

# **Business Etiquette**

**Instructor's Edition**

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**THOMSON**

 **COURSE TECHNOLOGY** <sup>TM</sup>

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# Business Etiquette

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PREVIEW

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# Business Etiquette

## Introduction

After reading this introduction, you will know how to:

- A** Use Course Technology ILT manuals in general.
- B** Use prerequisites, a target student description, course objectives, and a skills inventory to properly set students' expectations for the course.
- C** Set up a classroom to teach this course.
- D** Get support for setting up and teaching this course.

## Topic A: About the manual

### Course Technology ILT philosophy

Our goal at Course Technology is to make you, the instructor, as successful as possible. To that end, our manuals facilitate students' learning by providing structured interaction with the subject itself. While we provide text to help you explain concepts, the activities are the focus of our courses. Leading the students through these activities will teach the concepts effectively.

We believe strongly in the instructor-led classroom. For many students, having a thinking, feeling instructor in front of them will always be the most comfortable way to learn. Because the students' focus should be on you, our manuals are designed and written to facilitate your interaction with the students, and not to call attention to manuals themselves.

We believe in the basic approach of setting expectations, then teaching, and providing summary and review afterwards. For this reason, lessons begin with objectives and end with summaries. We also provide overall course objectives and a course summary to provide both an introduction to and closure on the entire course.

Our goal is your success. We encourage your feedback in helping us to continually improve our manuals to meet your needs.

### Manual components

The manuals contain these major components:

- Table of contents
- Introduction
- Units
- Course summary
- Glossary
- Index

Each element is described below.

#### Table of contents

The table of contents acts as a learning roadmap for you and the students.

#### Introduction

The introduction contains information about our training philosophy and our manual components, features, and conventions. It contains target student, prerequisite, objective, and setup information for the specific course. Finally, the introduction contains support information.

## Units

Units are the largest structural component of the actual course content. A unit begins with a title page that lists objectives for each major subdivision, or topic, within the unit. Within each topic, conceptual and explanatory information alternates with activities. Units conclude with a summary comprising one paragraph for each topic, and review questions that give students an opportunity to practice the skills they've learned.

The conceptual information takes the form of text paragraphs, exhibits, lists, and tables. The activities contain various types of questions, answers, activities, graphics, and other information. Throughout a unit, instructor notes are found in the left margin.

## Course summary

This section provides a text summary of the entire course. It is useful for providing closure at the end of the course. The course summary also indicates the next course in this series, if there is one, and lists additional resources students might find useful as they continue to learn about the subject.

## Glossary

The glossary provides definitions for all of the key terms used in this course.

## Index

The index enables you and the students to quickly find information about a particular topic or concept in the course.

## Manual conventions

We've tried to keep the number of elements and the types of formatting to a minimum in the manuals. We think this aids in clarity and makes the manuals more classically elegant looking. But there are some conventions and icons you should know about.

Instructor note/icon

### Convention

### Description

*Italic text*

In conceptual text, indicates a new term or feature.

**Bold text**

In unit summaries, indicates a key term or concept.

Instructor notes.

In the left margin, provide tips, hints, and warnings for the instructor.



Warning icon.

Warnings prepare instructors for potential classroom management problems.



Tip icon.

Tips give extra information the instructor can share with students.



Setup icon.

Setup notes provide a realistic business context for instructors to share with students, or indicate additional setup steps required for the current activity.



Projector icon.

Projector notes indicate that there is a PowerPoint slide for the adjacent content.

## Activities

The activities are the most important parts of our manuals. They are usually divided into two columns, with questions or concepts on the left and answers and explanations on the right. To the left, instructor notes provide tips, warnings, setups, and other information for the instructor only. Here's a sample:

*Do it!*

### A-1: Steps for brainstorming

#### Exercises

1 Sequence the steps for brainstorming.

Begin generating ideas.

Select the purpose.

Organize for the session.

Ask questions and clarify ideas.

Review the rules.

*Select the purpose.*

*Organize for the session.*

*Review the rules.*

*Begin generating ideas.*

*Ask questions and clarify ideas.*

## PowerPoint presentations

Each unit in this course has an accompanying PowerPoint presentation. These slide shows are designed to support your classroom instruction while providing students with a visual focus. Each one begins with a list of unit objectives and ends with a unit summary slide. We strongly recommend that you run these presentations from the instructor's station as you teach this course. A copy of PowerPoint Viewer is included, so it is not necessary to have PowerPoint installed on your computer.



## Topic B: Setting student expectations

Properly setting students' expectations is essential to your success. This topic will help you do that by providing:

- A description of the target student at whom the course is aimed
- A list of the objectives for the course
- A skills assessment for the course

### Target student

Students will get the most out of this course if they are employees, supervisors, and managers who want to learn how to apply the rules of business etiquette to make work life more successful and pleasant.

### Course objectives

Share these course objectives with your students at the beginning of the day. This will give them an idea about what to expect, and will also help you identify students who might be misplaced. Students are considered misplaced when they lack the prerequisite knowledge or when they already know most of the subject matter covered in a course.

After completing this course, students will know how to:

- Create a professional image, follow cubicle and office etiquette, and maintain positive office relationships.
- Use the Internet appropriately when at work and handle ethical dilemmas and personal issues in the workplace.
- Introduce people properly, be a good conversationalist, and follow proper etiquette in meetings.
- Display courtesy on the telephone, in voice mails, and in written communications.
- Follow proper etiquette at business functions and dinners, and identify formal table settings for business dining.
- Be a courteous traveler and prepare for international business trips.

## Skills inventory

Use the following form to gauge students' skill level entering the class (students have copies in the introductions of their student manuals). For each skill listed, have students rate their familiarity from 1 to 5, with 5 being the most familiar. Emphasize that this is not a test. Rather, it is intended to provide students with an idea of their starting point at the beginning of class. If a student is wholly unfamiliar with all the skills, he or she might not be ready for the class. A student who seems to understand all of the skills, on the other hand, might need to move on to the next Module in the series.

Skill	1	2	3	4	5
Creating a professional appearance					
Following cubicle and office etiquette					
Developing positive office relationships					
Using the Internet appropriately					
Handling ethical dilemmas and personal issues at the workplace					
Introducing people properly					
Being a good conversationalist					
Following etiquette in meetings					
Applying telephone courtesy					
Following e-mail etiquette					
Following writing guidelines					
Identifying different types of business functions					
Following etiquette at business functions					
Identifying table settings					
Applying etiquette rules to business dining					
Following the guidelines to be a courteous traveler					
Preparing for international business trips					

## Topic C: Classroom setup

In addition to a manual, each student should be provided with a pad and pens or pencils for jotting down notes or questions. Students should have a comfortable place to sit and ample table space to spread out their materials.

### Computer requirements

If you wish to use the PowerPoint presentation, you'll need the following:

- A Pentium-class or better computer
- A keyboard and a mouse
- A sound card and speakers
- Windows 98, NT, 2000, or XP
- A minimum of 32 MB of RAM, depending on your operating system
- CD-ROM drive
- A Super-VGA monitor
- An overhead monitor projector
- PowerPoint 2000 or later, or PowerPoint Viewer

### Classroom requirements

- Samples of informal letters from magazines or books.
- Sets of index cards depending on the number of students. The cards can have themes of flowers, animals, sportsmen, presidents, pop stars, actors, and so on. Each set can have four to five cards. Each card in a set will have the name of an element of that set written on it. For example, cards belonging to the set of flowers will have rose, jasmine, chrysanthemum, tulip, or orchid written on them.

### First-time setup instructions

The first time you teach this course, you'll need to download the PowerPoint presentations for the course to your computer. Here's how:

- 1 Connect to [www.courseilt.com/instructor\\_tools.html](http://www.courseilt.com/instructor_tools.html).
- 2 Click the link for Business and Office Skills to display a page of course listings, and then click the link for Business Etiquette.
- 3 Click the link for downloading the PowerPoint files, and follow the instructions that appear on your screen.

## Topic D: Support

Your success is our primary concern. If you need help setting up this class or teaching a particular unit, topic, or activity, please don't hesitate to get in touch with us. Please have the name of the course available when you call, and be as specific as possible about the kind of help you need.

### Phone support

You can call for support 24 hours a day at (888) 672-7500. If you do not connect to a live operator, you can leave a message, and we pledge to return your call within 24 hours (except on Saturday and Sunday).

### Web-based support

The Course ILT Web site provides several instructors' tools for each course, including course outlines and answers to frequently asked questions. To download these files, go to [www.courseilt.com/instructor\\_tools.html](http://www.courseilt.com/instructor_tools.html).

# Unit 1

## Office protocol

**Unit time: 65 minutes**

Complete this unit, and you'll know how to:

- A** Describe business etiquette, present a professional appearance, and identify appropriate business attire.
- B** Practice cubicle and office etiquette.
- C** Develop positive co-worker relationships and avoid rumors, gossip, and conflicts.

## Topic A: Office etiquette

### Explanation

*Business etiquette* is a code of behavior that makes business interactions predictable and professional. It combines common sense and consideration for others to establish a set of rules for professional behavior. When you apply these rules, you make work life more successful and pleasant for you and your co-workers.

### Importance of business etiquette



Business etiquette can influence your ability to succeed in your career. It can elicit desired responses from the people you interact with. It also organizes and shapes your behavior into a predictable and professional identity. When your behavior matches what people expect, they can focus on your message and not waste time and effort with interpretation.

When your behavior contains unexpected elements, it can detract from the messages you want to communicate. As a result, you might encounter obstacles to success. Good manners are invisible, while bad manners are clearly recognizable and might be the only characteristic that others notice about you.

Good manners can affect your ability to work successfully with your co-workers, supervisors, and staff. They can also influence your ability to work effectively with clients, vendors, and other professionals.

You want your behavior to reflect positively on your organization. You are a representative of your company. When you interact with customers, serious missteps in etiquette can lead to a loss of respect and reputation for you and your company. In some situations, they can even cause customers to take their business elsewhere.

The accumulation of small faux pas can be just as problematic as serious missteps. Over time, small annoyances can negatively affect your own reputation as well as that of the company. This might cause you to lose business and, potentially, your job.

Do it!

## A-1: Understanding business etiquette

### Exercises

1 Which of the following are characteristics of business etiquette?

- A** It makes interactions predictable and easy to navigate.
- B** It helps you avoid faux pas and serious missteps.
- C** It is clearly recognizable and attracts attention.
- D** It causes others to focus on interpreting your message.
- E** It helps you to elicit the response you want from others.

2 How do good manners affect business?

***Good manners can affect your ability to work successfully with your co-workers, supervisors, staff, clients, vendors, and other professionals.***

3 \_\_\_\_\_ are clearly recognizable and might be the only characteristic that others notice about you.

***Bad manners***

## **Professional appearance**

### *Explanation*

If you present yourself professionally, you show others that you care about your job and respect your role in the company. Whether it is fair or not, your appearance can determine your career track. If you dress appropriately and attractively, your chances for advancement improve. In addition to clothes, your nonverbal communication plays an important role in how others perceive you. You can follow several basic guidelines to help you develop a professional appearance that is acceptable in every situation. These include:

- Read your company's dress code guidelines.
- Do not call too much attention to yourself.
- Dress appropriately for your business.

### **Read your company's dress code guidelines**

If your company has a documented dress code, obtain a copy and read it thoroughly. Some companies might not have a written dress code, but they do have a dress code in practice. In this situation, pay attention to what others wear and make sure your appearance is similar.

### **Don't call too much attention to yourself**

Your professional dress is a wardrobe for work. You shouldn't try to express your unique style or personal flair in your work clothes. If you meet with customers regularly, your goal should be to emphasize your company's product or service, and not your wardrobe. In addition, you should want people to notice you because of your hard work, intelligence and dedication, and not because of your personal style.

### **Dress appropriately for your business**

If you don't, you might not be able to connect with your co-workers or customers. For example, if you meet with a group of customers dressed in suits and ties, and you are dressed in khakis and a polo shirt, this places a barrier between you and your customers. Over-dressing for your job can cause the same problem. If your customers dress in coveralls, they might perceive your suit as pretentious.



## Business attire

Companies follow diverse dress code policies. It's important for you to determine the business attire accepted by your company. Business attire can be classified into two categories. These are:

- Casual business attire
- Traditional business attire

### Casual business attire

The term "business casual" is often misinterpreted. Casual business attire, "casual Friday" attire, and casual clothing are not the same. In addition, "business casual" is not the same in every company. It's important that you know your company's dress code policy and pay attention to what others wear.

Casual business attire for women usually means jackets, sweaters, plain T-shirts, blouses, and twin sets, or sweater sets, worn with slacks or skirts. It also includes two pairs of leather shoes, one black and one brown and belts to match. Avoid overly bright colors and busy patterns. Jewelry should be simple and might include small earrings, a small-scale gold or silver chain, a watch, and a ring or two.

Casual business attire for men usually includes long-sleeved, button-down shirts, V-neck sweaters, sports coats, blazers, and polo shirts worn with khaki pants or other slacks. It also includes a pair of black shoes and brown shoes and belts to match. Wear black shoes with black or gray clothes and brown shoes with brown or tan clothes. Black or dark brown shoes can be worn with navy blue clothes.

Many companies have incorporated "casual Fridays" as part of their dress code. To learn what is appropriate at your office, review the dress code policy or talk to your supervisor. Although business casual clothes are certainly suitable on a casual Friday, some organizations include jeans, dress shorts, and tennis shoes on casual Friday. Sweat pants, tank tops, spandex, revealing clothing, shirts with offensive messages, or clothes that are stained, torn, or wrinkled are usually unacceptable in any organization. Tattoos should be kept out of sight and multiple earrings, nose rings, and other jewelry for non-traditional piercing should be left at home.

### Traditional business attire

It's usually easier to determine which clothes are suitable for traditional business attire than for casual business attire. Traditional business attire is also more consistent from one company to another. Still, you should review your company's dress code policy and understand the basics of traditional business attire.

For women, traditional business attire includes suits, pantsuits, dresses, skirts, dress pants, blouses, sweaters, and dress shoes with hosiery. The best shoes for traditional business attire include loafers and pumps with a heel no higher than two inches.

Traditional business attire for men includes suits paired with white or light blue long-sleeved dress shirts. Socks should be mid-calf or full-calf in dark colors that coordinate with the color of the suit. Dress shoes include wingtips, plain or cap-toed Oxfords, and plain or tasseled loafers. Ties should have a solid color or an understated pattern.

## Nonverbal communication

To express confidence in yourself and ease with others, you can use these means of nonverbal communication:

- Postures
- Facial expressions
- Gestures
- Eye contact
- Personal grooming

### Postures

To express confidence and ease, stand and sit up straight. Slouching or leaning on furniture while standing or sitting can communicate that you are uncomfortable in the situation. When sitting, be mindful of the position of your legs. Keep them together with your feet flat on the floor, or cross your legs at the knee or ankle.

### Facial expressions

Facial expressions provide more communication than any other type of body language. They're also usually the easiest to understand. Ensure that the messages you communicate through your facial expressions are appropriate. For example, suppose a client asks you a question that you have already answered twice. You might feel frustrated, but rolling your eyes will neither help your client understand the issue nor help you keep the client's business.

### Gestures

Gestures express levels of interest and concurrence among people. Open body language, such as facing others and uncrossed arms, shows that you are listening to and interested in what people say. Closed body language, such as crossed arms, might be seen as uncooperative or disinterested.

### Eye contact

Eye contact can communicate powerful messages. You should make eye contact with people during conversation. This displays interest in what others have to say and confidence when you speak. A consistent lack of eye contact can be interpreted as insecurity or dishonesty. On the other hand, an unblinking stare can be unnerving. Remember to occasionally break contact briefly, just as you would in a conversation with a friend. However, do not use the opportunity to check your watch, unless you intend to end the discussion.

### Personal grooming

Your professional image will be tarnished if you do not maintain proper personal grooming. Most importantly, shower every day, brush your teeth after meals, and wear deodorant or antiperspirant. Your nails should be well cared for and clean. Chewed or bitten cuticles and nails don't look professional.

Your hair should be neat and clean. Both men and women should consider pulling back long hair to keep it neat. Use colognes and perfumes sparingly, so that they don't bother your co-workers. Heavy foundation; bright eye shadow, lip color, and blush; and thick mascara and eyeliner can be distracting and unprofessional. Understated, natural colors and light application are usually best for the office.

Do it!

## A-2: Maintaining a professional appearance

### Exercises

- 1 Janet Porter is a new sales and service representative specializing in fax machines. Her co-workers have complained about her unprofessional appearance and demeanor to her manager.

Discuss the actions Janet needs to take to develop a professional appearance.

**Answers might include:**

- **Make sure her appearance fits in with what others wear.**
- **Dress suitably for the work she is doing.**

- 2 Your instructor will read out some articles of clothing. Identify them as casual or traditional business attire for men and women.

**Ask students to identify the attires as "Casual business attire for women," "Casual business attire for men," "Casual Friday attire," and "Traditional business attire for women."**

**Jackets, sweaters, plain T-shirts, blouses, and twin sets or sweater sets, worn with slacks or skirts and black or brown leather shoes**

**Casual business attire for women**

**Long-sleeved, button-down shirts, V-neck sweaters, sports coats, blazers, and polo shirts worn with khaki pants or other slacks and black or brown leather shoes**

**Casual business attire for men**

**Jeans, dress shorts, and tennis shoes**

**Casual Friday attire**

**Suits, pantsuits, dresses, skirts, dress pants, blouses, sweaters, and dress shoes with hosiery. Dress shoes include high-quality loafers and pumps**

**Traditional business attire for women**

**Suits paired with white or light blue long-sleeved dress shirts. Dark colored socks that are mid-calf or full-calf which coordinate with the color of the suit. Dress shoes, which include wingtips, plain- or cap-toed Oxfords, and plain or tasseled loafers. Solid-colored silk ties**

**Traditional business attire for men**

Ask these questions to a variety of students.

**Do you have a dress code in your office?**

Discuss some occasions that call for specific dress codes.

Discuss dress codes associated with various professions.

- 3 Janet Porter is a straight-talking, take-charge conversationalist, but her body language is intimidating to others. Select the actions that will help her convey a positive message to others.
- A Leaning on furniture
  - B Standing up straight**
  - C Crossing the arms
  - D Facing others**
  - E Placing the feet flat on the floor**
  - F Unblinking stare
- 4 Even if you have impeccable manners, express self-confidence, and wear the suitable clothes for your business, your professional image will be tarnished if you do not maintain proper \_\_\_\_\_.

***personal grooming***

## Topic B: Cubicle and office etiquette

### Explanation

To build relationships with the people in your office, you need to conduct business in a manner that helps your co-workers perform their jobs without unnecessary distractions. By practicing cubicle and office etiquette, you become a positive part of the work environment and set an example for others.

### Common rules of etiquette in an office



Whether you work in a cubicle or an office with a door, you should always follow the rules of etiquette. Two common rules are to use speakerphones sensibly and decorate your workspace appropriately.

If your office has thin walls or if you work in a cubicle, using a speakerphone can distract your co-workers. You have to speak loudly to ensure that you are heard on the other end. These conversations can be more irritating to co-workers than regular telephone conversations. Moreover, all your co-workers will overhear your messages if you listen to your voicemail over a speakerphone. Keep in mind that you never know when a message might contain confidential information. It's best to use the handset when listening to voicemail.

Decorating appropriately is another rule you should remember in any office setting. Before adding personal accessories, find out what policies your company has concerning office décor. In addition to the guidelines set forth by the company, you should consider three other factors when determining the décor for your office:

- The culture of your workplace
- The type of work you do
- The level of customer interaction that takes place in your office

In companies where creativity is essential, management typically encourages personal accessories to help stimulate creativity. For companies with frequent customer interaction, the décor is likely to be customer-focused. It is inappropriate to display obscene or sexist materials, and it's in your best interest not to display any material that is critical of your own firm.

## Cubicle office arrangement

Cubicle office arrangements place a large number of employees in close quarters. This arrangement can facilitate many types of work, including those that are team based. However, employees have to follow certain rules of etiquette to ensure that all individuals have the privacy required to perform their jobs comfortably and effectively. To improve your ability to work in a cubicle arrangement, follow these guidelines:

- Maintain a positive attitude.
- Respect others' space, privacy, and time.
- Avoid making excess noise.
- Use another location for personal or confidential matters.
- Set boundaries for others.

### Maintain a positive attitude

Whether or not you enjoy working in a cubicle, it's best to maintain a positive attitude and make the best of it. Complaining won't endear you to managers if the arrangement is out of their control. Complaining will only decrease morale among your peers.

### Respect others' space, privacy, and time

Cubicles provide easy access to employees. All the same, you should not assume that you can enter your co-workers' space any time you please. Before entering someone else's cubicle, knock or ask for permission to enter. This shows respect for your co-workers' space and privacy. If a co-worker is busy on the telephone, leave and return later. Do not hover outside the cubicle until the conversation is over. When you have completed your business with your co-worker, do not linger unless invited to do so.

### Avoid making excessive noise

One of the most common annoyances in cubicle settings is the noise produced by an open office environment. To improve your working experience with co-workers, avoid making excess noise that others might find distracting. For example, avoid tapping your pen, playing music loudly, snapping gum, singing or humming while wearing headphones, and yelling or leaning over cubicle walls. Many people speak louder when they are talking on the phone. Remember to use a normal tone of voice.

### Use another location for personal or confidential matters

Whether they want to or not, co-workers might overhear conversations that take place in your cubicle. Any time you need to discuss confidential matters, you should find a more suitable setting. This also applies to any personal telephone conversations you have throughout the day. Having a personal argument on the telephone can be distracting to your co-workers and damaging to your professional image. If the conversation cannot wait until after work, find a private setting for the call.

### Set boundaries for others

When working in a cubicle, you should expect your co-workers to respect your time and privacy just as you respect theirs. If your co-workers' behavior distracts or invades your privacy, ask them politely to stop. Your approach here is extremely important because you don't want to be seen as temperamental or uncooperative. For example, if it bothers you when a co-worker leans over the cubicle wall to ask you a question, politely ask them to come over to your cubicle, use the phone, or e-mail you instead.

Do it!

## B-1: Practicing cubicle etiquette

### Exercises

- 1 What are two common rules of etiquette you should always follow whether you work in a cubicle or an office with a door?

***Use speakerphones sensibly and decorate your workspace appropriately.***

- 2 In the following scenario, Francesco and Jennifer, both managers, are sitting in the break room. They work in cubicles that are next to each other. Jennifer is asking Francesco to stop some distracting behavior.

Francesco: Hey, Jennifer. I got your e-mail. What did you want to talk about?

Jennifer: Actually, I wanted to ask you if you would mind not yelling over the cubicle wall when you have a question for me. I know it's convenient, but sometimes I lose my train of thought.

Francesco: Well, all right.

Jennifer: If you could send me an e-mail when you have a question, it would really help me out a lot. I'll be able to concentrate on my work better, and I'll be able to answer your questions more thoroughly.

Which guideline of cubicle etiquette is being violated here, and how?

***Respect others' space, privacy, and time. Francesco yelling over the cubicle wall.***

How did Jennifer manage to solve the issue?

***By setting boundaries for Francesco. She asked him to send her an e-mail message when he has a question for her instead of yelling over the cubicle wall.***

- 3 Select the actions that are suitable for conducting business in a cubicle.
- A** Knock before entering a co-worker's cubicle.
  - B** Ask for permission before entering a co-worker's cubicle.
  - C** Wait outside the cubicle if your co-worker is speaking on the telephone.
  - D** Engage in casual conversation to help develop positive co-worker relationships.
  - E** Leave and come back later if your co-worker is talking on the telephone.

Encourage students to share their experiences of working in a cubicle.



## Office arrangement

### Explanation



If you have an office with a door, you'll experience the same problems as those who work in cubicles. However, additional issues exist when you have a private office. You can follow these guidelines to improve your relationships with co-workers while working in an office:

- Create a relaxed atmosphere.
- Close the door only when necessary.
- Never slam the door.

### Create a relaxed atmosphere

Sitting behind your desk during conversations can create an intimidating impression. You can create a more relaxed atmosphere for discussions by coming around your desk and taking a seat next to your co-worker. This arrangement can be helpful for interactions with co-workers who work in cubicles because it de-emphasizes the fact that you have a private office. You can also conduct conversations in your co-worker's cubicle on occasion, mainly when you know the discussion will be upbeat. You should also consider using an employee conference room. By varying locations, you neutralize the negative feelings that can arise when workspaces differ significantly.

### Close the door only when necessary

Keeping your door closed regularly can make you seem inaccessible to your co-workers. It also acts as a visible reminder that you have the privacy of an office with a door, which can be irritating to those working in cubicles. All the same, be sure to close the door when you conduct confidential discussions, when you host a meeting or an event that could create noise, or when you need to concentrate on a task without interruption.

### Never slam the door

It's never acceptable to slam your office door, regardless of the situation. If noisy and distracting interactions are taking place outside your door, either do your best to concentrate until the noise subsides, or leave your office to handle other tasks. If the noise is not likely to stop soon, close your door quietly, so that you don't create a scene. Slamming your door might make a point, but it's also likely to earn you a reputation of being confrontational and difficult.



Do it!

Identify other guidelines that can be added to this list.

Encourage a variety of students to share their experiences.

## B-2: Practicing office etiquette

### Exercises

- 1 After being appointed as the human resource representative of Icon's Consumer Products and Services division, you have been assigned a private office for your work. What are some etiquette guidelines you need to follow?
  - **Create a relaxed atmosphere.**
  - **Close the door only when necessary.**
  - **Never slam the door.**
- 2 When is it appropriate to conduct conversations in your co-worker's cubicle?  
**When you know the discussion will be upbeat**
- 3 When should you consider closing the door of your private office?  
**When you conduct confidential discussions, when you host a meeting or other event that could create noise, or when you need to concentrate on a task without interruption.**
- 4 What does the slamming of an office door communicate to you?

## Topic C: Office relationships

### Explanation

Considering that you spend most of your time every week with co-workers, creating positive relationships with your peers, subordinates, and superiors will improve your work experience as well as theirs. Your chances of success are better in an office in which you have many allies and few enemies. Although gossip in the office might seem harmless, it can actually damage people's careers. You should also resolve any conflict that arises between you and your co-workers. Being respectful, supportive, and tolerant of your co-workers benefits your career, their careers, and the success of your company.

### Positive co-worker relationships

The fundamental element for developing positive co-worker relationships is respect. By showing your co-workers that you respect them, you will encourage reciprocal attitudes and improve the climate of your workplace.

A key action that can help you display respect for your co-workers is to maintain a positive attitude. Your attitude greatly affects how you respond to various situations in the workplace, including stressful ones. One action you can take to help you maintain a positive attitude is to focus on the strength of your co-workers instead of their shortcomings. Your co-workers are probably just as busy and as stressed as you are. When you demonstrate a genuine interest in their contributions and concerns rather than focusing solely on your own, you'll find that people respond positively to you as a person and as a professional.

To maintain a positive attitude, you first need to recognize your usual responses to stress. After that, you can determine whether you need to adjust them. If your response to stress is less than respectful, try reminding yourself daily to take another approach. Tell yourself that you'll not react to a stressful situation without thinking what your response should be. You can also focus on solutions, rather than on the problem.

Besides maintaining a positive attitude, you can follow these guidelines to build positive relationships with your co-workers:

- Demonstrate basic good manners.
- Respect people's personal space.
- Show respect for rank.
- Be helpful and willing to be helped.
- Give and receive compliments graciously.

### Demonstrate basic good manners

Good manners help to build relationships because they demonstrate your willingness to respect others. Some basic good manners you should use in the workplace include saying "Good morning" and "Good evening" to those you encounter when arriving at and leaving work. You should also knock on closed doors before entering, and avoid swearing and other crass language. In addition, you should return the items you borrow, avoid interrupting people while they are speaking, and learn your co-workers' names. And, of course, basic good manners include saying "Please" and "Thank you."

**Respect people's personal space**

You can make your presence unwanted by invading someone's personal space. When conversing with co-workers, be sure to respect their personal space. Maintaining a distance of 18 inches between yourself and others is usually comfortable for everyone. If you notice someone backing away from you during a conversation, the other person might be feeling crowded. Consequently, you should not attempt to close the space.

**Show respect for rank**

You can take this polite action by standing when people of higher rank enter your office or workspace. In addition, maintain a formal posture when talking to superiors, even if the topic of conversation is casual. Backslapping, nudging, and other forms of contact are inappropriate. If you are a supervisor, remember to show respect for those you supervise. Using titles such as "Mr." and "Ms.," denote respect and can be helpful if you are younger than the people you supervise.


**Be helpful and willing to be helped**

Helping co-workers who are overwhelmed with work can build strong and positive relationships. A co-worker whom you have helped will probably be willing to help you in the future. If you receive help from co-workers, remember to thank them.

**Give and receive compliments graciously**

Compliments make people feel good and provide a source of motivation. Compliment your co-workers when you notice that they have done good work. Besides making them feel appreciated, you'll be seen as a caring and observant person. If a co-worker pays you a compliment, don't negate the praise. Instead, smile and say "Thank you." After all, you probably earned the compliment.

Do it!

 Click the picture in the slide to play the movie.

## C-1: Developing positive relationships with co-workers

### Exercises

- 1 Watch the movie and then answer the following:

How did Alleigh deal with the situation?

***She offered to provide Bernard with some rough estimates that he could present to Ms. Schrader. She also promised to update him on any changes after she had a meeting with her team.***

How did Alleigh maintain a positive attitude?

***She focused on the solution rather than the problem.***

- 2 Identify the guidelines for developing positive relationships with co-workers.

- A** Interact with your bosses in a casual manner to display your confidence in them.
- B** Say “Please,” “Thank you,” “Good morning,” and “Good evening.”
- C** Downplay compliments from co-workers so you do not seem conceited.
- D** Provide assistance to co-workers who are overwhelmed with an assignment.
- E** Respect people’s personal space during conversations.

- 3 A key action that can help you show respect for your co-workers is to maintain a \_\_\_\_\_.
- positive attitude***

*Explanation***Rumors, gossip, and conflicts with co-workers**

Avoiding rumors and gossip is important. Much of the information spread around an office is simply not true. Just as you would not appreciate co-workers spreading stories about you, you have no right to spread stories about others.

**Gossip and rumors**

Gossip in the office can damage people's careers. The best way to keep yourself out of the rumor mill is to prevent people from sharing juicy tidbits of information with you. When someone asks if you have heard the latest story, politely state that you would rather not know. This is a good move if the story contains details about what other persons do when they are away from work.

Another way to avoid gossip is to excuse yourself from situations in which gossiping occurs. You can also demonstrate leadership in these situations by saying, "Listen, we don't know that the story is true; it might be pure conjecture. We shouldn't be repeating it."

In addition, don't spread information that you are told in confidence, mainly pertaining to management plans. If you hear such rumors, point them out to management without asking for confirmation or denial. You can say, "I thought you should be aware that there is a rumor going around about... . Whether it's true or not, I felt you should know."

You might be fortunate enough to have a co-worker who will alert you to rumors being spread about you around the office. If you learn of this, do what you can to stop the rumors. The best way to accomplish this is to find the people who started the rumor. Ask your co-worker where he heard the information and trace it back to the source.

Confront those responsible as soon as you learn their identity. Choose a private area in the office to do this. An audience will only fuel more gossip. Express your concern about the situation and not your anger. Tell them that you are concerned about the gossip being spread about you and clarify that the information is not true. Your co-workers might not confess to having started the rumor, but they will hesitate to gossip about you in the future.



### Conflicts with a co-worker

There are several guidelines you can follow to help you resolve conflicts with a co-worker without hurting anyone's feelings. One of these is to focus on the issue at hand. Old disagreements or conflicts shouldn't be brought up in new conflicts. Try to maintain your focus on the current issue and how it can be solved.

Another guideline is to acknowledge mutual goals and points of agreement. It will help you and your co-worker to work together to overcome the conflict.

Finally, be open to compromise because it can help you get past a disagreement. Differences of opinion and style are best addressed face-to-face. You are more likely to reach a positive resolution in an actual meeting rather than by telephone or e-mail.

Don't permit your conflict to become personal. Insults and name-calling are inappropriate in the workplace. It does not help resolve conflicts and can earn you a reputation for being hotheaded. If you sense that a disagreement is getting out of control, end the conversation. You can do so by saying, "I think we'd better stop this discussion here. Let's talk later, after we've had some time to reflect on the issue." At this point, bringing in a neutral third party as an informal mediator can help you both regain your objectivity.

Do it!

### C-2: Avoiding rumors and gossip

#### Exercises

- 1 Watch the movie and then discuss the following:

What action did Francesco take when he discovered that it was Jennifer who was spreading the rumors about him?

- **Confronted Jennifer in a private area in the office**
- **Expressed his concern about the situation, not his anger**
- **Clarified that the information was not true**

- 2 Mikki Grant is an employee at Icon's Consumer Products and Services division. When she heard that Luis Jenkins was going to leave the company, she put on her best behavior because she wanted to improve her chances of filling his position. Mikki had heard about the job opening through office gossip before it was publicly announced.

Would you classify this kind of information as a damaging rumor?

**No. It motivated Mikki to be on her best behavior.**

- 3 What actions should you take if you sense that a disagreement is getting out of control?

**End the conversation and bring in a neutral third party as an informal mediator.**

Click the picture in the slide to play the movie.

**Relationships with superiors and staff***Explanation*

Build positive working relationships with your superiors by showing them respect and understanding. If you are a supervisor, then you know that your employees help you get your work done. Keep this in mind when you consider how you treat them.

**Relationship with superiors**

It's important to do your job as well as you can. This will make your supervisors' jobs easier because they will not have to address problems or issues with you. If you get along well with your boss, don't assume that you are friends. Respect their rank, and try not to get into personal conversations with them.

To build positive work relationships with your superiors, practice good corporate citizenship. Corporate citizenship includes arriving on time, meeting deadlines, and not asking for too many personal favors, such as time off or leaving early. Prepare yourself before meeting with your boss, listen before speaking, ask for clarification when you don't understand something, and own your mistakes.

When you disagree with your supervisors, do so diplomatically. Use phrases such as "I believe we should also consider another idea," or "Perhaps we could view this from a different perspective." Being energetic and upbeat, smiling, and having a sense of humor, can make the workplace more enjoyable.

**Relationship with staff**

People who work hard for you deserve your respect. One action you can take to build relationships with your employees is to make requests instead of demands. People are more receptive to completing tasks when they are asked to do them, rather than being told to do them. Other ways to demonstrate your respect include learning and using people's names, being polite, and recognizing that work doesn't constitute your employees' entire lives.

You can earn the respect of those you supervise by complimenting good work, offering constructive feedback in private, giving clear instructions, and practicing good manners. Another step that's sure to win respect is to hold yourself to the same high standards as you hold your staff.

The best supervisors model the behavior they want from their staff. This might include simple everyday occurrences, such as punctuality or saying "Please" and "Thank you." Managers should also model complex behavior, such as accepting criticism gracefully, defending your staff when they have been unfairly accused, giving individuals another chance when they make mistakes, and giving credit where it is due, mainly in front of your staff. Moreover, a good manager runs meetings efficiently and calls them only when necessary, encourages employees to better themselves by gaining new skills; and understands and encourages the use of the company's support services when people need them.

Do it!

### **C-3: Developing relationships with superiors and staff**

#### **Exercises**

- 1 Susan Cole is Icon's human resource manager. She asked Alleigh York, an employee, to find out about flextime programs used in her division. Alleigh did a lot of research and discovered that the most common feature of flextime hours was a set of core hours when all employees were expected to be in the office. She was also asked to find out from HR about programs that have been used in other divisions. However, she forgot to check with them. She apologized and assured Susan that she would do that before they meet again.

What aspects of good corporate citizenship did Alleigh demonstrate here?

***She was prepared for the meeting, and admitted an error.***

- 2 How can you build positive working relationships with your superiors?

- ***By doing your job***
- ***By respecting rank***
- ***By practicing good corporate citizenship***
- ***By disagreeing with supervisors diplomatically***

- 3 List a few actions you can take to build relationships with your employees.

- ***Compliment good work.***
- ***Offer constructive feedback in private.***
- ***Give clear instructions.***
- ***Practice good manners.***
- ***Request instead of demand.***

Answers might vary. Ask a variety of students to share their answers.



## Unit summary: Office protocol

### Topic A

In this unit, you learned the **importance of business etiquette**. You also learned how to create a **professional appearance** by following your company's dress code. You learned that **business attire** includes **casual business attire** and **traditional business attire**. You also learned that **nonverbal communication** plays an important role in how others perceive you.

### Topic B

Next, you learned about **office etiquette**. You learned how to display etiquette in a **cubicle arrangement** by respecting others' space, privacy, and time, and avoiding making excess noise. You also learned how to create a relaxed atmosphere for other employees.

### Topic C

Finally, you learned about developing **positive co-worker relationships** by demonstrating basic good manners and respecting people's personal space and rank. You learned how to avoid **rumors, gossip, and conflicts with co-workers**. You also learned how to develop a positive **working relationship with superiors and staff**.

### Review questions

- 1 What happens when your behavior contains unexpected elements?

*It can detract from the messages you want to communicate, and you might encounter obstacles to your success.*

- 2 Why should you dress suitably for your business?

*If you don't dress suitably, you might not be able to connect with your co-workers or customers.*

- 3 List the nonverbal communications that play an important role in how others perceive you.

*Postures, facial expressions, gestures, eye contact, and personal grooming*

- 4 What are three factors you have to consider when determining the décor for your office?

*1 The culture of your workplace*

*2 The type of work you do*

*3 The level of customer interaction that occurs in your office*

- 5 Why should you choose a private area in the office to confront your co-worker who is spreading rumors about you in the office?

*Conducting the discussion with an audience would only fuel more gossip.*

- 6 List two qualities of good corporate citizenship that you can practice to build positive work relationships with your superiors.

*Arriving on time, and not asking for too many personal favors, such as time off or leaving early*

PREVIEW

**NOT FOR PRINTING OR INSTRUCTIONAL USE**

# Unit 2

## Professional conduct

**Unit time: 60 minutes**

Complete this unit, and you'll know how to:

- A** Use the Internet appropriately.
- B** Identify and handle ethical dilemmas and maintain loyalty and confidentiality in the workplace.
- C** Handle personal issues in the workplace, such as flirting, dating, office romances, and sexual harassment.

## Topic A: Appropriate use of the Internet

### Explanation

Like other aspects of your work, Internet use involves rules of business etiquette. Make sure you thoroughly review your company's Internet use policy before you browse the Web or use other Internet services.

### Internet access

For the most part, Internet access at work should be used only for business. Some organizations permit employees to access the Internet for personal use during breaks or after hours. If this is the case in your organization, you should limit your personal use of the Internet to the specified times.

Knowing and respecting your company's policies about Internet use can even preserve your job. You have no guarantee of privacy when surfing the Internet at work and many companies also monitor how employees use the Internet. In some cases, misusing the Internet can lead to disciplinary action or dismissal.

### Risks of Internet use

If your company doesn't have an Internet use policy, it doesn't mean you can surf when and where you want. Even if your company doesn't monitor the Web sites you visit, there is always the chance of someone walking by while you are surfing. If this happens frequently, people might begin to question your work ethic and dedication.

Idle surfing can tarnish your reputation as a dedicated employee. Surfing inappropriate Web sites can offend co-workers and cost you your job for violating company harassment policies. It's inappropriate to visit "adult" Web sites when you are at work.

In addition, you should not use company Internet access to conduct job searches, complete job-hunting research, or apply for another job. If someone walks in while you are job searching or if your company monitors your searches, word is likely to spread that you are looking for another job.

Another hazard of surfing the Internet at work pertains to security. When you download information or software from the Internet, you put your company at risk for computer viruses, security breaches, and copyright infringements. You can reduce this risk by checking with a supervisor or an information systems specialist before downloading any software or document.

You should also be cautious about integrating any information that has been downloaded or copied from the Internet into your documents, because this information is often copyright protected. You can also protect the company by not sharing your passwords with anyone and by keeping your anti-virus software updated.

*Do it!***A-1: Accessing the Internet****Exercises**

- 1 You are the district director of Icon's Products and Services division. It has come to your attention that some of your employees have been downloading information from the Internet.

What are the risks involved in downloading software or information from the Internet?

- **Risk of infecting the system with viruses that corrupt programs, delete files, and even erase the contents of the hard drives**
- **Security breaches**
- **Copyright infringement**

How can employees reduce the risks involved in downloading information from the Internet?

***They should have approval from their supervisor or an information systems specialist before they download or install any software that comes from outside the company. They should also not share their passwords with anyone and keep their anti-virus software updated.***

- 2 Which actions can you take to practice appropriate Internet use at work?

- A** Familiarize yourself with your company's Internet use policy.
- B** Use Internet access at work for business purposes.
- C** Don't use the Internet for personal use in the presence of others.
- D** Limit your personal use of the Internet to times specified by the company.
- E** Limit your personal use of the Internet to your lunch break.

- 3 If your company does not have an Internet use policy, you should

- A** feel free to surf during breaks
- B** restrict your Internet use to business purposes
- C** use the Internet at any time to search for the topics of your choice
- D** assume your company does not monitor your Internet use

## Topic B: Ethical dilemmas

### Explanation

Ethics involve a basic understanding of right and wrong. This code of conduct permits people to move successfully through society by respecting the rights and needs of others. Ethical behavior is part of good business etiquette, and its practice ensures the success of the individual and the company. Although it's impossible to identify every ethical dilemma you might encounter in your professional life, some of the common issues include using office supplies, taking sick days, maintaining loyalty, and preserving confidentiality.

### Guidelines for handling common ethical dilemmas

Ethical conduct is critical to your success and the success of your company. Common ethical dilemmas include:

- Preparing expense reports
- Using office supplies
- Taking sick days
- Completing personal business
- Giving credit where it is due

### Preparing expense reports

When you prepare an expense report, you should find out the type of expenses your company will reimburse you for and submit only work-related expenses. Before you go on a business trip or take a client to dinner, find out what your company's guidelines are for completing expense reports. Your company might not reimburse money spent on alcohol, or it might pay for theatre tickets for you and a client. If guidelines don't exist or are not detailed, ask your supervisor for clarification. If you go sightseeing or have other entertainment activities on a business trip, you might need to cover these expenses yourself.

**Using office supplies**

You should not take office supplies home for personal use. At some time, you'll no doubt carry home pens, paperclips, or other small items. These actions are not considered problematic, but taking any large office supplies or small items in large quantities is unethical. The company purchases the products for you to use at work.

**Taking sick days**

Use your time off according to company policies. Although it might be tempting to use sick days as extra vacation days, keep in mind that these days are provided for actual illnesses. Lying about sick time can also damage your credibility.

**Completing personal business**

As the number of hours people work continues to grow, it becomes difficult to avoid completing at least some personal business at work. When you need to take care of a personal issue, keep in mind that the company is paying you to complete work-related tasks, so carry out your business accordingly. For example, keep personal telephone calls to a minimum and be sure to charge any long distance calls to your calling card. When you need to visit the doctor or dentist, schedule your appointments so that they don't disrupt your entire workday.

**Giving credit where it is due**

Giving credit to individuals when they deserve it is not only ethical, it can also help you build relationships with your co-workers. When a supervisor or another co-worker compliments you, accept it graciously. If others have contributed to the success of the task, be sure you give them proper credit. If you purposely or inadvertently accept credit for another's work, your co-workers might lose respect for you.

If your supervisors discover that you have taken more credit than you deserve, they might doubt your future accomplishments. If you are a manager, you should share credit with your staff members when appropriate, or they might become unmotivated and disgruntled.

Do it!



Click the picture in the slide to play the movie.

Ask student volunteers to share their experiences.

## B-1: Handling ethical dilemmas

### Exercises

- 1 Watch the movie and then answer the following:

In the movie, Bernard is having a discussion with his manager.

What is Bernard's dilemma? How did he deal with it?

***Bernard is setting up the travel arrangements for the trade show and he isn't sure whether he can use a larger vehicle to carry employees and other resources. He read the expense report guidelines of the company and also asked his supervisor for clarification.***

- 2 Your manager at Icon International praises you for doing a good job with a presentation at the tradeshow. You thank and accept the manager's praise. You also tell the manager that although you gave the presentation, it would never have turned out so well without the help of your co-workers and that it was a true team effort.

Which guideline for handling the ethical issue is followed here? Discuss the benefits.

***Give credit to individuals when they deserve it. It's the ethical action to take and can also help you build relationships with your co-workers.***

- 3 List some of the common ethical dilemmas you might encounter in your workplace.

- ***Preparing expense reports***
- ***Using office supplies***
- ***Taking sick days***
- ***Completing personal business***
- ***Giving credit where it is due***



## Loyalty and confidentiality

Explanation

Two other ethical dilemmas you might encounter in your workplace involve loyalty and confidentiality. Loyalty is a highly valued quality in most organizations. Confidentiality is also valued because a lot of information in the workplace requires discretion on the part of both the company and employees.

### Loyalty

Loyal employees promote the company, defend it against competition, and help it reach its goals. An ethical dilemma can arise when someone asks you, in the name of loyalty, to do something which conflicts with your values or the established company policy. For example, supervisors might ask you to lie for them. This can be a tricky situation, but you should never compromise your ethics for the sake of loyalty.

If this happens, take steps to maneuver out of the situation. First, give the supervisor an opportunity to retract the request. You can do this by repeating the action they asked you to take. For example, you could say in a straightforward manner, "You want me to tell Ms. Stewart that you completed the report yesterday even though you're still working on it?"

After this question, your boss might choose a different course of action. If this step doesn't succeed in making the person rethink the request, you can use a more direct line of questioning. For example, you could say, "Do you want me to lie to Ms. Stewart?" If they still don't change their minds, politely state that you are not willing to lie. Although your supervisor's reaction to this statement might vary from respect to disgust, it's important that you adhere to your decision.

As a supervisor, you should never ask your employees to compromise their ethics. You should not expect them to lie for you or take any unethical action to help you. If employees engage in unethical behavior to protect you, you will jeopardize their jobs and yours.



### Confidentiality

Your company needs to protect proprietary information from its competitors. To meet this need, many companies ask their employees to sign nondisclosure and confidentiality agreements. To ensure that you don't commit a breach of confidentiality, carefully read all your company's guidelines concerning confidentiality. If you're unclear about any aspect of the guidelines, consult your supervisor or a human resources representative.

Another reason for confidentiality is that your company is required by law to guard certain information about its employees. Any medical information acquired due to company-sponsored health plans must be kept confidential. It should be kept in secure files separate from other employee files, such as performance reviews or attendance records. Only authorized human resources personnel should have access to this information, and it should never be discussed with anyone other than the employee or health insurance provider.

Employees' personal information should not be shared around the office either by the employee or by authorized personnel who have access to the information. This information includes compensation issues; legal proceedings, such as divorce or garnishment of wages; and disciplinary actions. Breaches of this type can have severe consequences for the employee and the company.

The issue of confidentiality boils down to a matter of respect for the privacy of others. You should never rifle through someone else's desk, possessions, or papers. Don't read documents or correspondence that don't belong to you, even if they happen to be lying on a copier or fax machine or are available on a computer that you have borrowed. Although you might consider such actions to be harmless, they violate your co-workers' right to privacy.

Do it!

## B-2: Maintaining loyalty and confidentiality

### Exercises

- 1 In the following scenario, Jennifer, an Icon employee, is handling a situation in which her manager, Susan, requires her to lie about the status of a proposal.

**Susan:** We can't send the proposal to Mr. Davidson yet because I haven't had a chance to run all the numbers.

**Jennifer:** Didn't we need to submit the proposal by the end of the day?

**Susan:** Yes, that's the deadline. I tell you what. When Mr. Davidson's receptionist calls to see why we haven't turned in the proposal, tell him one of the vendors hasn't given all the information we need. Then, ask for an extension.

**Jennifer:** You want me to tell Mr. Davidson's receptionist that we're waiting for a vendor?

**Susan:** I know it's bad, but we have to do it for the department.

**Jennifer:** Do you want me to lie to Mr. Davidson's receptionist?

**Susan:** No, I guess that's a bad idea. Never mind. We'll just have to send the proposal through next time.

How did Jennifer maneuver out of the situation when her manager asked her to lie?

**By giving her supervisor an opportunity to retract the statement and by directly addressing the request**

You shouldn't compromise your ethics for loyalty. Discuss another scenario where you might find yourself in a similar dilemma.

Encourage student volunteers to share instances from their work experience in which they had to handle similar situations.

Answers might vary.

- 2 List some types of employee information that should be kept confidential.

- **Medical information**
- **Compensation issues**
- **Legal proceedings**
- **Disciplinary actions**

## Topic C: Personal issues in the workplace

### Explanation

To conduct yourself professionally, you must know how to handle personal issues in the workplace.

### Common personal issues

You might encounter some of the following personal issues in your workplace:

- Flirting
- Dating
- Office romances
- Sexual harassment
- Sharing personal information

### Flirting

Although most flirting in the workplace is harmless, you should be aware of the possible consequences before engaging in this type of behavior. An important consideration is your professional image. The way you interact with other employees, clients, and vendors affects how you are perceived in your organization. Flirting is never considered professional behavior. Developing a reputation for not being professional can only be detrimental to your career. Unwelcome flirting can be annoying and can lead to other problems.

Before engaging in any type of flirtatious behavior, consider the positions both you and the other person hold in the organization. Some organizations ban personal relationships between employees of unequal rank. Even if it is permitted in your organization, you should consider how flirting will be perceived by others. Any conduct that suggests more than a professional relationship might raise suspicions that the person of lower rank is being given special treatment.

**Dating**

You should take action to ensure that personal relationships don't interfere with your professional life. Consult your company's policy on dating, and then follow those guidelines. You might want to consult a supervisor or a human resources representative to ensure that you clearly understand what behavior is acceptable, how the guidelines in the dating policy apply to your situation, and whether any disclosure is needed.

You might discover that your company doesn't have a policy discouraging romantic relationships between co-workers, customers, or vendors. Although you might think you can keep a relationship private, it will inevitably become a topic of office gossip. If you still choose to engage in a personal relationship, disclose it to your supervisors.

If your relationship is not permitted by the company's dating policy, you can end the relationship or quit your job. If you and the person you're dating are of unequal rank, a transfer request by one person could be another alternative. Some companies will permit dating as long as one person is not supervising the other. Again, confirm this with your Human Resources department.

Even if your relationship is not discouraged by company policy, it's still important to maintain a certain level of decorum at the office. By leaving your displays of affection out of the workplace, you'll demonstrate that you respect your co-workers and that work is your priority when you're at the office.

**Office romances**

Before engaging in a romantic relationship with someone from work, you should be aware of the many potential problems it can cause. Relationships between employees of different rank can give the impression that the partner of lower rank is being given preferential treatment. The impression of special treatment is just as damaging to workplace morale and your own credibility as the actual existence of such treatment.

Another aspect of the problem occurs if the relationship ends. You need to consider that working with, working for, or managing your ex-partner would be difficult. In this situation, the company has to be concerned that the employee of higher rank might mistreat the other employee, which makes the company vulnerable to claims of sexual harassment. As a result, the dating policy of your company is to protect you and the company. It is your responsibility to read and follow the policy.

### **Sexual harassment**

*Sexual harassment* is any unwanted sexual behavior that creates an intimidating or hostile work environment. This conduct is not only inappropriate, it's also illegal. According to the United States Equal Employment Opportunity Commission (EEOC), unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment in certain situations. Some situations of sexual harassment include:

- Submission to such conduct is made either explicitly or implicitly as a term or condition of an individual's employment.
- Submission to or rejection of such conduct by an individual is used as a basis of employment decisions affecting that individual.
- Conduct that has the purpose of interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

The best way to prevent sexual harassment is to avoid engaging in any behavior that could be construed as offensive. Although the workplace of today should not become a sterile environment in which people are afraid to interact with each other, keep in mind that certain behavior, which might seem harmless to you, might violate the rights of others. Although there is no foolproof prevention for sexual harassment, certain actions can help. These include:

- Always speak and act in a professional manner, even after regular work hours, because "after hours" activities with co-workers can be subject to the same scrutiny as work activities.
- If a situation is uncomfortable, remove yourself from it.
- If you cannot leave an uncomfortable situation, make it clear to the individual harassing you that the behavior is unwelcome.
- If you experience harassment, report the incident to the relevant person or department outlined in the employee policy manual.



### Sharing information about private life

Discussing details of your private life at work can cause problems. Before you engage in conversations related to your family or your love life, consider that such conversations can cause problems later on, and that many of your co-workers might prefer not to know these details about your life.

Employees often create problems for themselves by divulging too many details about their family, including marital and financial difficulties. Although some of your co-workers will be genuinely interested in hearing about your family, they probably don't want to know every detail of your economic woes or divorce proceedings. This information can backfire when it's time for performance reviews or opportunities for advancement.

Revealing the details of your family's medical history could cause problems when you apply for health coverage for yourself or another member of your family. Suppose that you have continually expressed how much trouble you are having with your teenager. Co-workers, or even your supervisor, could assume that any deviations in your work performance are a direct result of your problems at home.

Another common problem is when employees discuss too much information about their love life. Someone might view such a conversation as sexual harassment. Co-workers might even find your stories annoying and they might feel no obligation to keep the information confidential. Before sharing the intimate details of your personal life, you should think about how much information you want your co-workers and superiors to know about you.

Do it!

## C-1: Handling personal issues in the workplace

### Exercises

- 1 Bernard, an Icon employee, is due for a promotion within a short time. He has great people skills and is a technical expert. However, he is depressed about the fact that his boss, Ms. Liggett, and Michael Clayton, another employee, are carrying on a relationship. He believes that Ms. Liggett will choose Michael for the promotion instead of him because of her personal relationship with Michael.

How did Ms. Liggett's behavior affect Michael?

***It made Bernard depressed and suspicious that she would give special treatment to Michael and choose him for the promotion.***

- 2 One of your employees believes that the company should not worry about how he spends his personal time or whom he spends it with because it is his private life.

Explain to him the importance of the company's dating policy.

***The company has a responsibility to ensure that its employees have a fair and unbiased working environment. In a situation where one employee has the power to determine the career path of another, personal relationships can lead to allegations of discriminatory treatment or sexual harassment. The guidelines have been established to protect the company and its employees from any allegations that can be brought legally.***

- 3 You have become romantically involved with a co-worker. You find the relationship promising and you want to sustain it. If your company does not allow office romances, what are your options?

- A** Quit your job.
- B** End the relationship.
- C** Ignore your company policy.
- D** Request a transfer.

- 4 The best way to prevent sexual harassment is to \_\_\_\_\_.

- A** not engage in any behavior that could be construed as offensive
- B** avoid any non-work-related topics of conversation
- C** not discuss personal issues with co-workers you don't know well
- D** avoid any situation in which non-work-related issues are being discussed

- 5 List some of the personal information you should avoid sharing with your co-workers.

- ***Marital and financial difficulties***
- ***Family's medical history***
- ***Your love life***

Ask student volunteers to share their experiences if they have encountered a similar situation.

Answers might vary.

Answers might vary.



## Unit summary: Professional conduct

### Topic A

In this unit, you learned guidelines for **accessing the Internet at work**. You also learned about the **risks of Internet use** when downloading information or software, which include computer viruses, security breaches, and copyright infringements.

### Topic B

Next, you learned about **common ethical dilemmas**, such as preparing expense reports, using office supplies, and taking sick days. You learned how to **handle ethical dilemmas effectively** by following common sense guidelines. You also learned about maintaining **loyalty** and **confidentiality** in the workplace.

### Topic C

Finally, you learned how to handle **common personal issues in the workplace**, such as **flirting, dating, office romances**, and **sexual harassment**. You also learned to be cautious about **sharing personal information** with your co-workers.

### Review questions

- 1 List two ways that you can protect the company when accessing the Internet.
  - 1 *Don't share your passwords with anyone.*
  - 2 *Keep your anti-virus software updated.*
- 2 If you are a supervisor, you should never ask your employees to compromise their \_\_\_\_\_.  
*ethics*
- 3 To protect proprietary information from its competitors, many companies need their employees to sign \_\_\_\_\_ agreements.  
*nondisclosure and confidentiality*
- 4 What behaviors affect how you are perceived in your organization?  
*The way you interact with other employees, clients, and vendors*
- 5 How do you define sexual harassment?  
*Any unwanted sexual behavior that creates an intimidating or hostile work environment*
- 6 If you experience harassment, you need to report the incident to the relevant person or department outlined in the \_\_\_\_\_.  
*employee policy manual*

PREVIEW

# Unit 3

## Communicating in the workplace

**Unit time: 65 minutes**

Complete this unit, and you'll know how to:

- A** Introduce people properly and identify actions to take when being introduced.
- B** Be an effective conversationalist and handle conversational faux pas.
- C** Follow meeting protocol and etiquette.

## Topic A: Introductions

### Explanation

People typically don't feel comfortable in business or social gatherings unless proper introductions have been made. Introductions create the relationships that help a business function smoothly.

### Guidelines for introductions

Although introductions might cause anxiety for some people, it's not a difficult skill to learn. The following basic guidelines can help you introduce people comfortably and effectively:

- Base business introductions on rank.
- When appropriate, use titles in introductions.
- Present others to a client.

#### Base business introductions on rank

The person of higher rank always receives the person of lower rank. In other words, the person of lower rank is introduced first to the person of higher rank. Then, the introduction can be finished by introducing the person of higher rank to the person of lower rank. Gender and age do not affect this guideline.

For example, if you have to introduce a new employee named Adam Jackson to the vice president of marketing, whose name is Mary Meyers, you should say, "Ms. Meyers, may I introduce Adam Jackson. He came to us from ABC Corporation. Adam, meet Mary Meyers, our vice president of marketing."

Your actual wording can vary. You might also say, "May I present . . ." "This is . . ." or "I'd like to introduce . . ." Always use each person's full name and provide information about each person so that when the introduction is complete, the new acquaintances will have something with which to begin a conversation.

#### When appropriate, use titles in introductions

Address your superiors as "Mr." or "Ms." If someone is the same rank as you, it's proper to use his or her first name. Professional titles, such as "Dr.," should also be used during introductions. Keep in mind that many titles, such as governor, senator, congressman, judge, and certain military ranks, are retained for life.

#### Presenting others to a client

The "rank" guideline does not cover all situations. There are a few additional guidelines to follow when making introductions. A client is always the most important person in an introduction. Therefore, even your supervisors would be presented to the client. For example, you might say, "Ms. Able, this is Darren Cox, our sales manager. Mr. Cox, meet Vicky Able from Technology Systems."

If the people you introduce are of the same rank, introduce the one you don't know as well to the one you know better. When the rank is not clear you can introduce a younger person to an older person, introduce a party or convention attendee to a guest of honor, and introduce a layperson to an official.

Do it!

Identify two students to play the roles of Mary Brighton and Davis Reynolds. Ask another student to introduce them. The other students need to observe if proper introductions have been made and suggest changes if any.

## A-1: Introducing people

### Exercises

- 1 How will you introduce Mary Brighton, director of sales, and Davis Reynolds, administrative assistant?

**Mary Brighton has the highest rank, so you need to present Davis Reynolds to her first. In addition, you should provide information about each person. The introduction can be:**

**Ms. Brighton, this is Davis Reynolds, our new administrative assistant. Davis, this is Mary Brighton, the director of sales.**

- 2 You are introducing Debra Carter and Derek Thomas. You are all of equal rank. Review the introduction.

“Derek, may I present Debra Carter, senior director of marketing. Debra, this is Derek Thomas, senior director of research and development.”

Select the criterion that makes this introduction correct.

- A** Derek is older than Debra.
  - B** You know Derek better than Debra.
  - C** Derek is a convention attendee, and Debra is a guest of honor.
  - D** Debra has an official title. Derek is a layperson.
- 3 Which of the following are guidelines for introducing people?
- A** Base business introductions on rank.
  - B** Introduce a younger person to an older person.
  - C** Introduce a person you know well to a person you don't know well.
  - D** Introduce people to a client or customer.
  - E** Address people of superior rank with their appropriate titles.
  - F** Address individuals by using their first names.

## Actions to take when being introduced

### Explanation



Just as there are guidelines to follow when you introduce people, you should also take proper actions when you are being introduced. These actions include:

- Shaking hands
- Standing
- Smiling
- Making eye contact
- Greeting the other person

### Shaking hands

In any business introduction, shaking hands communicates a message about you. You need to know the protocol for shaking hands because you want that message to be positive. Handshakes last about three seconds and are finished by the time the introduction is over. Handshakes should always be the same, regardless of whether you are a woman or a man and whether you are meeting a woman or a man.

To perform a proper handshake, extend your right hand, grip the other person's right hand firmly, pump the clasped hands once or twice, and unclasp the hands. The correct grip should not crush the other person's hand, nor should your hand be limp. The correct grip also means that palms are perpendicular to the ground and hands meet at the web of the thumbs.

### Standing

You should stand to show respect for the person you are meeting. If you don't stand, you might give the impression that you don't think the other person is important. You might be in a position in which it's awkward to stand, such as being seated behind a table. In this situation, you should lift yourself partially out of your seat as you shake hands and then sit back down.

### Smiling

Smiling conveys a positive message during introductions. A smile shows that you are friendly and pleased to meet the other individual.

### Making eye contact

Make eye contact during an introduction to show confidence in yourself and to show that you are giving the individual your complete attention.

### Greeting the other person

Whenever possible, use the person's name when you greet them. Doing so is flattering and helps you remember their names. When you and the other person are of the same rank, use their first name. If their rank is above yours, use the other person's correct title.

You might want to use other variations when you greet people. For example, you might have heard positive information about the individual to whom you are being introduced. In this case, you might want to say, "It's so nice to meet you," and then add, "I've heard so much about you."

### **Improper introductions**

Sooner or later, you'll forget someone's name, or someone will forget your name. It's important to not make a big deal out of it.

If you forget someone's name when you introduce him or her, simply say, "I'm sorry. I've forgotten your name." Frequently, you can make a joke to relieve the tension.

When someone forgets your name when introducing you, be helpful by immediately offering your name. Do not make the person fumble for your name and do not take the memory lapse personally. The same consideration is in order when someone misstates your name, title, or company affiliation. Politely correct the information and then move on with the conversation.

### **Introducing yourself**

When you meet someone new and no one else is present to make the introduction, you should introduce yourself. This situation frequently occurs at business meetings or social gatherings because the host cannot make introductions for all of the attendees at the same time.

If you have been invited to the event, you should feel free to introduce yourself to anyone present. You can offer your hand to a new person and say, "I don't believe we've met before. I'm Chris Wright from Network Technologies." When introducing yourself, it's best to leave off all titles. Stating that you are Chris Wright, director of personnel, might be perceived as arrogance. People might also question your level of self-confidence.

Do it!

Divide the class into pairs. Ask them to stand facing each other and introduce themselves to their partners.

## A-2: Following etiquette while being introduced

### Exercises

- 1 Work in pairs. Introduce yourself to your partner following proper actions.
- 2 In the following scenario, Francesco Amos and Jennifer Brower are two project managers at Icon International. They are standing in a conference room with Michael York, a human resources representative. Jennifer and Michael don't know each other, so Francesco needs to introduce them.

**Francesco:** Jennifer, I'd like you to meet Michael York. He's an HR representative and can help us develop our program. Michael, this is Jennifer Bower. She's one of our most capable project managers.

**Jennifer:** *(politely making the correction by enunciating the "r" and showing she is happy to meet Michael)* Actually, it's Brower. Michael, it's nice to meet you. I'm glad you're on our team.

**Michael:** Thank you, Jennifer. I really look forward to working with you and Francesco.

**Francesco:** Oh, Jennifer, I'm sorry. I'm so bad with names sometimes.

Now answer the following:

How did Jennifer respond when she was incorrectly introduced?

***She politely corrected the information and moved on with the conversation. She didn't make a scene and take the mistake personally.***

- 3 When should you introduce yourself to another person?

***When you meet someone new and no one else is present to make the introduction***



## Topic B: Conversations

### Explanation

After you have met new people, the relationships can grow only if conversation follows. The art of making conversation is essential in business because it puts others at ease and helps you get to know people. Choose appropriate topics for conversation. Be tactful and respect ethnic, cultural, and gender differences. You should also know how to handle conversational faux pas.

### Guidelines to becoming a good conversationalist

The most important guideline you can follow to become a good conversationalist is to be a good listener. Although many people tend to focus on the speaking aspect of conversation, good conversationalists know that they should do more listening than speaking.

When you listen, your body language should convey that you are listening. Usually, standing or sitting up straight, making eye contact, nodding, and not fidgeting communicate that the speaker has your attention. You can also demonstrate that you're listening attentively by asking intelligent questions.

You should also accept compliments gracefully, avoid repeating gossip, and do your best to show a good sense of humor. It's important to pay attention to the nonverbal cues of others, so you know when you are boring them or when they are uncomfortable with the topic of conversation. People who are bored with a conversation might yawn or glance at their watch frequently. People who are uncomfortable with the topic might back away from you.

Avoid interrupting others, and don't correct errors of fact, grammar, or pronunciation. Making these corrections can appear condescending. It's also considerate to draw into the conversation people who might be too shy to join in on their own.

### Topics for conversation

Proper topics for conversation vary depending on the situation and the people with whom you are conversing. Topics that are usually welcomed by all include sporting events that everyone is familiar with, current events, best-selling books, compliments about the event you are attending, or positive events that have occurred in the company.

Topics to avoid include religion, politics, sex, money, and your health. In addition, if you know personal information about someone with whom you are conversing, don't discuss it unless you know the person really well and you can speak in private.

## Qualities of a good conversationalist

Two simple qualities can be helpful in any social or business situation:

- Tactfulness
- Respect for ethnic, cultural, and gender differences

### Tactfulness

Tact involves presenting information in a way that is acceptable to those receiving it. It does not mean lying or withholding information. Rather, tact means conveying information to others in a way that will not cause offense. Using tact when you communicate will show that you respect others and will help you build relationships.

### Respect for ethnic, cultural, and gender differences

In conversation, you should never use racial and ethnic slurs or make sexist remarks. These labels and remarks are inappropriate because they are disrespectful of others. It's also disrespectful to refer to people by their race or ethnic identity. Always refer to people by name and, if appropriate, title.

You should also avoid any off-color jokes that could cause offense. Something that seems harmless to you might insult someone else.

### Conversational faux pas

At some point, you'll inevitably make a conversational faux pas. One common mistake is to say something awkward when making small talk. For example, you share your negative opinion about company XYZ's advertising campaign, and then learn that one of the people in the group works in advertising at company XYZ.

No matter how badly you might want to make your exit, you must stay and deal with the situation. If you simply end the conversation, you'll leave a bad impression, and you'll probably still be embarrassed the next time you meet the individual.

The best way to handle the situation is to make a self-deprecating joke. For example, you might say something like, "That's probably why I'm not in advertising. I'd probably better stick to development where I know what I'm talking about." Follow with an apology for any hurt feelings your remarks might have caused. After you have recovered from the faux pas, steer the conversation to another topic, or you might benefit from the good manners of another person who changes the topic for you.

*Do it!***B-1: Making conversation****Exercises**

- 1 Which of the following guidelines will help you become good conversationalists?
  - A** Be a good listener.
  - B** Interrupt others when you need to make a specific point.
  - C** Give and accept compliments gracefully.
  - D** Don't repeat gossip.
  - E** Change the subject to a topic you are knowledgeable about.
  - F** Develop a good sense of humor.
- 2 Deb Farrell, a sales representative for Northwest Laboratories, and John Kass, purchasing manager for Icon International, are having a friendly conversation. People are impressed by Northwest Labs' quick entry into the global market. John would like to ask Deb about the methods Northwest used to globalize in a short period. Choose the appropriate statement that he could use.
  - A** It's almost unheard of for a company to go from domestic to global in the short period that Northwest Laboratories did. Are you involved in any sort of espionage schemes?
  - B** How was Northwest able to increase its client base in such a short period of time?
  - C** It's difficult to globalize in such a short amount of time. What kind of strings did your executives have to pull?

- 3 In the following scenario, Alleigh and Bernard, employees at Icon International, are seated at a table in the break room, talking.

**Alleigh:** Hey, Bernard, how are you?

**Bernard:** Actually, I'm not so good.

**Alleigh:** Oh really, I'm sorry. What's the problem?

**Bernard:** I'm really frustrated because my project schedule updates will be late. There are two sets of status reports that haven't been turned in. I can't believe how irresponsible and selfish people can be. You'd think that if someone else's deadlines depended on your work, you get it done on time.

**Alleigh:** Those missing reports wouldn't happen to be for the Garrison project, would they?

**Bernard:** Yes. Why?

**Alleigh:** I have Wendy's status report. She asked me to turn it in for her, but I didn't realize it needed to be in by a certain time. I'll go get it for you.

**Bernard:** Oh, geez, Alleigh. I'm sorry about what I said. I've been under a lot of stress this week.

Now, answer the following:

How did Bernard deal with the conversational faux pas?

**He stayed in the situation and apologized to his co-worker.**

- 4 Select the actions you can take to demonstrate that you are a good listener.

- A** Ask intelligent questions.
- B** Correct errors of fact.
- C** Stand up straight.
- D** Nod as you listen.
- E** Don't fidget.
- F** Interrupt to express concurrence.
- G** Make eye contact.

- 5 Being tactful means \_\_\_\_\_.

- A** presenting information in a way that is acceptable to listeners
- B** withholding information that listeners might find offensive
- C** lying about information so that listeners won't be offended
- D** stating information in a way that focuses on content, not the listener

Ask two or three students to relate their experience in handling conversational faux pas.

## Topic C: Etiquette in meetings

### Explanation

Whether you attend or lead a meeting, you should understand the basic protocol for meetings so that you can make productive contributions to them. Productive meetings have a purpose, an agenda that is closely followed, and leaders and participants who are polite, prepared, and know and abide by basic meeting protocol. By understanding the protocol of meetings, you can shape your behavior so that people focus on your message rather than interpreting your actions. The participants of a meeting should respond to meeting invitations, arrive on time, respect the agenda, and complete the follow-up actions after the meeting.

### Meeting protocol

If you are leading a meeting, consider the following aspects of the meeting to conduct the meeting successfully:

- Meeting participants
- Time of the meeting
- Location of the meeting
- Notifying the participants
- Seating arrangements
- Visual aids
- Preparing an agenda
- Taking minutes

### Meeting participants

A meeting leader should invite participants who can contribute to or gain something from a meeting, or who are creative and innovative thinkers. Also consider inviting individuals whose jobs will be affected by a meeting. Meeting leaders can structure the meeting by determining who should attend it. This will help to address the participants' specific needs, anticipate participants' questions, and reduce participants' concerns about a subject.

When preparing for a meeting, the leader should learn the following characteristics about the participants:

- Attitudes about and experience with the subject
- Commitment to improving the situation
- Department roles
- Ability to contribute to discussions
- Personal or job-related goals

**Time of the meeting**

When choosing the time to hold a meeting, consider the availability of those who need to attend. Arranging a meeting around participants' schedules might be complicated, but it ensures that the majority of participants can attend. To determine the most convenient time for everyone to attend a meeting, conduct a quick survey and choose a time that accommodates the majority of the participants.

A helpful guideline when choosing a meeting time is to avoid Monday mornings and Friday afternoons because people might find it difficult to concentrate on the topic at hand. Also try to avoid scheduling meetings on the eve of holidays, and be sensitive to religious holidays.

Offer participants a way to RSVP for the meeting, whether by telephone, e-mail, or face-to-face communication. If participants confirm their intention to attend a meeting, you'll be able to prepare adequate accommodations.

**Location of the meeting**

Choose a location that's convenient for the majority of participants. They will be more likely to attend if the meeting is within a reasonable distance. Ensure that the location is available and adequate for the number of people attending. There should be sufficient lighting, seating, and ventilation to make everyone comfortable.

A few minutes before the meeting, check the room and make sure it's clean and organized. This will help prevent any embarrassing last-minute complications.

**Notifying the participants**

You can notify the participants of a meeting face-to-face, or use memos, e-mail, or a telephone call. As soon as you determine a meeting's time and location, inform participants so they can adequately prepare for the meeting. You also need to provide adequate lead-time for those who need to make travel arrangements to attend.

When notifying participants of a meeting, you should tell them who would attend and provide them with a copy of the meeting's agenda. If the meeting involves people who are not acquainted, provide a roster that includes each person's title and department. If there is someone from outside your company, include the name of his or her organization. If participants need directions to the meeting, or if they need specific preparation materials, provide this information when you notify them of the meeting.

**Seating arrangements**

Seating arrangements are determined by the size and type of meeting. Classroom-style configurations are used only in "feed-forward" gatherings, where information is being presented, not discussed. It will encourage interaction and a sense of team unity if you seat participants so that they are facing one another, such as around a circular table. If you are planning a large meeting in which many participants have not previously met, you can provide badges or nametags to help people get acquainted.

Assigned seating arrangements can be helpful if participants who frequently disagree or cause other distractions are in attendance. When you plan a seating arrangement, keep in mind that seating individuals across from one another encourages discussion. If certain participants attending the meeting are inclined to argue, avoid seating them directly across from one another.

### Visual aids

The need for visual aids depends on the nature of the meeting, the number of participants, the type of information discussed, and your personal preference. Visual aids can:

- **Clarify presentations.** Topics discussed during meetings can be too detailed or confusing without the aid of clarifying images. Visual aids will help you clarify complex presentations and help you illustrate points for participants who might be unfamiliar with the topic.
- **Reinforce your message.** Visual aids can help reinforce specific parts of your message. The ability to convey a message to participants and have them retain that information is essential to a successful meeting. Many people retain information best when you present it both verbally and visually.

### Preparing an agenda

Agendas should cover every topic you need to discuss in a meeting. Allow your agenda to accommodate unexpected discussion. When you create an agenda, try to:

- Prioritize topics so you can discuss the important items first.
- Designate the amount of time allotted for discussing each topic.
- Specify whether participants are to gain or share information, make a decision, or reach approval for a change.
- Limit the length of the meeting.

You might want to ask participants to help create the agenda before the meeting. When participants help form the outline for discussion, they are more likely to contribute to the success of the meeting.

Distribute agendas a few days before a meeting to gain feedback from participants about the topics. If possible, ask for feedback before the meeting to allow time to make any necessary changes.

When conducting informal meetings, you might not have time to create an agenda. In this situation, take a couple of minutes at the outset of the meeting to outline the meeting's objective with the participants.

### Taking minutes

Minutes provide meeting participants with a clear and accurate transcription of a meeting's discussion. They help remind participants of the topics covered, the conclusions reached, and the decisions made during a meeting. Minutes might also include a task assignment list so that everyone has a clear outline of any actions they need to take.

Appoint someone who can easily identify and record the main points of the meeting. The person taking minutes is also responsible for recording the discussions objectively to create an unbiased report of the meeting's topics. Ask someone who is not participating in the meeting to record the minutes. Recording and participating at the same time is often too much for one person to handle effectively.



Do it!

## C-1: Understanding meeting protocol

### Exercises

- 1 You are the director of strategic marketing at Icon International. You have recently learned that Icon executives want to increase the budget for a few departments. You want a budget increase for your department also. You decide to hold a meeting with your employees to discuss the issue.

How will you determine a proper time for the meeting?

**Conduct a quick survey and choose a time that accommodates the majority of participants.**

You need to have a meeting with Icon's chief financial officer to explain why you want an increase in your department's budget. You have to prepare an agenda for the meeting. What actions should you take to prepare an agenda?

- A** Prioritize the topics, so that important items are discussed first.
  - B** Limit the amount of discussion permitted for potentially controversial topics.
  - C** Specify whether participants are sharing facts, making decisions, or reaching approval.
  - D** Limit the length of the meeting.
  - E** Designate the amount of time allotted for discussing each topic.
  - F** Solicit feedback on the order of topics to be discussed.
  - G** Ask whether participants want a facilitator present.
- 2 Select the items you should provide to meeting participants before the meeting begins.
    - A** A copy of the agenda
    - B** A list of the attendees
    - C** A printed version of any visual aids you'll use
    - D** Materials to help them prepare
    - E** A copy of any notes you have made about the meeting
    - F** Directions to the meeting
  - 3 How do visual aids improve meetings?
    - **Clarify presentations**
    - **Reinforce information**



- 4 In the following scenario, Alec and Robin are sitting in a conference room. Robin is shuffling through some papers.

**Alec:** What are you looking for, Robin?

**Robin:** The minutes from last week's meeting. Oh, here they are. I couldn't remember what date we'd chosen for the district conference.

**Alec:** The third of November, right?

**Robin:** Yes, that's right. I need to book a location for it before the end of the month.

How did the meeting minutes help Robin?

*She wanted the date of the district conference to book a location for it. The minutes served as a helpful reminder of decisions that were made in the meeting about the conference.*

### **Professional conduct in meetings**

Explanation



Even when you aren't leading a meeting, you still have important responsibilities to fulfill to practice proper business etiquette. These include:

- Respond to meeting invitations.
- Prepare for the meeting.
- Arrive on time.
- Respect the agenda.
- Participate in meetings.
- Avoid distracting actions.
- Complete follow-up actions.

#### **Responding to meeting invitations**

As soon as you receive a meeting invitation, check your schedule to determine if you can attend, and respond to the meeting leader. If you cannot attend, be sure to follow up with the meeting leader or ask another participant to take notes for you.

#### **Preparing for a meeting**

After you receive the agenda, examine it to determine if there are any tasks you need to complete. If you didn't receive an agenda with the invitation, ask the leader if you'll need to prepare. When doing so, be polite and phrase the question as though you were not expecting an agenda. Otherwise, the meeting leader might interpret your inquiry as an admonishment for not having sent you a copy of the agenda.

### **Arriving on time**

You should arrive on time to meetings to show respect for other participants. When you arrive late, you give the impression that the meeting is not important to you.

Arriving early can also be a problem. If you arrive too early, you might distract the meeting leaders while they are making last minute preparations. If the meeting is in-house, find something else to do until the scheduled meeting time. If the meeting is at another location, tell the receptionist that you do not want to interrupt any preparations that might be taking place in the meeting room.

If you know in advance that you'll be late to a meeting, inform the meeting organizers when you reply to the invitation. If you are unexpectedly running late, call ahead to inform the meeting leaders. They can save you a seat near the door so you can enter without disturbing others.

If you're running late and have no way to notify the meeting leader or any participants, arrive as quickly as you can. When you reach the meeting room, don't rush in unprepared. Before entering the room, have a pen and paper ready to go, so that you don't cause any extra distraction by shuffling through your notebooks or briefcase. When you enter, do so quietly and take an empty seat near the door.

Be sure not to speak until you have referred to the agenda and listened to understand what is happening in the discussion. You'll annoy others and embarrass yourself if you enter a meeting late and proceed to ask questions about topics that have already been addressed.

Excluding emergencies, you are obligated to remain at the meeting until it's over. It's acceptable to leave a meeting early if you have notified the meeting leader ahead of time that you need to leave early. You can also leave ahead of time if a meeting is running past its scheduled end time.

If you need to leave early or exactly at the scheduled end time, sit near the door so you can leave quietly. When you leave the meeting, don't make a lot of noise when you gather your notes and other items. If you need to leave early because a meeting is running longer than expected, you should pass a note to the leader explaining that you have another commitment, and then leave quietly.

### **Respecting the agenda**

While you are participating in a meeting, respect the agenda. It was created to help accomplish specific goals and make the best use of everyone's time. Respecting a meeting agenda involves providing input relevant to each topic when it is discussed, and not skipping ahead to topics that are slated for later. Don't monopolize all the allotted time to discuss a specific topic.

**Participating in meetings**

Typically, people are invited to meetings with an assumption that they have something to contribute. When you have an idea or someone asks for your opinion, share it. If you are confused and need clarification, ask for it.

If you are new to an organization or in a subordinate position, avoid speaking first. Listen to those with more experience before offering your opinion or comments. If you are unfamiliar with the subject of discussion, remain silent. Use the opportunity to learn from those who have expertise. When you're unfamiliar with the subject, it's better to listen than to demonstrate your ignorance.

**Avoid distracting actions**

Business etiquette calls for certain actions to be avoided to help ensure the success of the meeting. Most importantly, make sure you don't interrupt the meeting. Before you enter a meeting, turn off your watch alarm, set your pager or mobile phones to their silent setting, or turn them off.

Do your best not to cause a distraction when someone else has the floor. Although it can be difficult to control the urge to voice disagreement, don't sigh, shake your head, or mutter derogatory comments. Instead, make a note of your objection so that you don't forget your point, and wait for an appropriate time to speak.

Keep in mind that the more seniority and expertise you have, the more you can say, "I disagree." You should exercise diplomacy by phrasing ideas as recommendations, not mandates or orders. Finally, regardless of how bored you might feel, don't permit your boredom to show. Don't doodle or play with your papers, pencils, or paper clips. Don't stare blankly into space, chat with a neighbor, or doze off.

**Completing follow-up actions**

After a meeting, complete any tasks you were assigned or volunteered for. Your ability to fulfill responsibilities after a meeting is just as important as your conduct during a meeting. If you don't complete your tasks, you reduce the productiveness of the meeting.

You might also want to prepare a memo that conveys the highlights of the information you acquired. You can send this memo to your supervisors if they were not in attendance. This action is frequently proper for off-site meetings. It's also proper meeting protocol to write a thank-you note to the organizer of a large meeting that entailed extensive planning and preparation. Consider sending short notes to fellow participants, such as potential clients or vendors, with whom you would like to stay in contact.

Do it!

## C-2: Conducting yourself properly in meetings

### Exercises

- 1 Select the responsibilities you should fulfill before attending a meeting.
  - A Respond to the meeting invitation.
  - B Complete any tasks that will help you be an informed participant.
  - C Provide the meeting leader with your evaluation of the agenda.
  - D Examine the agenda to determine what tasks you can complete to prepare for the meeting.
  - E Think of ways to challenge co-workers' positions on the meeting's topic.
  - F Ask the leader what you can do to prepare.

- 2 In the following scenario, Francesco Carter and Jennifer Adams, employees at Icon International, are discussing a meeting they had attended earlier that day to which their co-worker Michael Amos was late.

**Francesco:** How's your afternoon?

**Jennifer:** Well, it's pretty good. Although, I'm still frustrated about the project meeting this morning.

**Francesco:** Oh, really? I was happy with what we accomplished after Michael got there.

**Jennifer:** That's exactly it—*after* Michael got there. I think Michael has a lot to contribute to the project, but it's so frustrating when he shows up late to meetings.

**Francesco:** Yeah, I know what you mean. I had a lot of other work to accomplish this morning. I would have liked to use the 15 minutes we spent waiting on Michael to accomplish some other tasks.

**Jennifer:** It just makes me wonder whether he cares about this project.


What impression did Michael's tardiness create in his co-worker's mind?

**It gave the impression that he didn't respect other people's time and that the meeting was not important.**

- 3 Watch the movie and then answer the following:

What professional conduct did the lady follow?

**Completing follow-up actions. She got the estimates for the annual report from the printing companies.**

 Click the picture in the slide to play the movie.

## Unit summary: Communicating in the workplace

### Topic A

In this unit, you learned **guidelines for introducing people**. You learned that introductions create the relationships that help a business run smoothly. You also learned **actions to take when you are being introduced**. You learned that **shaking hands, standing, smiling, making eye contact**, and **greeting the other person** conveys a positive message about you. You also learned how to handle **incorrect introductions**. Then you learned how to **properly introduce yourself**.

### Topic B

Next, you learned guidelines to help you **become a good conversationalist**. You learned that being a good listener is essential in business conversations. You also learned how to choose **appropriate topics for conversation**, which could include sporting events, current events, and best-selling books. You also learned the importance of **being tactful** and **respecting ethnical, cultural, and gender differences**. Then you learned how to **handle conversational faux pas** by dealing with the situation light-heartedly.

### Topic C

Finally, you learned how to follow **meeting protocol**. You learned to consider the **participants**, the **meeting time**, and the **location** in advance. You also learned about **professional conduct in meetings**. Even if you aren't leading the meeting, you need to **respond to meeting invitations** and **arrive on time**.

### Review questions

- 1 Select the characteristics of a proper handshake.
  - A** The handshake lasts about three seconds.
  - B The handshake ends just after the introduction.
  - C** Palms should be perpendicular to the ground.
  - D The grip should be lighter when shaking a woman's hand.
- 2 List two ways you can overcome conversational faux pas.
  - 1 *Stay and deal with the situation.*
  - 2 *Steer the conversation to another topic.*
- 3 Select the characteristics a meeting leader should know about participants.
  - A** Attitudes about and experience with the subject
  - B** Commitment to improving the situation
  - C Current workload and level of stress
  - D** Department roles
  - E** Ability to contribute to discussions

- 4 How will you prepare an agenda for informal meetings if you don't have time to create one?

*Take a couple of minutes at the outset of the meeting to outline the meeting's objective with the participants.*

- 5 Why should you seat participants around a circular table?

*It encourages interaction and a sense of team unity.*

- 6 What is the follow up action that you can take if your supervisor was not present at a meeting?

*Send a memo to the supervisor that conveys the highlights and information acquired at the meeting.*

# Unit 4

## Etiquette in communication

### Unit time: 60 minutes

Complete this unit, and you'll know how to:

- A** Describe telephone courtesy and apply it while using telephone, voice mail, and speakerphones.
- B** Compose professional e-mail messages by writing effective subject lines and messages, and using professional e-mail signatures.
- C** Follow proper writing guidelines to communicate written information clearly and efficiently.

## Topic A: Telephone courtesy

### Explanation

Proper courtesy is critical when you speak on the telephone. Every interaction you have with people communicates a message about you. Being helpful and polite to callers demonstrates your professionalism and positive attitude. It improves your relationships with customers, co-workers, and supervisors. You can become a positive part of the work environment by projecting the right image and establishing a rapport with your contacts.

### Communicating effectively over the phone

When communicating with people on the telephone, the following guidelines can help you make a good impression on your callers:

- Create a positive image.
- Establish a rapport.
- Make a good impression.
- Return calls.
- Transfer calls.

#### Create a positive image

Factors that affect the image you project on the telephone include:

- **Clear diction, proper volume, and appropriate speed.** Your words must be clear, distinct, and spoken at an appropriate volume and speed. Enunciating your words clearly is more efficient and sounds more professional than repeating yourself for the caller.
- **Posture.** Although the parties can't see each other, sitting upright tends to make most people speak more businesslike and professional. If you slouch in your chair, you are more likely to project a careless attitude.
- **Eating, drinking, and chewing gum.** These activities are rude and usually obvious to the other party. They convey an unprofessional impression of you and your company.

#### Establishing a rapport

To establish a rapport, build on what you have in common with a caller. Three ways you can build a rapport with a caller are:

- **Use the caller's name.** Occasionally use the caller's name during a conversation. This personalizes the call and increases the caller's confidence in your desire to help.
- **Find common ground.** You're more likely to build a rapport when you can find common ground with a caller. These small connections demonstrate that you are working toward mutual goals.
- **Match the caller's speaking rate.** This is a subtle way to gain and focus the caller's attention. A person who speaks slowly tends to be suspicious of a person who speaks quickly. Conversely, a person who speaks slowly can frustrate callers who speak quickly.



### Making a good impression

There are many ways you can make a good impression on your caller. For example:

- **Answer promptly.** Try to answer all calls by the third ring. If you're unable to answer the telephone in this amount of time, consider making a brief apology after your initial greeting. Sometimes a caller will hear more rings than you do.
- **Use the appropriate identification.** Answer all calls with the appropriate identification. If the only calls you receive are from within the company, you need to identify your department and yourself. If you receive calls from customers, vendors, or other outside parties, make sure you identify the company, department, and yourself.
- **Use positive language.** In general, positive words and messages are easy to understand and convey a strong image. They imply action and results and instill confidence in the other party. A phrase such as, "She's away from her desk," is stronger than the negative, "She's not here."
- **Be helpful.** When you take calls for someone who is not available, offer the callers alternatives such as holding, leaving a message, or calling back. Both the callers and the individuals they are trying to reach will benefit when you are helpful, and the callers will appreciate your concern.

### Returning calls

Follow these guidelines when returning calls:

- **Tell the screener you are returning a call.** When you return a call and reach someone who is screening calls, tell the individual that your call is in response to a call made to you. Providing this information permits the screener to spend less time determining whether you have a legitimate need to be connected.
- **Express regret or appreciation.** If you are returning a call you were unable to take previously, briefly express your regret. In the same way, when the recipients of the call are people you have repeatedly attempted to reach, you should express appreciation that they took your call.
- **Avoid putting a caller on hold.** Avoid putting callers on hold because it can send a message that the call is not important. If you need to locate a person for callers or look up information, ask for permission before placing them on hold. Wait for the caller's response before you put them on hold. Saying "Please hold" and immediately putting the callers on hold does not make a good impression. After taking the callers off hold, be sure to thank them for their patience. If you must leave a caller on hold for more than 30 seconds, check back frequently to reassure the caller that you haven't forgotten about the call.

### Transferring calls

Be cautious when transferring calls. Shuffling callers from one department to another might give them the impression that your company is disorganized. If you must transfer callers, always ask whether they mind being handed over to someone else, and then explain why you are transferring them and to whom.

Make sure there is someone to speak with the callers before you make the transfer. Transferring the callers to someone who is not available can cause frustration. If the other person is not available to receive a call, ask the caller if he or she would like to be transferred to the recipient's voice mail.

*Do it!***A-1: Applying telephone courtesy****Exercises**

- 1 Jeremy is a sales representative at Icon International. Throughout the day, he receives phone calls from clients, partners, and other employees at Icon International. He must apply the correct communication etiquette to ensure proper handling of these calls.

Jeremy receives a call from Mike who works for Eastern Industries. Select the statement that he can use for answering the call.

- A** Good morning. Icon Sales department, Jeremy speaking.
- B** Hello. You've reached the sales department. How can I help you?
- C** Good morning. This is Jeremy. What can I do for you?
- D** Good morning. How can I help you?

Icon has sent a shipment of the operating system's upgrade to Eastern Industries without the copies of invoices. Mike needs the invoices of the shipment as soon as possible.

Review the statements and select the proper response that Jeremy could have used.

- A** I can probably get you another invoice in the mail. I can't send it until the end of the day, though.
  - B** Barring any catastrophe, we shouldn't have any problems sending those.
  - C** We'll send another copy of the invoice to you. I'll have it in the mail by the end of the day.
- 2 What is the purpose of finding common ground with a caller?
- A** To show that you and the caller have a lot in common
  - B** To make the caller feel like you're a friend
  - C** To demonstrate that you're working toward mutual goals
  - D** To display extra courtesy for the caller

- 3 You are a sales representative for Icon International. You receive a phone call from Susan, an auditor. She needs to talk to someone in the audit department about the audit she did for Icon the previous month.

Which statement can you use to inform her that she is talking to the wrong person?

- A I'm probably not the person you want to talk to. Do you want me to transfer you to someone in Accounting?
- B The operator must have connected you with the Sales department by accident. I can transfer you, give you the number, or have someone call you, if you'd like.**
- C I'm afraid I won't be much help, this is Sales. The switchboard operator probably connected you to me by accident.
- D I'm sorry. This is the Sales department. You'll need to talk to someone in Accounting.

- 4 Watch the movie and then answer the following:

How did the sales representative put the caller on hold without offending him?

**He asked permission before putting the caller on hold. He also thanked the caller for waiting.**



Click the picture in the slide to play the movie.

Ask student volunteers to share their experiences of being put on hold.

## Voice mail and speakerphone

### Explanation

Voice mail deserves as much attention to courtesy as a phone conversation. This applies to your outgoing greeting and the messages you leave on others' voice mail. You should also be courteous when you use speakerphones.

### Voice mail

Follow these guidelines to help ensure that you handle voice mail messages with appropriate courtesy:

- **Customize the greeting.** Most voice mail systems permit you to personalize your mailbox greeting rather than use a generic, system-generated message. A personal greeting makes a better impression and encourages callers to leave a message.
- **Update the greeting frequently.** Callers who hear an updated greeting feel reassured that you'll receive and respond to their message in a timely manner.
- **Tell callers how frequently you check messages.** If you're away from your telephone frequently, your voice mail greeting should let callers know about this. It's also important to reassure them that you check your messages frequently.
- **Give the caller alternatives.** If appropriate, your voice mail greeting should give callers an alternate number to call if they need immediate attention.

You'll likely find that you need to leave voice mail messages frequently. Only one-fourth of all business calls reach the intended individual on the first attempt. Follow these guidelines to leave an effective voice mail message:

- **Plan your message.** Planning what you want to say in a voice mail message helps ensure that you communicate all the necessary information. It's vital that you include your name, telephone number, and a specific message. Planning ahead prevents you from rambling. Try not to leave a message that's longer than 30 seconds, because it is often difficult for some people to listen attentively to a long, drawn-out message.
- **Speak clearly.** It's important that you clearly enunciate your message, because people cannot ask you to repeat what you have said. Some voice mail systems might also distort the quality of your voice.
- **Suggest a callback time.** To ensure that your message is returned, specify by what time you need a response, or let the individual know when you'll be available to take the call. To prevent a "phone tag" cycle from developing, use phrases such as, "You can reach me after 3:00 p.m. any day this week."

### Speakerphone

When several people need to participate in a call, or when you need your hands free to look through paperwork, a speakerphone can be helpful. Some people prefer not to be put on speakerphone, so you should ask for permission before using this feature during a call.

When using a speakerphone, eliminate distracting background noises, and verify that the caller can hear you clearly. Be aware of the clarity of your voice. You might need to speak louder than usual to ensure that the other person can hear you.

Do it!

Ask two volunteers to share their answers.

## A-2: Using voice mail and speakerphones

### Exercises

- 1 You are a sales representative at Icon International. You called your manager to get information about an upcoming sales meeting. You hear a voice mail greeting informing you that the manager is away at a convention, and prompting you to leave a message.

Compose the voice mail greeting and the message.

- 2 You would like to put a caller on speakerphone to free your hands for searching through paperwork. What steps should you follow when using the speakerphone?
  - **Ask for permission before putting a caller on speakerphone.**
  - **Ask if the caller can hear you clearly.**
  - **Eliminate distracting background noises.**
  - **Speak loudly.**

## Topic B: E-mail etiquette

### Explanation

You should use the same professionalism in your e-mail communications as you do in your conversations over the telephone or face-to-face.

### Professional e-mail communications

You can convey a positive message to the people with whom you work by keeping these guidelines of e-mail etiquette in mind:

- Respond to e-mail messages.
- Write effective subject lines.
- Use a professional e-mail signature.

### Responding to e-mail messages

Respond to e-mail messages as soon as you can. If you receive important messages that you don't have time to deal with immediately, or if it is a request that will take some time to respond to, send back a brief message letting the sender know that you received the message and that you'll respond soon.

### Writing effective subject lines

Subject lines are valuable for sorting and categorizing e-mail messages. Many people use the subject line to scan for important e-mail messages that they want to respond to first. As a result, you should always write a specific subject line to inform the readers of what your message is about and what they need to do. A precise subject line immediately informs the reader of your expectations. You should limit your subject lines to 10 words because longer subject lines usually cannot be displayed fully.

The subject line can also indicate the urgency or length of a message. For example, you could write "urgent response requested" if you need immediate feedback, or you could write "FYI" if the message is just information that does not require any action. If your message is long, write (long) at the end of your subject line. This tells the readers that they might need to return to it later.

### Using a professional e-mail signature

E-mail signatures are a few lines of text that you can add to the end of your e-mail messages. Your signature clearly identifies who you are and how people can contact you. Most e-mail programs allow you to create a signature file ahead of time and automatically attach it to the end of your messages. You can even create several signatures for different purposes.

Make sure your signatures are professional. They serve as your business card in e-mail form. Limit your signatures to four or five lines and include only the necessary information, such as your name, title, telephone number, and street address. It is a good idea to include your e-mail address in case someone has difficulty replying to your message.

Do it!

## B-1: Using subject lines and e-mail signatures

### Exercises

- 1 You are a sales representative for Icon International. You need to send an e-mail message to the members of the executive board to postpone an upcoming sales meeting.

What is an effective subject line for your e-mail message?

- A Request to the executive board, for a meeting postponement and reasons for such
- B Informing you of a postponement and the details behind why such a postponement is necessary
- C Request for postponement of sales meeting

- 2 Review the following e-mail signatures. Which among them is a professional e-mail signature? Provide a reason.

Nathan Iverson

Project Manager

1300 W. Central

(555) 555-5555

niverson@icon.com

Nathan Iverson

Project Manager

(555) 555-5555

niverson@icon.com

Go Cats! Purple Power!

***This is a professional e-mail signature. It contains only essential information.***

***E-mail signatures should contain only essential information.***

Ask two or three students to give reasons why the chosen subject line is most effective.

Ask students to create their own professional e-mail signatures.

Nathan Iverson

Icon International

1300 W. Central

Work (555) 555-5555

Fax (555) 555-3333

Mobile (555) 555-4444

niverson@icon.com

Nathan Iverson

Icon International

Work (555) 555-5555

niverson@icon.com

Never confuse motion with action.

Benjamin Franklin

***E-mail signatures should be limited to four or five lines.***

***E-mail signatures should contain only essential information.***



*Explanation***The body of e-mail messages**

Pay attention to the body of your e-mail messages, in addition to the subject line and signature. Consider the following guidelines when writing an e-mail message:

- Make e-mail messages easy to read.
- Provide a context.
- Review messages.
- Respond later.

**Making e-mail messages easy to read**

To make your e-mail messages easy to read:

- **Limit the line length.** You should limit each line to 60-70 characters. Use a carriage return at the end of each line because the display of e-mail messages can vary. Keeping your lines short prevents your e-mail message from wrapping oddly on the recipient's display and prevents the last characters in each line from being cut off.
- **Use appropriate fonts and punctuation.** Use a font that is easy to read and make sure your punctuation is correct. Words written in capital letters are perceived as shouting, so use them sparingly. Although you might use bold, italicized, or underlined text, some mail systems don't support these text formats. For systems that don't support text formatting, you can indicate emphasis by surrounding a word in asterisks.
- **Address only one subject.** By focusing e-mail messages on one subject, you help your readers to respond quickly and easily. If you must address more than one topic, leave a space between the different subject areas.
- **Limit the length of the message.** Your e-mail messages shouldn't exceed the length of one screen, because readers are less likely to read long messages immediately. If your message must extend beyond one page, organize it so the most important information comes first.

**Providing a context**

If you reply to or forward a message, provide a context for the message you send. For example, when you reply to a message, include the original as part of your e-mail. Otherwise, the recipient might not understand your response.

If you reply only to a specific question, you can add the other person's question in your e-mail and enclose it in angle marks, such as <<When will my order arrive?>> When you forward information, readers of your message need to see the original communication so that they can understand the context of your e-mail message.

You should include only as much information or as many previous e-mail messages as necessary. People don't read forwarded e-mails that become too drawn out. To avoid including too much information, summarize the other messages and then make your comments.

### **Reviewing messages**

After you send an e-mail message, you cannot retrieve it. Consequently, you must be sure that your message represents you and your company in a positive manner. You should always review your messages to ensure that they don't contain spelling or grammatical errors. Such errors can damage your credibility.

You should also check to see if any content could be misinterpreted. E-mail messages are often misinterpreted because e-mail carries no nonverbal cues. For example, humor or sarcasm can be difficult to interpret.

### **Responding later**

If you receive an e-mail message that makes you angry, it's best to respond at a later time. If you reply immediately, you might send an offensive message before you realize what you've done. After the message is sent, the damage might be irreparable. Allow some time to calm down before you respond.

Attacking an e-mail message is commonly called a *flame*. Although flaming someone might make you feel better for a few minutes, you risk damaging your relationship with the recipient. If you receive a flame message from someone, deal with the situation in a professional manner.

Do it!

## B-2: Composing the body of e-mail messages

### Exercises

- 1 You need to send an e-mail message to the members of the executive board to postpone an upcoming sales meeting. What should be the ideal length of your message?

#### *Less than a page*

Select the statement that can be used as an introduction to your e-mail message.

- A** Dear members of the board, the following e-mail message is a request for a postponement of the upcoming sales meeting.
- B** Dear members, please read this request for a meeting postponement and reasons for such. I'm also attaching a report you'll need for sales meetings beginning next quarter.
- C** To the members of the executive board, I need to inform you of a postponement and the details behind why such a postponement is necessary.
- D** Dear members, I need to request a postponement to a meeting. In the following message I will detail why it's necessary. I'm also including some suggestions for improving productivity in the workplace.

- 2 Which of these are guidelines for making your e-mail messages easy to read?

- A** Limit the line length.
- B** Use capital letters for important information.
- C** Use appropriate fonts and punctuation.
- D** Group multiple topics close together to keep reader interested.
- E** Address only one topic.

- 3 If you receive a negative, attacking e-mail message (a flame), you should

\_\_\_\_\_.

*Deal with it in a professional manner.*

Ask two or three students to give reasons why the chosen statement is the most effective one.

## Topic C: Writing guidelines

### Explanation

Written correspondence is a critical form of business communication. It's important for you to follow proper writing guidelines so you can communicate information clearly and efficiently. One of the most common forms of written communication is the business letter. You'll also have to write memos and send informal letters during the course of your work.

Whether you're handling formal or informal correspondence, avoid spelling and grammatical errors because they can damage your credibility and the perceived sincerity of the message. Such errors can also convey to your reader that either you don't know the rules of grammar and punctuation, or you don't think the letter is important.

To ensure that your letters and memos are well written, always edit them before sending the final draft. Sending error-free correspondence will communicate your professionalism and attention to detail.

### Business letters

Include the following features in a business letter:

- Heading or letterhead
- Date
- Inside address
- Salutation
- Body
- Closing
- Signature block

#### Heading or letterhead

This is placed along the left margin. It includes the organization's name, full address, and telephone number. Many organizations have letterhead stationery available that already contains this information.

#### Date

The date should be placed two lines below the heading. When writing dates, start with the full name of the month. Then, write the day in numerals followed by a comma and add the year.

#### Inside address

The inside address identifies the recipient and should be placed two lines below the date. Always address the readers with "Mr." or "Ms." and include the individual's position or title after their name. If you don't know to whom you are sending the letter, address it to the relevant department or a specific position within that department.

**Salutation**

This should be placed two lines below the inside address. It includes the recipient's name followed by a colon. You should address the recipient just as you would in person. If you don't know the reader's name, the proper salutation is "To whom it may concern:".

**Body**

The body contains your message and begins two lines below the salutation. Most letters are single spaced with a double space between each paragraph for clarity.

**Closing**

Put your closing line two lines below the body. Traditional closings include "Sincerely" and "Cordially." They should reflect your relationship with the reader.

**Signature block**

This contains your signature and your typed name. Leave three blank lines below the closing before typing your name. Add your signature in that space. If you include your company's name in the signature block, make sure that it's in capital letters.

**Special components of a business letter**

Occasionally, you'll need some special components in a business letter, including:

- Attention lines
- Subject lines
- Second-page heading
- Reference initials
- Postscripts

**Attention lines**

Use these when you know only the last name of the recipient or when you want to direct a letter to a title or department. Place attention lines two lines below the inside address. Begin with "Attention:" followed by the name of the recipient.

**Subject lines**

Use subject lines to briefly indicate the subject of the message. Place the subject line at the top of the page or immediately before the salutation.

**Second-page heading**

When a letter is more than one page long, place a second-page heading at the top of the page, and include the full name of the person receiving the letter, the date, and the page number. You might also include the name of the recipient's organization. When you use a second-page heading, leave two blank lines between the heading and the body of the letter.

**Reference initials**

Use reference initials when someone dictates a letter to a secretary or scribe. Reference initials should appear along the left margin, two spaces below the signature block. Place the writer's initials first and the typist's second. Some examples of reference initials include: BCL/jdw, BCL:jdW, and BCL:JDW.

**Postscripts**

Postscripts are usually afterthoughts, personal messages, or items that need further emphasis. Place them at the end of the letter. You can show postscripts with the initials: PS:, PS, or P.S. However, postscripts can communicate that a letter was poorly planned.

Do it!

**C-1: Formatting a business letter****Exercises**

- 1 Place the features of a business letter in the order they would appear in a letter.

Date	<b>Heading</b>
Inside address	<b>Date</b>
Heading	<b>Inside address</b>
Signature block	<b>Salutation</b>
Closing	<b>Body of the letter</b>
Salutation	<b>Closing</b>
Body of the letter	<b>Signature block</b>

- 2 Which of the following correctly describes the reference initials KDW/JMH.

- A** KDW dictated the letter to JM.H.
- B** JM.H dictated the letter to KDW.
- C** JM.H and KDW are responsible for transcribing the letter.
- D** KDW and JM.H wrote the letter together.

- 3 What is a potential disadvantage to writing postscripts?

**Postscripts can indicate that a letter was poorly planned.**

## Memos

Explanation



A *memorandum*, or *memo*, is a short document sent within an organization to a specific individual or group. Organize a memo according to its purpose. You can use the following guidelines to format a memo properly:

- 1 **Describe your objective briefly and up front.** Avoid wasting your readers' time with a long explanation for the memo.
- 2 **State what should happen.** Immediately inform the recipients about what needs to be done. This eliminates any confusion or misconceptions about your intentions, and focuses the memo on an action.
- 3 **Clearly state responsibilities.** If you request action from the recipients, directly state what they need to do. They will be better able to complete the assigned task when they clearly understand your instructions.

## Informal letters

You'll likely need to send informal letters to co-workers, supervisors, vendors, or customers. The most common informal letters include thank you notes, notes of sympathy, invitations, and congratulatory notes.



An important guideline to follow when sending informal letters is to send them at the appropriate time. Thank you notes should be sent within 24 hours of the event or act. Invitations should provide sufficient time for people to make arrangements to attend an event. Notes of congratulation or sympathy should be sent soon after the events that prompted either type of note.

When you write informal business letters, consider the purpose of the message and the person receiving it. Frequently, people find it challenging to compose this type of communication. Keep in mind that the fact that you took the time to send a letter in the first place will be meaningful to the recipient.

Do it!

## C-2: Writing memos and informal letters

### Exercises

1 What are memos?

*Short documents sent within an organization to a specific individual or group*

2 List three steps to format a memo.

- *Briefly describe your objective.*
- *State what should happen.*
- *Clearly state responsibilities.*

3 You are the CEO of Icon International. You need to inform members of the executive board that an upcoming meeting has been postponed. Select the type of letter you would choose.

- A Business letter
- B Informal letter
- C Memo**

4 Which of the following are valid guidelines for writing informal letters?

- A** Consider the purpose of the message.
- B** Consider the person receiving the message.
- C Send invitations at least two days ahead of time.
- D Send thank you notes within a week of the event.
- E** Send letters at the appropriate time.

5 You recently had to do business with Icon's Consumer Products and Services division. You were impressed by the way they handled and fixed the problem with your computer. Compose a letter to thank them.

*I am extremely pleased with the quality of service provided by your company. I sincerely appreciate your prompt response. Your technical expert helped me meet my deadlines. I look forward to doing business with you in the future.*

Answers might vary.

You can bring some samples of informal letters from magazines or books and discuss them in class.



## Unit summary: Etiquette in communication

### Topic A

In this unit, you learned the importance of **establishing a rapport**, and guidelines to follow when **returning calls** and **transferring calls**. You also learned how to apply telephone courtesy while using **voice mail** and **speakerphones**, with the goal of making a good impression on your callers.

### Topic B

Next, you learned guidelines to compose **professional e-mails**. You learned to write effective **subject lines** and use a professional **e-mail signature**. You also learned guidelines for **writing effective messages**. You learned that you should **make e-mail messages easy to read**, and **review the messages** before sending them.

### Topic C

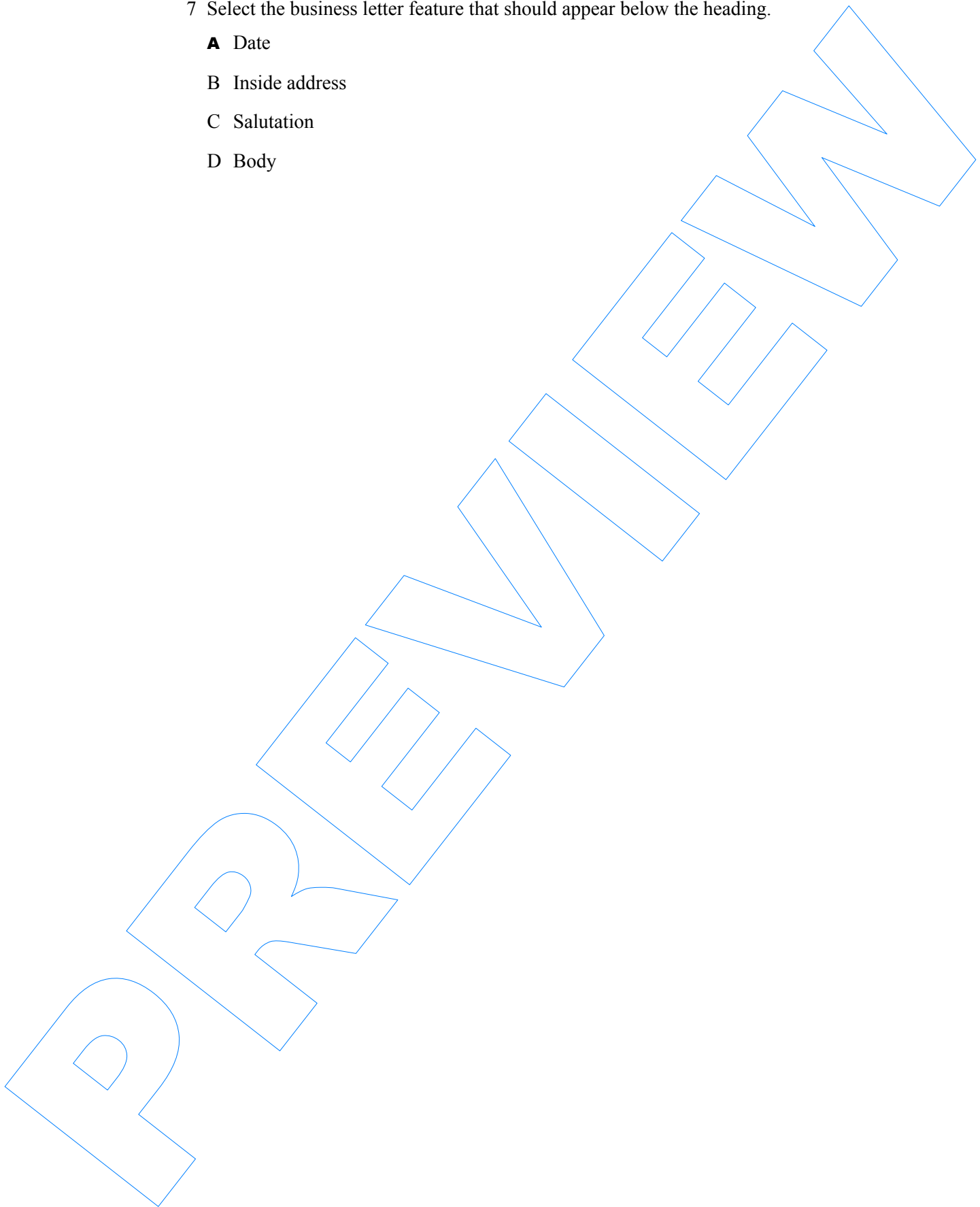
Finally, you learned **proper writing guidelines** to help you communicate information clearly and efficiently. You learned to edit your letters before sending them. You also learned standard **features of a business letter**, such as the **heading**, **date**, **inside address**, and **body of the letter**. Then, you learned additional features of business letters, including **attention lines**, **reference initials**, and **postscripts**. Finally, you also learned guidelines for composing common **informal letters**, such as **thank you notes**, **notes of sympathy**, **invitations**, and **congratulatory notes**.

### Review questions

- 1 Select the actions you can take to build a rapport with callers.
  - A** Use a caller's name.
  - B** Find common ground.
  - C** Speak more slowly than a caller.
  - D** Match a caller's speaking rate.
- 2 List two guidelines you can follow to help create a courteous voice mail greeting.  
*Customize the greeting and give the caller alternatives.*
- 3 A precise \_\_\_\_\_ immediately informs the reader of your expectations.  
*subject line*
- 4 How should you organize your e-mail if your message extends beyond one page?  
*Place the important information at the beginning.*
- 5 Use \_\_\_\_\_ when you know only the last name of the letter's recipient or you want to direct a letter to a title or department.  
*attention lines*
- 6 Why is it important to avoid spelling and grammatical errors in your correspondence?  
*They can damage your credibility and the sincerity of the message. These errors can convey to your reader that either you don't know the rules of grammar and punctuation, or you don't think the letter is important.*

7 Select the business letter feature that should appear below the heading.

- A** Date
- B Inside address
- C Salutation
- D Body



# Unit 5

## Business functions

**Unit time: 70 minutes**

Complete this unit, and you'll know how to:

- A** Follow proper etiquette at business functions.
- B** Identify formal table settings, utensils, and glassware at business dinners, and demonstrate proper etiquette for business dining.

## Topic A: Attending business functions

### Explanation

As an employee, you might be invited to attend business functions. These might include cocktail parties, banquets, tradeshow, conventions, sporting events, or cultural performances. You might also be asked to visit clubs as part of conducting business. You have to understand proper protocol for these events because you'll be representing your company.

### Business functions

There are several different types of business functions that you might be asked to attend, including:

- Cocktail parties
- Cocktail buffets
- Cocktail receptions
- Banquets
- Trade shows and conventions
- Country clubs and members-only clubs
- Sporting events
- Spectator sports
- Theatre, symphonies, ballets, or concerts

### Cocktail parties

Cocktail parties are commonly hosted by businesses because they don't require as much planning or expense as other events. Basic cocktail parties are informal functions that usually take place between 5:00 and 8:30 P.M. Meals are not served at these events. Hors d'oeuvres and a full bar are standard. Seating is not always available because the goal of these parties is to provide a forum for mingling. The attire for a typical cocktail party can be casual to formal, but be sure to check the invitation for any specifications about attire.

### Cocktail buffets

Cocktail buffets differ from cocktail parties in that more food is served, so there is likely to be more seating available. However, there might not be enough seating for every guest at once, so plan to sit while you're eating and then get up and mingle. A cocktail buffet is usually held between 6:00 and 9:00 P.M. and is hosted for a variety of reasons. For example, it could be a morale-boosting social, an event to introduce a new product, or to thank a customer. Although cocktail buffets usually entail traditional business attire, check the invitation for specifications about attire.

### Cocktail receptions

This is the most formal of cocktail parties. Cocktail receptions usually mark a special occasion, such as honoring someone or making a significant announcement. Traditional business attire or black-tie attire might be required. The cocktail reception is usually hosted for two hours before another evening engagement, or it might be held after an evening engagement for about an hour and a half. Early cocktail receptions are typically held between 6:00 to 8:00 P.M. and include hors d'oeuvres. Late receptions are held from 10:30 P.M. to midnight and include a variety of dishes and desserts. In addition to the usual drinks at a cocktail party, a cocktail reception will usually include champagne.

Whether you attend a cocktail party, buffet, or reception, keep in mind that it is not an opportunity to gorge yourself. Don't station yourself next to the food tables or empty passing trays of hors d'oeuvres. Another mistake is to drink beer or anything else directly from the bottle.

Cocktail events are the few remaining business-entertaining functions at which smoking might not be off-limits. If smoking is permitted at the event, be sure to use proper smoking manners. Light up only around other smokers, be aware of where your smoke is drifting, don't trail ashes on the floor, and use an ashtray. These guidelines apply to cigar and pipe smoking as well.

### Banquets

Banquets are typically large luncheons or dinners hosted by an organization. A banquet is one occasion at which you can expect business to be discussed.

The best approach you can take to enjoy a banquet is to be ready to meet new people and engage in conversation. If there are a lot of guests you don't know, introduce yourself. If you're nervous about speaking with new people, keep in mind that after you introduce yourself, many people will be happy to talk about themselves. Give them your undivided attention by listening and asking questions.

When the meal begins, check for place cards before settling into a chair. Banquets frequently have assigned seating. If the seats are assigned, sit at the chair with your place card whether you like the seating arrangement or not. Don't switch place cards because the host might have had a specific strategy for the seating arrangement.

**Trade shows and conventions**

Although trade shows and conventions don't serve the same purpose, the behavior expected of employees is almost the same. Companies or industries usually host conventions to bring together a group of people to focus on certain issues within their field. Trade shows provide a place for vendors to promote their products to prospective customers.

Trade shows and conventions also have a social aspect. In addition to business meetings, there are often other events to attend after hours. Remember that you are representing your company. Bear in mind that stories about the trip are likely to make it back to your office because you might be traveling with employees from your own company.

Although it's acceptable to socialize after hours, keep in mind that the company is paying for you to gain knowledge at the event and expects you to represent the company well. To do so, you should review the agenda of the event in advance. Determine what issues you would like to discuss or the questions you would like to ask and write them down. Be sure to attend all the meetings you are scheduled for and take notes so that you bring new information back with you.

Take advantage of the opportunity that trade shows and conventions offer for networking. Resist the temptation to spend all your time with other employees from your office. Meeting people at trade shows and conventions can help you find prospective customers and develop important business relationships.

**Country clubs and members-only clubs**

Country clubs and members-only clubs are common places for business meetings and parties. Use the same good manners you would use at any other business function.

Business entertaining at country clubs typically involves lunch before or after a game of golf or tennis. Business people usually take turns paying for the expense at their respective clubs. If you have been invited to participate in a golf or tennis tournament, your host will usually take care of the expenses. If you're playing individual rounds of golf, green fees will be charged for each player. You should offer to pay for yours. If your host insists on paying, then offer to pick up the caddie fees, if applicable, for you and your host. Be prepared to tip caddies, locker-room attendants, and parking attendants.

At members-only clubs, you might need to be more concerned about your attire as compared to a country club. If you're not sure what attire is expected, ask your host or call the club's office to check dress codes. Good manners are especially important at a private club because your behavior not only reflects on your company, but on your host as well.

### **Sporting events**

As work schedules become more flexible, you might find yourself participating in a sporting event for business. Some of the most common venues are golf and tennis. If you're invited to participate in a sporting event, be honest about your abilities. Don't accept an invitation unless you know the rules of the game and are proficient enough to not slow the pace of the event. If you don't play the sport in question, inform your hosts. They might suggest another sport or lunch instead.

If, on the other hand, you understand and enjoy the sport, feel free to accept the invitation with enthusiasm. Keep in mind that it's never proper to brag about your skills. If you play well, it will be obvious to others. If you exaggerate your skills, people who play the sport will notice immediately and you'll discredit yourself.

When participating in the sporting event, keep in mind that many of the civilities you would demonstrate in the office or at a business lunch also apply on the tennis court or golf course. Start the event by arriving on time, prepared with the right clothing and any necessary equipment. During the event, defer the schedule of events to your hosts. Let them suggest breaks to make phone calls or obtain refreshments. It's also important for you to show respect to the other participants. Don't cause distractions, use foul language, challenge rules or calls, or complain about anyone's performance, including your own.

If you lose the competition, congratulate the winners on their performance. If you win, be gracious. Do not gloat over your accomplishment and be sure to compliment your opponents on their skill. Remember, participating in sporting events with business associates is supposed to be for enjoyment.

### **Spectator sports**

At spectator sporting events, such as football or baseball, relax and enjoy the event. As with other business functions, follow your hosts' lead. Ask your hosts what to wear before you opt for jeans. If you don't have a favorite team, support your hosts' team, and if your hosts seem to want to concentrate on the game, keep small talk to a minimum. It's polite to offer to buy snacks for your hosts and other guests. When it comes to alcohol, follow your hosts' lead. If they have a beer, feel free to have one too. However, don't feel obligated to do so.

### **Theatre, symphony, ballet, or concert**

You might also be invited to attend a play, symphony, ballet, or other concert. For these events, make sure you arrive a bit early or, at the latest, on time. If you arrive after the start of the performance, you might not be permitted to enter the theatre until a scene change. Even then, your entrance will distract other patrons. Before entering, turn off your telephone or pager. During the performance, try to make as little noise as possible and don't talk.

Do it!

## A-1: Identifying types of business functions

### Exercises

1 Identify the following business functions based on the provided descriptions:

Usually take place between 5:00 and 8:30 P.M. Instead of a meal, drinks and hors d'oeuvres are provided.

**Cocktail parties**

Frequently hosted for two hours before another evening engagement, or held after an evening engagement for about an hour and a half.

**Cocktail receptions**

Typically large luncheons or dinners hosted by an organization.

**Banquets**

Provide a place for vendors to promote their products to prospective customers.

**Trade shows**

Here, business entertaining frequently includes lunch before or after a game of golf or tennis.

**Country clubs**

You should arrive for these functions a bit early or, at the latest, on time.

**Theatre, symphony, ballet, or concert**

2 What are common reasons for hosting a cocktail buffet?

- A** Help people to get to know each other.
- B** Honor someone.
- C** Introduce a new product.
- D** Make a significant announcement.
- E** Thank a customer.

3 What etiquette should you follow when participating in business sporting events?

- **Arrive on time.**
- **Be prepared with the right equipment.**
- **Show respect for other participants.**
- **Accede to your hosts' preferences.**



- 4 What guidelines are critical at trade shows and conventions?
- A Take advantage of the opportunity to socialize with co-workers.
  - B Review the agenda in advance.**
  - C Take notes on your competition.
  - D Attend the meetings for which you are scheduled.**
  - E Take advantage of networking opportunities.**
  - F Attend the sessions that interest you.

## Etiquette at business functions

### Explanation



Keep in mind the following important considerations when you attend a business function:

- Responding to an invitation
- Taking guests to a function
- Dressing appropriately
- Mingling with others
- Holding drinks and food while mingling
- Drinking alcohol at business functions
- Leaving a business function
- Thanking the host

### Responding to an invitation

When you receive an invitation to a business function, your first responsibility is to respond accordingly. If you receive an invitation in the mail or through e-mail, the invitation will indicate RSVP or say “Regrets only.” When the invitation says RSVP, the host wants to know whether you can make it or not. You should respond by the date specified in the invitation. If the invitation says “Regrets only,” this means that you need to respond only if you cannot attend. Again, do so promptly.

In many instances, the invitation you receive for a business function will be over the telephone or in person. If you can attend, accept the invitation graciously and with enthusiasm. If you cannot attend, thank the individual promptly for the invitation and politely state that you have a conflict.

After you accept an invitation, it’s important to attend the event. However, if you have an emergency or other legitimate reason that prevents you from keeping the commitment, inform the host immediately by phone, preferably prior to the event. If you cannot contact the host prior to the event, call immediately afterward. Follow it up with a note of apology, including a brief explanation of why you couldn’t attend the event.

### Taking guests to a function

The invitation to a business function, whether written or verbal, should tell you exactly who is invited to the event, as shown in Exhibit 5-1.



*Exhibit 5-1: An example of a business invitation*

If your host does not ask you to bring a guest or if it is not stated on the invitation, then assume that you cannot bring a guest. Don't plan to bring children to an event unless the invitation includes them or explicitly states that children are welcome.

It's common for spouses to be invited to trade shows and conventions that last several days. Spouses are usually invited to evening events. They should be sure to attend the events they're invited to and make an effort to learn something about the topic of the event. Preparing will help them carry on conversations with the people they meet.

### Dressing appropriately

Attire at business functions can vary greatly. Depending on the type of function and the culture of your company, this might include jeans and a shirt, tuxedos and formal wear, or anything in between. Always check the invitation to determine whether a certain type of attire is specified.

If the invitation doesn't provide you with enough information, and you're unsure what attire is appropriate, ask the host what is expected. Or, if the event is an annual occurrence, you can ask a co-worker what people usually wear. Erring on the conservative side is the best option. You should avoid wearing attire that is too revealing or trendy at any business function. This rule is especially important when participating in sporting events, such as swimming or tennis.

### **Mingling with others**

Mingling is an important part of almost any business party or banquet. Socializing with others shows that you are confident, friendly, and interested in other people. If you don't mingle at a social gathering, people might think you're not confident in yourself or that you think you consider yourself above socializing with the other people at the event.

When you mingle, try to talk to several people. You can have in-depth conversations, but keep in mind that there are many people you can meet at a business party. At some business functions, upper level managers or executives might be in attendance. Although it's certainly correct to make conversation with them, don't monopolize their time. Business functions are not a good place to flirt or try to get a date.

If mingling makes you apprehensive, there are simple ways to join a conversation. If you walk by a group of people in conversation, you can determine the topic of discussion and decide whether it is one you can enter freely.

If the group is discussing an impersonal topic, such as sports, economy, or music, feel free to join the conversation. To do so, approach the group with a smile on your face and make eye contact with some of the individuals in the group. Then, wait patiently until someone asks you to join in or until there is an opening in the conversation. After you've joined a conversation, pay attention to what others have to say. People appreciate a good listener, and being one will help you participate actively in the conversation.

### **Holding drinks and food while mingling**

At cocktail parties, a frequent obstacle is that while mingling with people, you might also be carrying a drink and food. To overcome this problem, hold your drink in your left hand so that you can shake hands freely with your right hand. This will also prevent you from having to switch your drink from one hand to the other, and you'll not have a clammy handshake caused by a cold beverage.

The best place to eat food is near a counter or a surface where you can set your plate. This permits you to keep a free hand. If you are introduced to someone when carrying both your drink and food, set your food down on a nearby surface, if it is practical. If it is not, smile and nod during the introduction.

### **Drinking alcohol at business functions**

If alcohol is served at a business function, feel free to imbibe. You can feel just as free to drink non-alcoholic beverages. A good host will always provide non-alcoholic beverages when alcohol is being served.

If you choose to partake of alcoholic beverages at a business function, be careful not to overindulge. Losing control at a business function is embarrassing and you might ruin other people's evening in the process. Set a limit for yourself before you start drinking. Eat something and alternate alcoholic beverages with water.

**Leaving a business function**

If the invitation to an event lists an ending time, be sure to leave by the stated time. Staying any longer might irritate your hosts. Although they might be gracious and not indicate that it is time for people to leave, they might be ready for the event to end.

You should also leave an event that appears to be taking a direction that could damage your reputation. This guideline includes excessive drinking and rowdy behavior; illegal drug use; loud arguments or physical altercations; gripe sessions about the company, other employees, clients, or vendors; conversations that include sexually oriented or discriminatory language and jokes; and any other behavior that violate or might potentially violate company standards. If the hosts are available, thank them and excuse yourself. If they are not available, simply excuse yourself from the group you are with and depart.

**Thanking the host**

Before you leave business functions, it's important to seek out your hosts and thank them for the evening or event. If you've been a guest in someone's home, it's also proper to thank your host's spouse. If you cannot find your hosts or if they are surrounded by many other people, you can leave the party and send a "thank you" note the next day. In the note, you should apologize for not being able to thank your host in person.

*Do it!*

**A-2: Following etiquette at business functions****Exercises**

- 1 You received an invitation to a cocktail reception. What is the proper way to respond to the invitation?

**Accept the invitation if you can attend. If you cannot attend, promptly thank your host for the invitation and state politely that you have a conflict.**

If the style of dress isn't specified on the invitation, what dress code should you follow?

- A Go in formal attire.
- B Dress in a black dress.
- C Check with the host to find out about the dress code.**
- D Find out from someone about the dress code.

- 2 Chris accepted an invitation to attend a business function in honor of the vice president of his division. On the day of the event, he discovered that he would be unable to attend. The next day, he sent a note to apologize to the host. What should Chris have done to handle this situation better?

- A He should have called the host as soon as he found out he couldn't attend.**
- B He should have sent flowers with the note.
- C He should have called the following day instead of writing a note.
- D He should have called immediately after the event.

Keep index cards ready for this activity.

Ask students to share the strategy they used to find their set mates.



Click the picture in the slide to play the movie.

- 3 Alexis wants to introduce her fiancé to everyone at a business function. Is it proper for her to take her fiancé along with her?

***If the invitation doesn't ask you to bring a guest, then you shouldn't take a guest.***

- 4 Follow the instructor's directions to play a game. The purpose is to understand the importance of mingling at social functions.

***Give an index card to each student. Tell the students that each card belongs to a set of cards, such as a set of Flowers. Ask them to find people with cards belonging to the same set. The group that completes a set first is declared the winner.***

- 5 Watch the movie and then answer the following question.

A common dilemma you might encounter while mingling is the need to shake hands with people while carrying a drink or food. How did Michael overcome this dilemma?

***Michael held his drink in his left hand so that he was able to shake hands freely with his right.***

- 6 List the steps you would have to take to join a conversation at a business function.

- ***Approach the group with a smile.***
- ***Make eye contact.***
- ***Wait patiently until you can join in.***

## Topic B: Business dining

### Explanation

Part of being comfortable at business dinners includes understanding formal table settings. If you understand what various dishes and utensils are for and how you are expected to use them, you'll feel more comfortable and confident. You should also know the basic rules of etiquette that apply to a business meal.

### Table settings, utensils, and glassware

There are three things to consider when attend a business dinner. These are:

- 1 Table settings
- 2 Utensils
- 3 Glassware

### Table settings

In formal settings, the large plate in the middle of the table setting is the service plate. This plate usually remains on the table until the dinner plate, which contains the main course, replaces it or until it is cleared so that dessert can be served. Soup bowls or salad plates will be placed on the service plate when they are served. In some cases, the salad might already be at the table setting when the meal begins.

There might also be a bread plate. This plate will be to the left side of the service plate and usually has a butter knife lying across it. The butter knife should be returned to the bread plate after each use.



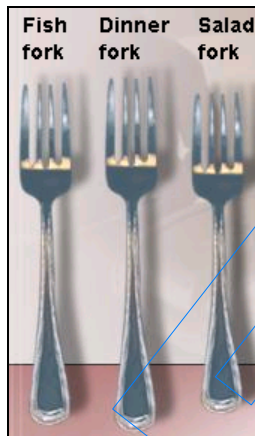
## Utensils

The number of utensils, or flatware, used in a formal table setting can be confusing and intimidating. A simple guideline to follow is to use the utensils furthest from the plate for the first course and then work your way in with each of the remaining courses.

However, some restaurants don't follow the "outside-in" table setting arrangement, so it's important to recognize the different types of utensils. At formal table settings, you might find any of these utensils:

- **Fish fork.** Occasionally, fish is served as the first course in a meal, so this fork will be placed to the far left of your table setting. You can also identify this fork by size. It is usually smaller than the dinner fork but larger than the salad fork.
- **Dinner fork.** This is the largest fork in your place setting. It is used to eat the entrée and any side dishes served with the main course.
- **Salad fork.** This is usually smaller than the dinner fork and will most likely be placed to the right of the dinner fork in a formal place setting. This arrangement indicates that the salad will be served after the entrée, in the European tradition. If fish is not being served and the meal is being served in the American style of dining, the salad fork will be the outermost fork at your table setting.

The different types of forks at a formal table setting are shown in Exhibit 5-2.



*Exhibit 5-2: Examples of forks used in formal table settings*



- **Salad knife.** Occasionally, you'll be provided with a knife for your salad. If the courses follow the European style of dining, this knife will be placed just to the right of the plate. If the meal follows the American style of dining, it will be the outermost knife at your place setting.
- **Dinner knife.** The dinner knife is used with the entrée and side dishes. It will be located to the right of the salad knife or the service plate, depending on when the salad is served.
- **Fish knife.** When fish is served as the first course of the meal, the fish knife will be the outermost knife on the right side of your place setting. This knife often has a sword like shape.

The different types of knives commonly used at a formal table setting are shown in Exhibit 5-3.



*Exhibit 5-3: Examples of knives used in formal table settings*

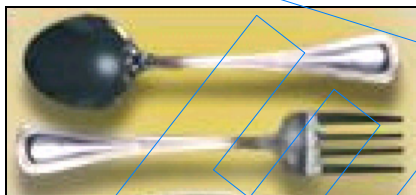
- **Soup or fruit spoon.** If soup or fruit is served at a meal, a spoon will be provided. It should be located to the right of the knives.
- **Cocktail fork.** When shellfish is served with a meal, a shellfish fork, also known as a cocktail or oyster fork, will be placed to the right of the spoon. Sometimes you might find it with the tines resting in the bowl of the spoon.

The soup or fruit spoon and the shellfish fork used at a formal table setting are shown in Exhibit 5-4.



*Exhibit 5-4: An example of a soup or fruit spoon and a shellfish fork*

- **Dessert spoon and fork.** The dessert spoon and fork might be brought out with the dessert, or they might be part of the original table setting. When they are part of the table setting, they will be placed horizontally at the top of the service plate, as shown in Exhibit 5-5. The bowl of the spoon is usually placed to the left and the tines of the fork are placed to the right.



*Exhibit 5-5: The dessert spoon and fork*

**Glassware used in formal dining**

At a formal meal, you can expect to see a water goblet and red and white wine glasses, as shown in Exhibit 5-6.

The water goblet is a bowl shaped glass with a stem. The red wine glass has a tulip-shaped bowl, and when used, it is never filled more than half. The white wine glass, which has straight sides, is usually smaller than the red wine glass. It is not filled more than three-quarters.



*Exhibit 5-6: An example of formal glassware*

Some restaurants use an all-purpose wine glass. It usually has straight sides and can be used for either red or white wines. Another common glass you might encounter at a business meal or cocktail reception is the champagne flute. Its tall, cylindrical shape helps keep the champagne bubbly. This flute shape has replaced the traditional saucer-shaped champagne glass.

Do it!

**B-1: Identifying table settings at formal dinners****Exercises**

Before the activity, prepare cards that have descriptions of utensils written on them. For example, the largest fork in your place setting, the knife that has a sword like shape, a glass that has a tulip-shaped bowl, and so on.

- 1 Follow the instructor's directions to play a game. The purpose is to identify the types of utensils used at formal dinners.

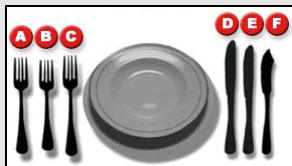
**Divide the students into two groups. Read the description on the card and ask each group to identify the utensil.**

**The group that identifies the most number of utensils will be declared the winner.**

- 2 When the dessert spoon and fork are part of the original table setting, they will be placed horizontally at the top of the service plate. True or false?

**True**

- 3 Identify the order of the utensils in a formal table setting in which the courses will be served in the American style of dining.



**(A) fish fork, (B) salad fork, (C) dinner fork, (D) dinner knife, (E) salad knife, and (F) fish knife**

- 4 What should you do with the butter knife when you are finished with it?

- A** Place it on the bread plate.
- B** Place it on the upper edge of the dinner plate.
- C** Place it to the left of your plate.
- D** Prop the end on the bread plate.

- 5 The \_\_\_\_\_ has a tulip-shaped bowl and is never filled more than half.

**red wine glass**

## Etiquette for business dining

Explanation



You should know the basic rules of etiquette that apply to a business meal, because it's common for business to take place during a meal. It's important to demonstrate your table manners, conversational abilities, and comfort with those around you during a business meal. To achieve this, you should exhibit proper behavior as it relates to:

- Seating arrangements
- Conversation
- Ordering drinks and food

### Seating arrangements

When all the guests have arrived, your hosts will accompany you to the table. They might have planned a seating arrangement, so before you take a seat, watch for a cue from your hosts. They might suggest where to sit, but if they don't, ask, "Where shall I sit?"

If you are the first to arrive at a restaurant, you can take a seat at the reserved table. Don't order anything or eat any of the bread while you wait. Don't complain about the location of the table to the maitre d' or anyone else. Your host might have chosen the location purposefully.

If your hosts don't arrive at the scheduled time, wait for 15 to 20 minutes and then call their office. If you cannot reach them or a receptionist who can tell you their whereabouts, wait another 30 minutes. If they still have not arrived, write a note to leave with the maitre d'. The note should explain that you waited nearly an hour and ask them to call you. It is also proper for you to tip the maitre d' because you have occupied a table that would have otherwise been used by paying customers.

### Conversation

After everyone is gathered at the table, conversation will begin naturally. A business meal will usually begin with small talk. Avoid any topics that are likely to be controversial or make others uncomfortable while they are eating.

Defer to your host to determine when to switch from small talk to business. Depending on the purpose of the meal, the business discussion might begin after everyone has ordered, or it might not begin until the food has been eaten. Typically, business dinners focus more on socializing, so business topics might not be discussed until the end of the meal.

When business discussion begins, keep in mind that you're at a restaurant and not in your office. Turn off your pager or cell phone, or set it to vibrate. If you need to take notes, carry a small notebook so that you don't have to spread papers across the table.

### Ordering drinks and food

Be careful when ordering drinks and food at a business meal. Watch for any cues from your hosts. If they don't order alcohol, you should refrain as well. However, if your hosts order alcoholic beverages, feel free to order one for yourself.

When it's time to order food, watch for cues from your hosts. They might indicate to you what price range is appropriate. For example, if your hosts suggest expensive items on the menu or tell you what they're having, then you know what price range is appropriate. A general guideline to follow is to order an entrée in the mid-price range and never order the most expensive item on the menu. If there are no prices listed on the menu, you can limit the cost by ordering food that is usually less expensive, such as a chicken dish.

Another issue to consider when ordering your food is whether or not it can be eaten easily while carrying on a conversation. Some foods that frequently cause problems include seafood in the shell, pasta such as spaghetti, linguine, or fettuccine, fish with bones, whole artichokes, and French onion soup. Unless you are confident that you know how to eat these dishes without making a mess, consider saving them for when you are dining on your personal time. Also, business outings are not the best time to try any foods with which you are unfamiliar.

Do it!

### B-2: Following etiquette for business dining

#### Exercises

- 1 Sequence the steps one should take if the host doesn't arrive at the scheduled time.

Leave a note.

***Wait 15 to 20 minutes.***

Call the host's office.

***Call the host's office.***

Wait 30 minutes.

***Wait 30 minutes.***

Tip the maitre d'.

***Leave a note.***

Wait 15 to 20 minutes.

***Tip the maitre d'.***

- 2 List conversational guidelines you should follow during business meals.

- ***Avoid controversial or uncomfortable topics.***
- ***Permit the host to make the switch from small talk to business.***
- ***Keep business paraphernalia to a minimum.***

- 3 You've been invited to a business dinner at a restaurant. Your host has arranged seating. How will you know where to sit?

***Watch for a cue from your host, who will probably suggest where to sit. If the host doesn't, ask, "Where shall I sit?"***

4 Select guidelines you should follow when ordering food.

- A** Watch your host for cues.
- B** Order alcohol if your host does.
- C** Don't order alcohol if your host doesn't.
- D** Order the most expensive item on the menu.
- E** Order a chicken dish.

5 At a business dinner, you want to order French onion soup, whole artichokes, seafood in the shell, and spaghetti. What should you keep in mind before ordering these dishes?

***These dishes can be messy and should be avoided if you aren't confident in your ability to eat them without embarrassment.***

## **Etiquette in handling utensils**

### *Explanation*



After your food arrives, the next item of etiquette is the handling of utensils and the napkin. For the two most common dining styles, American dining style and Continental dining style, the utensils are handled and placed differently.

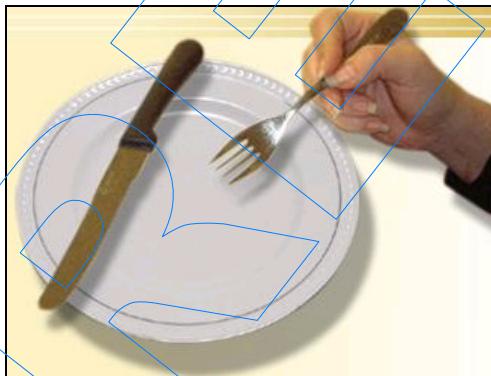
### **American dining style**

For the American dining style, hold the fork in the right hand and use it tines up when raising food to your mouth. The fork handle should rest on your middle finger with your thumb and index finger gripping the handle. When you need to cut food, switch the fork to the left hand and hold the knife in the right, as shown in Exhibit 5-7.



*Exhibit 5-7: The American style of cutting food*

Use the fork to spear the food and hold it in place while you cut with the knife. When you have finished using the knife, place it on the upper edge of the plate, as shown in Exhibit 5-8. Then, switch the fork back to the right hand. If you're left-handed, reverse these directions and cut with the knife in your left hand.



*Exhibit 5-8: The American style of dining*



### Continental dining style

Although the Continental dining style uses the same process for cutting as the American one, you don't put the knife down and the fork remains in the same hand whether you are cutting or eating. Usually, you use the fork tines down with the tip of your index finger touching the back of the handle near its base, as shown in Exhibit 5-9.



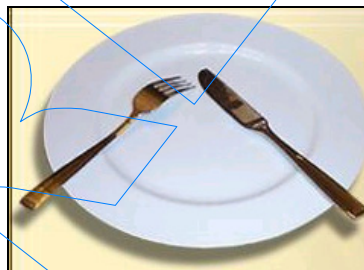
*Exhibit 5-9: The Continental style of dining*

### Other guidelines for handling utensils

Never place any utensil that you have been using on the table. Always lay these utensils on your plate. Keep in mind that they should not be propped against the plate with the handle resting on the table. When you've finished a course, assume that the utensils will be removed with the plate unless the waiter tells you otherwise.

Another important guideline is that the manner in which you lay your utensils on the plate communicates a message to the wait staff.

When you are pausing to take a drink or talk, lay your utensils on the plate so that the tips meet or cross near the top of the plate. Usually, you should place the fork tines down. This arrangement, as shown in Exhibit 5-10, helps the waiter know that you are not finished.



*Exhibit 5-10: The pause signal to a waiter*

When you lay the fork and knife side by side in the middle of your plate, as shown in Exhibit 5-11, the waiter gets the signal that you have finished and your plate can be removed.



*Exhibit 5-11: The finished signal to the waiter*

### **Using your napkin**

Using your napkin properly is as important as using your utensils. Soon after you sit down, open your napkin and place it in your lap. There is no need to shake your napkin. Simply unfold it. Regardless of what you are eating, your napkin should not be tucked into your collar or placed anywhere other than in your lap.

When needed, pat your lips with the napkin, rather than using a “washing” motion. Leave the napkin in your lap during the meal until you’re ready to leave or until your hosts signal that the meal is over by laying their napkins on the table.

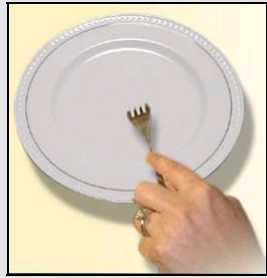


Do it!

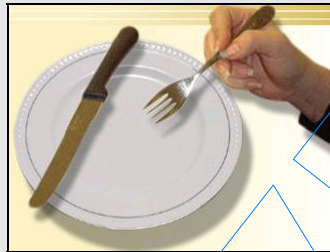
### B-3: Handling utensils and napkins

#### Exercises

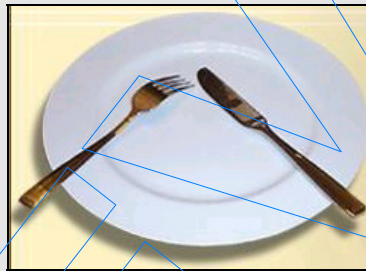
- 1 Study the pictures and then describe what the utensil arrangement indicates.



*Continental dining style, in which you don't put the knife down, and the fork remains in the same hand whether you're cutting or eating.*



*American dining style, in which when you've finished using the knife, you place it on the upper edge of the plate.*



*Signals to the waiter that you're pausing to take a drink or talk.*

- 2 Which guidelines should you follow for using your utensils?
- A Ask the waiter whether utensils will be removed with the plate.
  - B** Place used utensils on your plate.
  - C** Never place used utensils on the table.
  - D Prop the ends of your utensils on your plate.
  - E** Assume utensils will be removed with your plate.
- 3 List guidelines you should follow while using a napkin.
- **Open your napkin and place it on your lap.**
  - **Use it to pat your lips.**
  - **Don't use the "washing" motion.**
  - **Leave it on your lap until the meal is over.**

## Basic rules of dining etiquette

Explanation



When you eat your meal, follow these rules of dining etiquette:

- Never complain about your food or the service.
- Sit up straight, chew with your mouth closed, and don't fidget.
- Avoid reaching for an item across the table or in someone's personal space. If the item is too far away, ask someone to pass it to you.
- Don't wipe your plate with your bread.
- Don't comb your hair or apply makeup at the table.
- Don't pick your teeth in the presence of others.
- Don't make disparaging comments about another person's choice of food or beverage or about how little or how much someone has ordered, eaten, or drank.

Rules of etiquette also apply to these activities:

- **Passing and eating bread.** If bread is placed close to you, pick up the basket and ask if anyone would like some bread. Then pass the bread to one of the people beside you. Take your piece of bread only after everyone else has been served and place it on your bread plate. If you want butter with your bread, take several pats of butter and lay them on your bread plate as well. Or, if the butter is in a dish, scoop some with your butter knife and place it on the edge of your bread plate. To eat your bread, tear off a piece that is several bites in size, butter this piece, and eat it. Repeat this process until your bread is finished.
- **Passing and using the salt and pepper.** When someone asks for the salt and pepper, always pass both shakers together. In some restaurants, you might encounter a *saltcellar*, which is a bowl that contains the salt. This should also be passed with the pepper. You should assume your food is well seasoned and taste it before salting. This is a compliment to the chef and your host. If the food does need seasoning, use the spoon that accompanies the saltcellar to scoop up some salt. If everyone is given a separate saltcellar, you can use your fingers to take a pinch of salt.

## Awkward dining situations

Even if you have impeccable table manners, awkward situations can still occur during meals. These are some of the most common situations that you might face:

- **Someone has food on his or her face.** If one of your dining companions has food on his or her face, subtly tell them and lightly touch your face indicating where the item is located.
- **A drink is spilled.** If you spill your drink, set the glass upright and signal the waiter for assistance, if needed.
- **Something is in your food or a dish is unclean.** If there is a foreign object in your food or drink or if a dish is not clean, don't cause a scene. Quietly signal the waiters so they can bring you a new glass, utensil, or plate.
- **You drop a utensil or food on the floor.** If you drop a utensil, leave it on the floor. Ask the waiter to bring you a replacement, if needed. If you have dropped some food, simply leave it on the floor. You can discreetly inform the wait staff before you leave so that the mess can be cleaned up before the next set of guests is seated.
- **You need to excuse yourself from the table.** If you need to excuse yourself from the table during the course of a meal, you don't need to give an explanation. Simply say, "Excuse me. I'll be right back." After you've excused yourself, stand up and lay your napkin in your chair. When you return, remember to place your napkin back in your lap.

Do it!

## B-4: Applying basic rules of dining etiquette

### Exercises

1 List some of the basic rules of etiquette when dining.

- *Never complain about your food or the service.*
- *Sit up straight, chew with your mouth closed, and don't fidget.*
- *Don't wipe your plate with your bread.*
- *Don't comb your hair or apply makeup at the table.*

2 You are at a business dinner with your CEO, Jason. Review the following situations and discuss how you will handle them.

You notice that Jason has a piece of food on his chin.

***Be subtle and inform him that something is on his face without trying to draw attention.***

Your dinner with Jason is going well and he asks you to explain something. You lift your arm to emphasize a point you're making, and you accidentally knock over your glass, spilling your drink.

***Set the glass upright before you signal the waiter subtly.***

You dropped food on the floor during the course of the meal.

***Leave it on the floor and discreetly inform the wait staff before you leave so that the mess can be cleaned up before the next set of guests is seated.***

Ask students to share their experiences in handling awkward dining situations.

## Unit summary: Business functions

### Topic A

In this unit, you learned about different **types of business functions**. You learned that each business function demands specific attire and behavior. You also learned about proper **etiquette at business functions**.

### Topic B

Then you learned the rules of etiquette for **business dining**. You learned the importance of demonstrating your table manners and conversational abilities. Then, you learned about the **etiquette** involved in **handling utensils**. You learned that the way you place and handle utensils depends on the dining style. Finally, you learned how to **handle awkward situations** that often occur during meals.

### Review questions

- 1 Which of the following options apply to banquets?
  - A Smoking might not be off-limits.
  - B Business will be discussed.**
  - C You should be ready to meet new people.**
  - D The company is paying for you to gain knowledge.
  - E Seating might be assigned.**
- 2 More food is served at a cocktail buffet than at a \_\_\_\_\_.  
*cocktail party*
- 3 If an invitation says \_\_\_\_\_, you need to respond only if you cannot attend.  
*"Regrets only"*
- 4 What should you do if you cannot find your host at the end of a party?  
*You can leave the party and send a thank you note the next day apologizing for not being able to thank him or her in person.*
- 5 What is a simple guideline you can follow to use utensils correctly at a dinner?  
*Use the utensils furthest from the plate for the first course and then work your way in with each of the remaining courses.*

PREVIEW

**NOT FOR PRINTING OR INSTRUCTIONAL USE**



# Unit 6

## Traveling for business

**Unit time: 55 minutes**

Complete this unit, and you'll know how to:

- A** Be a courteous traveler and follow etiquette for traveling by plane, train, or car, and staying at hotels.
- B** Prepare for international business trips by understanding cultural orientations and respecting hosts.

## Topic A: The courteous traveler

### Explanation

It's imperative to be courteous when traveling on business. By showing respect for others, you represent your company well. There are several guidelines you should follow when you travel by plane, train, or any other means.

### Guidelines to be a courteous traveler

Follow these general guidelines to help you become a courteous traveler:

- Be self-reliant.
- Treat others with respect.
- Prepare a travel itinerary.
- Pack appropriate clothes.

#### Self-reliance

Don't depend on your hosts to take care of arrangements that you can handle yourself. Begin making your travel arrangements as soon as you know the dates for your trip. Use your company's travel department or service to arrange your hotel accommodations and, if you are flying, transportation from the airport to your hotel. Plan your arrangements so that you arrive on time at any scheduled meetings or appointments.

If possible, plan to arrive the day before your first scheduled event. This will ensure that you are refreshed and no unexpected delays will interfere with your schedule. If you must go straight from the airport to a meeting or appointment, consider reserving a rental car ahead of time or hiring a car service to pick you up. You never know when a rental car or taxi might not be available.

#### Treating others with respect

When you travel for business, you act as a representative for your company. As a result, you should be courteous to every person you encounter.

#### Preparing a travel itinerary

After your travel arrangements are set, give a copy of your itinerary to your office, family, and hosts. Your itinerary should include these items:

- Flight schedule that includes flight numbers and departure and arrival times
- Name, address, and telephone number of your hotel
- Meeting schedules and information about how you can be reached
- Name and telephone number of someone at the office you are visiting who will be able to contact you

#### Packing appropriate clothes

When packing for a business trip, you should know the proper attire for the office you're visiting. Don't dress in casual business attire on Fridays unless you are visiting one of your company's offices and you know the dress code. If you're giving a presentation at any office, dress at least as formally as the people you'll be addressing. If you're unsure about what clothes to pack, seek the advice of co-workers who have visited the location before.

Do it!

Ask two or three students to share their experiences of arriving on the same day as the scheduled meeting.

## A-1: Being a courteous traveler

### Exercises

- 1 You are a quality assurance manager for Icon's Software Development department in California. You're traveling to visit Icon's Software department in London to observe and learn from their quality control techniques. According to your schedule, your first meeting is on Wednesday.

What day should you schedule to arrive in London? Why?

**Tuesday. Arriving the day before your first scheduled event will ensure that you are refreshed and ready for your meetings, and that no unexpected delays will interfere with your schedule.**

- 2 You have to prepare an itinerary for your trip. What should it include?

- **Flight schedule**
- **The name, address, and telephone number of your hotel**
- **Your meeting schedule**
- **The name and phone number of someone at the office you are visiting**

- 3 Provide copies of your itinerary to \_\_\_\_\_.

- A trustworthy friends
- B your hosts**
- C your lawyer
- D your family**
- E your office**
- F your co-workers

- 4 What should you do if you're unsure about what clothes to pack for a business trip?

**Seek the advice of co-workers who have visited the location before.**

## Traveling by plane

### Explanation

Show respect for your fellow passengers and airline employees. Before you pack, find out how much luggage you can carry on the flight and what items are not permitted in carry-on luggage. Packing according to these guidelines will prevent unnecessary delays for you and other travelers.



Board the plane when your row number is called. Don't try to pass other passengers when you board the plane or when you are inside. When you stow your luggage, put your belongings in an overhead compartment and then move out of the way as quickly as possible, without blocking the aisle. If there is no room for your luggage in the overhead compartment, do not crush other passengers' luggage to make your luggage fit. Instead, check other nearby compartments for space or politely ask a flight attendant for assistance.

After you've taken your seat, feel free to carry on brief conversations with the people beside you, as long as conversation seems welcome. If you don't want to talk to other passengers, excuse yourself to work or read a magazine.

If you plan to work during the flight, be considerate to others by not spreading your papers across your neighbors' tray tables. Unless your work is urgent, ask your neighbors whether typing on your laptop will disturb them. You should also keep phone calls to a minimum because an airplane is not a personal office. Bear in mind that when you make telephone calls on an airplane, other passengers are forced to listen to your call. As a result, you should call only when it's absolutely necessary, and keep your voice at a low level.

Besides being courteous to your fellow passengers, you should be polite to the flight crew. Say "please" and "thank you" when you make a request, and thank them when you exit.

## Traveling by train



When traveling by train, you should follow the same rules as for air travel. On a train, you might be permitted to use electronic devices that cannot be used on planes. Keep in mind that other passengers don't have any choice but to listen to the noise you make. Keep your mobile phone and pager set on the lowest volume or switch them to vibrate mode.

## Traveling by car



When you're traveling by car, be courteous to other drivers. Determine your route in advance and allow plenty of time to reach your destination. If you know your destination, your route, and have ample time, don't speed to reach your destination.

If you're delayed, call ahead and inform the people you're supposed to meet that you're running late. Tell them what your likely time of arrival will be. This allows them to continue with their work, and helps you to relax because you no longer have to worry about being late.

Do it!

## A-2: Being courteous on an airplane, on a train, or in a car

### Exercises

- 1 Select the guidelines you should follow to be a courteous traveler on an airplane.
  - A Respect the airline employees and other passengers.
  - B Board the plane as soon as boarding begins.
  - C Don't crush other passengers' luggage in the overhead compartment.
  - D Pass slower-moving travelers while boarding.
  - E Don't block the aisle.
- 2 Share an instance in which fellow passengers on the train have disturbed you. How did you respond to the situation?
- 3 List two ways to ensure that you'll be courteous to the other drivers on the road.

#### Answers might include:

- Determine your route in advance.
- Permit plenty of time to reach your destination.

Ask students to share their experiences.

Ask students to share their experiences of rude behavior from other drivers.

## Staying at hotels

### Explanation



Business trips frequently include a hotel stay. It's important for you to follow the rules of etiquette for staying at hotels. Two basic rules of etiquette at hotels are:

- 1 Be polite to the staff.
- 2 Be prepared to tip.

### Be polite to the hotel staff

Although large hotels might have numerous staff members whose job is to assist you, you should treat them with respect and keep in mind that they have to assist other guests too.

### Be prepared to tip

When you stay at a full service hotel, remember to carry plenty of small bills so that you can tip the staff appropriately. If you know the functions of different staff members you will know whom to contact when you need assistance. When you arrive at the hotel, you might meet a doorman whose job is to greet you, help you with directions, and call a taxi. When the doorman calls or hails a taxi for you, the tip is usually a dollar. No tip is needed when you receive directions.

If you drive to the hotel, there might be valet attendants who will park your vehicle for you. The tip for valet attendants is usually one to two dollars when they retrieve your car. If you intend to drive frequently during the trip, you should ask yourself whether you need valet service. You could save money by taking your car in and out of the garage yourself.

You might also encounter a bellman who will carry your bags from the car to the front desk and then to your room after you've checked in. When the bellman arrives at your hotel room with your bags, your tip should be one to two dollars per bag.

The staff at the front desk will check you in and out of the hotel and provide you with information about the city or directions to specific locations. Some hotels might also have a concierge to assist you. In this case, take your questions about directions to the concierge instead of the front desk. A tip is not necessary when you receive directions from either the front desk staff or the concierge.

The concierge also provides other services, such as suggesting restaurants or ordering theatre tickets. If the concierge obtains tickets or dinner reservations for you, the usual tip is five dollars. If the concierge secures tickets or reservations that are in high demand, add an extra 5 to 15 dollars to the tip.

During your stay at the hotel, you should call the housekeeping staff for problems with your room. They can assist you if you need extra towels or blankets, or extra equipment, such as an ironing board or toothbrush. You can leave a tip for housekeeping at the front desk when you check out. The standard tip is two to three dollars per night.

Do it!

**A-3: Following rules of etiquette at hotels****Exercises**

- 1 Why should you carry small bills when staying at a full service hotel?
  - A To use the vending machines
  - B To tip the staff appropriately**
  - C To order room service
  - D To buy international calling cards
- 2 You're visiting Icon's Software department in Chicago to observe and learn from their quality control techniques. You've reserved a room in a four star hotel.

Study the following situations and identify the tip you'll give to the hotel staff:

You're traveling with three bags of luggage and a bellman takes them to your room.

***One to two dollars per bag.***

The doorman greets you and helps you with directions to Icon International.

***No tip is needed when you receive directions.***

The valet attendant parks your vehicle.

***The tip for valet attendants is one to two dollars when they take your car in and out of the garage.***

The concierge obtains tickets or dinner reservations for you.

***The standard tip is five dollars.***

The housekeeping staff brings you an ironing board.

***The standard tip is two to three dollars per night.***

## Topic B: International travel

### Explanation

When you travel internationally, it's essential to understand the culture of the place you're visiting. You should also show respect to your hosts by learning about the local language and gestures. To be a good conversationalist, read about the current events of the region you're visiting.

### Cultural orientations

When traveling internationally, it's important that you eliminate any ideas of cultural superiority. Try not to think of cultures in terms of good or bad. Cultures are simply different. Showing respect for other cultures is not only polite, but it also improves your ability to do business with people in other countries. Strains in international business relationships usually stem from a lack of understanding or respect for cultural and social aspects.

The best way to prepare for international travel is to learn about the place you'll be visiting. One place to start is the U.S. State Department's Web site at [www.state.gov](http://www.state.gov). This Web site provides information about political unrest, entry regulations, driving requirements, and currency. Other Web sites and travel books offer information about the cultural orientations of the area you are visiting. Co-workers who have made trips to the location in the past can also provide you with helpful insights.

By orienting yourself to the culture of the place you are visiting, you show respect for your hosts and improve your chances of successful interaction. If you ignore culture when traveling internationally, customers and co-workers might feel alienated and efficiency and profit might suffer. Cultural orientations affect global business in many ways. It's important to be aware of the following orientations:

- Individual vs. group
- Religious systems
- Masculinity vs. femininity
- Neutral vs. affective feelings
- Ascribed vs. achieved status
- Time





**Individual vs. group**

One of the primary cultural orientations you should be familiar with when conducting business internationally is individual versus group orientation. People in cultures with an individual orientation usually make decisions quickly. Employees who are not supervisors are frequently asked to participate in the decision-making process.

There are several guidelines to help you conduct business with people in an individual-oriented culture. One is to prepare for decisions to be made quickly. You should also realize that the person negotiating business probably has the permission to commit individuals who are not present and will be reluctant to end negotiations without a resolution. Show respect for the negotiators in this case because they have been sent to negotiate alone, which means they are probably highly respected and trusted within the organization.

People in cultures with a group orientation usually take longer to make decisions and sometimes defer decisions to supervisors or to reach a consensus. When conducting business with people in a group-oriented culture, show patience and respect by giving negotiators time to consult. Keep in mind that the goal of group-orientated cultures is to build long-lasting relationships.

**Religious systems**

Religions of some cultures have no impact on how their members handle business. However, in others cultures, religion can greatly affect how business is done, as well as when it is done. For example, the days of the workweek and holidays will be affected by the predominant religion of the area you are visiting.

**Masculinity vs. femininity**

It's important to consider how gender and work roles affect international business. In a culture that is predominately masculine, women might face discrimination and might not be taken seriously.

**Neutral vs. affective feelings**

Neutral and affective feelings affect how people conduct business. In cultures that have neutral orientations toward personal feelings, people typically don't reveal what they are thinking or feeling. Several guidelines can help you conduct business in this type of culture. A lack of emotional tone doesn't indicate boredom or lack of interest. The focus isn't on the people conducting the negotiation, but on the subject of the negotiation.

In cultures that have affective orientations toward personal feelings, people readily reveal thoughts and feelings. The emotions of these people flow easily and without inhibition because heated and animated expressions are the norm. It's important to remember that individuals' enthusiasm in tone and gesture does not indicate that they have made a decision. You should also realize that the negotiation is frequently more focused on the people involved than on the subject of the negotiation.

**Ascribed vs. achieved status**

The way in which cultures determine status can affect how you conduct business. Ascribed status is used in cultures where status is given to individuals because of age, class, gender, or education. In ascribed-status cultures, there is an extensive use of titles. Respect for superiors is a reflection of how committed you are to the organization and its mission.

Achieved status is used in cultures where status is given to individuals on the basis of their achievements. In achievement-oriented cultures, people use titles only when relevant to the skills a person is bringing to the task. They respect superiors based upon their knowledge and how effectively they perform their jobs. Senior managers might be of differing ages and gender.

**Time**

A culture's orientation toward time can greatly impact the way it conducts business. Cultures can be oriented toward time in three ways: past-oriented, present-oriented, or future-oriented. Past-oriented cultures concentrate heavily on tradition and on the origin of the family, business, and nation. Present-oriented cultures believe that activities and pleasures of the moment are the most important and that nothing should be left until later.

When conducting business in past- and present-oriented cultures, research the history, traditions, and past achievements of the company. During negotiations, emphasize history and tradition and agree on future meetings but don't enforce deadlines.

Future-oriented cultures are concerned with potential, aspirations, and future achievements. People from these cultures feel most comfortable when they are able to develop a plan. They show great interest in youth and in future potential. In a future-oriented culture, research the future prospects and technological potential of the company. Emphasize the freedom and future opportunity of the company and agree on specific deadlines.

Keep in mind that cultural orientations will vary from one country to another. Sometimes, these orientations also vary from region to region within a country. It's essential that you learn the cultural orientations of the place you're visiting.

Do it!

**B-1: Understanding cultural orientation****Exercises**

- 1 From where can you get information about the place you are visiting?
  - **Web sites**
  - **Travel books**
  - **Co-workers who have made trips to the location in the past**
- 2 Identify the cultural orientation associated with quick decision-making.
  - A Speed orientation
  - B Task orientation
  - C Individual orientation**
  - D Group orientation

Ask students to identify other sources that can be added to the list.

- 3 In the following scenario, Valorie, an employee at Icon International, is having a conversation with her manager, Jack, about her upcoming trip to the Middle East.

**Jack:** Valorie, I hope this meeting helps you prepare for your upcoming trip to the Middle East. As you know, the culture of the Middle East is group-oriented. What would you do if your Middle Eastern counterparts take an excessive amount of time to give you an answer regarding the acceptance or rejection of your proposal?

**Valorie:** Well, I think I would ask them what was taking so long. Then, I would push for an answer.

Do you think Valorie's approach is correct? Why or why not?

**No. She needs to give her counterparts time to consult each other and their superiors because they are a group oriented culture.**

Answers might vary

- 4 What is your experience with people who have different cultural orientations?
- 5 You are the regional director of Icon's Products and Services division. You need to visit some Asian countries to finalize some business. The success of these deals depends on how you handle your clients. Most of these countries have a past-oriented culture. What guidelines should you keep in mind while conducting business with them?

- **Research the history, traditions, and past achievements of the company.**
- **Don't enforce deadlines.**
- **Emphasize history and tradition in negotiations.**

- 6 In cultures that have \_\_\_\_\_ toward personal feelings, people don't generally reveal what they're thinking or feeling.

**neutral orientations**

## Respect your hosts

### Explanation



Take the following actions to show respect for the people with whom you are doing business:

- Learn some local language.
- Learn the local gestures.
- Be a good conversationalist.
- Apologize for any faux pas.

### Learning some local language

Learning a little bit of the local language can impress your hosts. Even if you aren't at all familiar with the language, you can easily learn a few phrases that will help you interact with others. For example, learning the proper greeting and farewell, the words for "please," "thank you," and a traditional toast can help you be successful.

### Learning local gestures

You should familiarize yourself with accepted gestures in the country you're visiting. In some cultures, business cards are exchanged in a formal manner. In these countries, stuffing your colleague's business card in your pocket might be considered offensive. It's polite to have your business card printed in the local language on one side and in English on the other.

You'll also need to understand accepted forms of personal address. To avoid offending anyone, you should know whether or not to use people's titles when referring to them. Find out if any common gestures you use have different meanings in another country. For example, the "thumbs-up" gesture is rude in Australia, but it is the signal for "number one" in Germany and the signal for the number five in Japan.

### Being a good conversationalist

Try to be a good conversationalist on international business trips. Reading about current events in the region can provide you with topics for conversation. Always avoid religious and political discussions.

### Apologizing for any faux pas

If at any point you sense that you have made a mistake, address the issue immediately. In many situations, the response you get from your hosts might indicate that you have done or said something offensive. When you make a faux pas, apologize for it. If you are unsure about what you did wrong, ask for clarification. For example, you can say, "I think I have offended you, and I'm sorry. Please tell me what I've done wrong." Asking for clarification will help you learn about the culture and avoid mistakes in the future.

Do it!

## B-2: Showing respect for your hosts

### Exercises

- 1 List some ways in which you can show respect for your hosts.

**Answers might include:**

- *The appropriate greeting and farewell*
- *The words for “please” and “thank you”*

- 2 Common gestures you use might have different meanings in another country. Give examples.

***The “thumbs-up” gesture is rude in Australia, but it’s the signal for “number one” in Germany and the signal for number five in Japan.***

- 3 Select the conversational topics that you should avoid while traveling internationally.

- A History and current events
- B International travel and money
- C Art and culture
- D Religion and politics**

- 4 Determine the course of action to take if you commit a faux pas.

- A Quickly make a joke to cover the situation.
- B Stop talking immediately.
- C Address the situation immediately; apologize and ask for clarification.**
- D Avoid eye contact.

Ask students to share their examples.

## Unit summary: Traveling for business

### Topic A

In this unit, you learned some **guidelines** to help you become a **courteous traveler**. You learned the importance of **respecting others** to represent your company well. You also learned the rules of etiquette to follow when **traveling by plane and train**. You learned that you should respect your fellow passengers and the crew. Next, you learned etiquette for **traveling by car**. You learned that you have to be courteous to other drivers on the road. Then you learned some rules of etiquette while **staying at hotels**. You learned that you have to **be polite** to the staff and **be prepared to tip** them properly.

### Topic B

Finally, you learned the importance of **cultural orientations**. You learned that you have to eliminate ideas of cultural superiority when traveling internationally. You also learned how to show **respect** for your **hosts**. You learned that showing respect is not only polite, but it also improves your ability to do business with people in other countries.

### Review questions

1 Select the guidelines you should follow when traveling internationally on business.

- A** Make travel arrangements as soon as you know your trip dates.
- B** Give a copy of your itinerary to your office, family, and hosts.
- C** Plan to arrive just before your meetings or appointments.
- D** Be self-reliant and treat others with respect.
- E** If you must travel from the airport to your meeting, take a taxi.

2 What guidelines should you follow when working during a flight?

- A** Don't spread your papers across your neighbors' tray tables.
- B** Do most of your work on your computer.
- C** Ask your neighbors if typing will bother them.
- D** Move to a row of empty seats, where you can spread out your work.
- E** Keep phone calls to a minimum.

3 What can happen if you ignore culture when traveling internationally?

*Customers and co-workers might feel alienated, and efficiency and profit could suffer*

4 In cultures that have \_\_\_\_\_ toward feelings, people readily reveal thoughts and feelings.

*affective orientations*

5 Name a behavioral characteristic typically found in future-oriented cultures?

*They are concerned with potential, aspirations, and future achievements.*

6 How is status determined by different cultures?

*Ascribed status is used in cultures where status is given to individuals because of age, class, gender, or education. Achieved status is used in cultures where status is given to individuals on the basis of their achievements.*

PREVIEW

**NOT FOR PRINTING OR INSTRUCTIONAL USE**



# Business Etiquette

## Course summary

This summary contains information to help you bring the course to a successful conclusion. By using this information, you will be able to:

- A** Use the summary text to reinforce what students have learned in class.
- B** Direct students to the next courses in this series (if any), and to any other resources that might help students continue to learn about business etiquette.

## Topic A: Course summary

At the end of the class, use the following summary text to reinforce what students have learned. It is not intended to be a script, but rather a starting point.

### Business Etiquette

#### Unit 1

In this unit, students learned the **importance of business etiquette**. They learned how to create a **professional appearance** by following dress codes, and they learned about different **business attire**. Then they learned about **office etiquette**, and the importance of showing respect for others' space, privacy, and time. They learned how to develop and maintain **positive co-worker relationships**, and how to avoid **rumors, gossip, and conflicts with co-workers**. Finally, students learned how to develop positive **working relationships with superiors and staff**.

#### Unit 2

In this unit, students learned guidelines for **accessing the Internet at work**. Then they learned about **common ethical dilemmas**, and how to **handle ethical dilemmas effectively** by following common sense guidelines. They also learned how to maintain **loyalty** and **confidentiality** in the work place. Finally, students learned how to handle **common personal issues in the workplace**, such as **flirting, dating, office romances**, and **sexual harassment**.

#### Unit 3

In this unit, students learned **guidelines for introducing people** and **actions to take when being introduced**. They also learned how to handle **incorrect introductions**, and how to **properly introduce themselves**. Then they learned guidelines to help them become **good conversationalists**, and they learned the importance of **being tactful** and **respecting ethnical, cultural, and gender differences**. Finally, students learned **professional conduct in meetings**, and how to **handle conversational faux pas**.

#### Unit 4

In this unit, students learned the importance of **establishing a rapport**, and guidelines to follow when **returning calls** and **transferring calls**. They learned how to apply telephone courtesy while using **voice mail** and **speakerphones**, and how to **compose professional e-mails**. Students also learned all the **features of a standard business letter**. Finally, students learned guidelines for composing **informal letters** such as **thank you notes, notes of sympathy, invitations, and congratulatory notes**.

### Unit 5

In this unit, students learned about different **types of business functions**, and proper **etiquette at business functions**. They also learned the rules of etiquette for **business dining** and the **handling of utensils**. Finally, students learned how to **handle awkward situations** that often occur during meals.

### Unit 6

In this unit, students learned guidelines to help them become a **courteous traveler**. They learned the importance of **respecting others** to represent their company well. They also learned the rules of etiquette to follow when **traveling by plane, train, or car**. Then they learned some rules of etiquette to use while **staying at hotels**, and the importance of **understanding and respecting cultural orientations**, which improves one's ability to do business with people in other countries. Finally, students learned the importance of showing **respect for their hosts**.

## Topic B: Continued learning after class

Point out to your students that it is impossible to learn any subject effectively in a single day. To get the most out of this class, it is important that students begin applying their knowledge of business etiquette as soon as possible.

### Next courses in this series

This is the only course in this series.

### Other resources

Course Technology's sister company, NETg, offers a full line of online and computer-based courses on business etiquette and a variety of other subjects. For more information, visit [www.netg.com](http://www.netg.com). This course maps precisely to the following three NETg courses:

- *Business Etiquette: Office Protocol*  
Course number: 45251
- *Business Etiquette: Communicating in Today's Workplace*  
Course number: 45252
- *Business Etiquette: Business Functions and Travel*  
Course number: 45253

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