

## Business Etiquette

### The Importance of Business Etiquette

Etiquette can help businesses improve the following areas:

1. **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.
2. **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.
3. **Employee Engagement:** Good manners will help improve morale and confidence between employees and team members.
4. **Team Synergy:** Good manners will help establish smooth working relationships within a team, which contributes to greater productivity.

### 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 Sachin Shah. 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. Aniket."* Or *"It's nice to meet you, Aniket."* 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: *"Pooja Dandakar, I would like you to meet President Vijay. Pooja 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. Gandhi" or "Attorney Saurabh Mukherjee".

## 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.



## 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 card 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 store 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 produced 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. Khan. 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, Mayur." 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 Birju the plumber, imagine the word Birju spelled with pipes. If Jaswinder Singh is a marathon runner, imagine Jaswinder running on a treadmill in a gym called Jaswinder'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 Jaya who sells kitchen ware, you can repeat in your head: *Jaya makes jam and juice in July.*
- **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.

## 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.

## Business Email Etiquette

Email is a convenient and effective medium to conduct business communication.

### 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. *Sita, 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.

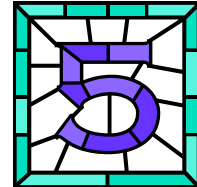
Always use full sentences and words with proper sentence structure. Don't use text-speak.

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."

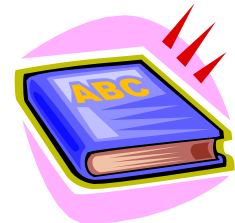
In business emails, avoid text-speak abbreviations such as BTW (by the way), IMHO (In my honest opinion,) and LOL (laugh out loud). Avoid the use of emoticons, as well.



## 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.



## **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, Kajol speaking." Or "You've reached Marks and Spencer, this is Raj."

Inquire how you might be of assistance.

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

### **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.



## 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 stationery.

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*

*Sunil Modi*

*Sinclair Enterprises*

*Dear Sunil,*

*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,*

*Vinita Tare*



## 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 kiran,"* instead of *"Dear Mr. Shah,"* 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..."*

## 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 would 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, & ties. Jackets are optional but preferred. For ladies, it's evening dress, dinner dress (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 coat, trousers with satin ribbon, cummerbund and bow tie. 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:

1. 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.
2. 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.
3. When dressing in the office, refer to the company dress code or if none is written, check the company culture.
4. 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.
5. When in doubt of your client's dress policy, err on the side of conservative. It's better to be overdressed than underdressed.

