



Unit 1

Introduction to Business Etiquette

Staff Training Solutions

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Network effectively, including making introductions, shaking hands, and using business cards appropriately
- ✓ Dress appropriately for every business occasion
- ✓ Feel comfortable when dining in business and formal situations

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Business Etiquette Basics

No matter how formal or informal your workplace is, people still care about social skills and manners (even if they don't come out and say so). Rules about which fork to use for a salad, or not talking with food in your mouth, are examples of **good manners**. **Etiquette**, however, takes the discussion about manners to a higher level.

Emily Post, famous for her approach to etiquette, manners, and ethics, defined etiquette like this:

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 persons' lives touch one another.

Having good manners doesn't just mean you can make a positive impression on others. It is also good for business. When you can apply your awareness of etiquette in different situations, you demonstrate that you want to be taken seriously. You become an ambassador for what you do and who you work with.

Instead of worrying about embarrassment from doing or saying the wrong thing in a business situation, this course will provide you with practical ideas to help you present yourself well.

This course is based on a Western point of view, so remember that etiquette in other cultures is different. If you are visiting other places or having people coming to visit you, you need to learn about their traditions and customs. Make a commitment to refer to outside sources to learn as much as you can about their culture and make appropriate accommodations.

Things to consider include:

- Language
- Holiday and work schedules (not everyone works Monday to Friday)
- Shaking hands, as not every culture does this
- Dining customs (such as food, table manners, and alcohol use)

Learn as much as you can about the customs of people you will meet. If you find that you have short notice, being respectful and conservative will serve you well, but you can build a lot more credibility by learning their customs ahead of time. Above all, ensure you are respectful.

Test Your Business Etiquette

you are at the buffet table and have been eating, it is expected that you will wipe your hand on your napkin before extending it to be shaken.

Depth of Grip

A handshake is palm to palm. Generally you will place your hand so that the web between your thumb and forefinger meets the web of the other person's hand, briefly. Your hand remains perpendicular. If your palm is facing up, this may be construed as a sign of submissiveness. Similarly, if your palm is on top, it can be seen as a sign of aggression.

Duration of Grip

The perfect handshake is about three seconds. You can gently pump once or twice, but this is not necessary. Then pull back your hand, even if you are still talking.

Eye Contact

While this will vary from culture to culture, in North America we expect the person shaking our hand to make eye contact with us as a sign of respect.

Other Points

Stick with a Single-Handed Handshake

If you use two hands in your usual handshake (enveloping the other person's hand with both of yours) it may signal warmth and affection. However, it can also seem too familiar for an introductory handshake. Save this handshake for a meeting with an old friend.

Prepare Your Introduction

To master the whole introduction process, make sure you have something to say as you shake hands. You don't have to be witty; you can even use the old standard, "Pleased to meet you." These few words can set the stage for small talk that is often at the beginning of a new business relationship.

Note about Other Cultures

Shaking hands in some cultures is not a customary greeting. For example, many Orthodox Jewish men and women do not touch members of the opposite sex, nor do non-Jewish members of the same sex. Traditionally, Muslim women are not permitted to shake hands with men outside of their immediate family and should not be pressured by us to extend their hand. These rules are general, however, and can vary from person to person.

If you meet someone and are not sure about their custom, you have a couple of polite options. You can wait until they extend their hand first. Or, you can lightly clasp your own hands in front of you or place your hand on your chest as you say, "Pleased to meet you."

Remember that part of demonstrating proper etiquette is to give a professional impression and to manage encounters to the best of your ability.

Business Card Etiquette

When it comes to giving out your business cards, keep the following tips in mind.

Don't leave home without your cards. However, **don't hand out your business card to everyone you know**, as if you are spreading the wonder of who you are. First, see if people need or want your card. Handing out your cards like chewing gum makes you seem like a pushy salesperson – not the image you want to project.

Make sure your business cards are clean and in **good condition**. They are a part of your business image. A business card that is dirty or curled at the edges leaves a poor first impression. Use a business card case to keep your cards clean and fresh.

When your cards are **damaged or out of date**, print new ones. If you start crossing out information on a card and write new information on top of it, it makes it difficult to read and looks messy. Business cards are part of your image. Make sure yours are well designed and up to date.

When you receive a card, take a moment to look at it. Make a positive comment about some aspect of the card: the logo, the company name, or business location. This shows respect for the other person, and demonstrates your interest in them. As well, this is an excellent way for you to find out more about them, such as their job title. It also helps you remember their name, or reminds you of their name in case you forgot – a very common occurrence.

If someone hands you a card that you don't want, **don't refuse** to take it. Accept it, look at it, and put it in a pocket. Throw it out later. After you've looked at the card, place it carefully in a card case, or in a front pocket – not a back pocket. Treat the card with **respect**. This includes being careful about writing on people's cards. Although this may seem contrary to current thoughts on networking, in many cultures (specifically Asia), a business card is part of one's overall persona, and should be treated with respect. People spend time and money designing a professional card and may not appreciate you writing across it. If you need to record information, write on the back, not the front. Ask first, "Do you mind if I write on your card?"

Make sure that you know how to use the **electronic version of business cards** if you are using a smartphone, BlackBerry, or similar electronic device. You don't want to be fumbling to figure out the technology when you've just met someone who only uses them in that format.

If you are visiting a **foreign country**, make sure you learn their card etiquette. In Asia, for example, you should be offering a card that has English on one side and your client's language on the other. The card

should be offered to them with their language on the top side. You also need to make sure that you have your job title and how they should address you on cards given in most other countries.

The Skill of Making Small Talk

Small talk has a bad reputation. Sometimes we think of it as the poor cousin of a “real” conversation, and in certain cultures it is not valued at all. However, without small talk, many of us will never get to those “real” conversations. Small talk helps us put others at ease and make them comfortable. Small talk breaks the ice and goes a long way toward furthering a relationship.

The ability to make small talk can help us build business, develop our networking skills, make friends, maintain relationships, and even find us jobs.

When you are out with a gathering of friends, do you find it easy to just chat away without thinking of what to say next?

How about when you get thrown in with a group of people you don't know?

Where do you find topics of conversation that you can bring up at the next party or office get-together?

Where can you get some good conversational openers?

What are some ways you have successfully started conversations with people you didn't know?

What Works?

- As important as what you say is how you say it. Wear a smile. It is always becoming to your voice.
- If you find yourself alone, look for others who look similarly disengaged or join a group with an odd number of people. You could also pass the cheese tray or sample the buffet table.
- One tip that often works is to imagine you are host or hostess. Now you will be less worried about yourself and more concerned about other people.

What Doesn't Work?

- Don't attempt to make a derogatory remark under the guise of humor (that's sarcasm).
- Don't try to shock. Some people are hard to shock anyway, and others may be shocked in a very negative way, so it just isn't worth the risk.
- Lengthy emotional debates will not contribute to the gathering. Death, politics, religion, illness, and children usually head the list of subjects to be avoided. There are, of course, exceptions to every rule, such as when you must express your condolences to someone when someone has been ill, or have somebody they care for who is ill.

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Exit Lines

No matter how seriously you try, not all conversations can be made into engaging discussions. Eventually even good conversations may come to an end. Tell the other person how much you have enjoyed speaking with them and go on to meet other people.

What are some exit lines that let you bring a conversation to a close?

Do You Remember Names?

To use the excuse, “I’m just no good with names” is just not acceptable if you want to win at the art of interpersonal relations and if you want to make the best impression you can. **So how do you remember names?**

Rule number one is that you must want to remember names. Think of it as a skill you are developing through practice. Some additional tips:

- Repeat the name after you’ve been introduced to the person. Then use it again as soon as possible to underline the name in your memory. Repetition helps.
- Look at the person as you say their name. Note anything visual about that person that will help you anchor that name in your memory.
- If you are given a business card at some point in the conversation, take time to look at the card and the person’s name. For visual learners, actually seeing the name helps keep it in your memory.
- If you have a journal, get in the habit of writing down the names of the people you meet at a function or during the day. You can include something you learned about them to help with making the connection, like the type of car they drive, that you met them on their birthday, or they received an award that day. This activates your kinesthetic learning and is just one more opportunity to fix the name in your memory.

Making That Great First Impression

We used to say that you have about five minutes to make a great first impression. Today, things move so quickly that it’s closer to 90 seconds or less!

Here are some things to keep in mind so you can make a positive impression:

- Sit and stand straight. Good posture is a sign of confidence.
- Make appropriate eye contact.
- Control your body movement. Gestures are fine, but don’t fidget.
- Wear clothes that are clean, unwrinkled, and stain-free.
- Make sure your shoes are clean and polished.
- Hair and fingernails must be clean. No chipped polish, if you wear any.
- Have a pleasant expression on your face, and a pleasant tone of voice.
- If you enter a meeting or reception, look like you belong there. Greet people and smile.

Do You Look Approachable?

No matter what you may like to think, people judge you on your appearance. They don’t take long to make assumptions, either. If you think you’d like to march to the beat of your own drum and you don’t need to follow some kind of standard for the way you dress, think again. While you may think you don’t

have to iron your clothes, you can get away with not polishing your shoes, or that you can wear sneakers with your business suit, we're here to challenge your thinking.

People who are well respected, highly trusted, and most likely to be promoted care about how they look. You shouldn't give in to the temptation to dress according to trends (sometimes they are simply a mistake). You also don't need to wear clothes that shout out who you are. You can dress conservatively and accessorize tastefully if you want to show that you are unique or have flair. Just do so while thinking about how people in your industry look when they achieve success.

Managing Your Breath

If you smoke or drink coffee, your breath will be affected. Make sure you brush your teeth, floss, and have regular dental cleanings to keep your breath fresh. (Did you know that not flossing or getting your teeth cleaned can contribute to bad breath?) During the day, keep breath mints handy, especially when you know you will be in close contact with people. Bad breath can really undermine an otherwise worthy meeting.

NOTE: We are not advocates of chewing gum to keep your breath fresh. People tend to forget they have gum in their mouths and chew with their mouths open, blow bubbles, or crack their gum, all things that do not belong in a business setting.

Monitoring Your Body Aroma

Most people probably don't know when their body odor is out of balance, so you'll have to monitor this closely. North Americans typically shower daily, but this is not the case everywhere. When you are nervous or in unanticipated heat and humidity, you can sweat more than usual. Make sure other people cannot detect body odor coming from you.

Use an effective underarm deodorant daily and keep yourself clean. Medication and food can change our body chemistry and cause us to give off odors, so be understanding of people. However, they usually will appreciate when you bring any problem to their attention.

Perfumes can also cause great distraction in a work setting. Make sure that you know the rules when you go to visit other workplaces. Err on the side of caution by using only light fragrances, or no fragrance at all. More and more people report sensitivities to fragrance, and they have been banned in many workplaces. Many hospitals, health providers, universities, and government offices now have policies in place to restrict the use of fragrances.

Be Polite

You may be one of those people who knows their manners and uses “please” and “thank you” all the time. That’s good! In certain environments and circumstances, people seem to lose all sense of what’s polite, as if they had never learned any manners at all.

Our recommendation is to always be polite. “Please,” “thank you,” and “you’re welcome” are hallmarks of someone who is polite. Be polite to everyone, no matter what is going on. Treat restaurant wait staff, receptionists, drivers, and CEOs with the same level of courtesy. Don’t swear (no matter what is going on around you) if you want to be considered someone worth paying attention and listening to.

Dress for Success

Dressing the Part

Tips for Success

The appearance of workers has changed. Not long ago, everyone from the most seasoned professionals to entry-level employees had a common understanding of appropriate business attire. The current acceptance of dressed down, casual Friday, and business casual dress makes dressing for success a challenge sometimes, especially if we don’t know what our office expects.

Here are a few easy rules to live, and dress, by.

Dress to Impress

One good rule of thumb is to dress for the position you want to have. Whether your goal is to move up in the organization, or simply to be taken seriously, you have to develop an image that supports you. If you come to work dressed in rumpled clothes and looking like you just stepped out of bed, do you expect anyone to take you seriously? How do you think you will rate when it comes time for a promotion?

Consider Your Work Environment

If you're meeting with clients or having business lunches, we recommend that you stay on the conservative side. This doesn’t mean you cannot have a bit of fun or let your personality shine with a dash of color or accessories. It means that you project a level of professional respect and decorum. You can save the jeans for a time when you'll be in the office all day.

Strive for Consistency

If you wear tailored and conservative outfits Monday through Thursday, Friday isn’t the day to show up like you just rolled out of bed. No matter what industry you’re in, consistency goes a long way in establishing your image – including trust and credibility – with all your internal and external contacts. Casual Friday does not mean that you have to look like you ought to be out in the garden. Unless you work at a greenhouse, of course.

Ask First, Dress Later

Show respect for both yourself and management; be sure to check with your HR department or manager if you have any doubts. Some companies have very specific expectations when it comes to things like footwear (no floppy sandals), fingernail polish, bare arms, and t-shirts with pictures or logos. Others expect you to purchase and wear clothes that are sold by the company or that have their logos on them.

It is important to know what is appropriate for your industry. Look around you and see if you can interpret the dress code levels in the area where you work.

For Women

If your company's idea of business casual isn't quite jeans and sweaters, pantsuits are the answer. Not only are they trendy, they can also be dressed up or down. Choose a dark, natural shade like black, navy, brown, or grey. Opt for pants that flatter and fit properly. Pair them with a light sweater, and you'll be ready to go from your desk to a client meeting without a second thought.

When jeans are the sensible choice for the worksite, pairing them with a jacket or blazer can take them from the yard to the office without missing a beat.

Stock up on different tops to give your wardrobe a bit of versatility. Crisp, cotton blouses in white (and hues like chambray and chartreuse) instantly add a casual element to your dress pants or khakis. Sweater sets are also an easy way to present a softer look while still looking professional.

Jewelry, scarves, and other accessories will add a polished touch to any outfit. Remember: less is more.

For Men

A sport coat instantly creates a pulled together look, especially in a business casual environment. It's also an ideal choice for client meetings or presentations. Pair up a black, navy blue, or dark grey blazer with khakis or dark wool pants.

In addition to traditional dress slacks, khakis, Dockers, corduroys, wool flannel, and linen slacks are also appropriate for the office, either with or without a blazer. Jeans can be appropriate attire on a worksite, but make sure they're not torn, stained, or frayed on the bottom.

Just because it's casual day doesn't mean you can turn up in wrinkled pants. Be sure to iron them beforehand.

Casual button-down Oxford shirts are a great alternative to dress shirts, with or without a tie. Skip the loud prints and reserve plaids for more casual times. Basic white, chambray, or pinstripes are the safest bet.

Shoes are an afterthought for many men, but unkempt footwear can ruin an otherwise polished look. Oxfords and loafers in brown or black are a good match for khakis or corduroys. If your work demands sturdy boots, make sure they are clean and presentable.

Maintaining Your Positive Impression

A Word About Ironing

There are people who take pride in being able to remove clothing from the dryer and put it on. However, that wrinkled look is not appropriate for work. If you are not sure how to iron, then it's time to learn. You can really stand out in the workplace by having crisply prepared clothes, especially if you are surrounded by wrinkled colleagues. Make sure that you check your clothing labels so you do not scorch or melt delicate fabrics.

Learn How to Sew Buttons On

One of our staff members knew a young woman who did not know how to sew on a button. She would throw out an expensive blouse rather than replace it, despite working in an entry level job with little extra money. What was she thinking?

A package of needles and spool of thread are a good, inexpensive investment. As well, knowing how to replace standard off-the-rack buttons with a set of vintage buttons or something elegant can make an inexpensive outfit look special.

Keep it understated. While someone in a design firm is likely to dress differently than someone in a law firm, both share something in common: if you stray far from what's considered the norm, you can be viewed as disrespectful and even as holding your employer in contempt. That won't do much for your career. Think about making a statement that is professional, and one that will be taken seriously for the work that you do.

Dress for the job you want, not the one you have. Always consider where you are going within the company. The image that you portray can help you meet your goals, or get in the way.

Be an ambassador. If you are wearing your company jacket outside of work, think about what you are doing. When people know that you work for a particular place, they expect certain things. If you suspect that you might do something foolish, don't wear your company gear outside of work.

Look after your things. Although it may take an investment of time and effort, learn to look after your things. Iron like a pro and get rid of that slightly rumped, still-in-college look. Replace it with an image that is crisp and professional. Find a tailor and have your trousers or skirts properly hemmed. (You're spending good money on clothes as it is, so respect yourself and present yourself well.) Replace buttons if they go missing. Make sure that you are cleaning clothes according to the instructions on the label.

Footwear requires attention. Shoes need to be in good repair and clean. Don't wear your weekend or gym sneakers even on casual days. Make sure you have a polishing kit and that you know how to look after your shoes to keep them looking like new. People notice your footwear. You can lessen your credibility significantly by wearing a nice outfit and a poor pair of shoes.

Glasses need to be clean. Long-time glasses wearers have a gift for being able to look through a pair of smudged or dirty lenses, but your customers, colleagues, and manager will notice that layer of grime. Keep a microfiber cloth handy to keep your glasses clean.

Leave sexy for another time. Workplaces take professionalism very seriously. It's in everyone's best interests to maintain a professional atmosphere. While you may think you look good in club wear, evening wear, or lingerie, none of these are appropriate office attire. It can also be distracting to the rest of the office. Whether we like it or not, low-cut blouses, tight pants, short skirts, see-through fabrics, poorly fitting bras, ill-fitting suit jackets, or open shirts can contribute to a poor professional impression rather than an appropriate one. At work, the goal is to create an image of competence and professionalism; leave the glamor and glitz for your evenings out.

What does your appearance say?

What's Your Code?

Decide what the dress code should be at the following levels.

Corporate

Business

Business Casual

Debrief

Corporate

This is the formal business level of dress, reserved for business executives, high level meetings, and interactions where there is a need to demonstrate integrity and credibility. This look includes:

- Dark clothing of an expensive material like wool, with a conservative, classic, tailored cut.
- Ties are conservative, plain or striped, in neutral or dark colors.
- Accessories are kept to a minimum, but are always expensive.
- Footwear includes laced black shoes and socks for men; pantyhose and conservative heels for women.

Business

This is usually what is expected in a professional business environment. It is the uniform of millions of North Americans every day. If this is your company's dress code, your wardrobe should include:

- Suits for men and pantsuits or skirted suits for women.
- The fabric is generally wool, or a wool blend for cooler seasons. For warmer weather, choose fabrics that hang well, like microfibers or fine blends.
- Colors are black, navy, grey, or brown.
- Shirts or blouses can have subtle patterns.
- Ties are required.
- Some colors and patterns are acceptable.
- Women's skirts are usually knee-length.

Business Casual

This is very common dress in business today, including those who work at the mid-management level.

This look includes:

- Coordinated jacket and pants or skirt is acceptable for both men and women.
- Fabric is still wool or wool blends, although microfibers and blends are also suitable.
- More variety in shoes: loafers in dark colors and tan are acceptable, but no sneakers.
- Denim is sometimes allowed, depending on the organization, but must always be clean and in good repair (no stains, tears, and properly hemmed).

Casual

This is not frequently endorsed, but when it is we typically see:

- Denim jeans (in good repair) with a jacket or sweater
- Sneakers, sandals, and workboots (depending on the industry)
- Footwear is always clean and in good repair

Here are some items that are inappropriate at any level:

- Leisure clothes like jogging suits or sweatpants
- Revealing clothing
- Torn, dirty clothing



Further Reading:

- ✓ *Boothman, Nicholas. How to Connect in Business in 90 Seconds or Less. Workman Publishing Company, 2002.*
- ✓ *Carnegie, Dale. How to Win Friends and Influence People. Pocket Books, 1998 (Reprint).*
- ✓ *Chaney, Lillian Hunt, and Jeanette St. Clair Martin. The Essential Guide to Business Etiquette. Praeger Publishers, 2007.*