



**NCATE**  
The Standard of Excellence  
in Teacher Preparation



# Business Etiquette

Gaining That Extra Edge

Student Manual

**Business Etiquette**  
Gaining That Extra Edge

Student Manual

# Copyright

All rights reserved world-wide under International and Pan-American copyright agreements. No part of this document can be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior written permission of Velsoft Training Materials Inc.

# Table of Contents

Session One: Course Overview .....	1
Session Two: Fear of Embarrassment .....	2
Session Three: The Handshake.....	3
Session Four: Business Card Etiquette.....	4
Session Five: The Skill of Making Small Talk.....	5
Session Six: Do You Remember Names? .....	6
Session Seven: Making That Great First Impression.....	7
Session Eight: Dress for Success.....	9
Dressing the Part.....	9
What's Your Code?.....	11
Adding Color to your Wardrobe .....	12
Session Nine: Business Dining.....	12
Eight Hot Tips.....	13
Demonstration.....	14
Other Rules .....	15
Session Ten: E-Mail and Telephone Etiquette .....	16
Common Sense .....	16
Debrief .....	17
In Good Company's Business Etiquette Quiz .....	20
A Personal Action Plan .....	21
Recommended Reading List.....	22

# Session One: Course Overview

## Course Overview

Fear of embarrassment from doing or saying the wrong thing is one of the most common sources of stress in a business or professional setting.

If you have had some awkward moments where you aren't sure which fork to use or which side plate is yours, or if you've ever had to make small talk with some VIP and been lost for words, you know just how agonizing such moments can be. However, what can be even more damaging to your career are those things you aren't aware of, the social gaffes you aren't even aware of making.

## Learning Objectives

This workshop will reassure you that you can handle most of those socially difficult moments, and perhaps give you that extra edge in areas that you'd never thought of before. Specific skills we'll work on include:

- Become more skilled at networking, from making introductions to shaking hands and using business cards appropriately.
- Be better prepared for both formal and informal meetings, even if you aren't presenting.
- Dress appropriately for every business occasion.
- Feel comfortable when dining in business or formal situations.
- Feel more confident of your business communication in every situation.
- Give you that extra edge that establishes trust and credibility.



## Session Two: Fear of Embarrassment

Fear of embarrassment from doing or saying the wrong thing is one of the most common sources of stress in a business or professional setting.

[Click here to list your fears of embarrassment.](#)



## Session Three: The Handshake

During the important first few minutes of a new relationship, a handshake is usually the only body contact between two people. It can communicate warmth, a genuine concern for the other person, and an image of either strength or gentleness. It can also communicate indifference and weakness. Developing a professional handshake is perhaps one of the most valuable business skills you can ever cultivate.

The message you communicate with your handshake is determined by five factors:

### **Degree of firmness**

Your grip should be firm rather than weak. However, you don't want your handshake to be painful to the other person. Consideration is appreciated. Be especially considerate if you are shaking hands with someone in a receiving line who has many more hands to shake, someone who is wearing a lot of rings, or who is obviously elderly and perhaps fragile.

### **Dryness of hand**

We all prefer to shake a hand that is dry. While you typically don't want to obviously dry your hands before greeting someone, this is perfectly acceptable if you have been holding a cold glass. Similarly, if you are at the buffet table and have been eating, it is expected you would wipe your hand on your napkin before extending it to be shaken.

### **Depth of grip**

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

### **Duration of grip**

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

### **Eye contact**

While this will vary from culture to culture, in North America we expect the person shaking our hand to make eye contact with us. Have something to say as you shake hands, if possible. It doesn't require anything witty. You can even use the old stand-by, "Pleased to meet you." These few words set the stage for some small talk that can be the beginning of a new business relationship. Grasping the top of the other person's hand with your other hand, so that their hand is enveloped in yours, may very well signal warmth and affection. However, this may be seen as patronizing and too familiar for an introductory handshake. Save this handshake for a meeting with an old friend.



## Session Four: Business Card Etiquette

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

- Don't hand out your business card to everyone you know, as if you are spreading the wonder of who you are. First see if people need or want your card. Handing out your cards like chewing gum makes you seem like a cheap salesperson – not the image you want to project.
- Make sure your business cards are clean and in good condition. They are a part of your business image. A business card that is dirty or curled at the edges leaves a poor first impression. Use a business card case to keep your cards clean and fresh.
- When you receive a card, take a moment to look at it. Make a positive comment about some aspect of the card: the logo, the company name, or business location. This shows respect for the other person and demonstrates your interest in them. As well, this is an excellent way for you to find out more about them, such as their job title. It also helps you remember their name, or reminds you of their name in case you forgot – a very common occurrence.
- After you've looked at the card, place it carefully in a card case or in a front pocket, not a back pocket. Treat the card with respect.
- Be careful about writing on people's cards. Now, this goes against convention with most networking books and articles. But in many cultures, specifically with people from Asia, a business card is an important part of their persona, and should be treated with respect. People spend time and money designing a professional card and may not appreciate your writing across it. If you need to record information, write on the back, not the front. And ask first, "Do you mind if I write on your card?"
- Don't leave home without your cards. You shouldn't give your cards to everyone you see, but have them ready when you need them.
- If someone hands you a card that you don't want, don't refuse to take it. Accept it, look at it, and put it in a pocket. Throw it out later.
- When your cards are damaged or out of date, print new ones. If you start crossing out information on a card and write new information on top of it, it makes it difficult to read and looks messy. Business cards are part of your image. Make sure yours are well designed and up to date.





## Session Five: The Skill of Making Small Talk

Small talk has a bad reputation. Sometimes we think of it as the poor cousin to a “real” conversation. However, without small talk, many of us will never get to those “real” conversations. Small talk helps us put others at ease and make them comfortable. Small talk breaks the ice and goes a long way toward furthering a relationship.

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

[Click here to describe how you would react or have small talk in different situations.](#)



## Session Six: Do You Remember Names?

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

Probably rule number one should be that you want to remember names. Think of it as a skill you are developing through practice. Some additional tips include:

- Repeat the name after you’ve been introduced. Then use it again as soon as possible, to underline the name in your memory bank. Repetition helps.
- Look at the person as you say his/her name. Note anything visual about that person that will help you anchor that name in your memory.
- If you are given a business card at some point in the conversation, take time to look at the card and the person’s name. For visual learners, actually seeing the name helps keep it in your memory.
- If you have a journal, get in the habit of writing down the names of the people you meet at a function or during the day. This activates your kinesthetic learning and is just one more opportunity to fix the name in your memory.



## Session Seven: Making That Great First Impression

In years past you've probably heard that we only have about 5 minutes to make a great impression. Well, in today's world, we seem to have shortened that to about 90 seconds.

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

- Confident posture
- Eye contact
- Minimal body movement
- Clothes are clean, unrumpled, and stain-free
- Shoes are clean and polished
- Fingernails are clean (for women, no chipped polish)
- Pleasant expression

### The Rule of Twelve

You can control that critical first impression by observing the following guidelines based on the Rule of Twelve, which suggests that we first notice and remember three things about people we meet.

- The first twelve inches from shoulders up.
- The first twelve steps a person takes.
- The first twelve words a person speaks.

The first rule of twelve tells you that people notice everything above the shoulders of your jacket: your tie, tie knot, how well-pressed or creased your collar is, the length and neatness of your hair, your complexion, your eyes, and your smile. Remember to smile, as this is a key factor in creating that critical first impression.

The second rule of twelve tells you to enter a room with confidence and to look as if you both have a reason to be there and are happy to be there. Smile and extend your hand. Keep your shoulders back and stand up straight. If you carry a briefcase or purse, keep it in your left hand so that the right hand is ready to shake hands.

The third rule concerns your first twelve words. If this is a meeting, your first twelve words should always include a thank you of some kind. For instance, you could thank the manager or client for taking the time to see you, indicate that you're glad you could finally get together, or mention that you've been looking forward to meeting the person for a long time.

Your words should invite the other person to respond in kind, for instance, by saying, "you're welcome." This approach puts everyone at ease and opens the appointment on a friendly footing.



Remember, first impressions are lasting, so give those first twelve inches, twelve steps, and twelve words everything you've got.

### **Do You Look Approachable?**

Far more important than how much our suit cost and whether our shoes are polished is whether or not we look approachable. Again, if we are to look approachable, we smile, make eye contact, shake hands with a good but not overpowering grip, show interest in the other person, and call them by name.

### **What Your Appearance Says**

We were inherently more respectful of each other in the past, and devoted more time to the niceties of getting to know someone and explore common ground. In today's world, we aren't willing to invest the time and effort to get to know one another. We make appraisals, and assumptions, and form decisions, all within the space of a few seconds.

Research tells us people determine seven things from your appearance.

- Income
- Education Level
- Social Position
- Sophistication
- Success
- Moral Character
- Trustworthiness



## Session Eight: Dress for Success

### Dressing the Part

The appearance of workers has changed as well. Not long ago, everyone from the most seasoned professionals to entry-level employees had a common understanding of appropriate business attire. Thanks to the creation of the khaki culture and increasing popularity of casual Friday and business casual dress, it's no longer that simple.

So how do you dress down for work without looking like you're headed to the beach? Here are a few easy rules to live, and dress, by.

#### **Consider Your Work Environment**

If you're meeting with clients or having business lunches, err on the conservative side. It's a sign of professional respect, and you can save the jeans for a time when you'll be in the office all day.

#### **Strive for Consistency**

If you wear tailored and conservative outfits Monday through Thursday, Friday isn't the day to show up like you just rolled out of bed. No matter what industry you're in, consistency goes a long way in establishing trust and credibility with all your internal and external contacts.

#### **Ask First, Dress Later**

Show respect for both yourself and management; be sure to check with your HR department or manager before showing up dressed for a barbecue.

#### **Dress to Impress**

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

#### **For Women**

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

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



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

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

### **For Men**

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

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

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

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

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



## What's Your Code?

The terms casual and business casual are familiar to most. The organization and position determine your professional attire, whether it be corporate, business, business casual or casual attire.

[Click here to decide what the dress code should be at different levels in the business world.](#)



## Adding Color to your Wardrobe

The navy blue or black suite is the corner stone of a professional wardrobe. Colors can add to your professional appearance but be careful some colors or too much color can set the wrong impression.

[Click here to discuss what the colors you wear say about you.](#)





## Session Nine: Business Dining

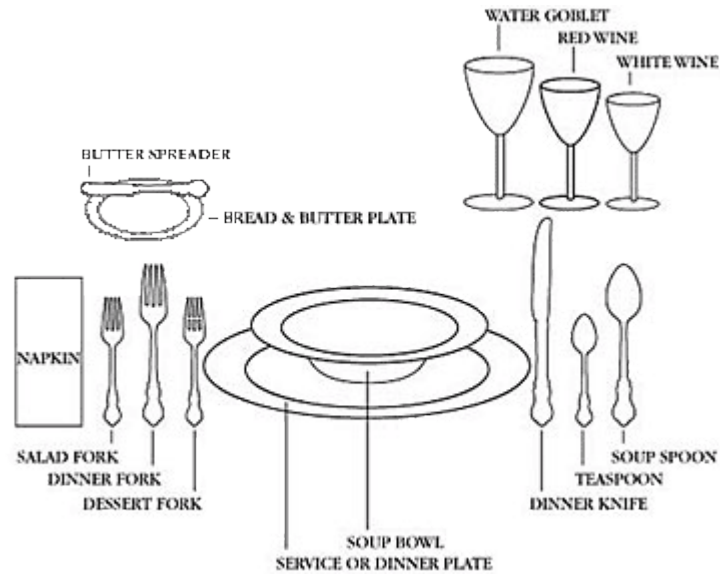
### Eight Hot Tips

"It may look like lunch, but it's still business!"

- 1) When inviting a client to lunch, remember that the restaurant you select is subconsciously perceived as an extension of your office. Therefore, select a restaurant where the food is of good quality and the service is reliable.
- 2) When escorted to a table by a maitre d', allow your guest(s) to walk behind the person. When finding a table on your own, take the lead.
- 3) Be sure to extend the power seat to your client. Seat yourself in the seat with your back facing the door/main body of the room.
- 4) Once everyone is seated, place your napkin on your lap. This gesture serves as a cue that the meal is about to begin.
- 5) When making a food recommendation, recognize that most guests also take your suggestion as the price range to stay within.
- 6) When the server asks for your meal order before your guests', it's the perfect time to say, "I'd like my guest(s) to order first." Besides being appropriate, it's a cue to let the server know that the check should be left with you at the end of the meal.
- 7) When reaching for the bread basket, salad dressing, etc., offer them to your guest(s) before using them yourself.
- 8) Finally, tip adequately. Treat the server as one of your employees. It's a small price to pay for good service, personal attention and, hopefully, the contract that you land!



## Demonstration



### Place Plate

The place plate is placed one inch from the edge of the table. If the first course is already on the place plate, the napkin is placed to the left of the forks; otherwise the napkin will be on the plate.

### Forks/Flatware

Handles of the flatware are aligned at the bottom. The forks (no more than three) are at the left of the place plate, placed in order of use, working from the outside in. The oyster fork is the only fork on the right side with the knives, tines of the fork placed upward, located across the soup spoon or parallel with the knives.

Often in North America the salad is served prior to the main course. In this case, the salad fork is positioned the furthest from the plate on the left. One would use this fork first. In the case of French style dining, the salad would be served after the main course. In this case, the salad fork would be positioned next to the plate.

### Knives

Knives, no more than three, are at the right of the place plate in order of use, from the outside in, with the cutting edge toward the plate. The only spoon (for a first course) is placed to the right of the knives.



## Dessert Silverware

The dessert fork and spoon are above the place plate, the bowl of the spoon facing left, the fork below facing right. In the most formal setting, the dessert fork and spoon are brought in on the dessert plate.

## Glassware

No more than four glasses are set on the table, in order of use, for water, white wine, red wine, and champagne, from the left to the right.

## Stemware

Note the shapes of each type of stemware. They all have a unique shape and should only be used for their respective drinks.

## Bread and Butter Dish

The butter plate (optional) has the knife placed across the top of the plate, handle to the right, edge of blade toward the user. The salt and pepper are above the place plate, pepper to the left of salt. Larger salt and pepper shakers to be shared are placed slightly below the wine glasses and between every two place settings.

## Other Rules

- At the end of the meal, you should place your used silverware close together on the plate, with the utensils entirely on the plate (less than an inch of the silverware over the side of the plate). This is a signal to the servers that your meal is finished and the dishes can be removed.
- The correct way to cut your meat, whether eating American or continental style, is to grasp your knife and fork in a relaxed, natural manner, never with clenched fists.
- In the American style of eating, after cutting your meat, you switch the fork to your right hand, place your fork on the plate, spear a piece of meat, and then eat it.
- In the Continental eating style, you keep your fork in your left hand and convey the food to your mouth after cutting each piece. The knife remains in your hand and may be subtly used to get meat or any other food to stay in place.



## Session Ten: E-Mail and Telephone Etiquette

### Common Sense

For most of us, the telephone is a vital source of communication. The use of cell phones and instant conversation is commonplace in our life today. However, the way you conduct yourself on the phone or other means of communication may be a key factor in building successful relationships.

[Click here to discuss common sense telephone, cell phone, email and text messaging etiquette.](#)



## Debrief

Here are some of our suggested guidelines.

### Telephone Etiquette

These tips will show you how paying attention to detail may make a big difference in others' impressions of you, both personally and professionally.

- Identify yourself. When calling someone, do you identify yourself after they've said hello?
- Respect others' time. When placing a call, after identifying yourself, do you ask, "Do you have a minute?" or "Is this a good time to reach your?" before explaining the reason for your call?
- Ask rather than just place someone on hold.
- After placing someone on hold and returning to the line, say "Thanks for waiting," rather than, "I'm back."
- When screening calls, do you ask, "Who's calling, please?" rather than, "Who is this?"

When calling a professional office for any reason, always identify yourself and explain the reason for your call. Example: "Hello, this is Joyce Washington from the District of Columbia and I'm calling to inquire about business opportunities in Nova Scotia."

### Call Waiting

Call waiting is only as good as the person using it. Rule #1: Just because you have call waiting, it is up to you whether to use it. It is a judgment call. Your decision should be based on who you are speaking to, the intensity of the conversation, and your relationship to the person. If you find it necessary to place someone on hold due to call waiting, always ask permission!

### Answering/Voice Mail Machines

When reaching an answering machine, if you had sufficient reason for calling, leave a message. Sometimes this helps the other person know how to respond: whether to expect another call from you or if they should attempt to return your call. "Hi, it's Julie, bye!" doesn't say anything, does it?

When leaving a message, what and how you say it is as important as if you were speaking to the person directly. Keep the tone of your voice pleasant and upbeat. Your message should include information on why you are calling and when would be a good time to call you back.



When you leave the number where you can be reached, slow down. Give the person who is listening a chance to write it down. If yours is an out of state number, remember to leave the area code as well.

### **Use Good Speech Habits**

Phrases to use:

- “One moment please”
- “Yes”
- “All right”
- “She’s not available now”
- “Good-bye”

Phrases not to use:

- “Hang on”
- “Yeah”
- “Okey-Doke”
- “Uh, I dunno where he is.”

Remember: You only get one chance to make a first impression!



## **Netiquette: Don't Send and Offend**

It has only been a decade since e-mail came into widespread workplace use, so perhaps we should be forgiven for making e-mail blunders. However, since we are talking about first impressions, judgments are made about words on a computer screen just as surely as they are when you are meeting somebody face to face.

Here are some things to keep in mind as you deal with technology:

- Always respond to a real message. Junk mail and forwards are one thing, but if this is someone you have met at a networking function or an old friend who just wanted to connect, take the time to respond.
- Use the subject line as a newspaper headline, to convey the content of your message. This is the most critical part of any e-mail, so don't use an old subject line, or make your subject line so cryptic the reader still doesn't know what the e-mail is about.
- For professional communicators, the use of emoticons and acronyms like BTW (by the way) are way too informal. Not everybody knows what they mean. Worse, readers could get the wrong impression of your writing skills.
- Make your electronic messages easy to read and easy to view. Keep the font readable and in the 10-12 point range. Use paragraphs and bullets but no background wallpaper.
- Avoid overly long messages. Don't ramble and don't try to cover a range of subjects in one e-mail. The general rule is no more than one screen length.
- "Send to All" should be reserved for those work-related messages that really should be sent to all.



## In Good Company's Business Etiquette Quiz

Now it is time to test your knowledge of business etiquette.

[Click here for the In Good Company's Etiquette Quiz.](#)

To find other answers to etiquette, go to [www.etiquetteladies.com](http://www.etiquetteladies.com).





## A Personal Action Plan

After completing the business etiquette training module it is time to define a personal action plan. Your action plan will help you identify the areas you are good in, areas for improvement and how you plan to improve. You will also have an opportunity to establish your long-term goals for success.

[Click here to outline your personal action plan.](#)



## Recommended Reading List

Boothman, Nicholas. "How to Connect in Business in 90 Seconds or Less (Audiobook)." Audiofy/Listen & Live, 2005.

Brennan, Lynn. *Business Etiquette For The 21st Century: What to Do and What NOT to Do*. Piatkus Books, 2004.

Carnegie, Dale. *How to Win Friends and Influence People*. Pocket Books, 1998 (Reprint).

Chaney, Lillian Hunt, and Jeanette St. Clair Martin. *The Essential Guide to Business Etiquette*. Praeger Publishers, 2007.

Craig, Elizabeth. *Don't Slurp Your Soup: A Basic Guide to Business Etiquette*. Brighton Publications, 1996.

DuPont, Kay. *Business Etiquette and Professionalism*. Crisp Learning, 2000.

Foster, Dean. *The Global Etiquette Guide to Europe*. Wiley, 2000.

Fox, Sue. *Business Etiquette for Dummies*. Wiley & Son's, Inc, 2000.

High, Jana L. *High-Tech Etiquette: Perfecting the Art of Plugged-In Politeness*. Rawdon & Watson Publishing Company, 2002.

Holberg, Andrea, Sonia Garza, Kathleen D. Kelly, and Kathleen A. Moses. *Forms of Address: A Guide for Business and Social Use*. Rice University Press, 2006.

Moats Kennedy, Marilyn. *Office Politics for Dummie* . Hungry Minds, 2002.

Ramsey, Lydia. *Manners That Sell*. Longfellow Press, 2000.

Sabbath, Ann Marie. *Business Etiquette: 101 Ways to Conduct Business with Charm and Savvy*. Career Press, 2002.

Wyse, Lois. *Company Manners*. Random House, 1994.

