BUSINESS PROTOCOL & ETIQUETTE

How you conduct yourself and treat others in a business or dining setting speaks strongly of who you are as a professional. Different cultures have different protocols. Review GoingGlobal (access via MyGate) for worldwide tips and strategies.

HOW TO APPROACH A GROUP

- Present yourself with confidence.
- Always smile.
- Extend right hand.
- State name (and company).
- Know how to say what you do and what your company does in 15 seconds.
- Distinguish between "open" and "closed" triads.
- Don't approach two people who are facing shoulder to shoulder. It is likely they are having a private conversation.
- Do not fold your arms or put them in your pockets. It's not inviting.

GREETINGS

- Hi, Hey, Yo, What's up?, What's going on? are never appropriate.
- Hello is informal, but ok to use.

INTRODUCTIONS

- Use proper titles when introducing others.
- You can omit titles when introducing people of the same rank and position.
- Never introduce a co-worker/superior by first name.

INTRODUCING YOURSELF

- It is your duty to introduce yourself.
- Make sure to look people in the eyes and smile in order to seem confident and approachable.
- Name tags should be placed high on right shoulder.
- When should you introduce yourself?
  - When you recognize someone and he or she does not recognize you.
  - When attending a business or social gathering.
  - When seated next to someone.
  - When the person introducing you does not remember your name.
  - When it's a friend of a friend.

INTRODUCING OTHERS

- When introducing others, introduce the person lowest on the totem pole to the one highest.
- The name of the person of greater authority is always spoken first.
- The name of person of lesser authority is always spoken last.
- Logistically this means you must look at the most "important person" and say, "Ms. Throckmorton, I'd like to introduce to you Mr. Thomas, an intern in our IT department. Mr. Thomas, this is Ms. Throckmorton, the director of technical publications."
- When dealing with people outside the company, clients are considered more important than anyone working within the company, and hiring managers are more important than job seekers.
- If you are seated while being introduced to someone, stand to greet that person and shake his or her hand. Have a firm handshake, but avoid death grips.
- Tell something about the person whom you introduce.

DURING THE CONSERVATION

- Learn how to make small talk.
  - Be current on domestic and international events.
  - Know what events impact your company (or client's company).
  - Ask questions to focus on the other person, not you.
  - Do not interrupt and/or finish people's sentences.
- Avoid conversations about your health or diet habits, cost of things, personal life, mean gossip, off-color jokes, and controversial issues.
- Don't gaze about the room when in conversation. It's rude and it makes the other person feel insignificant.
- Do not touch others unless you know them well.

ENDING A CONVERSATION

- Do not just walk away if you see someone more interesting. ALWAYS make a closing statement before moving on.
- Examples of closers:
  - "Please excuse me. It was nice talking with you."
  - "It was really a pleasure to meet you. I'll look forward to seeing you again soon."
  - "I enjoyed talking with you. I hope to see you again soon."
- Summarize what was said, "Oh, it looks like you have a fascinating job and I wish you good luck on your project."
- Learn how to express closing statements.
- If graceful disengagement doesn't work, be more direct: "I see it is really getting late and I really must go," then back up physically. As a last result, say a parting statement while you are shaking hands to say good-bye.

BUSINESS CARDS

- Always have enough.
- Are a personal reflection and should not be wrinkled, scribbled on, have lines crossed out, outdated or soiled.
- Carry in a card case to keep fresh and protected.
- Present the card with the print facing the recipient.
- Your name should be the largest print on the card.

- Don’t write on business cards in front of others.
- Never exchange business cards while dining.
- Learn how to juggle napkins, glass and business cards gracefully at networking events.
- Never pass them out like you are "dealing cards" or handling out a flyer to a grand opening.
- It is polite to comment on the card before putting it away rather than immediately stashing it in a pocket without looking at it.
- If one person asks for a business card, the other should offer his/hers in return.
- Before offering your business card to someone, always say, “May I give you my card?”
- Do not force your card on anyone or offer it early in a conversation.
- Junior staff should not give or request cards from senior executives. Let the senior executive ask for your card.

MEETINGS/NETWORKING EVENTS

- Offering to pay for the check if asked to a lunch/dinner meeting is always polite and shows good will. However, it is customary for the individual who extended the invitation to cover the check.
- Always have an agenda; know why you are attending the event and memorize names of those you wish to meet.
- Do not leave home without your business cards.
- Never rush into a room. Step to the right when you enter and pause to look around the room.
- Do not head for the bar or the food.
- Greet your host first, if possible. Do not monopolize the host’s time.
- Introduce yourself to other guests.
- Do not carry a bag or notebook that fills your hands.
- Hold food and drinks in left hand to leave the right hand open for handshakes.
- Avoid only talking with persons you know. Mingle with all guests.
- Never go to an event hungry.
- Stay away from foods that are messy or that can’t be eaten in one bite.
- Write a thank-you note within 24 hours.
- Remember you are there as a representative for your company.

RELATIONSHIPS AT WORK WITH CO-WORKERS

- Cooperate, get along with co-workers and develop a relationship of mutual support.
- Focus on the positive qualities and inner potential of co-workers (strengths, not weaknesses).
- Be friendly, but do not join a clique.
- Spend time observing how people act, who performs well and who takes a positive view toward the job and organization.
- Beware of the gripers and avoid the office gossip.
- Do not talk about co-workers behind their backs.
- Communicate effectively by voicing concerns, challenges and accomplishments.
- Do not use co-workers as confidants. A peer may someday be your boss, or you may be his.
- Be nice, polite and friendly to everyone, including individuals who work outside of your department.
- Exchanging holiday gifts with co-workers at office:
  - Always observe company's specific gift giving policy.
  - Be discreet when exchanging gifts with one another and away from other coworkers not receiving any gifts.

RELATIONSHIPS AT WORK WITH BOSS/SUPERVISOR

Your supervisor may send you to get answers to questions or concerns, be vague on how to complete a task or project, and come up with last minute assignments, unclear priorities and vague directions. So, how do you deal with it?

- Approach each task with a willing attitude and enthusiastically complete the grunt assignments.
- Demonstrate poise and maturity in everything you do.
- Ensure quality work that is completed on-time to make your supervisor and you look good.
- Your supervisor should be your ally, not your enemy.
- Your supervisor should aid in your training and development, not become your best friend.
- Do not ask your supervisor for advice on personal and financial problems.
- Your supervisor controls a great deal of what can happen to you during your first year.

CELL PHONES/SMART PHONES

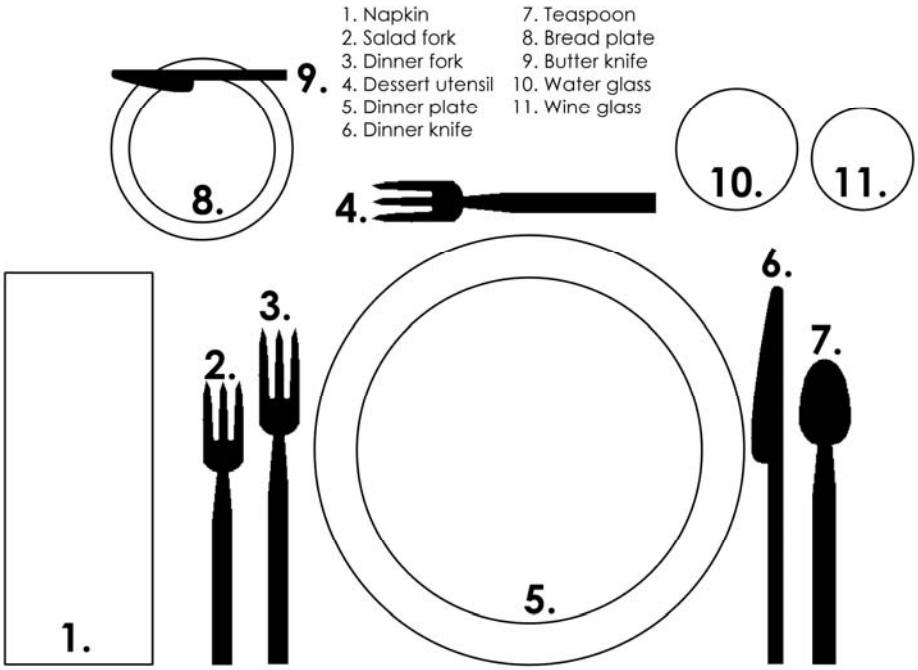
- Turn your phone off during meetings.
- Checking your phone for the time makes you appear districted. Invest in a watch.
- Try not to answer in restaurants; if expecting an important call, let those you are dining with know, and excuse yourself from the table to answer briefly.
- Be aware of voice volume and create space by moving at least two arm lengths away from those around you (or out of the room if possible).
- Put others first. The people you are with should take precedence over calls you want to make or receive.
- If you are expecting a call that can’t be postponed, alert your companions ahead of time.
- Remember that a phone conversation in public or in a crowded area is not private.

EMAIL ETIQUETTE

- Craft a compelling subject line.
- Treat email like a business letter.
- Keep it short and simple.
- Use proper spelling, grammar and punctuation.
- Never send an email when you’re angry.
- Email is NOT confidential and can be forwarded.
- Read it and check your spelling before sending it.
- Confirm that the attachment you intended to attach is indeed attached.
- Answer an email within 24 hours.
- Always be professional!!!

GENERAL DINING ETIQUETTE

- Do not order foods that are eaten with your hands.
- Pass food from left to right.
- If asked for the salt or pepper, pass both.
- Never season food before tasting it.
- Food is served from the left, dishes removed from the right.
- Butters, spreads or dips should be transferred to your serving dish before spreading or eating.
- Do not ask for a “to-go box” unless it is an informal dining situation.
- For hard to scoop items like peas, use a piece of bread, not your finger, to push items onto the fork.
- If hot food is burning your mouth, discretely drink something cool.
- Napkins belong in your lap. Wait until the host unfolds his or her napkin before you do.
- If you excuse yourself from the table, loosely fold your napkin (do NOT refold your napkin or wad it up) and place it beside your dinner plate.
- Meeting materials or briefcases should be left under your chair until it is time to discuss business.
- Do not ask to taste someone else’s food or offer to let them taste yours.
- Do not blow your nose at the table. Politely excuse yourself to the restroom.



CASUAL DINING EXCEPTIONS

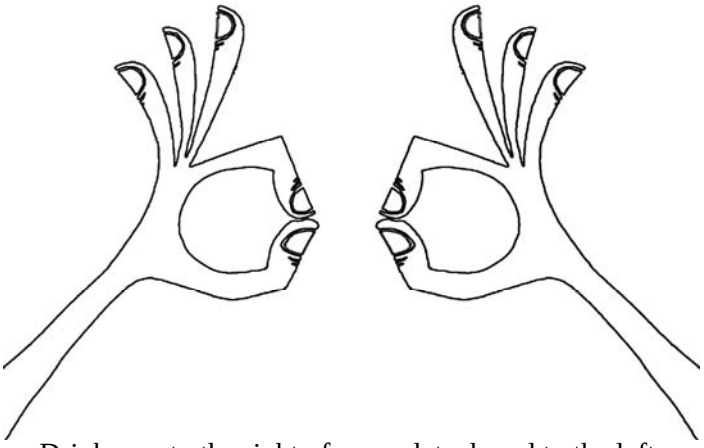
- You may order foods that are eaten with your hands.
- When sharing chips and salsa, you don’t have to transfer salsa to your plate, but do not double dip.

LEAVING A TIP

- Fifteen to 20 percent of the bill total is customary, but for exemplary service, a greater percentage is accepted.
- For poor service, ask to speak to the manager; not tipping is not an option.

PLACE SETTING TIPS

- The general rule for silverware is to work from the outside in as the meal progresses.
- The dinner plate is the center of the place setting. When finished, do not push the plate away from you. Instead place both your fork and knife across the center of the plate, handles to the right.
- Between bites, your fork and knife are placed on the plate, handles to the right, not touching the table.
- The dessert spoon/fork is above the dinner plate.



Drinks are to the right of your plate, bread to the left.
To remember this, make an “ok” sign with both hands;
your left hand makes a “b” for bread,
your right hand makes a “d” for drinks.