, everyone was seated around Mary's table and had their foot. John, one of the new hires, had tucked his napkin into his shirt. Everyone else had their napkins on their laps. Throughout the meal he picked at his teeth and spoke with his mouth full, and even spit food out that he didn't like. At the end of the dinner, everyone thanked Mary for hosting. John, however, was not invited to any more dinners.

Module Five: Review Questions

1) What kind of atmosphere do the business meals make compared to the office?

   a) More private
   b) More casual
   c) More official
   d) More tense

2) Which of the following statements IS NOT true?

   a) Solids are on the left, liquids are on the right
   b) Forks are on right, knives and spoons are on the left of the plate
   c) Place settings differ depending on the menu and the formality of the dining event
   d) The oyster fork is always placed on right

3) When do you unfold your napkin and place it on your lap?

   a) When you sit
   b) When everyone is seated
   c) When you start eating a meal which can cause you a mess
   d) Whenever you want, there is no special rule

4) Which of the following statements IS NOT true?

   a) If you leave the table during a dinner, you need to place your napkin on the table
   b) When you are finished dining, you should place your napkin neatly on the table to the left side of the plate
   c) If you drop your napkin on the floor, you should discreetly ask the waiter or host for another one
   d) Your napkin should remain on your lap throughout the entire meal

5) When it comes to business, you:

   a) Shouldn't talk about it during the meal under any circumstances
   b) Shouldn't talk about it, unless the senior members want to do so
   c) Should talk about it, because that is the purpose of a business meal
   d) Can talk about it if you want, there are no rules or restrictions

6) Which of the following IS NOT considered rude during the meal?

   a) Picking your teeth
   b) Applying make-up
   c) Combing your hair
   d) Keeping your elbows off the table

7) What is the best solution to the following sticky situation: A colleague is using the wrong utensil.

   a) You correct your colleague
   b) You try to indicate it to your colleague through a joke
   c) You try to let your colleague know it by using the right one yourself
   d) You ignore it

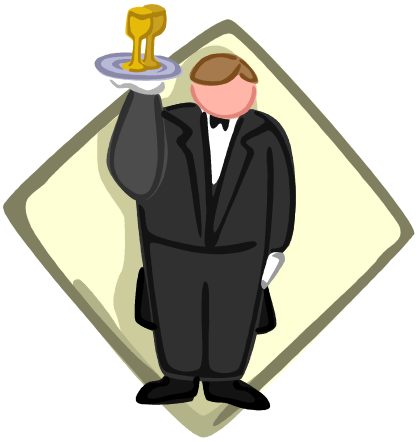
8) What is the best solution to the following sticky situation: You have put something in your mouth that doesn't agree with you.

   a) You swallow it no matter what
   b) You spit it in your spoon and put it on the edge of your plate
   c) You go to the bathroom and get rid of it there
   d) You ask the waiter for a napkin, discretely spit the food and place the napkin under a side of your plate

Manners are one of the greatest engines of influence ever given to man.

Richard Whately

Module Six: Eating Out



In the previous module, we talked about etiquette guidelines relating to dining in style. In this module, we will look at basic courtesies to be observed while eating out, including guidelines in ordering in a restaurant, intake of alcohol during a business meeting, paying the bill and tipping.

Ordering in a Restaurant

The following are some basic etiquette rules when ordering:

- As with many places, say 'please' and 'thank you' especially when addressing the waiter or server. For example, say "May I have the tuna casserole?" or "Could I please see your specials?"
- Don't order the most expensive item. When in doubt, follow the lead of the host. If they give an indication for you to do that, then order that.
- If you're the host, cue the server subtly at the start of the meal. You can say "My guests would like to know your specials" or "I'd like my guests to order first". Servers take orders from the first person to the host's right so make sure that you sit yourself to the immediate left of the most senior member of the group.
- Don't order for your associate. If they seem indecisive, offer a recommendation.
- If, after looking at the menu, you see items that you are uncertain about, ask your server any questions that you may have. Answering your questions is part of the server's job.

About Alcoholic Beverages

In general, alcohol is not recommended to be part of a business meeting. Alcohol intake lowers inhibition, which might affect the professional atmosphere at the table. Even if the meal is a social occasion meant to establish a relationship, you'd still want to project your best in front of potential partners and clients.

Depending on your guests, alcohol may be appropriate or even expected. If you do have to drink alcohol, limit it to 1 or 2 glasses.

What are the instances when alcohol is appropriate?

- Dinners are traditionally accompanied by wine. White wine goes with fish and poultry, while red wine goes with red meats.
- During celebratory occasions, such as a deal going through, a toast may be in order.
- There are certain cultures where wine is expected. Germans like to drink wine before a meal; Texans find a beer appropriate with a barbeque lunch.

If uncertain on how alcohol will be handled, take a cue from others at your table. If the boss, client, or interviewer orders a drink, then you can follow suit.

Paying the Bill

Here are some etiquette tips when paying the bill:

Who picks the tab? The host picks up the tab. If you're the one who invited the guests, then it is assumed that you would be the one picking up the tab.

If a client or investor invites you to discuss something that would profit you, it's good form to at least offer to pay the bill. If they insist paying, offer once to at least pay your half and just leave it at that. Never fight over a bill if someone else offers to pay; you can counter once, and then after that simply thank the person paying for the generosity and offer to pick up the tab the next time.

Be discreet in paying the bill: If you can, arrange that the receipt be not brought to your table. You can do this by:

- Requesting that the bill be held at the Maitre D's station. Excuse yourself as the meal is coming to a close, go to the station to review and sign the slip, and pick up your receipt.
- Arranging to pick the check on your way out.

- Arranging to have the check sent to your office.
- Leaving your credit card with the restaurant, and request that the server add the tip to the meal. The server will then run your credit card ahead of time, and return it and the receipt for you to sign at the end of the meal.

If the slip is brought to your table, pick it up and check the total without comment. Put the check *face down* on the tray in a folder with your card or money underneath.

Don't fuss with the check. Don't let the others know how much the meal cost.

Tipping

Tip appropriately. The standard is 15% for moderate service and 20% for excellent service of the pre-tax cost of the meal. In a self-service or buffet style restaurant, a tip of 10-12% is standard.

Deal with bad food or service by talking to the manager. Remember that many get a portion of the waiter's tip, not just the waiter, so you may be punishing the chef for a server's lack and vice-versa.

Keep the tip between you and the staff. There is no need to flaunt how much you gave.

Case Study

Harry was attending a post-work dinner with several colleagues, and they had chosen to go to a small Italian restaurant down the street. After they had all ordered their meals, Harry asked for a glass of red wine. No one else had ordered alcohol, but Harry assumed they would get their wine with their meal while he preferred his before.

When everyone's meal had come, they still hadn't ordered wine. Harry felt embarrassed, but decided against calling further attention to it. One of Harry's colleagues offered to pick up the tab. Harry argued with him, saying that he should cover as he had ordered wine. After Harry's behavior, he was left out of post-work plans for a long time.

Module Six: Review Questions

1) What do you do if your associate seems indecisive at a restaurant?

   a) You ask the waiter to bring the most expensive dish
   b) You order instead of your associate
   c) You offer your associate a recommendation
   d) You should not do anything

2) When it comes to the expensive dishes, you:

   a) Should order the most expensive dish to make a good impression
   b) Should not order the most expensive dish
   c) Should not order the most expensive dish unless your host gives you an indication to do that
   d) Should not bother with the price and make an order based on your taste

3) When it comes to business meetings and meals, alcohol is generally:

   a) Forbidden
   b) Not recommended
   c) Recommended in smaller doses
   d) Recommended for making a casual atmosphere

4) Dinners are traditionally accompanied by:

   a) Wine
   b) Beer
   c) Champagne
   d) Cocktails

5) Which of the following statements IS NOT true?

   a) The host usually pays the bill
   b) If you are invited to discuss something that would profit you, it's good form to at least offer to pay the bill
   c) If a client wants to pay the bill, you should be persistent and counter until the client gives up
   d) If you're the one who invited the guests, then it is assumed that you would be the one picking up the tab

6) When you are the one who pays the bill, you should not:

   a) Arrange to pick the check on your way out
   b) Arrange to have the check sent to your office
   c) Call the waiter to bring you the tab to your table
   d) Leave your credit card with the restaurant, and request that the server add the tip to the meal

7) When it comes to the tips, the standard for an excellent service is:

   a) 20%
   b) 15%
   c) 12%
   d) 10%

8) When it comes to the tips in a self-service or buffet style restaurant, a standard tip is:

   a) 5 – 10%
   b) 10 – 12%
   c) 12 – 15%
   d) 15 – 20%

Almost overnight the Internet's gone from a technical wonder to a business must.

Bill Gates Schrader

Module Seven: Business Email Etiquette

Email is a convenient and effective medium to conduct business communication. In this module we will discuss etiquette guidelines on how to address an email message, the use of grammar and acronyms in the letter body and top 5 technology tips.

Addressing Your Message

Here are two basic guidelines in addressing an email:

1. Know when to use the To, Cc and Bcc fields.

   There are three common ways to address an email, and each way is most appropriate to specific contexts.

   a. Using the 'To' field.

      The 'To' field is used when sending a direct message to someone.

      You may send the same email to multiple addresses using the 'To' field. Do so when your email is meant to be addressed directly to all recipients, as in the case of a manager directing his team.

      Note though that when you use the 'To' field, all email addresses can be viewed by all recipients. Put multiple addresses in the 'To' field only when every recipient is okay with his or her email address being released to everyone.

   b. Using the 'Cc' field.

      Cc stands for carbon copy.

      You use the 'Cc' field to send a copy of the email message to people who are not meant to be the direct recipients of the message, but still need to be kept on the loop.

For instance, if a manager has ordered his secretary to send a memo to everyone in the department, the secretary may place all the department employees' email address on the 'To' section, and the manager's email address on the 'Cc' field.

Note that, like the 'To' field, all email addresses entered in a 'Cc' field can be viewed by everyone.

c. Using the "Bcc' field.

Bcc stands for Blind carbon copy.

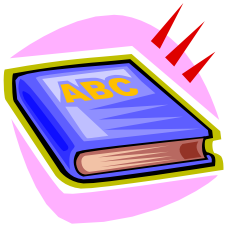
When you place email addresses in 'Bcc' field, recipients are 'blind' to other recipients' email address. The use of the 'Bcc' field is most appropriate if the recipients have not given permission for their email address to be released, or if there is reason to keep the email address private.

Because the 'Bcc' field offers privacy that the 'To' and 'Cc' fields do not, you may use the blind carbon copy field for both direct and indirect email messages where privacy of email addresses is needed. If you wish to send an email to many direct recipients, but you don't wish to disclose anyone's email address, just use your own email address in the 'To' field, and use the 'Bcc' field for the recipients' addresses.

2. Address the receiver by name in the first sentence of your email. *Mary, I received copies of the file.* Use the proper address, like Dr. or Mr. until told to use first names. You may take your cue from the way they sign their email.

Grammar and Acronyms

While online mediums of communication have developed their own vocabulary, it's best to remember that business emails the same formality as any business letter.



Here are some key things to remember with regards to grammar and the use of acronyms in an email.

- Always follow the rules of good grammar. You may refer to English writing style guides for these rules.
- Always use full sentences and words with proper sentence structure. Don't use text-speak.

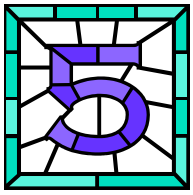
  Example: use "The reports are due on Monday." instead of "D reports r due Mon"
- Proper capitalization and punctuation are a must! In email, all caps give the impression that you're shouting, and small caps are hard to read.

Example: use “The report should include an evaluation report.” instead of “The report SHOULD INCLUDE AN EVALUATION REPORT."

- In business emails, avoid text-speak abbreviations such as BTW (by the way), IMHO (In my honest opinion,) and LOL (laugh out loud). Avoid the use of emoticons, as well.

Top 5 Technology Tips

Here are 5 tips when using technology:



1. **Medium is the message**: There are some things that are better done face-to-face rather than through the net. An example of this is delivering negative feedback. Don’t use technology when a personal approach is much more appropriate and or desirable.

2. **Always re-read your letters:** Some statements don’t come across well when written. An ironic joke, if people can’t see the twinkle in your eye, can end up sounding insulting. Read everything twice before you send it.

3. **Think security:** Do not assume privacy when communicating online. Do not use emails to discuss confidential and speculative information.

4. **Think of your recipient’s convenience:** Since reading from a screen is more difficult than reading from paper, the structure and lay out is very important for e-mail messages. Use short paragraphs and blank lines between each paragraph. When making points, number them or mark each point with bullets.

   Also don’t attach lengthy documents in your email. Forcing your client to read a long document through a screen is insensitive, not to mention the time it would cost them to download bulk files. If a hard copy is possible, then send a hard copy instead.

5. **Skip it if it’s not necessary**: Remember that most emails now go into PDA's. Before sending a message in the late hours, ask yourself: how will they react to me sending a text message?

Before you forward a memo you've received to your staff, think if they really need this piece of information. It's nice to keep your staff up to date, but not to the point that you're clogging their inboxes.

Case Study

Denise was sending an email memo to her staff, informing them of some changes happening in the company over the next few weeks. Knowing her staff was busy, she shortened a lot of her, writing, “All D prog reps r due Mon, tx =).” She sent it to her secretary, and CC’d everyone else. She also forgot to sign her email.

Monday came around, and no progress reports were being submitted. When she asked one of her employees why he hadn’t submitted a report, he explained that he didn’t know what she meant by “prog rep”, and on top of that, thought it was directed at her secretary and wasn’t sure why she CC’d everyone else.

Module Seven: Review Questions

1) The 'Cc' field is used:

   a) For direct recipients of messages where email address privacy is not an issue
   b) For non-direct recipients of messages where email address privacy is not an issue
   c) To send messages to multiple recipients without disclosing recipient's email address to one another
   d) Universally, for any type of emails

2) What does the 'Bcc' stand for?

   a) Blind carbon copy
   b) Balanced carbon copy
   c) Back carbon copy
   d) Basic carbon copy

3) Which of the following statements is true?

   a) Business emails don't have to be too formal
   b) Business emails are as formal as any business letter
   c) Business emails can contain acronyms
   d) Business emails can contain acronyms only if they are clear

4) In emails, all caps give an impression that:

   a) The content is very important
   b) You are in a hurry
   c) You are shouting
   d) You are not a professional

5) Why is sending emails with a good organized structure most important?

   a) Because it tells about you professionalism
   b) Because it proves your email writing skills
   c) Because it is a formality
   d) Because of the recipient's convenience

6) When it comes to sending emails in late hours, you should:

   a) Send it, because it doesn't disturb anyone
   b) Definitely forget about it
   c) Ask yourself is that email really necessary
   d) There is no rule about this

An unbelievable number of client interactions start with a phone call.

David Gerson

Module Eight: Phone Etiquette

This time we will look at telephone etiquette. Particularly, we will discuss how to develop an appropriate greeting, how to deal with voicemail and cell phone do's and don’ts.

Developing an Appropriate Greeting

How to create an appropriate phone greeting:

- Say your greeting:

  Business telephones should always be answered with a phrase like, "Good morning” or “Good Afternoon.” Speak clearly and distinctly, in a pleasant tone of voice. Some trainers recommend smiling before one answers the phone in order to project a positive energy into one’s voice.

- Identify yourself and the company. It’s only polite to tell the other person on the line that they’ve reached the right place.

  “This is ABC Company, Carol speaking.” Or “You’ve reached Marks and Spencer, this is Jonathan.”

- Inquire how you might be of assistance.

  “How may I be of service?” or “How can I help you?” can set the tone.

Dealing with Voicemail

Tips on leaving a voicemail message:

- State your name, affiliation and phone number.
- State your reason for calling.
- State any action plan or action required on your message.

Tips on managing your own voicemail:

- Record your own personal greeting. Include in your greeting your name, the department and or company name so that people know they have reached the correct person.
- Give people information that can help them, to save you time as well. *Example: "Please leave a brief message stating how I can help you, along with your phone number, and I will call you back."*
- Stay on top of your messages. The number of times you check voicemail each day will vary depending on your job function and industry. However, if you have not told people differently, at a minimum you should check messages once a day and return those calls. State when you would be unavailable if you can't respond within 24 hours. Example: *"I'm out of the office today, January 3rd. I will be returning January 5th. I will not check voicemail until I am back. If this is an emergency or you need immediate assistance, please call Bill Withers at 555-555-6789.*

Cell Phone Do's and Don'ts

Here are some cell phone do's and don'ts.

- Don't take calls in the middle of a business meeting or a conversation with another person. Exceptions are when you receive an urgent call, but excuse yourself first before taking it. Likewise, set your ringer to silent or your phone to just vibrate mode when in a social conversation.
- Never talk in intimate settings or places where silence is imperative. Examples of these are elevators, libraries, museums, restaurants, cemeteries, theaters, dentist or doctor waiting rooms, places of worship, auditoriums or other enclosed public spaces, such as hospital emergency rooms or buses.
- Don't talk on a cell phone in a public place. A good rule to keep is the 10 feet rule --- answer calls at least 10 feet away from the next person!
- If you really have to take a call in public, step out or to a secluded area to take that call. You can also set your phone to voicemail when going out in public. If you really must take the call,

answer briefly to tell that you're in a public place and that you would return the call as soon as possible.

- Keep business calls within business hours. Just because it's a cell phone doesn't mean that you can call anytime.

Case Study

Pierre was going on a vacation, and wouldn't be in his office for several days. He changed his office voicemail to, "You've reached Pierre Leroux at DataTech, I'll be unavailable between January 8th and January 14th. Leave your name, number, and reason for calling and I'll get back to you. If it's an emergency, call Ted Duncan at extension 555."

On his return he had several voicemails to return. He reached everyone who had called him with the exception of Bill Glenson. He left a message with Bill's voicemail, saying, "Good afternoon, this is Pierre Leroux with Datatech returning your call. I'm back at the office, and you can reach me at my regular hours. Have a good evening."

Module Eight: Review Questions

1) Business telephone calls should always be answered with:

   a) A friendly phrase like “Hi” or “Hello”
   b) A phrase like “Good day” or “Good morning”
   c) A simple and cold phrase like “Yes?”
   d) Any phrase that naturally comes your way

2) Before you answer the phone, it is recommended to:

   a) Smile
   b) Take a deep breath
   c) Wait for the phone to ring several times
   d) None of the above

3) When it comes to leaving a voicemail message, you don’t have to:

   a) State your name, affiliation and phone number
   b) State your reasons of calling
   c) State any action plan or action required on your message
   d) State the details intended to communicate during the phone conversation

4) Which of the following is not a necessary part of your personal voicemail greeting?

   a) Your name
   b) Your department
   c) Your company name
   d) Your supervisor

5) Which of the following is not considered as rude?

   a) Taking private phone calls during the meetings
   b) Taking urgent phone calls during the meetings
   c) Talking on the phone in a public place
   d) Talking on the phone where silence is imperative

6) Which of the following statements is true?

   a) Business calls should be kept within business hours
   b) Business calls can be taken anytime
   c) Business calls can be taken after the business hours, but not in the late hours
   d) There is no rule when it comes to the business conversations by cell phones

The art of art, the glory of expression and the sunshine of the light of letters, is simplicity.

Walt Whitman

Module Nine: The Written Letter

Even in written communication, appropriate tone, content and format must be observed. In this module, we would discuss how to write a 'Thank You' note, a formal letter and an informal letter.

Thank You Notes

Expressing appreciation is always a good idea, whether it's for a gift, an act of kindness, or a business courtesy. You can do this by sending a 'thank you' note.

The formality of your thank you note depends on your relationship with the person you're sending the note to. A thank you note to a senior who gave you a promotion would be more formal than, say, a thank you note to a long-time client for hosting your lunch. Formal ones can be written on the company letterhead, and non-formal ones can simply be a handwritten letter on a piece of stationary.

A thank you note need not be a long letter. Most thank you letters mention:

- Your thanks
- What you're thanking them for
- What their gesture, gift, or action meant to you or the company

Example:

August 14, 2010

Joseph Marvin
Sinclair Enterprises

Dear Joseph,
I would like to express my appreciation for your hard work in preparing the presentation for the Widget account. It was a last minute notice and I knew you pulled in some overtime to get it done. Despite your limited time to prepare, the materials were top-notch and on-target. The presentation went well and we owe it all to you.

Thanks again,
Velma Torres

Formal Letters

A formal style is recommended for most business correspondence. It shows courtesy, professionalism, and knowledge of protocol. As a rule, use a formal style unless invited otherwise or you have already established a relationship with the person you're writing to.

Here are some basic rules when composing formal letters:

Stationary*:* Formal letters are written in plain white (or shades of white like cream) 8 1/2-by-11 inch paper. Stationary that bears the company letterhead may also be used.

Content: A formal letter usually contains the following sections:

- Sender's full name and address
- Addressee's full name and address
- Date the letter is sent (or assumed to fall into the hands of the receiver)
- Formal Salutation e.g. *"Dear + Formal Address"*
- A Subject Heading e.g. *"Re: Job Opening for Quality Control Officer"*
- Letter Body
- Formal Closing e.g. *"Respectfully yours, Sincerely yours,"*
- Name and Signature of the Sender

Lay-out on Page: There are two commonly used lay-outs for a formal letter: the block and the semi-block. In the block format, all text is aligned to the left margin and the paragraph is not indented. In the semi-block format, all text is aligned to the left margin but the paragraphs are indented. Both formats are considered appropriate for business correspondence.

Tone: Formal letters are formal in tone. Words are spelled out and the sentences follow grammatically correct sentence structure. Comments are organized in a clear and concise manner, and avoid unnecessary information. Slang is avoided.

Informal Letters

An informal business letter is a shorter and more straight-forward version of a formal letter. Standard rules on grammar and spelling correctness still apply, but with certain flexibilities.

For instance, contractions, abbreviations, and slang may be permissible as long as the professional tone of the letter is preserved.

The tone in an informal business letter is more relaxed and conversational. Salutations and closings can be more personalized, for instance you may use *"Hey Jim,"* instead of *"Dear Mr. Wentworth;"* and close with *"Cheers,"* instead of *"Respectfully yours,"*

Content can be less technical or academic. Familiarity is assumed but the respect is still there. Example, you can replace *"This letter is in reference to your letter dated July 4, 2009…"* to *"Regarding your message last week…"*

Case Study

Kurt, a sales department manager, was writing a thank you letter to Jen, who was an outside PR consultant. Jen had prepared a portfolio of the company's charity works and community outreach programs to impress a potential client who valued charity and good will. It was very short notice, and Jen had done a remarkable job.

He started the letter with the date and who it was addressed to, before writing, "Dear Jen, I'd like to express my appreciation for the hard work you did in preparing that portfolio for me. I know it was short notice, but the presentation went off without a hitch. I couldn't have done it without you. Thanks again, Kurt."

Module Nine: Review Questions

1) What does the formality of your thank you note depend on?

   a) The company rules
   b) Your level of knowledge about writing such contents
   c) Your relationship with the person you're sending the note to
   d) The occasion

2) Besides your thanks and what are you thanking them for, your thank you note needs to contain:

   a) How are you going to repay
   b) A promise that you will repay one day
   c) What their gesture, gift, or action meant to you or the company
   d) None of the above

3) You don't have to write in formal style when:

   a) The letter doesn't contain crucial matters
   b) You have already established a relationship with the person you're writing to
   c) The letter contains an invitation
   d) You always have to use formal style for business letters

4) What is usually above the name and signature of the sender?

   a) Letter body
   b) Post Scriptum
   c) Formal closing
   d) None of the above

5) Which of the following statements IS NOT true?

   a) An informal business letter is shorter than formal
   b) An informal business letter is more straight-forward than formal
   c) Standard rules on grammar and spelling correctness still apply in informal letters, but with certain flexibilities
   d) Informal letters still must contain a formal opening and closing

6) The tone of an informal letter is:

   a) More technical than the tone of the formal letter
   b) More conversational than the tone of the formal letter
   c) More informative than the tone of the formal letter
   d) Pretty much the same as the tone of the formal letter

Module Ten: Dressing for Success

A significant part of practicing etiquette is proper self-presentation. The way you look talks to people, not just how you want to project yourself, but also the courtesy you have for the people in your company. In this module, we will discuss guidelines in dressing for success. Particularly, we would talk about the meaning of colors, the meaning of dress codes and guidelines on how to choose the right clothes to wear.

The Meaning of Colors

Here are some guidelines in the use of colors in business attires:

- In general, conservative colors are perceived as more professional and appropriate for business-related situations. These colors include black (which is perceived as the most formal), white, dark-gray, and navy blue. Conservative colors are recommended for formal occasions; you can be more playful during casual days.
- Wear these conservative colors in solid blocks instead of as part of a printed pattern.
- The main suit is recommended to have conservative colors but louder colors can be mixed with the accessories. E.g. the tie and pocket squares for men or scarf for the women.

  Some of the common interpretations associated with colors are:

  - Red – dominance and power
  - Orange – warmth and enthusiasm
  - Yellow – optimism and confidence
  - Green - vitality and harmony
  - Blue - serenity and peace

- A lot of companies use color dress code for building their brand as employees interact with the consumers. Also, when the workforce dresses the same color, it further brings unity among the employees.

Interpreting Common Dress Codes

Dress codes often depend on the company or industry where you work in, and even in the type of job that you do. It is also not unusual for different activities in the same job to call for different dress codes.

- Dressy Casual: Dressy casual means dressed up versions of casual looks. For men, it could be neatly pressed slacks and a sports coat. For women, it can be slacks, but also skirts, dresses. This can be matched with solid color t-shirts, mock turtleneck, polo shirt, collared or button down shirts/blouses.

  Casual means anything goes but in the business setting, casual is recommended to be interpreted as dressy casual.

- Semi-Formal: Semi-formal means a medium between formal and informal. For men, semi-formal can translate to neatly pressed dress pants, slacks, button shirts, and ties. Jackets are optional but preferred. For ladies, it's evening dresses, dinner dresses (knee length) or some pants suits.

- Formal: Formal means tuxedos, dark suits, and ties for men. For ladies, it's cocktail to floor length dresses, nylons and dress shoes.

- Black Tie: Black tie is the most formal dress code. Men wear black tuxedo coats, trousers with satin ribbon, cummerbunds and bow ties. Ladies are to wear ball gowns. There are dress codes that state 'Black tie optional'. This means that the men have the option of wearing a regular suit with a tie instead of a tuxedo. Ladies have the option of wearing a cocktail gown or a dinner dress. Long to full-length skirts are preferred.

Deciding What to Wear

Tips when deciding what to wear:

- When attending a work-related social function, try to determine how your host or hostess would like you to dress and go with their response. There is nothing wrong in making inquiries about dress codes beforehand.

- Casual generally means that you can wear whatever you want. But in business, casual carries with it a lot of do's and don'ts. You should dress comfortably but not too comfortable. Business casual means avoiding flip-flops, shorts, cut-off jeans and halters.

- When dressing in the office, refer to the company dress code or if none is written, check the company culture.

- Note the context of the meeting, the seniority of the company, as well as the venue. Obviously, lunch at a burger place is more casual than lunch at a star-rated restaurant. A meeting with board members is more formal than a meeting with your staff. Dress accordingly.
- When in doubt of your client's dress policy, err on the side of conservative. It's better to be overdressed than underdressed.

Case Study

Ted had been invited to a semi-formal charity event that his company was hosting. He chose to wear a button down shirt and a colorful tie to match, and completed his ensemble with a pair of jeans and his new running sneakers, which he thought looked very good. When he arrived at the event, he realized his faux-pas as no one else was wearing jeans.

Ted thought about going home to quickly change, but was informed that he'd be giving a quick speech in a few minutes. When Ted walked on-stage, there was some laughter in the audience over his attire. He quickly finished his speech and left the event, embarrassed over his mistake.

Module Ten: Review Questions

1) Which of the following statements IS NOT true?

   a) Conservative colors are perceived as more professional and appropriate for business-related situations
   b) Accessories need to be in conservative colors
   c) Conservative colors should be worn in solids instead of as a printed pattern
   d) Conservative colors are recommended for formal occasions, but you can be more playful during casual days

2) What is the interpretation of orange color?

   a) Warmth and enthusiasm
   b) Optimism and confidence
   c) Serenity and peace
   d) Vitality and harmony

3) What is the most formal dress code?

   a) Tuxedo
   b) Bow-tie
   c) Black tie
   d) Floor length dress

4) Which of the following can be accepted as semi-formal?

   a) Jeans
   b) Sport coat
   c) Polo shirt
   d) Slacks

5) Which of the following statements is true?

   a) Dressing casually means that you can wear whatever you want
   b) Casual dressing implies that you should wear the most comfortable clothes
   c) Casual business clothing is the same as general casual clothing
   d) Casual business clothing has many do's and don'ts

6) Which of the following IS NO so important in business clothing?

   a) Your personal style
   b) The context of the occasion
   c) The seniority of the company
   d) The venue

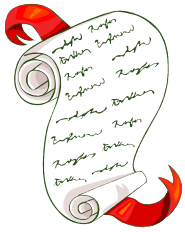
Etiquette requires us to admire the human race.

Mark Twain

Module Eleven: International Etiquette

Etiquette is heavily influenced by culture; each country and nation has their own set of rules for polite behavior. When dealing with an international clientele, or when conducting business in a foreign country, it's best to be aware of local etiquette guidelines. In this module we would discuss general rules in international etiquette, important points, and ways to prepare.

General Rules



Etiquette is heavily influenced by culture; what may be good manners in one country or to one nation may not be good manners in another. As most businesses today are operating with a global mindset, it pays always keep international etiquette in mind.

- Always take the time to research cross-cultural etiquette when dealing with a foreign client, or when conducting business in a foreign country.
- Awareness of international etiquette is important not just in face-to-face meetings but also in non face-to-face encounters such as sending gifts, conversing over the phone or communicating online.
- Areas you need to look at include:
    - Religion
    - Dress Codes
    - Social Hierarchy
    - Rules on Meet and Greets
    - Use of titles and forms of address
    - Exchanging business cards
    - Valuing Time
    - Physical Space
    - Dealing with embarrassment

- When uncertain, err on the side of what you presume is conservatism. And be observant; check if people are becoming uncomfortable.
- Etiquette mishaps in international setting can range from merely embarrassing to potentially insulting to the other person. When you realize that you have committed a faux pas, apologize immediately and ask how you can make up for it.

Important Points

Here are some important points when dealing with other cultures:

- Some cultures dress conservatively as the norm.

  Americans tend to be more relaxed when it comes to dress codes, and even recommends dressing for comfort in certain fields and professions. People from other parts of the world are generally more conservative. The Japanese, for example, dress according to rank. Some Muslim nations find short dresses for women as offensive. If uncertain, err on the side of conservatism.

- Some cultures meet and greet people with a kiss, a hug, or a bow instead of a handshake.

  A handshake for greeting is mostly universal. However, don't be surprised if you are occasionally met with a kiss, a hug, or a bow somewhere along the way.

- Stick to formal titles for business interactions unless invited otherwise.

  Approach first names with caution when dealing with people from other cultures. Some cultures are very hierarchical, and with consider it disrespect to be addressed without their title. Some cultures never accept first names in the business setting, and this should be respected.

- Some cultures are less time-conscious than others.

  Don't take it personally if someone from a more relaxed culture keeps you waiting or spends more of that commodity than you normally would in meetings or over meals. Stick to the rules of punctuality, but be understanding when your contact from another country seems unconcerned.

- Understand differences in perception of personal space.

  Americans have a particular value for their own physical space and are uncomfortable when other people get in their realm. If the international visitor seems to want to be close, accept it. Backing away can send the wrong message.

Preparation Tips

- It starts with being open-minded.
- Read up!

  Possible resources:

  - Publications put out by the Department of Trade and Industry (DTI) and local embassies. They usually provide basic facts about demographics and business practices.
  - The Economist Business Traveler's Guides have chapters designed to develop awareness with reviews of local etiquette and customs and the 'elusive psychological factors' that can make or break a deal.
  - Slim volumes on Simple Etiquette by Paul Norbury Publications.
- Find informants, or experts with good local knowledge of both countries, and simply ask them to talk to you over a good lunch or dinner. If you live near a university or a centre of expertise on a particular country, it can also be helpful to seek guidance from experts who will probably be only too glad to be consulted and share their knowledge.
- For the really serious there is no better way than to spend at least two or three days traveling with at least two representatives selling your company's products or services. Use the time to absorb the atmosphere, methodologies, hospitalities, practices, and styles.
- Take a more specialized course on international etiquette if relating with international clients is a big part of your job description.

Case Study

Clyde, the owner of a farm equipment manufacturing company, was meeting with a potential business partner in Japan, Takashi Akiyama. Clyde wanted to open a branch in Japan to help him access Asian markets, and Takashi already owned several manufacturing facilities and wanted to expand into different markets. In preparation for the meeting, Clyde researched Japanese business culture and learned as much as he could.

When the two met, Clyde bowed to Takashi and greeted him using his last name. Clyde was glad he had researched the culture beforehand, or he may have made several mistakes that could cost him a profitable partnership. In the end the two agreed to work together, in no small part to Clyde's initial manners.

Module Eleven: Review Questions

1) Which of the following IS NOT among the most important areas for researching the international etiquette?

   a) Dress code
   b) Dealing with embarrassment
   c) Valuing time
   d) Valuing money

2) When you realize that you have committed a faux pas, you should:

   a) Pretend that it didn't happen
   b) Change the topic
   c) Apologize immediately
   d) Turn it into a joke

3) Which of the following statements IS NOT true?

   a) Some cultures meet and greet people with a kiss, a hug, or a bow instead of a handshake
   b) Some cultures dress according to rank
   c) Relaxed approach instead of uptight conservatism helps breaking the cultural barriers
   d) Some cultures are less time-conscious than others

4) What is the best thing to do in following situation: In your culture, personal space is very important and you are uncomfortable when someone is too near. However, a foreign client tries to get too close to you.

   a) You explain the client that you are uncomfortable
   b) You move away discreetly
   c) You accept it
   d) You ignore it

5) Preparation for exploring the international etiquette starts with:

   a) Reading
   b) Talking to experts
   c) Taking courses
   d) Being open-minded

6) Which of the following is the most helpful for exploring the international etiquette before business cooperation with foreigners?

   a) Travelling to their country alone
   b) Travelling to their country with your family on a vacation
   c) Travelling with at least two representatives selling your company's products or services
   d) None of the above, such travelling is only wasting your time

This feeling, finally, that we may change things - this is at the centre of everything we are. Lose that... lose everything.

Sir David Hare

Module Twelve: Wrapping Up

Although this workshop is coming to a close, we hope that your journey to improve your business etiquette skills is just beginning. Please take a moment to review and update your action plan. This will be a key tool to guide your progress in the days, weeks, months, and years to come. We wish you the best of luck on the rest of your travels!

Words from the Wise

- **Yogi Berra**: In theory there is no difference between theory and practice. In practice there is.
- **Dwight Eisenhower**: Plans are nothing; planning is everything.
- **Jonas Salk:** The reward for work well done is the opportunity to do more.