



Session 8: Communication & Etiquette



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Purpose Of This Session

***To teach you how to
properly conduct
business functions and
communicate in-person,
at your office, and in
writing.***

Session# 8 Outline

- I. In-Person Etiquette
- II. Office Operations
- III. Written Communication

I. In-Person Etiquette

Introducing Someone

- Use Full Name
- Use most important person's name first

Forgetting Someone's Name

- Ok To Admit It
- "My name is ____ and I can't recall if we have met?"
- "Your face is familiar but I can't recall your name?"

Entering A Revolving Door

- You go first
- You are available to receive guest on other side

3 Foot Rule

- Stand no closer
- Stand no farther
- Understand international etiquette

Discussion In Public Places

- Never discuss private matters
- You never know who can hear what you are saying

Should You Inform Someone That Their Zipper Is Down?

- Yes – wouldn't you want to know?
- Discreetly pull them aside and politely inform them

Dress Code For Meetings

- Know who you are meeting with
- 55% of first impression is on how the person dresses
- 45% of first impression is based on body language

Unsure of dress code?

- Dress a little nicer than expected
- If you are concerned you can always ask.

Confirming Meetings

- Call day of meeting to confirm the time
- Double check your directions

Arriving For Appointments

- Don't Be Late – Allow Time
- Don't walk in office more than 5 minutes early. Wait outside.

Cell Phones

- Turn off before entering office
- Never answer calls or email during a meeting, unless previously negotiated with the other person

Greeting The Receptionist

- Smile & Identify Yourself

"Hello My Name Is ____ and I have
a ____ appointment with ____"

Meeting For The First Time

- Extend your hand to shake
- Introduce yourself first and
thank the person for meeting
with you

Shaking Hands

- Right hand to Right Hand
- Offer Your Hand First
- Not too limp, not too firm

Starting A Meeting

- Restate Your Purpose

- Agree on length of meeting

- Get the other person engaged by asking a question

Exchanging Business Cards

- Either at very beginning or very end

- Never exchange cards during a meal or meeting with food

II. Office Operations

Meetings At Your Office

- Confirm date/time with all attendees in advance
- Have a predetermined agenda
 - Start on time!

Meetings At Your Office

- Have a designated leader
- Assign approximate times for each item on the agenda
- Schedule follow-up before departing

Office Decor

- Keep it clean and professional
 - Reinforce your brand
- Put cleaning guidelines in writing

Dress Code

- Explain your dress code to employees in writing
- Give examples
- Realize that you may have guests who will see office staff

Handling Phone Calls

- Have a separate business line or cell phone to take calls
- Plan your recorded voicemail greeting
- Promptly return calls

Answering the phone

- Identify your company and yourself
- Ask how you can help
- Listen closely and take notes

Leaving a message

- Identify yourself and company
- Purpose for your call
- Leave call-back information but offer to call back

Handling angry customers

- Stay calm
- Speak softly – slow pace
- Listen. Say you understand and repeat back what they said.

III. Written Communicaton

"Never put in writing something that you would like to show up in a courtroom"

Email is Not Private

- Send no confidential information
- Don't send large attachments
- Avoid forwarding jokes and chain letters. Keep it professional.

Business Email

- Different address than personal
- Include full signature with contact information
- Use consistent format

Email Format

- Clear & concise subject line
- Greeting
- State Purpose
- Keep it short and readable

Written Letters

- State purpose
- Elaborate options and next steps
- Build relationships
- Follow consistent format

Full Block Format

Your Address

Date

Their Address

Greeting

SUBJECT

Body

Signature

123 Main Street
City, State Zip Code

January 1, xxxx

Mr. John Doe
Jim's Lawn Mowing Service
567 Cross Street
Jimstown, California 90011

Dear Mr. Doe:

REQUEST FOR PRICE QUOTE

We would like to have your company prepare a written quote to mow our lawn every week for the entire summer.

Sincerely,

Susie Smith

Modified Block Format

Your address

Date

Their Address

Greeting

SUBJECT

Body

Signature

123 Main Street
City, State Zip Code

January 1, xxxx

Mr. John Doe
Jim's Lawn Mowing Service
567 Cross Street
Jimstown, California 90011

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Written Contracts

A contract is an agreement between two parties in which there is a promise to do something in return for a valuable benefit known as "consideration."

Written Contracts

- Include:
- Names of parties involved
 - Description of work
 - Dates & deadlines
 - Payment terms
 - Ownership rights
 - Liability clauses
 - "Riders"

Email Questions?

Mailroom@TheBusinessCourse.com

Assignment

Create A Contract Template
For The Business You Have
Chosen or Create A Welcome
Letter/Email For A New Customer



Next Session:
Filing, Record Keeping
&
Time Management
