Etiquette

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The Opportunity
Business etiquette is made up of significantly more important things than knowing which fork to use at lunch with a client. Unfortunately, in the perception of others, the devil is in the details. People may feel that if you can't be trusted not to embarrass yourself in business and social situations, you may lack the self-control necessary to be good at what you do. Etiquette is about presenting yourself with the kind of polish that shows you can be taken seriously. Etiquette is also about being comfortable around people (and making them comfortable around you!)

People are a key factor in your own and your business’ success. Many potentially worthwhile and profitable alliances have been lost because of an unintentional breach of manners.

Dan McLeod, president of Positive Management Leadership Programs, a union avoidance company, says, "Show me a boss who treats his or her employees abrasively, and I'll show you an environment ripe for labor problems and obviously poor customer relations. Disrespectful and discourteous treatment of employees is passed along from the top."

Most behavior that is perceived as disrespectful, discourteous or abrasive is unintentional, and could have been avoided by practicing good manners or etiquette. We’ve always found that most negative experiences with someone were unintentional and easily repaired by keeping an open mind and maintaining open, honest communication. Basic knowledge and practice of etiquette is a valuable advantage, because in a lot of situations, a second chance may not be possible or practical.

The Solution
There are many written and unwritten rules and guidelines for etiquette, and it certainly behooves a business person to learn them. The caveat is that there is no possible way to know all of them!

These guidelines have some difficult-to-navigate nuances, depending on the company, the local culture, and the requirements of the situation. Possibilities to commit a faux pas are limitless, and chances are, sooner or later, you’ll make a mistake. But you can minimize them, recover quickly, and avoid causing a bad impression by being generally considerate and attentive to the concerns of others, and by adhering to the basic rules of etiquette. When in doubt, stick to the basics.
The Basics

The most important thing to remember is to be courteous and thoughtful to the people around you, regardless of the situation. Consider other people’s feelings, stick to your convictions as diplomatically as possible. Address conflict as situation-related, rather than person-related. Apologize when you step on toes. You can’t go too far wrong if you stick with the basics you learned in Kindergarten. (Not that those basics are easy to remember when you’re in a hard-nosed business meeting!)

This sounds simplistic, but the qualities we admire most when we see them in people in leadership positions, those are the very traits we work so hard to engender in our children. If you always behave so that you would not mind your spouse, kids, or grandparents watching you, you're probably doing fine. Avoid raising your voice (surprisingly, it can be much more effective at getting attention when lower it!) using harsh or derogatory language toward anyone (present or absent), or interrupting. You may not get as much "airtime" in meetings at first, but what you do say will be much more effective because it carries the weight of credibility and respectability.

The following are guidelines and tips that we’ve found helpful for dealing with people in general, in work environments, and in social situations.

It’s About People

Talk and visit with people. Don’t differentiate by position or standing within the company. Secretaries and janitorial staff actually have tremendous power to help or hinder your career. Next time you need a document prepared or a conference room arranged for a presentation, watch how many people are involved with that process (you’ll probably be surprised!) and make it a point to meet them and show your appreciation.

Make it a point to arrive ten or fifteen minutes early and visit with people that work near you. When you’re visiting another site, linger over a cup of coffee and introduce yourself to people nearby. If you arrive early for a meeting, introduce yourself to the other participants. At social occasions, use the circumstances of the event itself as an icebreaker. After introducing yourself, ask how they know the host or how they like the crab dip. Talk a little about yourself- your hobbies, kids, or pets; just enough to get people to open up about theirs and get to know you as a person.

Keep notes on people. There are several "contact management" software applications that are designed for salespeople, but in business, nearly everyone is a salesperson in some capacity or another. They help you create a "people database" with names, addresses,
phone numbers, birthdays, spouse and children's names; whatever depth of information is appropriate for your situation.

It’s a good idea to remember what you can about people; and to be thoughtful. Send cards or letters for birthdays or congratulations of promotions or other events, send flowers for engagements, weddings or in condolence for the death of a loved one or family member. People will remember your kindness, probably much longer than you will!

**Peers and Subordinates**

Impressing the boss isn’t enough.

A 1997 study by Manchester Partners International, says even in this tight job market, 40% of new management hires fail in their first jobs. The key reason for their failure is their inability to build good relationships with peers and subordinates.

Social rank or class is a cornerstone of social interaction in many cultures. The corporate climate in the United States is no exception. People tend to feel uneasy until they’ve seen an "organizational chart" or figured out who reports to whom. They feel that it is more important to show respect and practice etiquette around superiors than around peers or subordinates.

The current social and economic climate is one of rapid advancement through technology, which make it very possible (and even likely) for a pesky salesman to become an important client, or an administrative assistant to become a manager.

Mergers and acquisitions add to this "class mixing," causing a former competitor to become a coworker overnight.

This can make things awkward if you treat people differently depending on their "corporate standing." If you show respect and courtesy to everyone, regardless of position or company, you avoid discomfort or damaging your chances in any unexpected turn of events.

Having a consistent demeanor improves your credibility. Even the people at the top will begin to suspect your motives if you treat VIPs with impeccable courtesy and snap at counter clerks.

**Superiors**

The only thing you owe your boss above and beyond what you owe peers and subordinates is more information. Unobtrusively be sure he or she knows what you’re doing, is alerted as early as possible to issues that may arise, and is aware of outcomes and milestones.

Never surprise your boss.
It goes without saying that you should speak well of him or her within and outside the company, and give him or her the benefit of the doubt. (Which you would do for anyone, of course!)

**International Business**

The information in this article is presented from a Western point of view. It is important to note that etiquette in other cultures requires a bit of adaptation and flexibility. If you’re traveling on business to a foreign destination, or have visitors here, it is a good idea to learn as much as you can about the culture they are coming from and make appropriate allowances.

Items to consider:

- Language (learn theirs if possible, but don't pretend to be fluent unless you have many years of study under your belt!)
- Time zones
- Working schedules
- Holidays
- Food customs (table manners, use of implements, etc.)

Generally speaking, as long as you are trying to be considerate and express an interest in learning, you should be fine. If in doubt, err on the conservative, formal side.

**The Workplace**

The remainder of this article is divided into two sections- The Workplace and Social Situations. The division is really for convenience only, since with less formal workplaces and more "business" seeming to take place in social situations now than ever before, the lines get blurred.

**Meetings**

If a subject is important enough to call a meeting, be considerate of the participants time and ensure that it is well prepared.

Communicate beforehand-

- The objective
- The expected duration (Be sure to observe the ending time scrupulously, unless everyone agrees to continue.)
- Items expected to be discussed

Often overlooked- be sure to THANK meeting members for their time and participation, and demonstrate (in the minutes or written record, at least) how their contributions helped meet the objective of the meeting. Participants are frequently left wondering if they've been heard or if their attendance and contributions were noticed. Distribute minutes or
some written record (no matter how simple the meeting) to all attendees and absentees, with concise but complete descriptions of decisions made and including action items.

Never assign an action item to a person who is not present to negotiate it, unless you absolutely have to. Note in the minutes that the person hasn’t been notified, and will be contacted for a final disposition of the item.

**The Phone**

Always return calls. Even if you don’t yet have an answer to the caller's question, call and explain what you’re doing to get the requested information, or direct them to the appropriate place to get it.

If you’re going to be out, have someone pick up your calls or at a minimum, have your answering system tell the caller when you’ll be back in the office and when they can expect a call back.

When you initiate a call and get a receptionist or secretary, identify yourself and tell them the basic nature of your call. That way, you’ll be sure you’re getting the right person or department and the person you’re trying to reach will be able to pull up the appropriate information and help you more efficiently.

When you’re on the receiving end of a phone call, identify yourself and your department. Answer the phone with some enthusiasm or at least warmth, even if you ARE being interrupted, the person on the other end doesn’t know that!

Make sure your voice mail system is working properly and doesn’t tell the caller that the mailbox is full, transfer them to nowhere, or ring indefinitely. Address technical and system problems- a rude machine or system is as unacceptable as a rude person.

You don’t have to reply to obvious solicitations. If someone is calling to sell you something, you can indicate that you are not interested and hang up without losing too much time on it. However, you do need to be careful. You may be receiving a call from an insurance or long distance company that wants to hire you as a consultant! Be sure you know the nature of the call before you (politely, of course) excuse yourself.

Personalize the conversation. Many people act in electronic media (including phone, phone mail, and e-mail) the way they act in their cars. They feel since they’re not face-to-face with a person, it is perfectly acceptable to be abrupt, crass, or rude. We need to ensure that we make best use of the advantages of these media without falling headfirst into the disadvantages.

**E-mail**

Make the subject line specific. Think of the many messages you're received with the generic subject line, "Hi" or "Just for you."
Don’t forward messages with three pages of mail-to information before they get to the content. In the message you forward, delete the extraneous information such as all the "Memo to," subject, addresses, and date lines.

When replying to a question, copy only the question into your e-mail, then provide your response. You needn't hit reply automatically, but don't send a bare message that only reads, "Yes." It's too blunt and confuses the reader.

DON'T TYPE IN ALL CAPS. TOO INTENSE, and you appear too lazy to type properly. This is still a written medium. Follow standard writing guidelines as a professional courtesy.

**Interruptions**
Avoid interruptions (of singular or group work sessions, meetings, phone calls, or even discussions) if at all possible. Most management folks feel free to interrupt informal working sessions of subordinates, but need to realize that they may be interrupting a brainstorming session that will produce the company’s next big success.

Always apologize if you must interrupt a conversation, meeting, or someone’s concentration on a task. Quickly state the nature of what you need, and show consideration for the fact that you are interrupting valuable work or progress.

**Guests, Consultants and New Employees**
If you have a new employee, guest, or consultant working at your company for a day, week, or longer, be sure that that person has the resources and information that he or she needs to do the job. This isn’t just courtesy, it’s good business, since time spent flailing around looking for things is embarrassing to the consultant and expensive for your company.

Give a consultant or guest the same type of workspace as an employee at your company in a similar role. A consultant who is there to do programming should have, if at all possible, the same size cube, type of computer equipment, etc. as an employee programmer would have in your company. This prevents your employees from feeling looked down-upon, and the consultant from feeling singled out or treated as second-rate.

A guest from a regulatory agency will tend to want to know what’s "really" going on in the company. By treating him or her like everyone else, (instead of isolating them in a plush office in a far wing, for example) will raise less suspicion and enable them to get the information they need more efficiently.

Appoint an employee to be a ‘buddy’ to a guest or consultant to ensure that they are introduced around, "shown the ropes," and have someone to help resolve little logistical problems that may arise and cause non-productivity or embarrassment.
Appreciation/Credit
Always pass along credit and compliments to EVERYONE who made a contribution to the effort. Speak well of your coworkers and always point out their accomplishments to any interested party. Appearing to have taken the credit in a superiors’ or customers’ eyes is the surest way to sabotage a relationship with a coworker.

Dress/Appearance
It can be insulting to your coworkers or clients to show a lack of concern about your appearance.

Being wrinkled, unshaven, smelly or unkempt communicates (intentionally or not) that you don’t care enough about the situation, the people, or the company to present yourself respectably.

If in doubt, always err on the side of conservative. If you think jeans may be OK for a social event but aren’t sure, show up in ironed khakis and a nice golf shirt. If you think a situation may call for dress slacks, wear a dress shirt and tie. If you have any inkling that a suit may be called for, dress to the nines.

Women’s clothing is a bit more complicated, but again, err on the side of conservative and dressy.

Always practice impeccable grooming (even in a jeans environment!)

Social Settings
Many impressions formed during a party, dinner or golf game can make or break a key business arrangement, whether or not business is discussed directly. Always carry business cards. Arrive at a party at the stated time or up to 30 minutes later. (Not earlier than the stated time, under any circumstances.)

Introductions
Before an event, use your address book or your "people database" to refresh your memory about the people you are likely to meet.

If you forget someone’s name, you can sometimes "cover" by introducing a person you do know first. "Do you know my Joe Smith, one of our account reps?" which will usually get the unknown person to introduce him or herself.

If this doesn’t work, an admission that you’ve had a mental block is preferable to obvious flailing around.
Table Manners
These apply to the Americas and most of Europe. If you’re elsewhere, do some research beforehand.

The fork goes on the left. The spoon and knife go on the right. Food items go on the left, so your bread plate is on your left. Drinks, including coffee cups, should be on the right. When sitting at a banquet table, you may begin eating when two people to your left and right are served. If you haven't been served, but most of your table has, encourage others to start. Reach only for items in front of you, ask that other items be passed by a neighbor. Offer to the left; pass to the right, although once things start being passed, go with the flow.

Conclusion
This is a lot to consider, and there’s a lot more out there. Volumes of information have been written on what is right and correct in business etiquette. It’s enough to make veterans and newcomers too insecure to deal with people.

Since you're human, (we're assuming!) there will be times when you step on toes, forget an important name, pop off with a harsh comment, or (heaven forbid!) use the wrong fork. We all do. Think about the "outtakes" scenes at the end of some movies where we see how many times it took to get things perfect, even when everyone was performing to a script! This is real life, there are no scripts, and we're all making it up as we go along.

The important thing to remember is that if you strive to make the people around you feel comfortable and valued, you have succeeded whether you’re perfectly in compliance with these or any rules you’ve read.
Appearance and Etiquette
From ASME [www.asme.org]
This section was compiled by Chris Christianson, SSC Jr. Representative to Region IX.

Appearance and etiquette are two areas which are not taught by colleges and universities, however, they may play important roles in your success in business. Some business environments today do not put significance in how people are dressed. On the other hand, some environments emphasize that all employees dress the same way, e.g., the work jackets prevalent in Japanese companies. Be aware of appropriate dress for the environment that you’re in. This section was taken from Business Etiquette & Protocol, National Institute of Business Management.

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Your Business Costume Can Do A Lot For You
Your personal feelings may be that the business "costume" is just for executives. In reality this is not so. Even executives who have no personal desire to dress up for business often form their first impression of others based on clothing, accessories and grooming. What else do you have to go on in those first few impressionable seconds when you meet someone? Remember, first impressions are difficult to change.

Some executives assume that if their clothing and accessories are expensive, they’re automatically dressed correctly. This is not always the case. Clothing and accessories used as business "costumes" have two functions:

To help you make a statement about yourself.

To indicate that you fit in with the environment in which you are functioning.
An executive who wears a silk suit with a dark tie is saying something. So, too, is the executive who wears a tie, sports jacket and trousers whose colors clash. The clash is obviously intentional and is often accompanied by eyeglass frames that were stylish in the 1930s and a haircut that is disheveled. A silk suit leaves an impression of success, the clashing wardrobe may say, "I’m creative, eccentric and do things my way." Nevertheless, the jacket and tie say, "I’ll go along with you to a certain extent." A "costume" cannot be judged by itself. One must be aware of its function before passing judgement on it. Obviously, some executives can "get away with" more than others due to their reputations or because their areas of expertise lend themselves to a nontraditional "costume."

In general, most people prefer to deal with people who are successful. Assuming one is successful, he or she is accustomed to the finer things in life, which supposedly includes expensive, well-tailored clothes and accessories. But the fact is that an executive’s
"costume" can have the right look without costing a bundle. The color, material, fit and style of clothing are vital when a "costume" is used to make a statement. Expensive clothes that are wrinkled, fit poorly, or are not in acceptable colors for business make the wrong statement.

The First Impression is Vital

Don’t judge a book by its cover" and "Beauty is only skin deep" are adages that usually are not heeded in the business world. If something about an executive turns you off, chances are you’ll never get to know more about him or her. What’s more, once that first impression is formed it takes a lot of doing to alter it. Most everyone would agree that one’s costume alone is not enough. But before a single word is said, your eyes are making judgements which form that first vital impression that is often lasting.

How To Use Clothes, Accessories, and Grooming to Make A Positive Statement

The first thing to determine is exactly what statement you want to make. But no matter what the statement, this checklist should be adhered to:

Obviously, hair should be neatly combed and clean.

It goes without saying that shoes should have a well-polished look.

Jackets that are skimpy should be avoided.

A man’s tie should end just above the belt.

Suit material should not be 100% polyester.

The most acceptable business colors for suits are gray and blue.

Ideally, a tie should be made of silk.

Women’s blouses should be made of either silk-like polyester, or cotton. For a conservative statement, the best colors are white or off-white.
A man’s shirt collar should be large enough to be comfortably buttoned and worn with a tie.

Jewelry should not be obtrusive.

A white shirt is preferable as an accessory to a suit.

Avoid strong colognes, scented powders and perfumes during business hours.

Pay Attention to Local Customs Regarding Clothes

What’s "in" in New York may be "out" in the West Coast cities or smaller cities and towns. If in doubt about local customs, it is better to be "overdressed" than "under-dressed." In some areas it is difficult to tell who’s who by judging an individual’s clothing. In most cities, however, you can spot the higher-ranking executives by the clothes they wear. This is especially so with regard to women executives and their female secretaries. If the custom is for secretaries to wear skirts and blouses, usually the female executives wear suits. In some areas the customs changed and secretaries began wearing suits. Women executives then countered and switched to dresses.

"Props" Also Make a Statement

A briefcase, notepad, or even a pen in your hand makes a statement. You’re saying, "I’m here to conduct business." If you make these "props" evident after some initial small talk you will usually move more quickly into business talk. If you pull files from your briefcase and set them out before they are mentioned, you are signaling the start of a business conversation. Also, when arriving for an appointment, if you are carrying a briefcase it is clear that you are on a business mission.

"Props" should follow the tenor of the rest of your "costume"

The briefcase should be made of leather. It’s fine if the leather looks somewhat worn as long as the briefcase is not falling apart.

The pen should be silver or gold.

Any other "props" must be of visibly high quality in keeping with the rest of your "costume."
Sexy Clothes are a "No-No"

Conventional restrictions on men’s wardrobes make it difficult for them to wear "sexy" outfits. But women executives should be careful not to wear items of clothing that may be inappropriate. A dress in lieu of a suit may be fine if the dress is businesslike and not a revealing outfit better suited for a cocktail party. See-through blouses, tight garments, revealing slits in skirts and low-cut dresses are not considered proper business dress. More often than not they will backfire on executives who wear them.

Try to Avoid Colognes and Other Fragrances

You have everything to gain and little to lose by avoiding personal fragrances. Those who use fragrant powders and wear colognes can easily offend one or more people in elevators or meeting rooms that have poor circulation. The negative reaction to these fragrances isn’t worth the risk. A large number of people are allergic to ingredients used to manufacture powders, colognes and the like. Generally, these people will go out of their way to keep someone who offends them out of their presence. Some executives have been using expensive cigars as a "prop" for years. They should be mindful that some people find cigar smoke offensive.

Powerful "Costumes" and "Props" are Subtle, Not Flashy

No matter what your "costumes" or "props," do not let them "shout" at people. They should be kept simple and somewhat inconspicuous. Don’t do anything to call attention to them. They will do their job and be noticed even if partially hidden. Reference should never be made to "costumes" or "props." If, during the course of a meeting, an item is noticed and commented upon favorably, a simple "Thank you" is the best reaction. It is proper for you to commend someone on his or her clothes or accessories if you feel genuine about it, but avoid doing so immediately after you receive a compliment. When complimenting someone on his or her clothing or jewelry, do not ask where the person bought it or if it is new. This information should be initiated by the person complimented if it is his or her desire to do so.

Etiquette Regarding Wearing Apparel

If you or someone in your party is wearing an expensive fur garment, do not offer to check it in a restaurant. Doing so will cause the owner of the garment to feel uncomfortable and also might alarm the checkroom attendant. If others are checking their garments, say "I assume you’d rather keep your coat with you." Then you can help the person remove the coat. Once shown to your table, place the coat or jacket behind the
chair of the person who owns it. If the maitre d’ offers to take the coat, (in many fine restaurants, checking coats is routine) defer to the owner’s wishes.

When in a meeting do not remove your suit jacket or loosen your tie unless the host or hostess does so or suggests that everyone do so.

As a guest in someone’s office, do not remove your suit jacket even if the person you’re visiting has his or her jacket removed. If the person you’re visiting asks if you would like to remove your jacket, it is proper to do so, but not mandatory.

If you are in shirt-sleeves in someone’s office, never roll up your sleeves, even if others do.

Upon entering an office, if a receptionist or secretary offers to take your outer garment, it is proper to accept.

It is not proper to fold your coat or other apparel onto a visitor’s chair in someone’s office unless you’re told to do so.

Do not place your briefcase on a chair or desk. Keep it in your lap or on the floor, beside you.

It is not proper to comb your hair or apply makeup in someone’s office. If necessary, excuse yourself and take care of your grooming in a restroom.

If you need a place to rest a file, do not move items on someone’s desk to make room for it. Use your lap.

When inclement weather has you wearing over-shoes or carrying a wet umbrella, check with a receptionist or secretary for a place to store them before entering someone’s office.

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First Impressions
As you’ve doubtless been told time and time again, it takes only ten or fifteen seconds to make a first impression - and the rest of your life to undo it. If it’s a negative one. With practice, you can learn to present yourself as a polished professional every time you meet someone. Here are some guidelines to get you off on the right foot.

Four Rules for Making A Good Impression
Since body language and words both play a major role in how you are perceived by others, let’s look at four rules that address the first impression we present to others.

Make your first 10 words count. The most effective way to open any interaction is to send a "thanks" message.

"Thank you for taking the time to meet with me this morning, Mr. Smith."

"It’s a pleasure to finally meet you in person, Miss Wright."

These are excellent thanks messages for first-time meetings. You can also use this rule effectively with people you already know. For example,

"Thanks for your interest in getting together, Barbara." "Dennis, thank you for suggesting we meet."

When possible, include the person’s name in the first ten or twelve words of conversation.

"It’s great seeing you again, Charlie,"

Admit it. Most of us tune in when we hear our names. We all enjoy personal recognition, no matter how modest. So start on a positive note and recognize the person you’re speaking to.

Tune into others. Make eye contact. Wear a smile. Your expression can convey energy and motivation or gloom and depression. Do you prefer to meet with someone who looks as if she’s had a bad night? Or with someone with a smile on her face and a twinkle in her eye? Your expressions demonstrate the confidence you have in yourself. Smile. Be vibrant. Be confident. People will respond positively. Try it. It works.
Walk with a purpose. Whether you’re walking into your office building or are on your way to meet clients, put some bounce into your step. Move with vigor and vitality. Most of us enjoy being around high-energy people. Try walking at the end of a long day with the same early morning zest you enjoy at the beginning of a day. Others will notice that extra bounce and energy.

Be impeccably groomed. There are numerous books with specific tips on professional dress for men and women, but positive first impressions dictate a few basic considerations.

Wear jewelry appropriate to the event and situation. The quality of jewelry and accessory items you wear is often perceived as a reflection of the kind of person you are. Men, use the one-finger test when buying shirts. To make sure a shirt fits properly, place your index finger between the collar and neck. If there’s enough room to slip your finger comfortably into the space, you are not only assured of an excellent fit, you will also feel less compelled to unbutton the top button.

Calling all men and women. Start off on the right foot. Give the same attention to the grooming of your shoes that you do to your hair and clothing. Shoes should be so well maintained that they look like new.

Women should also be aware of the poor impression made by hosiery with runs. Always keep an extra pair of stocking at work just in case. And, men ... please know that most women love to see a little leg, but not when you’re wearing trousers. Wear socks that cover your calves when seated.