



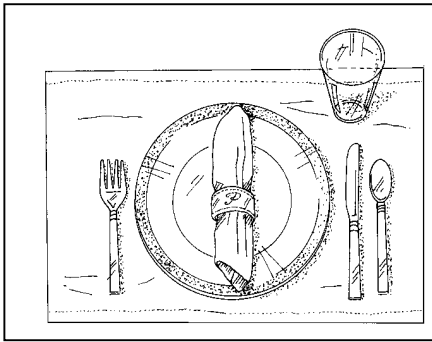
The Etiquette Advantage in Business



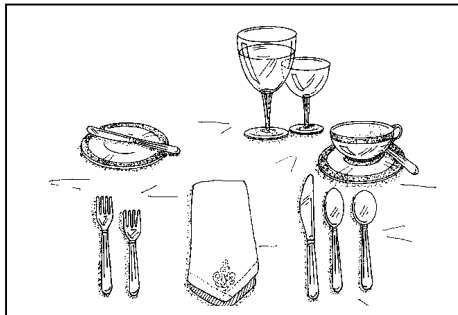
RESOURCES



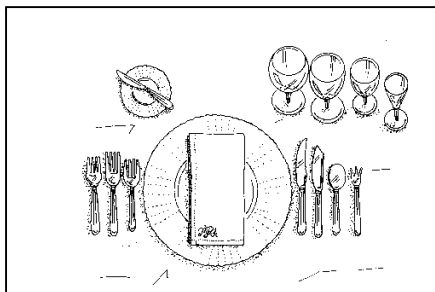
TABLE MANNERS



Family Meal



Informal Dinner



Formal Dinner

The standard family place setting that is typically used at everyday meals is straightforward: just one fork, knife, and spoon. As you increase the number of courses or the formality of the meal, you have more pieces in your table service. You are most likely to encounter the *informal* three-course dinner setting when dining at fine restaurants and attending parties or receptions where seated meals are served. Some of the additional pieces and their places in the setting are:

- Salad fork, placed to the left of the dinner fork if salad is served before the main course; to the right of the dinner fork if served after, as in the illustration.
- Soupspoon at the far right of the place setting.
- Dessertspoon to the left of the soupspoon, next to the knife (or horizontally above the plate, handle pointing right).
- Salad plate to the left of the forks.
- Butter plate and butter knife (laid across the plate) above the forks.
- Coffee cup and saucer (usually just at events) above and slightly to the right of the knife, with the coffee spoon resting on the right side of the saucer.
- Wine glass or glasses above and slightly to the right of the dinner plate and to the right of the water glass.

Why Do Table Manners Matter?

Why Table Manners Matter

- People judge others by their knowledge and use of table manners.
- Table manners are an easy way to look good and to use etiquette to build a better relationship.
- How you handle yourself at the table gives strong clues about your confidence and your professionalism.
- Knowledge and use of table manners can be the “differentiator” between you and your competition.

The Most Important Table Manners Guidelines

- Always arrive on time.
- Be prepared: In foreign countries learn any customs; be conversant in the country’s current affairs, leaders and important political, cultural and athletic figures.
- Always chew with your mouth closed. Swallow before speaking.
- Never pick up food with your hands unless it is clearly “finger food.”
- When in doubt, wait and watch other people for a clue as to how to conduct yourself.
- Never use a cell/smartphone at the table.
- Be engaged. Join in the conversation but don’t try to dominate it.
 - Prepare information for any business subjects that will be discussed.
 - Brush up on current events.
- Excuse yourself from the table to do personal things like pick your teeth, blow your nose, belch, (or worse!).
- Thank your hosts twice: once at the end of the meal and then send a thank-you note.

When Hosting a Business Lunch or Dinner

1. Consider your guest's taste: if possible, find out what cuisine your guest likes or dislikes. You can simply ask when making the invitation or call an assistant for the information. You might offer a choice of restaurants serving different types of food.
2. Choose a restaurant you know. This is a business event so you want to be sure of yourself at every step. That hot new restaurant may seem like a great idea, but the noise and the bustle may make conversation impossible.
3. Invite well in advance. Make the invitation at least a week in advance so the guest can fit it in his/her schedule and can prepare for the meeting.
4. Reserve ahead. Remember to call for a reservation as soon as the guest answers, or better yet make that reservation before you do the inviting.
5. Make it clear you are the host. "Will you be my guest for lunch?" clearly implies that you are going to be the host, and you will be paying for the meal.
6. Arrange for payment before the meal, especially if you are a woman. You want no confusion on a waitperson's part about who gets the check. Or you can arrange with the maitre d' to pay the bill in advance. Whether you are a man or woman, it's nice to be able to tell your guest, "We can go now; everything is all taken care of."
7. Tell your guest what to expect. Be specific about any business subjects you want to cover so your guest can be prepared with any materials.
8. Reconfirm. Call your guest the day before and confirm your engagement.
9. Arrive 5-10 minutes early. There is no excuse for a host to be late. In some cultures, lateness to a lunch or dinner engagement will ruin any chances for success with the client or prospect. If you are unavoidably delayed, call the restaurant and have the maitre d' give your guest the message that you are on your way and will be there in a specific amount of time.
10. As the host, it's your responsibility to bring up any business conversation, but only if you wish to. At lunch, bring it up after you place your order; at dinner, wait until after the main course.

The Good Guest

At an informal dinner at a business colleague's home, you can take a number of actions to be a polite guest and make a good impression on the host(s) and the other guests.

1. Bring something: In the United States flowers are always welcome and very safe. A bottle of wine or a box of special chocolates is a good alternative.
2. Forgo the personal house tour: Don't snoop. Don't go to private areas of the home. It's the hosts' prerogative to decide what rooms to show you.
3. Look out for others: When you excuse yourself to get a refill, offer to get one for others with whom you are talking.
4. Be flexible: If no seating is assigned, look around and sit with someone who seems to be sitting alone.
5. Offer to help, and be specific: For instance, as you see your host passing hors d'oeuvres, ask if you can do that for him. Help bring glasses to the kitchen or collect plates. If your host does not take you up on your offer, accept the decision.
6. Thank your host twice: once as you leave and then call the next day or better yet send a note. If a boss, someone senior to you, or a client gave the dinner, a written thank-you note is essential.

Thank-You Note Guidelines

- Mail within 24 hours of the event.
- Keep it short: 3-5 sentences.
- Be gracious.
- Stick to the point.
- The different ways to follow-up with a thank you to a host:
 - A written invitation requires a written thank-you note.
 - A phone invitation can be followed-up with a phone thank-you note.
 - An emailed invitation can be followed-up with an email thank-you note.
 - Note: a written thank-you note is the most appropriate form of showing appreciation and is always polite even when the invitation was made via phone or email.

Sample to a Colleague

Dear Larry,

Thank you so much for the lunch today and for introducing me to the Pot O' Gold. I can understand why it is your favorite restaurant. The conversation was valuable, and the Beef Bourguignon was delicious. I really appreciated your wise counsel about the transfer offer.

Best,

Sarah

Sample to a Superior or a Client

Dear Ms. Jones,

Thank you so much for lunch today. The restaurant was lovely, and the meal was delicious. Most of all, I really appreciated your ideas and guidance about my proposal for a more efficient reporting system. Your suggestions definitely helped me to get my priorities in order. I will submit the proposal tomorrow and will be sure to let you know how it is received.

Sincerely,

Mark Dawson

Eating Out

Make a point to visit a variety of ethnic restaurants and try some different dishes so you learn which dishes you like and which you should avoid.

If you are unsure what to wear, ask one of your peers who has more experience. Remember, you can always be a little overdressed and it won't matter. But if you are underdressed you will stick out like a sore thumb.

Avoid alcohol at business social events. If you do decide to imbibe, consider a glass of wine or a beer instead of hard liquor. Regardless, in business social situations limit yourself to one drink.

Ordering wine:

- If you are going to order wine for the table, check with your guests to see who will want wine and what they are eating so you can choose white, red, or a combination.
- Spend some time learning about various types of wine from a knowledgeable friend or from a good wine guide. Find out the names of some good reasonably priced wines that you can count on to go well with the food and not be vicious to your pocketbook.

Ordering dinner:

- As the host, select a restaurant which you have already tried and found to be good. Taking associates, clients and prospects to untested restaurants can be a recipe for disaster. If you are new to the area be sure to ask peers or supervisors for recommendations.
- As the host, when the menus are brought suggest one or two items to your guests that you know are particularly good.
- As the host, if a guest only orders a main course, suggest an appetizer or soup you know to be good in case the guest is "holding back."
- Avoid ordering foods that are difficult to eat.
- Avoid ordering foods you have never tried before.
- Remember, the focus of your attention must be on your guests, not on your food.

As a guest:

- Take your lead from the host.
- If he/she orders a hard liquor drink, then you may do so as well, but it is better to stick to low alcohol or non-alcoholic drinks.
- Listen for clues as to what might be a good dinner to order.
- Make sure you converse with the people sitting to either side of you. Don't ignore one of them for the entire evening.
- Thank the host at the end of the evening.
- Write a note the next morning and mail it, thanking him/her again.

Menu Guidelines for International Business Meals

Here's a sampling of menu items you might expect to find at a high-end restaurant:

Panzanella	salad with tomatoes, onion, garlic and oil soaked bread
Baccala	dried salt cod with garlic
Scottiglia di Cinghiale	wild boar chops
Tartuffo nero	black truffles
Brodo di Pesce	fish soup
Carpaccio	thin slices of raw beef
Zuppa di Cozze	mussels in white wine
Risotto alle Seppie	Rice with black cuttlefish ink
Sarde in Saor	grilled sardines in a sweet and sour sauce
Cotoletta alla Milanese	veal cutlets, breaded and fried
Fagiano Tartufato	pheasant stuffed with white truffles, pork fat and wrapped in bacon
Coda alla vaccinara	braised oxtail in tomato sauce
Agnello arrosto	roast lamb
Saltimbocca alla Romana	veal with ham
Oeufs en meurette	eggs poached in red wine sauce with bacon
Ris de veau	veal sweetbreads
Noisettes d'Agneau	lamb cutlets
Quenelles de brochet	pike dumplings in cream sauce
Gateau St. Honore	chocolate cake
Entrecote Bercy	rib steak in white wine sauce
Coquilles Saint-Jacques	sea scallops in a creamy white wine sauce
Magret de canard	breast of duck

Guidelines For Business Social Situations

- If you think, “I just don’t know how to do this (for example: small talk),” practice; practice everywhere with store clerks, taxicab drivers, etc.
- Meet and greet people: stand up to meet any outside person — man or woman; look them in the eyes; shake hands and say your name and repeat their name.
- In business social situations, the emphasis is on building relationships. Avoid talking about the nuts and bolts of the business.
- When getting sufficient face-to-face time is difficult and you need to discuss a business topic, consider these points:
 - Who did the inviting?
 - The host, the person who did the inviting, is responsible for bringing up a business subject.
 - As the host, wait until a social topic comes to a logical end and then transition to business, perhaps saying: “That’s really interesting; I was wondering if we could discuss our new ... for a few minutes before the meal begins,” or, “Before we leave this evening I was wondering if we could take a few minutes to discuss...”
 - The guest should not bring up business.
 - Business subjects can be brought up after orders are placed at lunch or breakfast and after the main course is completed at dinner.
- Stand up at cocktail parties. Work the room.
- Seek to meet and engage people.
- Invite others to join your group. Ask others their opinions on topics.
- Content matters — stay away from controversial topics. Leave your personal opinions at the door.
- Find some common ground of interest and build a relationship on that ground.
- Find out what interests the client. Homework pays off here.
- It is okay to talk about news of the day; read newspapers, news magazines — be interested and informed.
- Steer clear of politics, sex or religion. If asked your political opinion, be honest, tell them what you think, but don’t go overboard. Ask: “What do you think? Why?”
- Show interest in what others have to say.
- Sports is a safe topic; so are recreational and seasonal activities.

Guidelines For Business Social Situations

- If you are at the prospect/client's house, look around the house for clues as to what to talk about.
- Avoid putting on airs, bragging, or exaggerating.
- Do not use "I," "me," and "mine" all the time. Ask about the client.

Small Talk

- Expand your body of knowledge; a limited repertoire is a problem.
- Ask the prospect or client who has an interest in something you know nothing about: "How can I learn more about ...?" (opera, ballet, horses, fishing, rare coins, etc.)
- Read books and see movies from different eras (World War II, for instance). Be tactful and sensitive in how you use this.
- Make it your goal to become a multi-faceted generalist with lots of interests.
 - Know what is on the best seller's list and read.
 - Learn about all kinds of music, theatre, art, etc.
 - Look at sitcoms to know what is going on in popular culture: "Did you see ...?"
 - Know what is going on in the world around you: The World Series, Academy Awards, etc.

Tips on Relating to a Wide Array of Clients

- Everyone needs to develop personal breadth to be able to relate to an infinite variety of prospects and customers.
- Don't let titles get in the way of relationship building. Learn to relate to the chairman and to the receptionist.
- Learn to engage anyone and make others comfortable.
- Show interest in what others are doing.
- Bridge the Generation Gap:
 - Develop breadth in your own world — first in your own social, family, and community circles.
 - Learn things that the client knows about.
 - Find out how people think; what motivates them: "Tell me about your career."
 - Ask them for their opinion or how they learned about their interest.
 - Seek a mentoring relationship with someone from that strata/socio-economic group/age. Mentors help you grow in breadth — and they are nonjudgmental.
 - Establish relationships with more senior individuals from all walks of life to gain perspective on the customer of a different generation.
 - Avoid stereotyping and respect what each generation has to offer. Be open minded about others who differ from you.

Guidelines For Business Social Situations

Working the Room

- Prepare for the event as you would a business meeting. Read the newspaper, trade publications, etc. Be prepared to converse on a variety of subjects. Practice how you will introduce yourself.
- Don't wing it. Have a strategy:
 - Develop a list of the key people you want to talk to and create a plan of action for meeting them.
 - Do research on the key clients and prospects you want to meet. Learn about their background (family, educational history, etc) and their non-business interests (hobbies, travel, etc.) to use as conversation starters. Record this information and review it before the event.
 - When appropriate, leverage your relationship with the clients' office staff to gain information that will help you converse with your clients.
- At the event, move out of your comfort zone. Remember that this is an opportunity to get to know your clients in a more relaxed setting. Make a conscious effort to engage people.
- Be appropriate in how you approach others. Observe body language.
 - As a general rule, avoid approaching two people who appear engaged in a very intense, private conversation.
 - Feel comfortable approaching groups of people. Begin by being a listener and using body language to communicate your intent. Once you feel yourself included, join in the discussion.
- Make a comment/ask a question to engage the person in a dialogue. Avoid negative comments. Use open-ended questions to encourage dialogue.
- Avoid the temptation to socialize with colleagues. Use the time to build relationships with clients.
- Special considerations for introducing seniors:
 - Give the senior executive's title.
 - Take the lead in introducing clients or prospects to senior executives. Help to get the conversation started by giving the senior a clue (e.g., "We were just talking about ..." or "Joe is also an avid golfer.").
 - Do not leave until after the senior has had an opportunity to exit the conversation first.
 - Be conscious of time, and if you are exceeding eight to ten minutes, facilitate disengaging the *client and yourself* from the senior executive.
 - Do not leave the client or prospect with the senior executive.

Guidelines For Business Social Situations

Tips on Ordering Wine

FRENCH WINES

White

Bourgogne:

- Chablis (Chardonnay)
- Pouilly Fuissé (Chardonnay)
- Meursault (Chardonnay)
- Chassagne Montrachet (Chardonnay) – a bit more expensive

Loire:

- Sancerre (Sauvignon Blanc)

Alsace:

- Riesling

Red

Bordeaux St. Estephe:

- Chateau Meyney (Cabernet Sauvignon, Merlot, Cabernet Franc)

Côte de Nuits

- Nuits St. Georges (Pinot Noir)

Côte de Beaune:

- Chassagne Montrachet (Pinot Noir)

Côte de Rhone:

- Chateau Neuf du Pape (Syrah)
- Crozes-Hermitage (Syrah)

AMERICAN WINES

White

- Chalone (Chardonnay)
- Sonoma-Cutrer (Chardonnay)
- Clos du Bois (Chardonnay)
- Ferrari-Carnaro (Fumé Blanc)
- Mondavi (Fumé Blanc)

Red

- Beaulieu Vineyard (Cabernet)
- Burgess (Cabernet)

Guidelines For Professional Attire

Guidelines for Professional Attire

- Your goal is to look presentable and professional. Dressing appropriately is a way of treating your co-workers with consideration and respect.
- Be considerate and respectful of your corporate culture. Understand your corporate culture and determine the best way to respect it.
- If your clothing draws attention to you, then it is detracting from your optimal interaction with others.
- Ask if there is a corporate dress policy and abide by it.
- It is not appropriate to comment or give feedback on inappropriate dress to people who don't work for you.
- Clothing should not be an issue. Your clothing should have no impact on the relationship. (Lawyers in Boston switched to business casual so as not to be intimidating to clients who wore business casual.)
- Don't use appearance to make a personal statement on the job.
- What is in fashion isn't always appropriate in business settings, despite what you may see in fashion magazines or on television.
- If you think you are making a statement with your clothes, then you are probably making a mistake with your clothes.
- Don't expect that you will be told if your dress is inappropriate. Many managers have a difficult time addressing this issue. Nonetheless, it could be holding you back.

Guidelines For Professional Attire

Regardless of corporate culture or dress policy, the way to apply the principles of consideration and respect is to keep it neat, clean, and professional.

Neat

- Not torn, ragged, shabby, worn or wrinkled.
- Not provocative or distracting.
- Hair groomed/tidy.
- Jewelry should be minimal and simple.
- Look groomed overall, not sloppy.

Clean

- Washed and without odor (on clothing or the person).
- No stains.
- Nails clean and trimmed and shouldn't distract from business.
- Teeth brushed, mouthwash, shower daily, deodorant, hair washed.

Professional

Pushing the envelope socially is different from pushing the envelope in business. Socially, it may make you stand out and even make you more attractive. In business, pushing the attire envelope may make you stand out, but:

- You may lose respect of your co-workers and/or supervisors.
- You may hinder your chances for advancement.
- Ultimately you may lose your job.

Tips

- No distractions so you and others can focus on the business at hand.
- Don't push the envelope of what is appropriate: too tight, too short, too low cut, too loud, too high, too sheer, etc.
- Keep it understated, not loud or showy.
- Respect your company.
- Be flexible, dress appropriately for the situation.
- For men, collars work best whether it's casual or formal.
- Remember the business in "business casual."

Be smart! Don't let appearance get in the way of being successful.

Men — Professional	Women — Professional
Acceptable: Suits — three piece, two piece, two-buttoned or three-buttoned Blazer or Sports jacket with tie Slacks Dress shirts or oxford button down Vest Overcoat or raincoat Oxfords, wingtips, or loafers Dark socks Umbrella (arriving for a meeting soaking wet is not impressive) Not Acceptable: Loud colors or bold patterns Wearing spread collar without a tie Athletic shoes White socks Fur coats Showy belt buckles	Acceptable: Three piece suit: jacket, trousers, and an interchangeable skirt White or cream colored blouse Coordinating color blouse Sweater set A silk scarf Quality all-weather coat Good quality handbag 1 ½ inch black leather pumps or high heels Good-quality loafer-style shoes or flats Tights and/or stockings Umbrella (arriving for a meeting soaking wet is not impressive) Not acceptable: Jewelry that dangles, jangles, sparkles, or is overly large Athletic shoes Fur (depends on locale) Metallic, glittery, or sheer fabrics
Men — Casual	Women — Casual
Acceptable: Blazer Shirts — Oxford style, button down collars Turtleneck shirts Short sleeved polo shirts Khaki slacks or dress jeans V-neck or crew neck sweaters Informal ties Not Acceptable: T-shirts with slogans, sayings, or cartoon characters Torn or worn out jeans Anything shiny or too tight Sandals Tank tops Shorts	Acceptable: Casual blazer over nice quality tailored pants or skirt Day dress Khaki slacks or dress jeans Washable linen pants Twin sweater sets Tunic style sweaters Loafers or flats Open-toe pumps Not Acceptable: T-shirts with slogans, sayings, or cartoon characters Torn, worn-out jeans Strapless, stretchy bandeau tops Exercise clothing, sweatpants, or sweat suits Tank tops Bare midriffs

The issue of jeans: Wearing jeans or not is determined by the workplace. At some places jeans are fine and others they are not. However, it is never acceptable to wear jeans that are torn, have holes, are stained, are too tight, and/or are very worn out. This applies to men and women. The same guidelines apply to t-shirts where in some companies the company shirt with a logo is perfectly acceptable.

Meeting Etiquette

Show Consideration:

- Prepare for the meeting:
 - Review the agenda; think about it.
 - Ask questions: “What can I do to prepare?” “Should I bring anything?”
- Be punctual:
 - Arriving too *early* may interfere with your host’s preparation.
 - Arriving too *late* distracts other participants in the meeting.
- Notify the meeting organizer if you will be unavoidably late.
- Enter unobtrusively when you are late, and apologize without interrupting.
- Turn off your cell/smartphone, etc.
- Let the leader know before the meeting starts if you need to leave a meeting early.

Show Respect:

- Participate with interest; avoid complaining or displaying a whining tone.
 - Remain attentive and focused, even if you are not speaking.
 - Resist the temptation to hold side conversations or perform tasks that are not related to the meeting.
- Take cues from the leader as to appropriate tone/style.
- Don’t sit at the end of a conference table unless you are leading the meeting.
- Respond to the invitation, even if a response is not required.

Show Honesty:

- Treat the meeting as “job time” and not “down time.”
- Be honest with yourself about the value of the meeting. If you don’t see the value, then you need to bring it to your boss’s attention after the meeting.
- Follow up: After the meeting, do what you were assigned to do.

Guidelines For Relationship Problems

From the Petty to the Intolerable

Petty Annoyances

- Being asked to get a cup of coffee.
- Coffee not made.
- Liverwurst and onions every day.
- Someone cooks a bag of popcorn.
- People leave their stuff on the conference room table.
- Photocopier out of paper.
- Someone talking loudly on the phone.

Dealing with Petty Annoyances

- Take a deep breath. Ask yourself:
 - Is it worth it?
 - Is it rising to the level of being intolerable?
 - Is it just you?
 - Does it bother others?
 - Are you really willing to make an issue of it?
 - Can you deal with other's foibles and your own?
- If you decide to deal with it:
 - Do it in private.
 - Do it when you are not angry.
 - First, ask yourself: Is it my problem?
 - Do I have beliefs or attitudes that need to be looked at?
 - Be prepared with alternative solutions that recognize the other person's needs.
 - If the person does not acknowledge the problem, just forget it. Or, talk to the boss about a re-arrangement.
- Harassment goes beyond etiquette.
 - If you suspect that you are a victim of it, seek help from the proper authority inside or outside the company. Go to your boss and HR if necessary. Many companies have a "harassment-free" policy.

Guidelines For Relationship Problems

Intolerable/Revolting Situations

- See the handwriting on the wall; be honest with yourself.
 - Know when enough is enough.
 - Sometimes it is a new person who comes in – in the client organization or as a new boss.
- Continuous, insidious problems:
 - Set your own limits – what you are willing to accept and not.
 - Know your boundaries – find your backbone.
 - “I feel uncomfortable with...”
 - “It’s inappropriate.”
 - “I find it offensive.”
 - “I really don’t think I can do business with you.”
- For people who ask personal and private questions, you don’t have to prove you are an “enlightened” or “with-it” person by answering. Just say, “I really prefer not to discuss personal matters at work.”
- Know your standards first so you can decide what is right for you.
- We can feel trapped and think there are no alternatives. Do not believe it.
- You have choices or moral decisions to make. “If we are going to continue this relationship, we can’t continue to do this.”
- Tell the boss. Ask the boss: “Where is our integrity here? Do we just put up with anything?”
- Different companies have different tolerance levels; you have to make your decision.
- To a client: “This isn’t the right situation for us to work on. You need someone more in sync with you.”

Guidelines For Relationship Problems

Interpersonal Conflicts

- Adhere to policies, but how you work with and approach the individual makes the difference.
- Apply honesty by being willing to communicate, no matter how strained the situation. The failure to communicate is detrimental to relationships.
- Address issues one-on-one in private, not out in the open or in front of other people.
- Separate your emotions from your responses and strategies.
 - When annoyed or angry – step back; observe the situation.
 - Take a deep breath and wait to get yourself back under control.
 - Examine what triggered the anger and address it without the emotion/anger.
 - Apologize for anger, but not for the message.
 - We all have the ability to disengage from our anger. Dispassionately observe the physical sensations that build when you become angry. They are only sensations and do not control you. You don't have to react to them. Do not let your personal anger bleed in – anger shuts off people's willingness to consider alternatives.
- For aggressive behavior – when someone really goes after you:
 - First, disengage in the heat of it. Ask:
 - What is the underlying issue?
 - What is really going on here?
 - Deal with the underlying behavior and the issue separately.
 - Don't take it personally.
 - Observe, detach, and develop a strategy.
 - Refuse to be humiliated.
 - Document the incident, tell a friend, report it to the proper people.
 - Follow up if you don't get a clear response.
 - Ask for help if you are not sure what to do.

Email Etiquette Guidelines

1. **Never forget: emails are public documents**

If you wouldn't post your email on an office or company bulletin board, then don't send it. It is much too easy for your email to be shared around the office, throughout the company or literally, in some horrific cases, around the globe. One unsuspecting young lady wrote her husband at work to extol the intimate pleasures of the previous night. Upwards of 15,000,000 people are said to have read that email as it made its way around the world.

2. **Keep it short: favor quality over quantity**

Just as people tend to repeat themselves when they talk, they also tend to repeat themselves when they write emails. People have very little time to waste in business: Reading, or writing, the same point several times is a time-waster for both sender and receiver.

3. **Let it simmer. Use the "draft" or "send later" buttons**

Because email is such an instant form of communication, it is possible to imbue an email with a tone which may not be the tone you wanted. Written memos and letters were worked and reworked to get the message just right. In the email world, the "send later" or "draft" buttons give you the opportunity to reconsider the content and tone of an email before sending.

4. **Proofread**

When you send an email, all people have to judge you by are the words you actually write. There's no body language or voice inflection to help them develop an impression of you. Mistakes, poor grammar, inappropriate word choice all reflect poorly on you. In fact, instead of focusing on the message you are sending, the recipient may focus on the mistakes and miss the message.

5. **Be careful about the informality of emails**

Don't be overly familiar. "Hey Jim-bo" is no way to start a message to your boss, client, or prospect, even if you know him well. "Jim:" or "Dear Jim," will make a much better opening. People also make the mistake of not using any salutation, but simply start with the body of the message. Address the person the message is going to. If there are too many people in a group to identify personally, identify them as members of a group: "To all software support staff:" or "To all my email friends:" (just remember rule 6 below)

6. **Send only to those people who really need to receive the message**

Email mailboxes are bombarded with far too much unnecessary clutter. It is annoying to the receiver. Avoid using the "Reply to All" button unless everybody on the original "Send To" list really needs to hear from you. In addition, ask yourself if you really need to send a message to an entire group or department when an email to an individual is all that is required.

Email Etiquette Guidelines

7. Avoid jargon like “cuz” instead of “because”

Jargon can sound “with it” when you are talking, but when written it often loses its impact. In fact, jargon may prove to be detrimental in an email. The reader may start to wonder *why* you are using the jargon. It may actually seem stilted.

8. Avoid using all capital letters or all lowercase letters

Some people tend to think that all caps or all lowercase is an easier way to write. It avoids the problem of deciding if some words should be capitalized or not. In email parlance, ALL CAPS is a fast way to imply you are shouting at the recipient. ALL CAPS also has been shown to be more difficult to read than upper/lowercase. All lowercase gives the impression of laziness or lack of caring.

9. Strive for clarity and coherence

Clarity and coherence are much more important than length. The easiest way to know if what you have written is clear and makes sense is to read it out loud. If the words flow, if each sentence makes sense and adds to the message then it will “sound” right. But if you trip over awkward phrases or it sounds monotonous and boring, then your message needs rewriting.

10. Don’t use email to avoid difficult face-to-face interactions

“I don’t want to tell him he did a poor job on that report, so I think I’ll just write him an email instead.” Email should never be used as a way to avoid talking to a person, especially about a difficult situation. An email that criticizes an individual will simply leave a bad impression of you and may fail to address the situation and provide full closure.

Personal Skills for Professional Success

An Emily Post Seminar for
Siemens Financial Services

1

"Welcome"

It is my pleasure to be here with you today.

2

- What is Etiquette?
- Three goals
- Manners and Principles
- Why Business Etiquette?
- Leading with civility
- Thank-you and follow-up notes
- 24/7 Professional

3

Etiquette

4



After publication in 1922, "Etiquette," topped the nonfiction bestseller list, and the phrase "according to Emily Post" entered our language as the last word on the subject of social conduct.

Her numerous books, newspaper columns and a regular CBS radio program made Emily Post a figure of national stature and importance.

5

"Whenever two people come together and their behavior affects one another, you have etiquette. Etiquette is not some rigid code of manners, it's simply how person's lives touch one another."

- Emily Post



6

- Are Americans ruder today than 20 or 30 years ago? 69%
- On a frequent/occasional basis, do you encounter people using their cell phone rudely? 89%
- Have you used your cell phone in a loud or annoying manner in the past few months? 8%

7

It's **easier** to see rudeness in **others** than in yourself.

Rudeness **isn't** always **intentional**.

8

1. Think Before You Act
2. Make Choices That Build Relationships
3. Do It Sincerely

9

Etiquette = Manners + Principles

- Manners smooth the way to build better relationships by telling us:
 - what to do.
 - what to expect of others.
- Principles help us:
 - figure out how to interact when there is no set manner.
 - resolve relationship situations.

10

What are some examples of **civility** in the workplace?

Of **incivility**?

11

- Be on time.
- Greet each other with a smile.
- Respect coworkers' privacy.
- Ask for time and attention.
- Focus on your colleague when you are meeting.
- Dress for the occasion.
- Pay attention to greeting, parting, and introductions.

12

Business ETIQUETTE Business Etiquette Principles

The Principles

- **Consideration**
Thinking, empathy
- **Respect**
Recognizing the worth of others. Having care for others, self and things.
- **Honesty**
Acting sincerely, being truthful

Etiquette in Action

- **Think Before Acting**
- **Make Choices That Build Relationships**
- **Do It Sincerely**

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Business ETIQUETTE

Why Business Etiquette?

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Business ETIQUETTE Differentiator

Opportunity Vs. Obligation

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Business ETIQUETTE UNC Study

- **1,400** persons were interviewed.
- **775** persons had an uncivil act committed against them:
 - Lost work time avoiding instigator **28%**
 - Lost work time worrying **53%**
 - Decreased work effort **22%**
 - Actually left their job **12%**

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Business ETIQUETTE UNC Study

Instigator

- Three times more likely to be a person of **higher status**.
- Likely to be a worker with **valued talent**.

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17

Business ETIQUETTE Causes of Conflict

```

graph TD
    A[Incivility/Rudeness] --> B[Stress]
    B --> C[Loss of Awareness]
    C --> A
  
```

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1. Think Before You Act
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19

Lead by example.

Communicate positively and carefully.

Clarify expectations for the future.

Enforce standards in your places of work.

Embrace the goals to **Think Before You Act** and to **Make Choices That Build Relationships** and **Do it Sincerely**.

20

Thank-You and Follow-Up Notes

21

- Email, phone call, text, or handwritten?
- Choose handwritten thank-you notes for:
 - Gifts, substantial favors, special meals
 - Major opportunities
 - Relationship milestones

22

Send within 24 hours if possible:

- Keep it short: 3 – 5 sentences.
- Be gracious, stick to the point.
- If you meet with several people, write a note to each person

23

- Use the date and a salutation.
- State your thanks or appreciation, especially for a gift or meal.
- Mention something specific to the situation or conversation.
- Indicate your next actions, if appropriate.
- Thank again and use a closing.

24

July 19, 2023

Dear Mr. Jones,

Thank you very much for meeting with me. I enjoyed having the opportunity to find out more about your company. I am looking forward to working with your team. Thank you again.

Sincerely,
Carla Ramirez

25

The 24/7 Professional

26

- Actions outside work affect you.
- Purely social situations can become business situations instantly.
- Highest level of professional conduct at off-site business venues.
- Use the principles regardless of what others think.

27

- How you conduct yourself matters.
- Cultivate awareness of and care for others.
- “Good etiquette” is not something you know; it is something you practice.

28

1. Be on time.
2. Use “Please” and “Thank You.”
3. Present yourself for the job you want to have, not the job you are in: attire, attitude, effort.
4. Harness the power of the compliment.
5. Fight demeaning or superior attitudes in yourself.
6. Take responsibility.
7. Be prepared.
8. Focus on the etiquette for greetings, table manners and workspace issues.
9. Think before acting and then act to build relationships.
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Thank You

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1

"Welcome"

It is my pleasure to be here with you today.

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2

- Etiquette, Manners and Principles
- Host and Guest Roles
- Introductions
- Conversation
- Networking
- Business Social
- 24/7 Professional

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3



After publication in 1922, "Etiquette," topped the nonfiction bestseller list, and the phrase "according to Emily Post" entered our language as the last word on the subject of social conduct.

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"Whenever two people come together and their behavior affects one another, you have etiquette. Etiquette is not some rigid code of manners, it's simply how person's lives touch one another."

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What are some examples of **civility** in business social situations?

Of **incivility**?

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The Good Host and The Good Guest

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7

1. Invite clearly: include the who/what/when/where/why.
2. Plan well: Prepare as much and as early as you can.
3. Remain calm: Your mood sets the tone.
4. Make guests feel welcome: greet, introduce, check in.
5. Be flexible and gracious.
6. Be appreciative: Thank guests for attending and for gifts.

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8

1. RSVP immediately.
2. Be on time.
3. Be a willing participant.
4. Offer to help when you can.
5. Don't overindulge: whether it is the mozzarella sticks or the Champagne.
6. Thank the host twice: on your way out the door and with a phone call or a written note the next day.

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9

Introductions

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10

First impressions can make or break you.

You never get a second chance to make a first impression.

How you handle yourself gives strong clues about your confidence and professionalism.

The introduction is your opportunity to make a positive first impression.

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Introductions matter. 4 steps:

- Stand or sit up.
- Look them in the eye and smile.
- Firm grip.
- Say your name and repeat their name.

Confidence is key.

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Talk **first** to the person:

- More **important**
- You would like to **honor**.

“Mr. Guest, I would like to introduce our senior account representative, Tom Smith, to you.”

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Never say or do something with a member of one gender that you wouldn't say or do with someone of a different gender.

Ask, don't just do.

- Holding a chair
- Holding the door
- Navigating the revolving door

It's not about men performing courtesies for women; it's about people being courteous to people.

What does chivalry look like today?

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Conversation

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Active Listening Skills

1. Use nonverbal cues.
2. Repeat back what you have heard.
3. Ask open-ended follow-up questions.
4. Keep it up.

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Three Tiers

1. Safe - Sports, weather, celebrities
2. Risky - Politics, religion, dating
3. Personal - Family and finance

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- Please – Soften a request
- Thank you – Show appreciation
- You're Welcome – Acknowledge appreciation
- Sorry – Indicates regret
- Excuse me – Asks for forgiveness
- Pardon me – Acknowledges mistake

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Business Social

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- Show up on time.
- Turn off phones and devices.
- Introduce yourself to three people.
- Learn something new about someone you already know.
- Hand out five business cards.
- Get contact information from two people.
- Follow up over 24 hours later.

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1. Wear your nametag on your right lapel.
2. Hold beverages in your left hand.
3. Never double dip.
4. Get a napkin and a spare.
5. Don't over imbibe, follow the one drink rule.
6. Know your role - be a good host or guest.
7. Participate fully.

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The 24/7 Professional

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- How you conduct yourself matters.
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- "Good etiquette" is not something you know; it is something you practice.

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Business Social Top Seven

1. Avoid the temptation to socialize with colleagues.
2. Commit to introducing yourself well.
3. Don't stuff your plate or over imbibe—set your limit before you start.
4. Don't talk with your mouth full.
5. Welcome people into your conversation.
6. Avoid dirty laundry and controversial topics.
7. Follow-up when appropriate.

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Business Etiquette Top Ten

1. Be on time.
2. Use "Please" and "Thank You."
3. Present yourself for the job you want to have, not the job you are in: attire, attitude, effort.
4. Harness the power of the compliment.
5. Fight demeaning or superior attitudes in yourself.
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Personal Skills for Professional Success

Emily Post Business Meeting Etiquette for
Siemens Financial Services

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1

"Welcome"

It is my pleasure to be here with you today.

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2

- Etiquette, Three Goals
- Meeting Best Practices
- Organizer Consideration
- Hosting Responsibilities
- Attending Best Practices
- Virtual Meetings
- Business Cards and Follow-up

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1. Think Before You Act
2. Make Choices That Build Relationships
3. Do It Sincerely

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6

What are some examples of **civility** in business meetings?

Of **incivility**?

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Basic Principles

- One person speaks at a time
- One topic is discussed at a time
- Each topic is debated fully
- We meet as equals
- Minority rights are protected, majority will prevail
- Avoid negative motions

Meeting Agenda

- Call the meeting to order. Your manager or other designated chairperson is responsible for this step.
- Take roll call.
- Read and approve past meeting minutes.
- Review reports.
- Address high-priority agenda items.
- Deal with any unfinished business.
- Cover new items of business.
- Adjourn the meeting.

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Organizer Responsibilities

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- Invitation:
 - The correct date, day, time, and time zone
 - All attendees were issued an invitation
 - The correct location, link, or call-in number was issued
- Share contact information to use in case attendees have technical difficulties or need to get in touch
- Send necessary prep materials, or request them from attendees. Reserve space.
- Check in-person room set-up given the nature of the meeting: seating, lighting, screens, refreshment, accessibility

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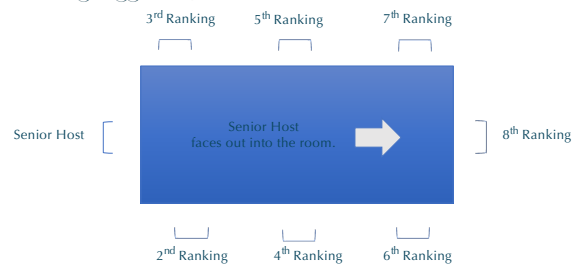
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- Send an email, text, or IM reminder with any necessary log-in information
- Confirm presentations, materials, and meeting supplies
- If the meeting is in person:
 - Prepare the room: test equipment, organize refreshments, name and place cards
 - Arrive early and greet attendees as they arrive
- If the meeting is virtual:
 - Test the system ahead of time as a guest
 - Log in to the platform or call five to ten minutes early so you are ready to receive or admit attendees as they arrive

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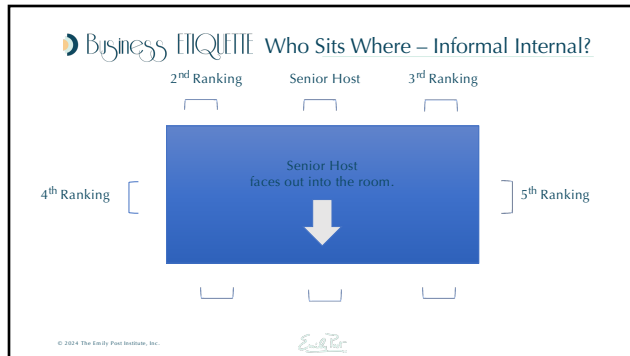
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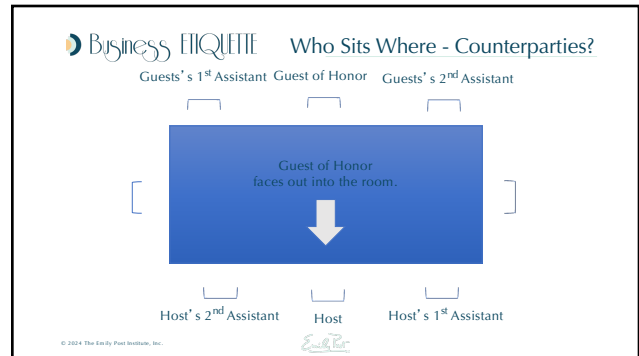
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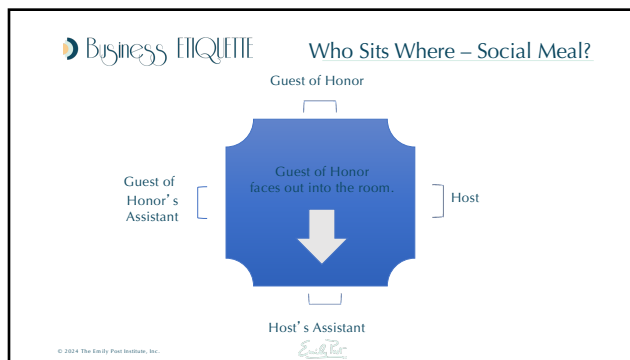
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15

- Business ETIQUETTE** Attendee Meeting Prep Checklist
- Participate in scheduling if necessary
 - RSVP once a date and time have been sent and an invitation issued
 - Double-check that it's on your calendar correctly and that any log-in information is accessible
 - Review the agenda and any meeting documents well before the meeting
 - Arrive on time and bring any requested materials or information to the meeting
 - Have pen and paper handy
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Business ETIQUETTE

The Good Host and The Good Attendee

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- Business ETIQUETTE** Six Ways to Be a Good Host
1. Invite clearly: include the who/what/when/where/why.
 2. Plan well: Prepare early and share agendas, materials, and relevant meeting information.
 3. Start on time and stay on schedule
 4. Guide participants: greet, introduce, check in, review agenda.
 5. Be a flexible and gracious moderator.
 6. Close well and on time: summarize, assign tasks, conclude, and thank as necessary.
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18

Business ETIQUETTE Six Ways to Be a Good Participant

1. RSVP appropriately.
2. Be on time. Deal with lateness responsibly.
3. Stay engaged, follow along.
4. Balance participation.
5. Be patient, don't interrupt. Save important contributions for later by writing them down.
6. Follow through: on decisions, tasks, and deadlines.

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Business ETIQUETTE Discussion: Mobile Devices

People expect meetings to be free of phone and tablet distractions.

What are some examples of **Civil** phone use in business meetings?

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Business ETIQUETTE

Virtual Meetings

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21

Business ETIQUETTE New Courtesy - Virtual Meetings

Emerging post-pandemic standards for video meetings

- Simulate the in-person experience to the best extent possible
- Know your equipment and systems
- Be timely
- Minimize Distractions

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Business ETIQUETTE Virtual Set-up

- Control your environment. Consider lighting, camera placement, eye contact, and external distractions.
- Test all systems and technical capabilities ahead of time:
 - Software – familiarize yourself with the platform, download and install apps, AI, backgrounds, chat and special features
 - Hardware – Check cameras, mics, external screens, remotes, speakers, connection speed
- Show Up. Turn on your camera when the meeting begins

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Business ETIQUETTE Virtual Meeting Considerations

- Treat it like an in-person meeting. Dress and act the part.
- Set expectations at the start. Cameras, participation, agenda, timing, AI recording, supporting materials.
- Identify all parties.
- Mute microphones-also alerts, alarms, and notifications.
- No eating please.
- Build in time for welcome, intro, transitions and closing.

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Business Cards and Follow-Up Notes

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The Value of a Business Card

- It is a tangible reminder.
- Defines who you are and your responsibilities.
- Invites business acquaintances to get in touch with you.
- Provides methods of communication:
 - Phone, Email, Address
 - Social accounts

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Handing Out Business Cards

- Give and ask for one from people you expect to do business with:
 - At start of meeting
 - After introductions
 - In response to being offered one
 - At end of meeting or interaction
- Offer and receive with two hands.
- Face the text to the recipient.
- Look at it carefully, put it away carefully.

26

- Email, phone call, or handwritten?
- Choose handwritten notes for:
 - Gifts, special favors, meals, recognition of achievement
 - Major opportunities
 - Relationship milestones

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Send within 24 hours if possible:

- Keep it short: 3 – 5 sentences.
- Be gracious, stick to the point.
- If you meet with several people, write a note to each person

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28

- Use the date and a salutation.
- State your thanks or appreciation, especially for a gift or meal.
- Mention something specific to the situation or meeting.
- Indicate your next actions, if appropriate.
- Thank if appropriate and use a closing.

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July 19, 2024

Dear Mr. Jones,

It was so good to finally get a chance to meet with you. I enjoyed having the opportunity to hear more about your company and look forward to continue working with your team. Next time you will have to let me host you at our new office. Until then.

Sincerely,
Carla Ramirez

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Business Meeting Top Seven

1. Be prepared: As the organizer, Have an agenda and supporting documents. As a participant, Bring the materials and information assigned to you.
2. Notify the organizer of any change required in your plans ASAP.
3. Be punctual. If you are late, don't disrupt the meeting when you enter.
4. Have your business cards ready.
5. Turn off cell phone, watch timer, and smartphone alerts.
6. During the meeting: Keep a positive attitude, eye contact, poker face, Do not contradict each other, Be a good listener/participant; avoid daydreaming, dozing, looking bored.
7. Follow-up: Organizers send minutes and to do's, Participants be clear of expectations and follow through.

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Business Etiquette Top Ten

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