

Tips on Business Etiquette: *Setting a professional tone*

For organizations and employees alike, recognizing the critical link between business protocol and profit is key to your success. Learn how to confidently interact with colleagues in ways that make you and your whole organization shine with this special report.

Discover best practices on making proper introductions; cubicle etiquette; “casual dress” rules; handshake protocol; guest etiquette; workplace behavior faux pas; business dining etiquette, office wedding invites and other co-worker special occasions; business letter and email protocol—and even how your office decorations may affect your professional image.

Tips on Business Etiquette also presents real-life etiquette questions answered by “America’s foremost authority on manners,” Letitia Baldrige. And you’ll learn tips on how to finesse awkward, embarrassing situations at work, courtesy of the great-grandson of Emily Post, etiquette expert Peter Post.

Business Etiquette Tips _____ #1

‘Casual dress’ etiquette: Demystify your company’s dress code

Casual. *Corporate* casual. *Business* casual. *Smart* casual. *Resort* casual. Don’t leave employees baffled about your company’s dress code.

Explain what you mean by “business casual” or “corporate casual,” etc. with examples of appropriate attire for men and women.

If you will be attending a meeting where the dress code is unclear, conduct casual research: Contact someone in the host organization, talk with previous attendees to learn what people *really* wear (ties are encouraged, but no one wears one) or seek the advice of experts at a clothing shop that caters to businesspeople.

Business Etiquette Tips _____ #2

How to finesse awkward, embarrassing situations

Knowing whether or not to tell your CEO that he has spinach stuck in his teeth is one sure test of your business etiquette skills. (*Answer:* Tell him, but discreetly.)

How would you handle the two difficult or embarrassing situations below?

Situation 1. You find a personal—and potentially embarrassing—document left behind on the photocopier.

Solution: Normally, you’d put forgotten pages in a tray beside the copier, for people to claim later. In this case, though, deliver the document in person, advises Peter Post, author of *The Etiquette Advantage in Business* and great-grandson of Emily Post.

And don’t peruse its contents. “Save the person any worry,” writes Post, “by

volunteering: ‘I didn’t read this when I opened the copier lid, but I could tell it was private and thought I’d drop it by.’”

Situation 2. The boss is expecting a visitor any moment, and you notice his fly is open. You wonder whether you should tell him or just hope someone else does.

Solution: If you’re a man, tell him. If you’re a woman, ask one of the guys in the office to let him know.

Business Etiquette Tips _____ #3

Handshake etiquette: Setting the stage for instant rapport

A good, well-timed handshake to pair with your smile is a sure way to stand out, whether you’re at the company picnic or an industry conference.

Here’s how important it is: A prospective employee with the best handshake is more likely to get the job, research shows.

Even if you’re not a job-seeker, a good handshake will grant you instant rapport when meeting someone new. With that in mind, here’s a refresher course on the business protocol of the perfect handshake:

- **Focus on the person you’re shaking hands with.** Look directly into the person’s eyes during the handshake.
- **Keep your grip firm and assertive but not too tight.** *General rule of thumb:* Grasp as tightly as the other person does.
- **Two up-and-down pumps are adequate.** The shake should last about three seconds.
- **Two-handed handshakes are a sign of real affection,** so steer clear of them when meeting new people.
- **Be ready to shake hands, regardless of your gender** or the other person’s. He or she will remember that you extended your hand first.

Business Etiquette Tips _____ #4

Guest etiquette: Roll out the red carpet for visitors

When a VIP comes to your office, how do you dole out extra-special treatment? Being friendly and responsive is the key to treating VIPs well, says etiquette expert Peter Post. Here’s Post’s advice on how to do that:

Greet VIPs by name. “There’s something so powerful about using somebody’s name when you greet them,” Post says. “I’m always surprised when some people don’t do it.” Make the person feel welcome. Post even suggests standing up in some cases.

Example: Stand up, say: “Hello, Mr. Smith. Let me tell John you’re here.” Go to John’s door, as opposed to calling him, open it for the VIP guest, then close it behind him. These are nice, simple things you can do. And you’ll be remembered.

Deliver a heads-up to the boss. Even if you wouldn't normally give your boss a five-minute warning before an appointment, this would be a time to do it. That sets the stage. "You're giving him that moment to get ready," Post says.

Shoo away distractions so you're not caught juggling when the VIP arrives. If someone comes to your desk with a problem, be direct in asking her to wait.

Example: "I want to help you with that problem, but I know Mr. Smith is about to arrive and I need to give him my full attention. I'll get back to you."

Make small talk only if you observe a clear signal. "I think part of the smartness of an admin is an ability to read people," Post says. If the VIP ends up waiting a minute or two, you'll need to evaluate whether to attempt chitchat. If he whips out a newspaper, don't try to make conversation. If he sits and smiles at you, then ask about the weather.

"And, please, converse without going into controversial topics," Post advises.

Business Etiquette Tips _____ #5

Business phone etiquette: Soothe angry callers

Turn a growling caller into a purring, pleased customer with these telephone etiquette techniques:

▶ **Bite your tongue.** When someone screams on the phone, your first thought may be, "What a jerk!" But that attitude will only poison an already-tenuous relationship with the caller. Instead, stay calm and listen.

▶ **Let 'em vent.** Like a whistling kettle, angry callers need to vent some steam. Don't interrupt—even with a solution—before they tell their story.

▶ **Take it down a notch.** Instead of raising your voice to match the caller's volume, speak softly. That will soothe the speaker and show him or her that you're interested in handling the complaint in a calm, rational way.

▶ **Stay focused.** Resist the urge to complete another task while a caller rants. The sound of your rattling papers will signal that you don't care.

▶ **Empathize and apologize.** When the caller runs out of vitriol, show that you understand why the person is angry. *Example:* "I know this has been frustrating for you, Mr. Smith, and I'm sorry that Ms. Jones has not returned your call." *Note:* Use the caller's name and speak in complete sentences, not single words such as "Yes" or "No," which sometimes sound rude.

▶ **Take one for the team.** Accept responsibility for the problem even if you're not to blame. *Example:* "I should have made it clear that, although our manager will be returning to the office today, she's tied up in meetings until the afternoon."

▶ **Ask, "What would you like me to do?"** This shows that you're there to help.

▶ **Offer a fallback.** Never end a call with "I can't do that." If you can't do what the caller asks, tell him or her what you can do. *Example:* "I can't interrupt that meeting, Mr. Smith, but I can pass along the message to call you as soon as it

ends.”

Business Etiquette Tips _____ #6

Business letter etiquette: The art of the personal note

Who hasn't started writing a thank-you or condolence note, only to encounter “the big um” after the first sentence?

“The big um is when you get your first couple of words out and wonder, ‘What’s next?’” says Angela Ensminger, co-author of *On a Personal Note: A Guide to Writing Notes with Style* (Hallmark). “That blank paper is very intimidating.” Ensminger told attendees at an International Association of Administrative Professionals convention that great personal notes come from taking these five steps:

1. State why you're writing in a straightforward manner. *Example:* “Thank you for taking the time to visit our offices.”

2. Elaborate on step 1. *Example:* “It was so valuable for our entire executive team to meet with you face to face. And your meeting sparked several creative ideas that we're excited to pursue.”

3. Build the relationship. “This is the most important step,” says Ensminger. “What you're saying here is: ‘Your relationship matters, and I'm proving it by taking the time to write this note.’ In business relationships, time taken is worth everything. If there's a bell curve of emotion to a personal note, this is the top of it.”

That key step is often missing in personal notes, adds Ensminger, so doing it well will set you apart from the crowd. As you write, take into consideration how close your boss is to the recipient and what's coming up next in the relationship.

Example: “We feel fortunate to have spent so much time with you. We look forward to seeing you again at the XYZ convention next year.”

4. Restate why you're writing. *Example:* “Again, thanks for your visit.”

5. Offer your regards. For business notes, “Sincerely” is the standard.

Bottom line: It takes practice, but the payoff is huge. Ensminger says, “People still get a jolt when they look in their mailbox, and there's something other than a form letter in there.”

Business email etiquette: 3 quick tips

1. Send the right message with your email sign-off by “mirroring,” says Judith Kallos,

creator of www.NetManners.com, a site dedicated to online etiquette.

“In business, you want to maintain the highest level of formality until the other person indicates

otherwise,” she says. “Let the other side set the level of familiarity.”

2. Unless your organization specifies otherwise, you need not respond to email messages

if your name is in the “cc” field, says productivity expert Laura Stack. And don’t reply simply to

confirm receiving a message, since most email systems allow the sender to request a receipt

if needed. Reply only if you can’t handle an assignment in the time frame expected.

3. Find out whether you’ve been rude via email at www.NetManners.com.

Business Etiquette Tips _____ #7

Business dining etiquette: 5 rules

Whether you’re lunching with peers at a convention or meeting with a vendor, business dining etiquette can keep you from marring your image with a faux pas.

Here are five etiquette rules for business meals, according to Robin Jay, author of *The Art of the Business Lunch: Building Relationships Between 12 and 2*.

1. Never, ever talk with your mouth full. Instead, take small bites so you can quickly swallow if somebody asks you a question, Jay says.

2. Come prepared with a few casual, non-business topics in mind. It helps you avoid awkward silences. People enjoy giving their thoughts on subjects like travel, sports and movies.

3. Always be kind to the waitstaff, no matter what happens. Anyone who is nice to you but nasty to the server is not a nice person.

4. Know your lunch partner’s business. It’s especially key when your tablemate is someone you’d like to impress, but the rule holds true regardless. The fewer times you have to say (or think), “I didn’t know that!” the more impressed the other party will be. *How to steal this idea:* Take a few minutes to do a Google search before you leave for lunch.

5. Put some thought into choosing the right restaurant. Too casual or inexpensive and the person may not feel valued. Too expensive and they may perceive you as wasteful. When in doubt, suggest that the other person pick the place.

► **Bonus tip:** If you’ve ever wondered when (and how much) to tip an airport skycap, cab driver, pizza delivery person or furniture delivery person, go online to

[The Original Tipping Page](#). The site offers advice on various tipping moments, plus a tip-rate chart for your wallet.

Business Etiquette Tips _____ #8

Office decorations: Balance personal & professional image

If reaching for reference materials requires moving a handful of beads you brought back from Mardi Gras, your personality may be overpowering your professional image.

Personalizing our office space is tempting because we spend more awake hours there than anywhere else. But strike a balance by answering these questions about your cubicle décor:

1. Who will see it? A receptionist in an office with many VIP visitors obviously enjoys less freedom of expression than someone whose workplace hosts few outsiders. In wide-open spaces, search for private spots to display meaningful mementos. *Example:* Post an inspirational quote on your keyboard tray.

2. What does it say about you? Great choices for office decorations tell visitors something about you that might spark a conversation. A photo of you crossing the finish line in a marathon might inspire others as well as yourself. But a wall of blue ribbons hints at either boasting or insecurity. If doodads and figurines obscure your computer and desktop, don't be surprised when others question your commitment to work. And while live plants add a splash of color, a dead one screams "Neglect!"

3. Is it distracting? Although cubicle walls may block your items from view, they still may disturb others. Avoid screensavers and toys with sound effects, or fresh flowers each week if your neighbor suffers from allergies. Judge whether a candy dish on your desk offers hospitality, unwelcome temptation or an invitation to distractions from work.

4. Does it go overboard? Show off a few prize pieces from your collection, not hundreds of frogs. *The test:* If it's impossible to take a professional-looking photo of you from any angle in your workstation, you've surrounded yourself with too many items unrelated to work.

Just like professional dress in the workplace, seek cues from the corporate culture, your manager and others you respect about what's appropriate in your workplace.

Business Etiquette Tips _____ #9

Etiquette questions: Expert advice from Letitia Baldrige

Letitia Baldrige has been called "America's foremost authority on manners." She has written dozens of books on manners, entertaining and design. In a column in Business Management Daily's Administrative Professional Today,

she answered readers' questions on workplace etiquette and protocol. Here's a sampling.

► **What's the proper way to introduce business associates?**

Q. I occasionally escort business visitors around our office and introduce them to our executives. I'm never sure whose name and title to say first—the visitor's or the executive's. What's the proper protocol?

Letitia: Always start with the more important person's name. For example, if you're showing your CEO's new executive assistant, Susan Flynn, around the office, you'd say: "Jim, I'd like to present George's new executive assistant, Susan Flynn. She has just transferred here from our offices in Pasadena. Susan, this is Jim Farnsworth, our corporate counsel, and you'll be seeing a lot of him."

If you're introducing someone important in your company to a more junior visitor, you would come out first with your senior executive's name: "Mr. Anderson, I would like to introduce Camilla Bianco to you. She is a new vice president for creative services. Camilla, this is Jonathan Anderson, president of the Blue Division."

If you get confused, relax: The important thing is to say the names of both people clearly. They'll take it from there.

► **Office wedding protocol: Must I invite everybody?**

Q. I'm planning my wedding and trying to keep the guest list to a manageable number. But I feel compelled to invite people from work. How can I invite some people but not others without hurting anyone's feelings? And I know I should invite my boss, but should I invite my boss's boss?

Letitia: Tell everyone well before your big day that you're having a small wedding, so no one will feel left out. Invite only very essential friends from the office, including your boss (but not your boss's boss!), his or her spouse, and perhaps your two closest friends. Your family members should take priority over co-workers, as should close friends from other parts of your life.

If you're lucky enough to have a group of supportive, close friends at work, ask them to give a simple, no-frills cocktail party in honor of your wedding a couple of weeks before it takes place. Then you can invite everyone from work, and they will feel caught up in the excitement of the wedding and look upon this event as if it were a reception.

► **Business dining etiquette: Who pays for lunch?**

Q. When a group of co-workers takes a colleague to lunch for a special occasion, such as a birthday, how should we divide the tab?

Letitia: I presume most people want these special occasion meals for office colleagues to be amusing, memorable and pleasant from every aspect. The big obstacle to success is when the bill is presented. There is fumbling and mumbling, indecision and objections. The conversation at bill-paying time might go like this:

"I had only a house salad, so I should pay less."

"Is \$10 enough?"

"I had a really expensive dessert. Should I pay more?"

"I didn't bring much cash" ... and on and on and on.

The way to solve this is always to split it according to how many people are in attendance. The total should include the cost of the guest of honor's meal, plus the gratuities for everyone. If you feel you were cheated by spending less this time, it will probably even out the next time, or the time after that, when you will be spending more than the others. It almost always comes out in the end.

To split a large check 10 ways is easy. To calculate each person's charges, buttered by butter pad, spoils the party.

► **Does it matter who opens a door nowadays?**

Q. What's the proper procedure when a group of people are approaching a closed door? If I (a female) arrive first, I usually open the door and hold it for others, but I notice that makes some people (particularly older males) uncomfortable.

Letitia: We spend too much time worrying about who should go through the door first. The important thing is just to get through it!

If you hold the door for a man who is clearly embarrassed by it, rest easy in the knowledge that you won't see many more men like him. He's obviously of the "outgoing generation" of businessmen whose touches of chivalry are no longer the norm. Just be thankful you once knew a "real gentleman."

Of course, you can avoid this problem by simply not being the first person at the door. Let someone else be the first.

If you find yourself stuck with holding the door for what seems like an interminably long line of people, step away from the door and let someone else cope with it. You shouldn't be left holding the door for the whole world.

► **What's the protocol on presenting my business card?**

Q. When's the proper time to present my business card at a meeting?

Letitia: When you present your business card to someone, you're handing *yourself* to that person, so it pays to remember these business card etiquette tips: To gracefully exchange cards while talking to people before a meeting, hand the other person your card, saying: "I hope you won't mind if I give you my card, and I would appreciate having yours, also. I would enjoy discussing some things further with you, and now is obviously not the time."

Read the other person's card before you put it away, then follow up with a call within a day or two. Never present your card when the recipient is talking to someone else, hurrying to an appointment, talking on the telephone, or eating and drinking.