

5.3: Your Best Behavior

Learning Objectives

- Understand the appropriate etiquette for business communication.

You probably learned about table manners, thank-you notes, and other forms of etiquette when you were younger. The way you conduct yourself says a lot about who you are in life and, by extension, in business. Although many companies have a casual dress code, don't be quick to assume that protocol and established practices aren't important. It would be easy to misinterpret lack of formality as lack of professionalism. Manners matter in selling, now more than ever.

Never Underestimate the Power of Good Etiquette

How do you make a positive impression when you meet someone? What's the best way to ask for her business card? When is it appropriate or expected to send a thank-you note? Who picks up the bill at a business lunch? It's hard to know the "rules of the road," especially in today's casual, fast-paced selling environment. **Etiquette** can make the difference in how your customer perceives you and your personal brand.

Etiquette Tips for Letters and Memos

Despite the use of electronic devices in business, formal written communication such as letters, memos, proposals, reports, and presentations are still major methods of communication in selling. These more official methods of communication reflect factual statements that you are making on behalf of the company. Here are some tips for writing business communications:

- Use company letterhead where appropriate. For example, letters are always written on letterhead, whether in hard copy or in an electronic format that can be sent via e-mail.
- Use the formal elements of a business letter shown in Figure 5.7 .
- For a company memo, use the company format. Most companies have a set format for hard copy and electronic memos. See an example of a company memo in Figure 5.8 .
- Spell-check and proofread your document carefully before you send it. Be sure it is complete and factually correct and does not include any grammar or spelling errors.
- Use CC to indicate the names of other people who should also receive a copy of the letter or memo. The term "CC" is short for "carbon copy," which dates back to the days of typewriters when carbon paper was used to make multiple copies of a document. It can also mean "courtesy copy": an additional copy provided to someone as a courtesy. Mary Ellen Guffey, *Business Communication*, 6th ed. (Mason, OH: South-Western Publishing, 2008), 175.
- Use BCC (blind carbon copy) to send copies to other people without having the primary recipient see it. Mary Ellen Guffey, *Business Communication*, 6th ed. (Mason, OH: South-Western Publishing, 2008), 175.

Tips for Writing a Business Letter



Etiquette makes all the difference in the quality of your communication.

Source: eHow.com



Moore Manufacturing Group 575 Parkland Avenue Lake Forest, IL 60515

August 28, 2009

Ms. Janice Lee
Buyer
Universal Parts, Inc.
101 Corporate Drive
Deerfield, IL 60511

Dear Ms. Lee,

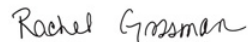
Productivity and cost savings are even more critical today than ever before. But you can't afford to give up customer service for reduced costs. You deserve impeccable service from a supplier who also keeps costs among the lowest in the industry.

Based on the research I have done on Universal Parts, it appears that switching to Moore Manufacturing could save you as much as 12% on your annual purchases. In addition, you would have a dedicated customer service expert available to you 24/7 for any questions or issues you may have.

I'd like the opportunity to meet with you and learn more about your priorities and business challenges. I will call you on Tuesday to set up a time that is convenient for you.

In the meantime, you might find it interesting to review the attached audit that was conducted on your current offering. It reflects where you can potentially realize savings.

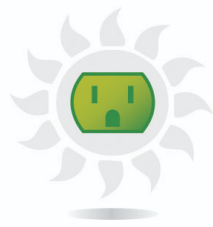
Sincerely,



Rachel Grossman
Account Manager

Attachment

Figure 5.3.7: Business Letter Format



Good to be Green.com Internal Memo

TO: Jason Sedgewick
FROM: Abe Forte
RE: September 12 Sales Meeting

The quarterly sales meeting will be held on September 12 at the Radisson City Center. You are cordially invited to participate in the interactive planning session at 10:00 a.m. Your insights will be extremely valuable as the sales team frames the plan for next year.

Please confirm your attendance by Friday by calling me at x5432 or by e-mailing me at aforte@goodtobegreen.com.

Thanks in advance for your participation.

CC: Alena Adamonis

BCC: Justin Jankowski

Figure 5.3.8: Company Memo Example

Etiquette Tips for Conversations, Meetings, and Presentations

Although common sense should prevail in all business communications, here are some tips that will help make your conversations, meetings, and presentations more effective forms of communication:

- Be prepared; don't waste anyone's time or focus.
- Prepare a written agenda and hand it out at the start of the meeting to keep the group focused on the desired topics.
- Speak clearly and at a volume that is easy to hear, but not too loud so as to be distracting.
- Be professional and respectful; don't interrupt when others are speaking.
- Use eye contact.
- At the end, recap your key points and identify next steps.

In sales, time is money so conducting effective and efficient meetings is critical to your success.

Etiquette for Requesting and Giving Business Cards

Business cards are a branding tool for your company and a way to stay in touch with your customers and other people in your network. In fact, giving out and requesting a business card is considered good etiquette. Here are some tips to exchange business cards in a professional manner:

- Carry your business cards in a case or protective holder; never give anyone a card that is worn, dirty, or out of date. Barbara Bergstrom, "Business Card Tips," *Orlando Business Journal*, July 3, 2009, <http://orlando.bizjournals.com/orlando/stories/2009/07/06/smallb3.html?t=printable> (accessed July 12, 2009).

- Always put a supply of business cards in your case when you attend a business event. Barbara Bergstrom, “Business Card Tips,” *Orlando Business Journal*, July 3, 2009, <http://orlando.bizjournals.com/orlando/stories/2009/07/06/smallb3.html?t=printable> (accessed July 12, 2009).
- Present your card with the print facing up so the recipient can easily read it. Barbara Bergstrom, “Business Card Tips,” *Orlando Business Journal*, July 3, 2009, <http://orlando.bizjournals.com/orlando/stories/2009/07/06/smallb3.html?t=printable> (accessed July 12, 2009).
- Never force anyone to take your card. Barbara Bergstrom, “Business Card Tips,” *Orlando Business Journal*, July 3, 2009, <http://orlando.bizjournals.com/orlando/stories/2009/07/06/smallb3.html?t=printable> (accessed July 12, 2009).
- When receiving a business card, take a minute to review the information to make sure you remember who gave you the card. Make any notes or comments on it later. Barbara Bergstrom, “Business Card Tips,” *Orlando Business Journal*, July 3, 2009, <http://orlando.bizjournals.com/orlando/stories/2009/07/06/smallb3.html?t=printable> (accessed July 12, 2009).

Watch this video for a demonstration on The Etiquette of Exchanging Business Cards



This is the right way to exchange cards.

Source: BNET

Etiquette for Business Meals

The purpose of a business breakfast, lunch, or dinner is to get to know someone and build a relationship. As you learned in Chapter 3, to engage in business entertainment is considered part of the sales job description. Table manners are a form of nonverbal communication, and impolite etiquette can reverse all the effort you have put into a relationship. Business meals are so important that many companies use business lunches or dinners as part of the interview process. Whatever the situation, you want to be prepared with proper etiquette for the occasion.

10 Ways To Demonstrate Your Business Etiquette

<https://www.indeed.com/career-advice/career-development/business-dinner-etiquette>

Etiquette for Giving and Receiving Gifts



High Tech, High Touch

The year was 1982, and the world was just beginning to realize the amazing potential of computer technology. John Naisbitt wrote a book called *Megatrends: Ten New Directions Transforming Our Lives*, where he coined the term “high tech, high touch,” which he defined as the contradictory state in which people are driven by technology yet long for human interaction. John Naisbitt, *Megatrends: Ten New Directions Transforming Our Lives* (New York: Grand Central Publishing, 1998). He wrote about how the United States has been transformed from being comfortable with technology to being intoxicated with technology, a state he calls the “Technologically Intoxicated Zone” in his 1999 book, *High Tech/High Touch*. You probably can’t imagine living without your cell phone or personal digital assistant (PDA), iPod, computer, or other electronic devices. In fact, it’s likely you can’t even remember what communication was like before the Internet.

Technology, with all of its efficiency and benefits, cannot, however, become a substitute for old-fashioned human efforts. “Technology makes *tasks* easier, but it does not make our *lives* easier,” according to July Shapiro in a recent article in *Advertising Age*. July Shapiro, “A Digital Myth: Technology Doesn’t Make Life Easier,” *Advertising Age*, May 11, 2009, adage.com/digitalnext/post?article_id=136533 (accessed May 12, 2009). Shapiro’s observation is true, especially as it relates to business; sometimes, the crush of technology takes precedence over business etiquette. However, people have begun to rethink the lack of personal interaction and its corresponding etiquette in the workplace. Yes, “there’s even an app for that”; a firm named Etiquette Avenue has recently launched an iPod app for business etiquette. The fact is, technology isn’t personal and can’t behave in the right way at the right time with your customer or on an interview; that’s completely up to *you*. CommercialKid, “iPhone 3g Commercial ‘There’s an App for That,’” video, <http://www.youtube.com/watch?v=szrsfeyLzyg> (accessed July 16, 2009). “Good Advice in Bad Times: New Etiquette Avenue iPhone App Puts Professional Protocol at Fingertips,” *Business Wire*, June 29, 2009.

Now, we’re seeing a bit of a reverse movement: Technology is so pervasive in selling that salespeople are actually pushing back on their managers and asking them for more face time and less gadget time. One of the best opportunities for sales managers and their salespeople to discuss business problems and build relationships with one another has traditionally been during “windshield time,” which is the time in the car driving between sales calls. “Sales reps report that the intrusion of technology has stolen this valuable time from reps and their principals [bosses],” according to a recent article in *Agency Sales*, because as soon as they get into the car to drive to the next call, the sales manager pulls out his BlackBerry. “If there’s one thing I could tell my principals [bosses] when they come see me in the field is to ditch the electronic communications and pay attention to me and our customers,” said one salesperson quoted in the article. “Reestablishing the Inside Connection: Open Communication with Inside Sales Strengthens the Rep Bond,” *Agency Sales* 39, no. 5: 38. It’s no surprise that there’s a need for business etiquette, especially as it relates to technology.

Being Connected versus Being Addicted

In a recent pitch to a potential client, a marketing executive in Manhattan thought it was strange that his potential customer was so engaged with his iPhone that he hardly looked up from it during the meeting. After ninety minutes, someone peeked over the customer’s shoulder and saw that he was playing a racing game on his iPhone. This was disappointing, but not shocking according to the marketing firm that was doing the presentation; they continued with their pitch because they wanted the business. Some are not as tolerant. Billionaire Tom Golisano, a power broker in New York politics, recently announced that he wants to have State Senate majority leader Malcolm A. Smith removed from office because Smith was focused on his BlackBerry during a budget

meeting with him. Recently, in Dallas, Texas, a student lost his opportunity for an internship at a hedge fund when he checked his BlackBerry to check a fact during an interview and took an extra minute to check his text messages at the same time. Alex Williams, “At Meetings, It’s Mind Your Blackberry or Mind Your Manners,” *New York Times*, June 22, 2009, A1. It’s no surprise that BlackBerrys are also called “CrackBerrys.” According to Maggie Jackson, author of *Distracted: The Erosion of Attention and the Coming Dark Age*, we are living in “an institutionalized culture of interruption, where our time and attention is being fragmented by a never-ending stream of phone calls, e-mails, instant messages, text messages, and tweets.” Patrick Welsh, “Txting Away Ur Education,” *USA Today*, June 23, 2009, A11.

The need to be connected should not overwhelm respect for colleagues and customers. Although texting has become a national pastime, especially among teenagers, it’s important to know the appropriate etiquette for the use of handheld electronic devices when conducting a sales call.

First, it’s best to turn off your electronic devices *before* you enter every meeting. If you think you can’t live without checking your text messages, think about how you would feel if you went on a job interview and the person with whom you were meeting was checking his electronic device during your interview. Just because some people demonstrate bad behavior and check their electronic devices for messages during a meeting doesn’t make it appropriate. In fact, it will help you stand out as a good listener, and you will make your customer feel even more important when you focus exclusively on her, as shown in this video.

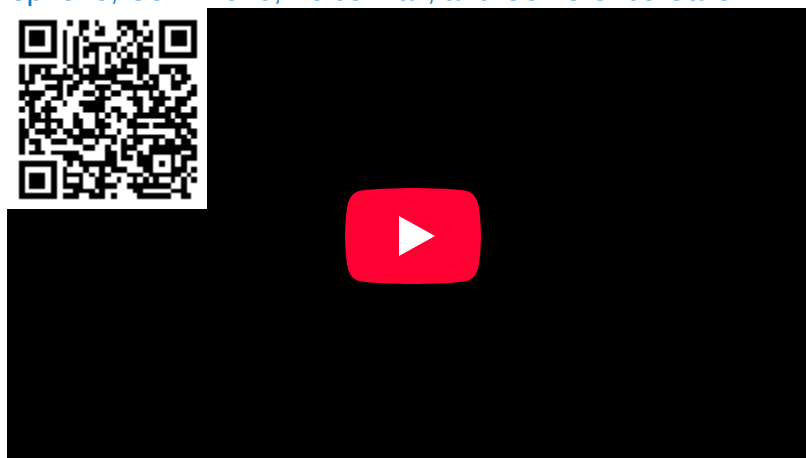
To Text or Not to Text



Learn about appropriate business etiquette.

Source: eHow.com

Etiquette Tips for Telephone, Cell Phone, Voice Mail, and Conference Calls



Sometimes, however, the use of technology is entirely necessary to conduct business when personal interaction is impossible. It’s important that verbal communication that is not face-to-face is effective and professional. Because you don’t have the benefit of

using or seeing the receiver's nonverbal communication, the challenges for effective and appropriate communication are even greater.

Here are some dos and don'ts of telephone etiquette:

- *Do* be aware of the volume of your voice when you are speaking on the phone in the office or on a cell phone.
- *Do*, when using a speakerphone, conduct the call in an enclosed or isolated area such as a conference room or office to avoid disturbing others in the area.
- *Do*, when leaving a voice mail message, speak slowly, enunciate, spell your name, and leave your number (this makes it much easier for the recipient to hear your message the first time).
- *Do*, when you leave a voice mail message, be specific about what you want: make it easier for the caller to get back to you and include what time you will be available for a callback to avoid playing telephone tag.
- *Do* customize your voice mail message: create a different message for each of your customers or prospective customers so the message is personal and relevant. Keith Rosen, "Eight Tips on Crafting Effective Voice Mail Messages," AllBusiness.
- *Do* speak with enthusiasm: it's best to convey a smile in your voice, especially if it is the first time you are calling or leaving a message for someone. Keith Rosen, "Eight Tips on Crafting Effective Voice Mail Messages."
- *Don't* take another phone call during a meeting. Joanna L. Krotz, "Cell Phone Etiquette: 10 Dos and Don'ts."
- *Don't* discuss confidential or personal issues during business calls.
- *Don't* discuss confidential issues in public areas—you never know who might overhear a conversation in the hallway, on a train, or in other public areas.
- *Don't* leave a long, rambling voice mail message: be prepared with a message that is no longer than sixty seconds. John R. Quain, "Quain's Top Ten Voice Mail Tips," *Fast Company*, December 18, 2007 (accessed July 17, 2009).
- *Don't* multitask during a long phone call or conference call—give the other person or people the courtesy of your full attention.

Etiquette Tips for E-mails, Text Messages, Instant Messages, and Social Networks

Written communication has evolved to include multiple methods, all of which have appropriate places in selling. Notice the operative word here is *appropriate*. E-mail has become an accepted method of communication in most businesses, whereas text messages, instant messages, and social networks are commonplace for only some companies. That's why etiquette is especially important when using any of these methods of communication, and you should take time to choose your method carefully. Letters, memos, proposals, and other written communication are considered formal, whether they are sent on paper or transmitted via e-mail. However, text messages, instant messages, and social networking are considered informal methods of communication and should be used only to communicate less formal information, such as a meeting time when schedules have been adjusted during a factory tour. Text and instant messages should never be used to communicate company policies, proposals, pricing, or other information that is important to conduct business with customers. It's also worth noting that in all these methods your communication is permanent, so it's a good idea to know the dos and don'ts of electronic communication.

- *Do* use an e-mail subject line that clearly tells the recipient about the content of the e-mail.
- *Do* create a short, concise message that uses proper grammar and spelling—use spell-check to be sure all words are spelled correctly. "Shouting and Other E-mail Faux Pas," *BusinessLine*, April 20, 2009.
- *Do*, in all electronic communications, use uppercase and lowercase letters as grammar dictates. "Shouting and Other E-mail Faux Pas," *BusinessLine*, April 20, 2009.
- *Do* use e-mail, text messages, and instant messages when appropriate, according to your company's practices, and with your customers to communicate factual information such as to confirm meeting date, time, and location. Patricia M. Buhler, "Managing in the New Millennium: Six Tips to More Effective Communication," *Supervision* 70, no. 7 (July 2009), 19.
- *Do* use social networking sites to join the conversation and add value—you can build your personal brand by creating a blog or joining a professional conversation on social networking sites such as Twitter or Facebook. Norman Birnbach, "10 Twitter Etiquette Rules," *Fast Company*, July 2, 2008, <http://www.fastcompany.com/blog/norman-birnbach/pr-back-talk/10-twitter-etiquette-rules> (accessed July 17, 2009).
- *Don't* use all capital letters in an e-mail; it appears that you are shouting or angry. "Shouting and Other E-mail Faux Pas," *BusinessLine*, April 20, 2009.
- *Don't* use "Reply to All" unless it's absolutely necessary that all the recipients see your response—be selective to avoid mailbox overload.
- *Don't* send an e-mail, text message, or instant message when you are angry: take the time to think about what you send because you can't take it back after it's sent. Paul Glover, "Why We Need E-mail Etiquette," *Fast Company*, December 30, 2008,

<http://www.fastcompany.com/blog/paul-glover/surviving-workquakec/why-we-need-e-mail-etiquette> (accessed July 17, 2007).

- *Don't* use abbreviations like “ur,” “2b,” and others—this is not appropriate business communication. Norman Birnbach, “10 Twitter Etiquette Rules,” *Fast Company*, July 2, 2008, (accessed July 17, 2009).
- *Don't* use company e-mail, text message, or instant message accounts to send personal correspondence, and don't check your personal accounts or pages during company time, as all communication that takes place on company hardware and servers is property of the company.
- *Don't* use electronic communication to transmit bad news: talk to the person first, and if follow-up is necessary, reiterate the information in written form.
- *Don't* use text messages, instant messages, or social networks to communicate information such as pricing, proposals, reports, service agreements, and other company information that should be sent using a more formal method.

Understand what makes a good impression on your customers.

Source: eHow.com

✓ Power Point: Lessons in Selling from the Customer's Point of View

When the Customer Tweets

Social media give customers a voice like never before. When companies listen to customers, they can turn a bad situation into a good one; but if they don't respond, customers speak out. For example, a dissatisfied Virgin America passenger posted a tweet on Twitter during a flight to Boston, thanks to the Wi-Fi service onboard. Virgin America monitors Twitter so closely that by the time the plane landed, a ground team met the customer at the gate to be sure his needs were met, and he left the airline with the memory of extraordinary service. Gerhard Gschwandtner, “Wow Your Customers with Twitter in Real Time,” *Selling Power*, (accessed July 23, 2009).

Music to Your Ears

When is an iPod or other MP3 player or a handheld gaming device appropriate at work? Only when it is used for business purposes. “You're isolating yourself,” says Dale Chapman Webb, founder of The Protocol Centre in Coral Gables, Florida. “You are sending a message that my music is more important than the work at hand.” If you feel the need to listen to your iPod or use handheld gaming devices at work, sales may not be the right profession for you.

Key Takeaways

- Proper **etiquette** is a necessity in selling. There are etiquette guidelines for virtually every form of communication, including conversations, meetings, business cards, business meals, thank-you notes, e-mails, text messages, and even social networking.
- **Written communication** should always include proper grammar and spelling. This applies to formal business communications such as letters and memos, as well as informal business communications such as e-mails and text messages.
- **Written communication** such as letters, reports, and memos are considered formal methods of business communication; many formal communications are transmitted via e-mail. Text messages, instant messages, blogs, and social networks are considered informal communications and should only be used for informal communications such as confirming a meeting place when noise is an issue, such as on a factory floor.
- It's best to remember that most **written communication** is permanent, so take the time to craft it carefully.
- Professionalism should prevail in all business meetings and communications, including meals. When you are at a restaurant, it's a good idea to remember BMW: **B**read to the left, **M**eal in the middle, **W**ater goblet to the right. Use silverware starting with the utensils on the outside and work your way in throughout the meal.
- You can add a personal touch to a business relationship by sending a thank-you note. Although it is acceptable to send a thank-you note via e-mail, it is recommended to send a personal handwritten note to reflect a sincere sentiment that really stands out.
- It is never appropriate to use an electronic device such as a cell phone, BlackBerry, or iPhone while you are talking with someone else. Turn off your devices before you enter a meeting.
- When talking on the phone, be courteous and use an appropriate volume in your voice. Never discuss confidential or personal topics on the phone when others might overhear.

? Exercise 5.3.1

1. Assume you work for a textile manufacturer. Draft a letter to invite your customer to tour your company's factory next month. Choose a specific date, time, and location for your tour to be included in your letter. Who, if anyone, should be included as a CC? Why? Who, if anyone, should be included as a BCC? Why?
2. Create a voice mail message that you would leave on a customer's voice mail if you were calling to set up a meeting to follow up from your first sales call. What information is essential to be included in the voice mail? What information should *not* be covered in the voice mail?
3. You are scheduled to meet your customer for an off-site training meeting. You just realized you are at the wrong meeting location, and you need to contact your customer and let her know that you are on your way to the right location. What is the best method to communicate with your customer? What would your message be?
4. You just learned about a delayed shipment date for your customer's order. What is the best method to communicate this to your customer?
5. You are in a meeting with a customer, but you have a potential problem that is developing with a different customer. You are expecting a phone call about the second situation during your meeting with the other customer. How would you communicate this to the customer with whom you are meeting?
6. You are at a business dinner with your boss and her husband in a very nice restaurant. Watch the following video and answer the following questions.

(click to see video)



Source: BNET

- o From which side of the chair do you sit down?
- o How do you determine which bread plate is yours?
- o When do you put your napkin on your lap?
- o When someone asks you to pass the salt, what do you do?
- o When you want to excuse yourself, what is the appropriate way to do it?

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