Essential Office Etiquette
Facilitated by ATTE - The Training Edge (Pty) Ltd
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You have chosen Business Etiquette as one of your continuous professional development activities for 2012.

We are going to have fun but when you have completed the program you will be able to:

• Identify and correct protocols for business etiquette for a range of business scenarios
• Apply the techniques required to build and project a professional image through professional behaviour
• Describe appropriate and inappropriate behaviour in a range of workplace settings
**PROGRAMME MAP**

**Session 1:** Etiquette and Rules of Behaviour

**Session 2:** Dealing with Colleagues

**Session 3:** Professional Conduct

**Session 4:** Dealing with Difficult People and Issues Professionally

**Session 5:** Etiquette in Meetings

**Session 6:** Netiquette

**Session 7:** Etiquette in and around the Office

**Session 8:** Business Entertainment the Professional Way
Essential Office Etiquette 2012
DELEGATE GUIDE

Session 1

Etiquette and Rules of Behaviour

The etiquette of business is the set of written and unwritten rules of conduct that make social interactions run more smoothly. Office etiquette in particular applies to co-worker interaction, excluding interactions with external contacts such as customers and suppliers.

These rules are often echoed throughout an industry or economy. For instance, 49% of employers surveyed in 2005 by the American National Association of Colleges and Employers found that non-traditional attire would be a “strong influence” on their opinion of a potential job candidate.

Both office and business etiquette overlap considerably with basic tenets of netiquette, the social conventions for using computer networks.
Personal Behaviour

Personal behaviour indicates that etiquette is something we acquire and practise as individuals. You learn appropriate behaviour at home, how to speak to adults, how to eat in a proper manner and how to use a telephone. This is further taught at school and as a young adult entering the business world, you knew how to conduct yourself in a polite society.

We must take cultural and religious backgrounds into account when we discuss etiquette. Office etiquette therefore has some standard rules, which can be learnt and practised on a daily basis.

Polite Society

Polite society is about order, about respect for others and about earning their respect in return. As proper behaviour in your own community is important, so is it in the office, thus having mutual respect for people who have different cultures and views.

EXAMPLE

You may believe that eating with a knife and fork is correct, but your Chinese colleague may believe chopsticks are the proper way.
Conventional Rules

The rules of office etiquette are unique to every organisation and it is important that you understand the rules in your environment in order to succeed.

Questions you may ask include:

- ‘Whose rules of conduct do I follow?’
- ‘What is the appropriate behaviour?’
- ‘Will I be appropriately dressed?’

Those who have mastered the rules of etiquette will instinctively know the answers to these questions. They might respond as follows;

“I will conduct myself according to the ‘conventional rules’ of my host, superior or the person to whom I wish to show respect.”

How you greet someone, how you dress, how you eat, the way you write letters, how well you make a presentation; all of these can make the difference between sending the correct message, making the right impression, or not making a good impression, which might ruin a great career.
Dealing with Colleagues

There are many definitions for relationship management but about.com defines it as follows:

*It is the process of establishing a mutually beneficial relationship with other business people and potential clients and/or customers.*

Relationships are needed for every facet of your career. From the interview for your first job to your speech at your retirement party—relationship skills are the common denominator for nearly all successful employees.

In fact, research has found that as many as 80% of ‘first job’ graduates who are fired during their first year of work are let go because they don’t have adequate relationship skills and cannot get along with co-workers (NACE, 2000).
The Elements of a Relationship

To begin, let’s look at six necessary elements to any positive relationship. Perhaps you can assemble a more impressive, more complex list, but these comprise a core from which you can build any relationship.

**Self-Respect**
To treat yourself as worthy of attention, esteem, regard, and consideration is the first step. Just as charity begins at home, respect begins with oneself. You cannot give what you don’t have and you cannot respect another person without a healthy dose of self-respect.

**Mutual Respect**
This critical element must flow freely through the relationship, from yourself to the other individual and back to you again. It must continue for the relationship to be successful.

**Compassion**
A degree of compassion is necessary in any relationship, even a business relationship that is going to endure past necessity. Many relationships based on self-interest, without honest compassion, can exist briefly but only for a specific purpose. Compassion assumes a genuine concern for the other, and never with an ‘agenda.’
Co-operation
Operating in a joint effort, towards a common purpose builds relationship strength as surely as any muscle building activity builds physical strength. We hear about ‘building a team’ from the time we are old enough to play soccer or netball, but many of us cast it aside when we outgrow the playground.

Mutual Trust
With team work comes mutual trust. It is reliance based on the truthfulness, character, integrity, and the proven ability of the other individual, as you experience it over time. Trust is always earned through experience with the other person and there’s no way around it. You cannot demand it and you cannot fake it. You must make deposits to the relationship account and only then can you withdraw the trust.

Commitment
Commitment is an agreement, a pledge, and it must be 100% there to count. It’s an all or nothing undertaking. Commitment is nothing more than a decision and, like most decisions, it’s only difficult if it’s avoided. Sitting on the fence has never been comfortable! Once the decision is made, the execution follows along easily.
Another potential stumbling block to establishing positive relationships is the assumption that other people view the world in the same way that you do. There are many forms of diversity that can lead to misunderstandings and undermine trust.

**These include:**

- **Communication styles**
  All people do not communicate in the same way. There are many inventories available to identify differing styles and we will explore this in more detail later. Once you understand a person's communication style, this knowledge can lead to respect rather than conflict.

- **Non-verbal communication**
  All forms of communication must be considered. This form of communication is less obvious, but no less important. Non-verbal communication includes body language, and tone of voice. Non-verbal communication may differ from the verbal. With this additional understanding of what is really being communicated more effective collaboration is possible.

- **Learning styles**
  People learn in different ways. People gather information, make decisions and think about the world in their own way. Appreciating that others experience the world differently form the way that you do means you can be more open to their approach.

- **Boundaries**
  Boundaries are the limits you place on the behaviour of others around you. We all have different needs for personal space – psychological ‘walls’ beyond which we do not allow others. First be aware of peoples’ boundaries and then use this understanding to approach them respectfully. Observing the boundaries of others avoids conflict and strengthens relationships.
• **Differing values**

This concept can be a little tricky. While values need to be identified and respected, there are times when conflicting values can be so different that they cannot co-exist on the same team. In this case, we need to take boundaries into account.

• **Company culture**

Seasoned employees have come from different companies and each company has a culture. This must be identified and respected to ensure successful integration into the current company. This concept is especially pertinent to mergers and acquisitions.

• **Culture of the country**

With the global nature of our business, employees often come from different countries, each with different habits and ways of doing things. In order to successfully integrate multicultural differences, these differences must be understood, articulated, and respected.

• **Family cultures**

The influence of our backgrounds is enormous. Often we ignore these differences because it is said ‘they do not belong in the workplace’. However the reality is that people cannot keep who they are out of the work environment. The key here is to recognise when the source of the conflict is based on someone’s family/personal issues. Conflicts rooted in familial history are rarely worth confronting. They are best ignored.

Office etiquette in the workplace is determined by two factors: specific cultural values and norms AND good manners and common courtesies. Senior management establishes the rules and sets the tone in the office. All etiquette issues, such as attire and behaviour should be documented and managed by senior management.

**Let’s now look at some of the areas where relationships play a key role in correct office etiquette.**
Displaying Affection

A degree of fondness is necessary in any relationship, even a business relationship that is going to endure past necessity.

**However remember:**

- Avoid showing inappropriate physical affection to others, it is inappropriate in some cultures, the workplace and could be termed as sexual harassment.
- Sexual advances, which is inappropriate at work anyway; runs the risk of being considered to be sexual harassment, especially when they are not returned.

Addressing Colleagues

How the person introduces themselves to you the first time you meet them is how you should address them i.e. if they are formal, you remain formal, if they are more informal introducing themselves by their first name then you need to mirror that. If, after a period of time, they change that, respect the change and adapt to the new request e.g. “We will be working together for while please call me Susan.” Where previously Susan introduced herself as “Dr. Doe”

- Call colleagues by their names - nicknames might be appropriate in a sports team but not in the workplace.
- If a term of address offends you, politely tell the person and give the name you prefer.
- To maintain professionalism, family members who work together should avoid using pet names and nicknames and avoid discussing family issues at the office.
- Never address anyone with words such as ‘honey, darling, love, dear or sweetheart’
Conversations at Work

You spend most of your life at work and therefore you will socially interact with your colleagues.

Take note of the following:

- Excessive social chit-chat, office gossip, politics and anything very personal should be avoided. “Say nothing, then there is nothing!”
- Criticising or reprimanding someone in front of others is hurtful and shows insensitivity - rather call the person aside and address any issues in private.
- Give praise where praise is due.
- Don’t discuss your personal affairs at work, if your need help go to an appropriate professional like a counsellor, doctor etc.
- Avoid sexist or racist jokes, especially in a large organisation with a diverse workforce.
- Avoid asking personal questions and do not feel obliged to answer personal questions.
- Don’t shout to get someone’s attention - it reflects laziness and disrespect for the person you are calling and other around you.
- Don’t converse in front of others in a language they don’t understand - the official business language in South Africa is English - use it.
- Make sure that anything shared with you in confidence whether work-related or personal stays that way.
- Avoid losing your temper at work or becoming aggressive - it shows poor emotional intelligence and is not professional.
- Always say please and thank you and try to learn the terms in all 11 official languages.
Etiquette for Personal Contact

We have all had experiences where the people around us do not observe the etiquette of respecting our private space and you will agree that this can make you feel very uncomfortable. Classic examples would be somebody invading your personal space in a queue in the supermarket, a stranger on the street standing too close to you ate the robot or the vendor on the street corner putting his face through your window.

In business there are also protocols that you need to be aware of and observe in terms of other people’s personal space.

Introductions

Knowing the rules is critical because it will help you feel more relaxed and confident and make the subsequent interaction with the other person or people much easier. When meeting someone for the first time, expect three things: eye contact, a smile and a handshake.

Who is first?:-

- When making an introduction, remember, that in business age and gender play no role; rank and authority do. If the two people being introduced are of similar seniority or importance, first introduce the guest or visitor to the other person, and use their correct titles.
- The rule is that people of lesser authority are introduced to people with greater authority.
- Add minor background information to the introduction, as this is a good starting point of conversation for the two people who have just met. When they start talking to one another, you can excuse yourself.
- No matter the seniority, status or gender, a person seated should always stand up when being introduced.
- Although the person to whom one is being introduced usually extends their hand first, often both parties will extend hands at the same time.
- If you are the host to a function, make sure you welcome all your guests personally. If it is a function of high authority, the host will appoint a greeter. In this case the greeter has to introduce them self to guests and then make sure that he or she makes the appropriate all round introductions.
• When introducing someone to a group of male and female peers at work with no distinct seniority or importance, make the introduction more general and informal, for example, “Hi team, I’ll like you to meet…”

• After the introduction, say a few words about the person/people whom you have just introduced, and try to say something of special interest about them.

**Getting the names right:**

• Listen very carefully when being introduced and try to memorise the name of the person you’re being introduced to. If a name is unfamiliar, politely ask the person to repeat it. Then try to form a memory link by associating the name with an object or rhyme.

• Use the first available opportunity to use the person’s name in conversation.

• If someone introducing you mispronounces your name or gives you the wrong title, wait until the introductions are over and say: “Jim is not the first person to have trouble pronouncing my name, it is … (and give the correct one).” Or: “I am afraid Jim has given me a promotion (or demotion). Actually, I am now … (and give your title).”

• If you are the one making the introduction and you forget the name of the person you are introducing, you can say something like “I remember our last meeting at the Hilton Hotel. Please tell me your name again. I am having a memory lapse.”

• If you have been introduced to someone and you need to introduce them to a third party, and you have a memory lapse, ask the person who introduced you to the person to do the introductions.
Handshakes:

- Always shake hands with your right hand.
- In the company of African people, it is acceptable to use the modern African form of greeting.
- A handshake should be brief, and accompanied by a smile. Look the person directly in the eye and use words such as “how do you do?” and “pleased to meet you.”
- Remember that many African, Coloured, Malay and Indian people may prefer a soft grip.
- Do not squeeze another person’s hand as this may cause discomfort if one person is wearing sharp jewellery.
- Some Indian, Malay, Muslim or Jewish people may not offer their hands due to religious beliefs, a smile and nod is enough.
- Do not offer a wet or dirty hand.
- On formal business occasions and in public, it is inappropriate to kiss, hug or show any other form of body contact greeting other than a handshake.
- First-name terms in the workplace are acceptable providing that you give due respect to superiors, in terms of posture and body language.
**Personal Body Space**

- As a general rule in South Africa, an arm’s length away from the person you are greeting or talking to is considered appropriate.

- Even if you know the person well, avoid standing too close. You should be able to turn 360°, and not have physical contact with your colleagues. When you are queuing in the canteen or perhaps waiting in the foyer, the same rules apply. If a person enters your personal space, move one step back and keep your legs slightly apart, creating more space around you. Be careful that you are not too obvious with your gestures, as people might take offence. It is not polite to tell a colleague to move back as they are in your personal space.

- On formal occasions, even a couple should avoid any physical contact.
Romantic Interaction

Office romance is fairly common these days as the office is where we spend so much of our time. Handled well it can lead to a relationship. Handled badly it can lead to a lawsuit for harassment.

• **Be Discreet**
  With social networking sites and TV reality shows encouraging us to let the world into our most private moments, discretion may be a dying art. When it comes to a workplace romance, it is much better to keep your relationship private than it is to flaunt it. This doesn’t mean you should lie about it. Just don’t put it out there for everyone to watch unfold.

• **Set Rules and Have an Exit Plan**
  Make sure you and your partner are on the same page. Decide how you will proceed with your relationship as far as the office is concerned. Also figure out how you will handle it if your relationship doesn’t succeed.

• **Be Honest With Each Other**
  Honesty is, of course, important in any relationship, but dishonesty can add to the bitterness that often accompanies the end of a romance. You don’t want to end on bad terms, particularly because you will have to see each other regularly.

• **Don’t Let Your Feelings Get in the Way of Your Job**
  This may take quite a bit of effort, but if your feelings for your partner influence how you do your job, you may find yourself looking for a new one (job and partner).

• **Stay Within the Law**
  Sexual harassment suits are unpleasant for everyone involved. Be aware of what constitutes sexual harassment and avoid doing anything that can invite those accusations.

**NOTE**
It may be that your organisation has a policy in place that will address the matter of romantic interaction in the workplace.
Sexual Harassment

The problem of sexual harassment is increasing. Companies are starting to realise that the problem is real; some managers are admitting that it could affect their staff, and more victims are starting to gather the courage to complain. In terms of recent labour legislation, victims do have legal recourse. Every man and woman, who becomes aware of the implications of this issue, can help both companies and individuals to address this insidious and destructive problem.

A major issue is people’s diverging views on what constitutes harassment. Definitions vary - from verbal harassment by sexist, crude or suggestive remarks, through casual touching or open advances, to the extremes of coercion or blackmail if a manager has the power to threaten a subordinate’s job if she (or he) doesn’t “play along”, to attempted or actual rape.

It is difficult to pinpoint the problem: sometimes the more “innocent” forms of harassment - a stare making the woman feel uncomfortable, the too-personal comment, or “friendly” touching - may mean the man is testing her reaction and will move further if not clearly repelled.

Sexual harassment can consist of unwelcome sexual advances, requests for sexual favours in return for employment benefits, pressure for sexual favours to clinch sales deals, the display of sexually offensive posters, cartoons or drawings, or any other form of verbal or physical behaviour that the recipient regards as unwelcome or embarrassing.

Any of the examples above may represent harassment. In all cases it is the consequences, and not the intentions, that count. The severity of the harassment is to a large extent determined by the impact it has on the victim. So “It was just a joke” or “I had too much to drink” is no excuse.

Harassment usually relates to intimidation, exploitation and power; not to real, mutual personal attraction and respect.
Use the following guidelines to deal with potential sexual harassment:

- If any member of staff flirts with you, acts suggestively or harasses you in any sexual way, and this action is intentional and unwelcome, then this amounts to sexual harassment.
- Be assertive and confront the person without being rude.
- Report the matter to your supervisor or the human resources manager.

Accommodating Colleagues with a Disability

Disability is a condition caused by an accident, trauma, genetics or disease. The effects of the condition may include; limited mobility, hearing, vision, speech, and intellectual or, emotional function.

With sweeping legislative changes in employment equity, disabled persons have been afforded opportunities to join mainstream employment and knowing the correct etiquette and protocol when dealing with a disabled colleague or client has never been more important.

When you’re around someone who has a disability, be relaxed and talk about mutual interests. It’s okay to talk about the disability if it comes up, but don’t pry.
Guidelines for interacting with a colleague with a disability include:

- Always address the person first—not the disability. For example, say “a person with a disability” instead of “a disabled person.” Likewise, say “people who are blind” rather than “the blind,” and avoid old-fashioned terms such as afflicted, crippled or lame.

- Speak directly to someone who is hearing impaired, rather than to an assistant. Don’t shout, but speak clearly and slowly and remember that your colleague will rely on your eye contact, facial expressions and gestures in order to receive the message.

- Be patient if the person needs extra time to do or say something.

- If the person uses a wheelchair, sit down to talk so you’re at the same level.

- Listen carefully and patiently to a person with speech impairment. Avoid speaking for the person, and try to ask questions that require short answers.

- Don’t touch a guide dog or a wheelchair or crutches used by the person unless you’re asked to do so.

- Offer help if asked or if the need seems obvious, but don’t insist.

- If you are part of the day-to-day life of a person who has a disability, your emotional as well as physical support can be an invaluable source of strength.

It is therefore important that you:

- Learn the facts about the person’s disability. Knowing what to expect can help prepare you for future challenges.

- Know how and when to help. Respect the person’s feelings. Ask a person who uses a wheelchair if he or she would like assistance before you start pushing.

- Foster self-esteem. Be positive and encourage independence, to the extent possible. Help your colleagues look for new ways to achieve his or her goals.
All will certainly agree that success on the work front is one thing which every working professional wants to attain. Well there are several factors that decide your personal growth at your job. One thing that you can’t afford to miss out on this aspect is your behaviour or the official conduct. No matter how busy and dedicated you are towards your work you are probably going to not score any point if your official conduct isn’t acceptable. You need to also monitor your body language in the office and ensure that it corresponds with whatever you are claiming.

Watch what you wear. While this holds true for anyone, it holds even more signification for ladies. Your office is meant to be a place for work and not some fancy dress competition. At work, you should be dressed in a straightforward yet smart fashion.
Professional Communication

Effective communication is about conveying your messages to other people clearly. It’s also about receiving and interpreting information that others are sending to you, with as little distortion as possible. Doing this involves effort from both the sender of the message and the receiver. If the process is not used properly, messages can get muddled by the sender, or misinterpreted by the recipient. When this happens, it can cause tremendous confusion, wasted effort and missed opportunity.

Communication is only successful when both the sender and the receiver have the same understanding of the same information as a result of the communication. By successfully getting your message across, you convey your thoughts and ideas effectively. When not successful, the thoughts and ideas that you actually send do not necessarily reflect what you think, causing a communications breakdown and creating barriers that stand in the way of your goals – both personally and professionally.

In a recent survey of recruiters from companies with more than 50,000 employees, communication skills were cited as the single more important decisive factor in choosing managers. The survey, conducted by the University of Pittsburgh’s Katz Business School, points out that communication skills, including written and oral presentations, as well as an ability to work with others, are the main factor contributing to job success.
Communication Styles

A useful factor in building positive relationships is to understand that each person has a unique communication style. Once you recognise communication styles you can adjust your own to communicate more effectively. Ideally this is mutual, but if the other person does not adjust their style, it is up to you to accommodate and adjust to make the interaction as successful as possible.

Being able to communicate effectively is therefore essential if you want to build a successful career. To do this, you must understand what your message is, what audience you are sending it to, and anticipate how it may be perceived. You must also weigh-in the circumstances surrounding your communications, such as situational and cultural context.
Below is a diagram showing how you would recognise each of the communication styles.

**THE DRIVER**
- Action oriented.
- Good at starting things, getting results, taking control and making decisions.
- Loves to compete and loves to win.
- Has strong opinions.
- More concerned about getting things done than forming relationships.
- Takes charge!

**THE ANALYST**
- A thinking person.
- Good at figuring things out.
- Good at planning action, gathering data.
- Can look at the pros and cons of each step.
- Plans for delays, works methodically; meets deadlines.
- May seem stand-offish; likes to work alone.
- Produces excellent results.

**THE SUPPORTER**
- Is sociable.
- Relates to others through warmth and friendliness.
- Lets others take the lead.
- Creates and maintains cooperation.
- Shares credit.
- Sticks to tried and true methods.
- Likes informality; uses personal influence to get things done.
- May be overly concerned about what others think.
- Prefers working on a team.

**THE EXPRESSER**
- Promotes ideas.
- Relates to others through the power of personality.
- Creates energy and enthusiasm.
- Generates ideas and motivates others.
- Takes risks.
- Works intensely.
- Leaves details to others.
- Hates routine tasks.
- Usually prefers to work with others, but as the leader of the group.
How to deal with each of these communication styles:

<table>
<thead>
<tr>
<th>Factors:</th>
<th>Expresser</th>
<th>Driver</th>
<th>Supporter</th>
<th>Analyst</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to recognise:</td>
<td>They get excited.</td>
<td>They like their own way; decisive with strongly-held viewpoints.</td>
<td>They like positive attention, to be helpful and to be regarded warmly.</td>
<td>They seek a lot of data, ask many questions, and behave methodically and systematically.</td>
</tr>
<tr>
<td>Tends to ask:</td>
<td>Who? (the personal dominant question.)</td>
<td>What? (the results oriented question.)</td>
<td>Why? (the personal non-goal question.)</td>
<td>How? (the technical analytical question.)</td>
</tr>
<tr>
<td>What they dislike:</td>
<td>Boring explanations and wasting time with too many facts.</td>
<td>Someone wasting their time trying to decide for them.</td>
<td>Rejection, being treated impersonally, uncaring and unfeeling attitudes.</td>
<td>Making an error, being unprepared, spontaneity.</td>
</tr>
<tr>
<td>Reacts to pressure and tension by:</td>
<td>‘Selling’ their ideas or being argumentative.</td>
<td>Taking charge - taking more control.</td>
<td>Becoming silent, withdrawing and becoming introspective.</td>
<td>Seeking more data and information.</td>
</tr>
<tr>
<td>Best way to deal with them:</td>
<td>Get excited with them, show emotion.</td>
<td>Let them be in charge.</td>
<td>Be supportive; show you care.</td>
<td>Provide lots of data and information.</td>
</tr>
<tr>
<td>Likes to be measured by:</td>
<td>Applause, feedback, recognition.</td>
<td>Results and goals.</td>
<td>Friends, close relationships.</td>
<td>Activity that leads to results.</td>
</tr>
<tr>
<td>Must be allowed to:</td>
<td>Get ahead quickly. Likes challenges.</td>
<td>Get into a competitive situation. Likes to win.</td>
<td>Relax, feel, care, and know you care.</td>
<td>Make decisions at own pace and not be cornered or pressured.</td>
</tr>
<tr>
<td>Will improve with:</td>
<td>Recognition and some structure to reach a goal.</td>
<td>A position that requires cooperation with others.</td>
<td>A structure of goals and methods for achieving each goal.</td>
<td>Interpersonal and communication skills.</td>
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<tr>
<td>Likes to save:</td>
<td>Effort.</td>
<td>Time.</td>
<td>Relationships. Friendship means a lot to them.</td>
<td>Face. They hate to make an error, be wrong or get caught without enough info.</td>
</tr>
<tr>
<td>For best results:</td>
<td>Inspire them to bigger and better accomplishments.</td>
<td>Allow them freedom to do things their own way.</td>
<td>Care and provide detail, specific plans and activities to be accomplished.</td>
<td>Structure a framework or &quot;track&quot; to follow.</td>
</tr>
</tbody>
</table>
Use your knowledge of communication styles when working in a team, or leading a group. Help others to understand one another.

**EXAMPLE**

- The Driver can intimidate others in a group with their direct, action-oriented style of communication. They’ll take charge even if it’s really someone else’s ‘show’.
- The Supporter’s informal chatty style can seem “unbusinesslike” but they’ll be stars for you in establishing consensus and getting the group to work together.
- The Analyst will produce excellent results, but will seem stand-offish to the Supporter.
- Everyone may have to outlast the waves of enthusiasm and intensity surging from the Expresser -- but they’ll all appreciate these qualities many times during the project.

When you’re negotiating or promoting your business or services, you’ll need to understand that you’ll have to let the Driver take the lead, give the Analyst plenty of time to consider what you’re presenting; spend extra time socialising with the Supporter; and help the Expresser get down to the detail level.

Good communication means being aware of the different styles of communication and working with the other, not against them. Understand where the other person is coming from, and you’ll get better results all around.
Using Body Language

Body language is the nonverbal and often unintended communication on the part of one individual to another. Nonverbal communication includes facial expressions, head movements, eye contact, hand gestures and body positions. In general, body language expresses an individual's emotions, feelings, and attitudes.

**Did you know that studies show that:**

- Non-verbal communication accounts for more than 55% of the impact you make;
- What you say accounts for 7% of your impact; and
- How you say it accounts for about 38%.

As a speaker, your movements, gestures, eye contact and facial expressions all send out messages to other people. Misunderstanding and confusion occur when your body language does not support what you are saying.

**EXAMPLE**

When you told your colleague about the promotion you had been given, she frowned and said, “That’s great” and turned back to her computer.

If your colleague really thought your promotion was good news, she would have used appropriate body language to support the spoken words. The appropriate body language would include:

- **Facial expression:** Your colleague would smile, not frown.
- **Action:** Your colleague would not turn away. Your colleague may have saved her work and asked for more details. Your colleague may have given you a hug or shaken your hand.

Being aware of what signals your body language are sending, and understanding the body language signals shown by your listeners, can make you a better communicator.
Posture
The way you position your body can indicate your feelings.

**EXAMPLE**

*When you are sitting:*

- Slouching can indicate low self-esteem or disinterest.
- Sitting at an angle or facing away from a person during a group discussion, appears rude and indicates that you want to leave.
- If you are interviewing someone and are leaning back on your chair, it can indicate boredom.
- If you are involved in discussions and are seated, crossing your arms could be interpreted as not being open to others’ ideas.

*When you are standing:*

- Shifting your body weight from one foot to another can indicate impatience.
- Standing with your arms crossed creates a barrier between you and the listener.

*Take note of the listener’s posture:*

- Leaning forward slightly, indicates keenness and interest.
- Leaning back a little will show the listener is relaxed, but leaning back too far can be interpreted as not being interested.
- Leaning back with your hands behind your head indicates contemplation, or scepticism.
 Movements  
Movements convey meaning and attract attention. They can be used to enhance oral communication, but keep these points in mind:

• **Appropriate Movements**  
Make sure movements are appropriate. If you are talking about something serious, do not wave your arms around wildly.

• **Distracting Movements**  
Your movements should never distract attention from your speech. If you make too many movements, your audience may pay more attention to your appearance than to what you are saying.

• **Excessive Movement**  
Excessive movement can give the impression that you are out of control. Pacing up and down a stage could indicate nervousness.

• **Artificial Movements**  
Your movements should look natural and spontaneous. Artificial movements and over-use of bodily movements will have a negative effect on the audience. If your movements look forced and unnatural, the audience may not believe what you are saying.
**Gestures**
A gesture is a form of non-verbal communication made with your hands, and can be used instead of verbal communication or in combination with it.

**It is important that you know the following:**

- Gestures are only effective if they are meaningful and expressive. If you want to emphasise that you are here, it is meaningful if you point downwards when you say “here”.
- You should only use gestures if they contribute to the impact of the message. Putting your hands together as if in prayer could be effective if you were pleading for something, but would be ineffective if you were demanding something.
- Gestures should be natural, open and free and not used too much. An abrupt and nervous gesture is ineffective and will detract from the effectiveness of your message.

**Eye Contact**
Eye contact with your listeners is very important and indicates that you are engaged in the conversation. Your listeners expect you to look at them.

**Benefits of eye contact include:**

- Eye contact portrays confidence and shows that you are at ease with the topic.
- You are able to receive visual feedback from your listeners, which is an important part of effective oral communication.
- Your message is transmitted properly and communication is not disrupted.
Facial Expressions

Your facial expressions reveal your feelings. While you are speaking, try and make sure your expression shows that you are enthusiastic, motivated, confident and interested in your subject. Be careful not to exaggerate your facial expressions, as this is a barrier to effective communication.

EXAMPLE

If you are talking about a serious topic and you make comical expressions, your audience will not take your speech seriously. A smile shows your enjoyment and pleasure and it adds warmth and intimacy to your talk.

Your Professional Image

Being thought of as a professional in your field takes a lot more than doing your work well. Even if you are good at what you do, you may find it difficult to reach the type of success you strive for unless you are also considered to be professional by others.

The following are points to remember when you are creating your own professional image:

- Always show respect for senior management and be loyal to them. They lay down the company rules and set the tone of the workplace and the relationships within it. They also uphold the image of the company.
- Show respect for your colleagues generally. You will quickly earn theirs’ if you do.
- Do not make people wait. Be on time for meetings and appointments. If you are going to be late, contact the person and inform them.
- Dress according to your company’s requirements. If the company has no dress code policy, dress in the same manner as senior management.

There are many different factors that go into creating a professional and well-respected image. While each individual factor can help increase your success, together these elements can create a professional and sought-after image your clients and potential clients will appreciate.
Quality of Work

It’s obvious that in order to be considered a professional by clients and peers, you need to work hard and be good at what you do. You may consider this to be the foundation for your entire image.

Factors that you should focus on as part of your professional image:

• **Responsiveness and customer service**
  The level of importance you place on your clients is an important element of creating a professional persona. Some facets of responsiveness and customer service may include:
  - Being willing to go the extra mile to make your clients happy
  - Responding to e-mail and phone messages promptly
  - Following up with clients after a project to ask for their feedback
  - Being willing to make recommendations and offer solutions to problems

• **Accountability**
  Holding yourself accountable can be challenging at times, but if you do it successfully, you will gain the respect of others. This means that although you should take credit and celebrate successes, you also need to face your role in any failures and shortcomings, without excuses.

• **Overall presentation**
  Essentially, your presentation is responsible for making a solid first impression and getting potential clients moved to the next level. This can be your web site, marketing materials, proposals and project plans, portfolio, voicemail message, e-mail signature, your look and voice when you meet with clients, and any element that puts you in front of your prospects.

• **Communication and listening ability**
  The way you communicate, verbally and in written form, tells a lot about who you are and how you work. Being clear, concise, respectful and responsive is vital for success. And don’t forget about the importance of listening to your clients and taking the time to hear and understand what they are saying.
• **Social networking personas**
  While your profiles on LinkedIn, Facebook, Twitter, on your blog and other networking sites also play a role in your overall presentation, they deserve individual attention. What you say in those forums may feel informal and relaxed, but keep in mind that these outlets can work against you if you’re not being consistently professional and genuine.

• **Reputation**
  Although sometimes we’d all like to ignore what others think of us, your reputation can go a long way in supporting (or hurting) your professional image. That’s why it’s so important to treat others with respect and honesty, even if you would never consider working or collaborating with them.

**IMPORTANT NOTE**
Try to keep each factor consistent with the others.

**Dress for Success**
In this section we focus on creating the right impression to help you build a professional image and your personal brand.

**NOTE**
If you a have specific dress code due to your religious belief, discuss the matter with the human resources department. Most organisations will allow staff to wear clothing that forms part of a religious belief. Respect colleagues who wear clothing for religious purposes. Ask your colleague what the meaning is of the item worn for religious purposes. Never be afraid to ask.
You’ve invested in your career, college, or training. Now it’s time to invest in yourself, your appearance and the image you portray. Figuring out professional dress attire for men and women is not difficult. Here are some guidelines to follow to ensure you are dressing for success.

**Guidelines for men:**

- Beards and moustaches as well as protruding nose and ear hair should always be neat and trimmed.
- Avoid brightly coloured, white or patterned socks and ensure your socks are long enough to cover your ankles.
- Wear leather belts that match your shoes and overweight men should wear braces rather than belts.
- Ensure that the length of your trousers is acceptable; they should touch the front of your shoe and be about two centimetres above the shoe heel.
- Avoid filling your pockets until they bulge.
- When wearing a long-sleeved shirt without a tie at an informal occasion, you could roll up your sleeves, preferably no further than mid-forearm.
- To appear informally dressed, undo the first one or two shirt buttons and splay your collar.
- Wear a plain tie with a striped or patterned shirt, and vice versa. Neatly knot your tie, leaving no more than half a centimetre of space between your top button and the knot.
- Make sure your tie is the correct length when knotted; the broad end of your tie should just touch your belt.
- Remember your tie is your signature; it reflects your personality and should harmonise with the rest of your clothing.
Guidelines for women:

- Monochromatic dressing—makes us all look taller and thinner, a richer look.
- Vertical lines—made with clothing, accessories, and colour contrasts make us look taller and thinner.
- Blazers and jackets — are a must for a professional environment.
- Ask a friend whose appearance you admire for feedback or to help you go shopping.
- Buy your clothing to fit the size you are now! No one sees the tags. Too tight and they add pounds, too loose and you look untidy.
- Invest in a full length mirror to appraise your final look.
- Shoe colour should match or be darker than the hemline.
- Though dress pants are gaining acceptance, skirts and dresses are still the preferred professional look.
- A sleeve should always be worn in the office. Sleeveless tops and spaghetti straps must be covered by a jacket.
- Yes, many fashion magazines now say, “don’t be afraid to show cleavage”. This is NOT for the workplace! This is a distraction and will actually cause hostility, rumours, and distance from fellow employees, the ones who count anyway.
- Avoid showing the midriff, see-thru blouses, and short skirt lengths.
- It doesn’t hurt to always be on the lookout for a sample of business dress to keep your look fresh.
- It takes a little extra time and not a lot of money to look professional and ready to take your place as a professional.
Guidelines for men and women:

### Clothing and accessories

- Ensure your clothes fit well and avoid out-of-date clothes - a good fit and a good choice of clothing does not have to cost a fortune. Clothing is an investment, rather buy fewer items of good quality, than more items of bad quality.

- Ensure that your clothes are neat and pressed, with no marks, holes, dandruff, loose hair or animal fur, missing buttons, fallen hems or frayed cuffs visible.

- Wear polished shoes that fit well and that show no sign of wear and tear such as worn heels or scuff marks.

- Keep jewellery tasteful and remember - less is more.

- Ensure that your clothing is always comfortable. If you are comfortable, you will automatically be calm and self-assured.

- Ensure that your handbag or briefcase, purse or wallet is of excellent quality. This is a once in a lifetime investment. Buy the best you can afford.

- Wear black shoes with dark (black, charcoal and navy) or grey-coloured trousers, slacks or skirts. Shoes that are lighter than your hem-line is a professional no-no.

### Hair

- Keep your hair at a length and style which you can properly maintain, in a clean and neat manner at all times.

- Wash your hair at least twice a week, using a mild shampoo, and always ensure that you rinse your hair thoroughly.

- If you dye or colour your hair, ensure that you do not look completely unnatural. You want people to be listening to what you are saying, not staring at your outrageous hair.

- Remember to touch up your hair colour regularly or when necessary.
**Nails**

- Keep them well-trimmed and preferably buffed and polished too.
- Men can buff their nails using a nail shining tool.
- Clip and file your nails to the length you want them, but do not trim them too close to the skin.
- For the girls: Make sure that your nail polish looks fresh and is not chipped or untidy.

**Makeup**

- Use make-up sparingly and maintain a natural-looking complexion.
- Ensure that your foundation is the right tone for your skin, there should never be a line around your jaw line.
- Use blusher sparingly, just enough to give you a natural glow.
- Lipstick should be natural-looking. Use colours that complement your clothing and complexion.
- Eye make-up must enhance your eyes and not overpower.

**Perfume / colognes / after-shaves**

- Use scents that are mild and pleasant.
- Your scent should not linger for too long after you leave a room.
- Do not cause sneezing fits around you because you have used too much perfume or cologne.
Notes
Session 4

Dealing with Difficult People and Issues Professionally

In an office environment you do not always have the choice of who should be employed. Therefore it will be likely that you do not have a great relationship with all staff. Remember to be kind and considerate to all. You do not have to befriend all of your colleagues; always make sure you keep things professional. Respect your fellow staff and keep your personal issues you are dealing with to yourself. If you need to speak with someone regarding a matter, ask someone you can trust and one that will not start office gossip. You can always speak with the human resources department, as they are objective in an organisation.
Dealing with Personal Issues

“Don’t take it personally”. We have all heard that expression but at some time in your career things will become personal.

**Guidelines on how to deal with such a situation in a professional manner:**

- Always be in control of your emotions. Keep your voice in control and check your body language.
- Address the problem NOT the person.
- Air your views in a calm manner - take a deep breath and count to ten if you have to!
- Do not sulk and spoil the office atmosphere if you do not get your way. Accept the fact that other people’s viewpoints may differ from yours and admit that if there are two different viewpoints that both parties can be right.
- Always be honest but at the same time be as diplomatic as you can. The truth does not always have to “hurt”. You can communicate your side of the story without compromising the other persons sense of self-worth.

Dealing with Difficult people

Understanding your colleagues will assist you in building better relationships with them. We achieve this by having open honest and clear communication. Every individual has needs that need to be satisfied; and with etiquette we need to understand why people become difficult. The reason is clear, the basic needs we have are not being met. Focus on the issue, not the individual. So identify the need that has not been met and address the issues.

**All humans have four basic needs:**

1. The need to be understood and to be heard.
2. The need to feel welcome and have a sense of belonging and inclusion.
3. The need to feel important and be acknowledged when they do well.
4. The need for comfort and re-assurance.
How do your colleagues signal these needs to you?

1: The need to be understood and to be heard.

<table>
<thead>
<tr>
<th>The Need</th>
<th>The Signal</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to be understood</td>
<td>This need is signaled by a person repeating themselves, speaking slowly, speaking loudly, getting angry when they are not being understood, or bringing a friend or relative to help explain.</td>
</tr>
</tbody>
</table>

Accommodating their need

- Paraphrasing back what is being said and checking that your understanding is correct.
- Listen for feelings communicated as well as the content of the message. Very often the real crux of the message is in what has not been said rather than the extra words.
- Empathise with problems. Use phrases like: “You must be feeling really upset by.....” etc

2: The need to feel welcome and have a sense of belonging and inclusion.

<table>
<thead>
<tr>
<th>The Need</th>
<th>The Signal</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to feel welcome</td>
<td>This need is signalled by a person ‘looking around’ before coming in and / or coming in with friends or relatives. It is also demonstrated by wearing the ‘right’ clothes for the situation.</td>
</tr>
</tbody>
</table>

Accommodating their need

- Providing a warm and friendly welcome.
- Talking in a language everyone will understand.
- Engaging in friendly conversation specifically asking the person about themselves and acknowledging their contributions.
3: The need to feel important and be acknowledged when they do well

<table>
<thead>
<tr>
<th>The Need</th>
<th>The Signal</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to feel important.</td>
<td>This need is often signalled by someone ‘showing off’ or bragging about who they know. This need is also demonstrated by flashing money, a display of jewellery and / or extreme clothing.</td>
</tr>
</tbody>
</table>

Accommodating their need

- Using the person’s name.
- Tune in to individual needs and show that you are aware of these needs by responding to the person’s need to feel important.
- Compliment them - this must be genuine and sincere.

4: The need for comfort and re-assurance

<table>
<thead>
<tr>
<th>The Need</th>
<th>The Signal</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to feel comfortable.</td>
<td>This need is expressed by colleagues being ill at ease, nervous, or unsure of themselves. This need is also expressed when help, assistance or directions are requested indirectly.</td>
</tr>
</tbody>
</table>

Accommodating their need

- Set colleagues at ease by being warm and inviting and making small talk until they relax.
- Relieve anxiety by re-assuring them that you will help them.
- Explaining the service procedures carefully and calmly and checking for their understanding.
Dealing with Ethical Dilemmas

What is ethics?
Simply put, ethics involves learning what is right or wrong, and then doing the right thing. For example, the accounting industry has developed a Code of Professional Conduct, which everyone should adhere to. According to the Code of Professional Conduct, there are five fundamental principles of professional ethics.

These principles are:

- Integrity,
- Objectivity,
- Professional competence and due care,
- Confidentiality, and
- Professional behaviour.

Under the framework, all professional accountants will be required to identify threats to these fundamental principles and, if there are threats, apply safeguards to ensure that the principles are not compromised.

Ethical dilemmas can keep you up at night, worrying about what’s the right thing to do. The problem with ethical dilemmas is that there’s never an easy answer to this question. You have to weigh your moral code of conduct with the consequences for the people involved.
**How to Solve an Ethical Dilemma**

1. **Consider your own motives** and try to detach them from your decision. If your ethical dilemma is whether to tell your friend’s husband that she’s cheating, your instinct might be to keep quiet rather than potentially lose your friendship. Take your own feelings out of the equation and focus on consequences to the involved parties.

2. **Consider your moral code of conduct.** If you’re pondering ethical issues, you must have a strong sense of right and wrong. Ask your conscience what the right thing to do is. See if that makes the dilemma easier to solve.

3. **Think about the consequences,** what will happen if you come down on one side of the moral dilemma versus the other. Consider whether anyone will be hurt or will suffer unjustly. Also consider any secondary parties involved. Telling the boss that the cleaner did a bad job in the conference room might force an inadequate employee to take responsibility for their actions. If a family living at poverty level loses an income over one sloppy job, it might be worth it to suffer through a little more dust than you prefer.

4. **Act with the frame of reference** of ethical behaviour in mind:
   - The laws of the country.
   - Your specific industry rules.
   - Organisational policies and procedures.
   - General principles and values.
   - Your own moral compass.
Indicate in the following circumstances whether these situations are ethical dilemmas. Which frame of reference can you use to justify and answer your question?

<table>
<thead>
<tr>
<th>Circumstance</th>
<th>Ethical Dilemma</th>
<th>Frame of Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. You need a bit of extra money and you take on an extra job as a waitress / waiter.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. You often take work home, which means you will need stationery to get the work done. Can you take office supplies home?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. A client offers you a gift for your birthday. Will you accept the gift?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. You copy music onto your i-Pod from CDs that you bought. Your friends like it and ask if they can copy it from you.</td>
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<td></td>
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</tbody>
</table>
Session 5

Etiquette in Meetings

Meetings are a necessary evil in the workplace and are costly, even if they are held in your company boardroom. It is therefore important that meetings are productive. Managing a meeting professionally entails using the time effectively to interact with others about business matters and maintaining professional conduct at all times.
Managing a Meeting

What to Consider when Arranging a Meeting

Purpose of a meeting:

• Make sure there is a purpose for the meeting and that the same result cannot be achieved with an e-mail or a phone call that will save time and money for all parties concerned.

• If you decide that a physical meeting is the root to go, plan your meeting well, the better you plan the more successful the outcome.

Meeting logistics:

• When deciding on date, time and place, make provision for attendees who have to travel long distances to attend.

• Allow for extra time in case a meeting overruns its planned duration.

• Check what you will need for the meeting: size of venue, seating, printing of documents, proximas, refreshments etc and make sure that the necessary arrangements are made timeously.

• Remind those expected to attend by email the day before the meeting.

Meeting agenda:

• A meeting agenda lists the topics to be discussed and allows meeting delegates to prepare properly and ensures that meetings are kept on track. It is important that the agenda accompanies the meeting invite. It will also confirm in the invitees mind that they need to attend the meeting.

• The agenda is a working document and in the invite, attendees should be invited to add any relevant topics. A finalised agenda should be sent out at least three days before the meeting.

Minute taking:

• If people can’t remember or agree on what actually occurred at a meeting, how can the group effectively accomplish its objectives? Minutes refer to formally written notes that capture the main points made and the decisions taken.

• These should be sent out no later than two days after the meeting, detailing action items, responsibilities and time lines to ensure that decisions taken at the meeting is carried through.
Formal Meetings

In formal meetings, decisions are reached through motions. Motions are proposals placed before the members for debate and voting.

On arrival:

- When arriving early at a formal meeting, wait to be told where to sit.
- At a formal meeting, the chairperson usually sits in a prominent position. For example, at the head of the table.
- Make sure you are aware of the rules and conventions your organisation uses to govern formal meetings.
- If you arrive late at a meeting, apologise to the chairperson and quietly take your seat. Don’t greet all your colleagues and interrupt the meeting.

During the meeting:

- Don’t fidget, tap your fingers or look bored while someone is speaking.
- Do not ‘click’ your pen.
- Make certain that your cell phone is switched off, not on silent. Settings such as silent and vibrate, may affect the sound system and disturb attendees.
- Do not use your laptop during a meeting to respond to e-mails or do anything else not related to the meeting.
- Avoid interrupting another speaker.
- At a formal meeting, speak ‘through’ the chairperson. That means indicating to the chairperson that you want to speak, and then speaking when the chairperson invites you to do so. When addressing the chairperson, use the correct title i.e. Madam / Sir Chair.
- Do not hold private discussions with attendees during a meeting.
- Do not leave a meeting unnecessarily and if you have to first asking the chairperson to excuse you.
- Do not eat snacks and food during a meeting, wait for the scheduled break.

At the end of a meeting:

- The convenor must ensure that the meeting room is tidied once participants have left.
- It is acceptable for anyone at a meeting to extend a vote of thanks to anyone who made a special contribution to the meeting.
**Duties of the chairperson:**

The chairperson is a person who occupies the place of authority in a meeting and has control over a meeting, committee, board, etc. If you are the chairperson:

- Arrive a few minutes early and start the meeting on time.
- Welcome everyone, make the necessary introductions and declare the meeting open.
- Confirm and follow the agenda of the meeting.
- Present and confirm the minutes from the previous meeting.
- Manage and control the meeting. Start a meeting by setting a cut-off time. This helps to encourage people to be brief.
- Call on individuals to introduce or lead the discussion of points on the agenda and gives everyone a chance to speak.
- Ensure that no one dominates discussion. At the end of each topic of discussion, summarise the outcomes and get an agreement on the decision being minuted.
- Ensure that the person given the responsibility to action the decision, knows what they have to do and when it should be done and reported on.
- Set the date for the next meeting.
- Thank those present for attending.
- Thank anyone whose facilities have been used for the meeting.
- The chairperson may call a short, unscheduled ‘comfort break’, if several attendees require this.

**Informal Meetings**

Small groups, perhaps because of their size, sometimes prefer to operate more informally. Although the structure of the meeting may differ from a formal meeting, the same professional conduct should be practiced.
Session 6

Netiquette

As the internet has become part of our daily routine, we take it for granted that our employer allows us to access the World Wide Web (www).

Your organisation should have an acceptable use policy, which outlines the rules for the use of the internet.
Internet Usage Policy

If your organisation does not have a policy in place, you need to remember that the following is regarded as unacceptable.

- Visiting internet sites that contain obscene, hateful, pornographic or otherwise illegal material.
- Using the computer to perpetrate any form of fraud, software, film or music piracy.
- Using the internet to send offensive or harassing material to other users.
- Downloading commercial software or any copyrighted materials belonging to third parties, unless this download is covered or permitted under a commercial agreement or other such licence.
- Hacking into unauthorised areas.
- Publishing defamatory and / or knowingly false material about your organisation, your colleagues and / or your customers on social networking sites, ‘blogs’ (online journals), ‘wikis’ and any online publishing format.
- Undertaking deliberate activities that waste staff effort or networked resources.
- Introducing any form of malicious software into the corporate network.
- Representing yourself as someone else.

E-mail Etiquette

Excerpt from www.emailreplies.com

“It is amazing to find that in this day and age, some companies have still not realised how important their email communications are. Many companies send email replies late or not at all, or send replies that do not actually answer the questions you asked. If your company is able to deal professionally with email, this will provide your company with that all important competitive edge.

Moreover by educating employees as to what can and cannot be said in an email, you can protect your company from awkward liability issues. This website discusses the main etiquette rules and provides advice on how employers can ensure that they are implemented:”
### E-mail Etiquette Rules and Advice

<table>
<thead>
<tr>
<th>Rule</th>
<th>Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Be concise and to the point</td>
<td>Do not make an e-mail longer than it needs to be. Remember that reading an e-mail is harder than reading printed communications and a long e-mail is more likely to land in the Deleted folder - unread.</td>
</tr>
<tr>
<td>2. Answer all questions, and pre-empt further questions</td>
<td>An email reply must answer all questions, and pre-empt further questions. If you do not answer all the questions in the original email, you will receive further e-mails regarding the unanswered questions, which will not only waste your time and your reader’s time but also cause considerable frustration. Moreover, if you are able to pre-empt relevant questions, your reader will be grateful and impressed with your efficient and thoughtful customer service. Imagine for instance that a customer sends you an email asking which credit cards you accept. Instead of just listing the credit card types, you can guess that their next question will be about how they can order, so you also include some order information and a URL to your order page. Customers will definitely appreciate this.</td>
</tr>
<tr>
<td>3. Use proper spelling, grammar and punctuation</td>
<td>This is not only important because improper spelling, grammar and punctuation give a bad impression of your company, it is also important for conveying the message properly. E-mails with no full stops or commas are difficult to read and can sometimes even change the meaning of the text. If your program has a spell checking option, why not use it?</td>
</tr>
<tr>
<td>4. Make it personal</td>
<td>Not only should the e-mail be personally addressed, it should also include personal i.e. customised content. For this reason auto replies are usually not very effective. However, templates can be used effectively in this way. Refer to the next tip.</td>
</tr>
<tr>
<td>Rule</td>
<td>Advice</td>
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<tr>
<td>5</td>
<td>Use templates for frequently used responses Some questions you get over and over again, such as directions to your office or how to subscribe to your newsletter. Save these texts as response templates and paste these into your message when you need them. You can save your templates in a Word document, or use pre-formatted emails. Even better is a tool such as ReplyMate for Outlook (allows you to use 10 templates for free).</td>
</tr>
<tr>
<td>6</td>
<td>Answer swiftly E-mails have almost become like telephone calls. Customers send an e-mail because they wish to receive a quick response. Therefore, each e-mail should be replied to within at least 24 hours and preferably within the same working day. If the email is complicated, just send an email back saying that you have received it and that you will get back to them. This will put the customer’s mind at rest and usually customers will then be very patient!</td>
</tr>
<tr>
<td>7</td>
<td>Do not attach unnecessary files By sending large attachments you can annoy customers and even bring down their e-mail system. Wherever possible try to compress attachments and only send attachments when they are productive.</td>
</tr>
<tr>
<td>8</td>
<td>Use proper structure and layout Because reading from a screen is more difficult than reading from paper, the structure and lay out is very important for e-mail messages. Use short paragraphs and blank lines between each paragraph. When making points, number them or mark each point as separate to keep the overview.</td>
</tr>
<tr>
<td>9</td>
<td>Do not overuse the high priority option We all know the story of the boy who cried wolf. If you overuse the high priority option, it will not be as effective when you really need it. Moreover, even if a mail has high priority, your message will come across as slightly aggressive if you flag it as ‘high priority’.</td>
</tr>
</tbody>
</table>
### Rule 10: Do not write in CAPITALS

IF YOU WRITE IN CAPITALS IT SEEMS AS IF YOU ARE SHOUTING. This can be highly annoying and might trigger an unwanted response in the form of a flame mail.

### Rule 11: Don’t leave out the message thread

When you reply to an email, you must include the original mail in your reply, in other words click ‘Reply’, instead of ‘New Mail’. If you receive many emails you obviously cannot remember each individual email. Leaving the thread might take a fraction longer in download time, but it will save the recipient much more time and frustration in looking for the related emails in their inbox!

### Rule 12: Add disclaimers to your emails

It is important to add disclaimers to your internal and external mails, since this can help protect your company from liability. Consider the following scenario: an employee accidentally forwards a virus to a customer by email. The customer decides to sue your company for damages. If you add a disclaimer at the bottom of every external mail, saying that the recipient must check each email for viruses and that it cannot be held liable for any transmitted viruses, this will surely be of help to you in court. Another example: an employee sues the company for allowing a racist email to circulate the office. If your company has an email policy in place and adds an email disclaimer to every mail that states that employees are expressly required not to make defamatory statements, you have a good case of proving that the company did everything it could to prevent offensive emails.
<table>
<thead>
<tr>
<th>Rule</th>
<th>Advice</th>
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</thead>
<tbody>
<tr>
<td>13</td>
<td><strong>Read the email before you send it</strong>&lt;br&gt;A lot of people don’t bother to read an email before they send it out, as can be seen from the many spelling and grammar mistakes contained in emails. Apart from this, reading your email through the eyes of the recipient will help you send a more effective message and avoid misunderstandings and inappropriate comments.</td>
</tr>
<tr>
<td>14</td>
<td><strong>Do not overuse “Reply to All”</strong>&lt;br&gt;One of the biggest problems with e-mails is that the sender tends to hit this button and clog up other people’s inboxes with e-mails that are unnecessary and serves to irritate only. Only use “Reply to All” if you really need your message to be seen by each person who received the original message.</td>
</tr>
<tr>
<td>15</td>
<td><strong>Mailings – use the Bcc: field or do a mail merge</strong>&lt;br&gt;When sending an email mailing, some people place all the email addresses in the “To:” field. There are two drawbacks to this practice: (1) the recipient knows that you have sent the same message to a large number of recipients, and (2) you are publicizing someone else’s email address without their permission. One way to get round this is to place all addresses in the “Bcc:” field. However, the recipient will only see the address from the “To:” field in their email. Even better, if you have Microsoft Outlook and Word you can do a mail merge and create one message for each recipient. A mail merge also allows you to use fields in the message so that you can for instance address each recipient personally. For more information on how to do a Word mail merge, consult the Help function in Word.</td>
</tr>
<tr>
<td>16</td>
<td><strong>Take care with abbreviations and emoticons</strong>&lt;br&gt;In business emails, try not to use abbreviations such as BTW (by the way) and LOL (laugh out loud). The recipient might not be aware of the meanings of the abbreviations and in business emails these are generally not appropriate. The same goes for emoticons, such as the smiley :-) . If you are not sure whether your recipient knows what it means, it is better not to use it.</td>
</tr>
<tr>
<td>Rule</td>
<td>Advice</td>
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<td>-----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>17</td>
<td><strong>Be careful with formatting</strong> Remember that when you use formatting in your emails, the sender might not be able to view formatting, or might see different fonts than you had intended. When using colours; use a colour that is easy to read on the background.</td>
</tr>
<tr>
<td>18</td>
<td><strong>Take care with rich text and HTML messages</strong> Be aware that when you send an email in rich text or HTML format, the sender might only be able to receive plain text emails. If this is the case, the recipient will receive your message as a .txt attachment. Most email clients however, including Microsoft Outlook, are able to receive HTML and rich text messages.</td>
</tr>
<tr>
<td>19</td>
<td><strong>Do not forward chain letters</strong> Do not forward chain letters. We can safely say that all of them are hoaxes. Just delete the letters as soon as you receive them. They clog inboxes and generally not well received!</td>
</tr>
<tr>
<td>20</td>
<td><strong>Do not request delivery and read receipts</strong> This will almost always annoy your recipient before they have even read your message. Besides, it usually does not work anyway since the recipient could have blocked that function, or their software might not support it. If you want to know whether an email was received it is better to ask the recipient to let you know when they receive it. From your side it is also good etiquette to acknowledge receipt of an expected or urgent e-mail with a quick note.</td>
</tr>
<tr>
<td>21</td>
<td><strong>Do not ask to recall a message</strong> Chances are that your message has already been delivered and read. A recall request would looks unprofessional. It is better just to send an email to say that you have made a mistake and sending the correction through at the same time.</td>
</tr>
<tr>
<td>22</td>
<td><strong>Do not copy a message or attachment without permission</strong> Do not copy a message or attachment belonging to another user without permission from the originator. If you do not ask permission first, you might be infringing on copyright laws.</td>
</tr>
<tr>
<td>Rule</td>
<td>Advice</td>
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<td>------</td>
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<tr>
<td>23</td>
<td><strong>Do not use email to discuss confidential information</strong>&lt;br&gt;Send an email is like sending a postcard. If you don’t want your email to be displayed on a bulletin board, don’t send it. Moreover, never make any libellous, sexist or racially discriminating comments in emails, even if they are meant to be a joke.</td>
</tr>
<tr>
<td>24</td>
<td><strong>Use a meaningful subject</strong>&lt;br&gt;Try to use a subject that is meaningful to the recipient as well as yourself. For instance, when you send an email to a company requesting information about a product, it is better to mention the actual name of the product, e.g. ‘Product A information’ than to just say ‘product information’ or the company’s name in the subject.</td>
</tr>
<tr>
<td>25</td>
<td><strong>Use active instead of passive voice</strong>&lt;br&gt;Try to use the active voice of a verb wherever possible. For instance, ‘We will process your order today’, sounds better than ‘Your order will be processed today’. The first sounds more personal, whereas the latter, especially when used frequently, sounds unnecessarily formal.</td>
</tr>
<tr>
<td>26</td>
<td><strong>Avoid using URGENT and IMPORTANT</strong>&lt;br&gt;Even more so than the high-priority option, try to avoid these types of words in an email or subject line. Only use this if it is a really urgent or important message.</td>
</tr>
<tr>
<td>27</td>
<td><strong>Avoid long sentences</strong>&lt;br&gt;Try to keep your sentences to a maximum of 15-20 words. Email is meant to be a quick medium and requires a different kind of writing than letters. Also take care not to send emails that are too long. If a person receives an email that looks like a dissertation, chances are that they will not even attempt to read it!</td>
</tr>
<tr>
<td>Rule</td>
<td>Advice</td>
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</tr>
<tr>
<td>28</td>
<td>Don’t send or forward emails containing libellous, defamatory, offensive, racist or obscene remarks.</td>
</tr>
<tr>
<td></td>
<td>By sending or even just forwarding one libellous, or offensive remark in an email, you and your company can face court cases resulting in multi-million rand penalties.</td>
</tr>
<tr>
<td>29</td>
<td>Don’t forward virus hoaxes and chain letters</td>
</tr>
<tr>
<td></td>
<td>If you receive an email message warning you of a new unstoppable virus that will immediately delete everything from your computer, this is most probably a hoax. By forwarding hoaxes you use valuable bandwidth and sometimes virus hoaxes contain viruses themselves, by attaching a so-called file that will stop the dangerous virus. The same goes for chain letters that promise incredible riches or ask your help for a charitable cause. Even if the content seems to be bona fide, the senders are usually not. Since it is impossible to find out whether a chain letter is real or not, the best place for it is the recycle bin.</td>
</tr>
<tr>
<td>30</td>
<td>Keep your language gender neutral</td>
</tr>
<tr>
<td></td>
<td>In this day and age, avoid using sexist language such as: ‘The user should add a signature by configuring his email program’. Apart from using he/she, you can also use the neutral gender: ‘The user should add a signature by configuring the email program’.</td>
</tr>
<tr>
<td>31</td>
<td>Don’t reply to spam</td>
</tr>
<tr>
<td></td>
<td>By replying to spam or by unsubscribing, you are confirming that your email address is ‘live’. Confirming this will only generate even more spam. Therefore, just hit the delete button or use email software to remove spam automatically.</td>
</tr>
<tr>
<td>32</td>
<td>Use cc: field sparingly</td>
</tr>
<tr>
<td></td>
<td>Try not to use the “cc:” field unless the recipient in the cc: field knows why they are receiving a copy of the message. Using the “cc:” field can be confusing since the recipients might not know who is supposed to act on the message.</td>
</tr>
</tbody>
</table>
Telephone Etiquette

The telephone is a useful tool in every day communication. It is been estimated that 70-80% of today's business is conducted over the telephone, largely because it is an immediate means of communicating.

You can enhance your professional reputation through polite and effective telephone manners. Your telephone manners should not make people reconsider whether they really want to do business with you.

Answering the Telephone

Answering the telephone correctly includes:

- Answering promptly, that is allowing no more than two or three rings before picking up the handset. An immediate response says a lot about you and promotes good public relations.

- Answering with a smile which the caller will hear it in your voice. A cheerful voice begets a happy caller or listener, and a favourable impression is created.

- Speaking in a warm, audible, clear voice at a moderate phase so that the caller can follow the conversation.

- Not eating, drinking, smoking or coughing while talking into the mouthpiece. If you have to cough, excuse yourself first, cover the mouthpiece and cough away from it.

- Always sound professional, pleased to hear from someone and ready to deal with their concerns.
Making Telephone Calls
The impression you create on the telephone reflects not only your personality but also the image of your company, organisation or employer.

With this in mind:

• Try to phone when you know it is convenient for the other person and confirm that they are able to speak

• Always identify yourself and your company immediately. This information makes you sound confident and in control, and enhances your chances of being put through promptly to the person you’re trying to reach

• If you make a long distance call and the other person is not available, you should try again. Do not leave a message that the person should phone you
The Telephone Conversation

EXAMPLE
An Example of a Professional Telephone Conversation

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1</td>
<td>When you pick up the phone, greet the caller, then identify your company, then identify yourself, then ask what you can do for the caller. “Good morning. Mary-Anne Smith speaking. How can I assist you?”</td>
</tr>
<tr>
<td>2</td>
<td>The caller then has an opportunity to greet you and state the purpose of the call. “Hello Mary-Anne, this is Michael Adwell from ABC Printers. Do you have a minute to talk about your printing requirements?”</td>
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<tr>
<td>3</td>
<td>The conversation then follows. In this case, Mary-Anne is being assertive, because she cannot accommodate this unsolicited intrusion on her time. Though assertive, she remains courteous. “No, Michael, I’m afraid I’m busy at the moment preparing for a conference. Could you call back at the same time tomorrow?”</td>
</tr>
<tr>
<td>4</td>
<td>The intrusive caller retreats though with an undertaking to call at the agreed time the next day. Then the closing greeting follows. “Certainly, Mary-Anne I’ll call you tomorrow morning at 9:30. Goodbye.”</td>
</tr>
<tr>
<td>5</td>
<td>Mary-Anne returns the greeting before replacing the handset, only after the caller has put the phone down.</td>
</tr>
</tbody>
</table>
Telephone Messages
A lot of time can be saved in the workplace by taking or leaving detailed messages. It also enhances your and the company’s image if you are able to respond to a message sounding informed.

When leaving a message:
- Give full details so that the person who returns your call can get in touch with you.
- The first name and surname are important, as is the reason for the call.
- If you call wanting to offer or sell the person something, do not leave a message; rather phone back later. Ask when it will be convenient to speak to the person and call back at that time.

When taking a message:
- Keep the following at hand at all times: a pen, a message book, a calendar and a dairy (in case appointments have to be made). Take messages carefully and write down all the details in your message book for the possible future reference.
- Note for whom the message is intended, plus the full name and title of the person who called. Ensure that you have the correct spelling of all names and surnames. Record the date and time of the call.
- Obtain their telephone number and code as well as the extension, and ask until what time their call can be returned.
- Note the name of the organisation or business they represent, as well as the purpose of the call.
- In the case of an urgent message, take the caller’s home or cell phone number.
- For safety sake, leave the handwritten message on the person's desk.
Cell Phone Etiquette

Cell phones have become indispensable business tools but at the same time can tarnish your professional image if used indiscriminately.

Cell Phone Etiquette Do’s and Don’ts

The use of cell phones in the workplace:

- Don’t use loud and annoying ring tones that destroy concentration and eardrums.
- Don’t speak louder on your cell phone than you would on any other phone.
- Maintain a distance of at least three meters from the nearest person when talking on a cell phone.
- Keep all cellular conversations brief and to the point.
- Use an earpiece in high-traffic or noisy locations.
- Tell callers when you’re talking on a mobile, so they can anticipate distractions or disconnections.
- Respect ‘quiet zones’ and ‘phone-free areas’ at work and in public venues.

Cell phones in meetings:

- Phones should be off or on silent. Better still, leave your cell phone with your assistant or colleague or divert calls to an assistant
- If you are leading the meeting, remind everyone to do this before you begin.
- Do not read or send text messages during a meeting.
- If you forget to switch to silent and it rings, turn it off immediately and apologise
- If the call pertains to the subject matter of the meeting or if expecting an emergency call:
  - Clear it with the chairman of the meeting.
  - Inform meeting participants that you are expecting the call.
  - Only take that specific call, if it’s someone else, divert to voicemail.
  - Keep the phone on vibrate in a place where you could grab it immediately.
  - Sit near the exit so you can leave the room quickly and quietly.
  - Once you have taken that call, switch off your phone.
Your Personal Voice Mail

Your voice mail message is an extension of your professional image. It is thus important that your recorded message reflects the same professional image that you intend to promote in a face to face setting.

Your recorded message:

• Ensure that your voice mail message is short and professional.
• Keep it general and avoid religious greetings and connotations.
• Ensure no background music or other noises are recorded.

Planning your recording:

• When planning your message, look at it from the caller’s perspective:
  o What would they need to know if you are not available to talk to them?
  o When would you be back?
  o Who else could help them?

Managing your messages:

• Check for messages immediately on your return.
• Return the call the same day; immediately if possible.
Session 7

Etiquette in and around the Office

For many work is a home from home and like you do in your home you need to respect the needs of others and make sure that the environment reflects the professional image you are project to the outside world.
Open Plan Office Etiquette

Showing consideration to colleagues in an open plan office will only work if you all adopt a mutual respect for each other.

_Open Plan Office Protocols_

In general, it’s quite easy to get along well in an open plan working environment. Remember not everybody will share exactly the same values as you but in general, to adopt a policy of treating people how you’d like to be treated yourself is usually a good benchmark to ensuring a harmonious workspace.

_Maintaining a productive environment:_

- Allow yourself to be accessible to others but adopt clearly understood signals for when you’re busy and don’t wish to be disturbed.
- Keep your desk tidy. This is especially important if you are sharing an open plan desk and show courtesy when using any shared spaces.
- Be careful when having conversations. Don’t speak too loudly as you may be interrupting another fellow worker from getting on with their work.
- If you tend to have to field a lot of calls as part of your job, always switch your answer machine on before leaving your desk.
- If a colleague is on the phone themselves, don’t interrupt them during the call but wait until they’re off the phone.
- Avoid taking personal phone calls.
- Should some of your colleagues be holding an informal meeting, don’t just walk up and join in. Ask yourself if you really need to be there, if you haven’t been invited.

_Promoting harmony and tranquility:_

- Never shout to a colleague who’s at a workstation several feet away to attract their attention.
- Even within open plan workspaces, there will be designated aisles or walking routes to use. Use them and don’t be tempted to take short cuts across other people’s ‘patches’.
- Never use anything which might cause disruption to others, e.g. a speaker phone or radio unless you’ve got express permission from fellow colleagues that this is acceptable.
- If you do have your radio on, do not have loud music playing across the entire office.
- Do not speak in a language your colleagues do not understand.
Courtesy when eating and drinking:

- Pungent or bad odours are one of the most complained about aspects of working in an open plan office. Therefore, make sure you practice good hygiene but don’t make the mistake of going overboard on the aftershave or perfume.

- Likewise with food; if there is an established policy of being able to eat at your desk, be careful that you choose relatively neutral smelling foods i.e. no curries, onions or garlic.

- If there is no policy regarding food at your desk, eat in designated areas, or outside. It is rude to eat at your desk.

- Do not eat in front of someone who is fasting.

Respect privacy and confidentiality:

- You should always be wary of speaking openly about any issues of confidentiality.

- If you are speaking on the phone about a certain issue that your team should not have any knowledge of, make sure you move to a more private enclosed space to make or take the call.

- Should you accidentally overhear a conversation that you know was intended to remain private between the people having the conversation, simply forget about it. Don’t make the mistake of falling into the trap of telling other people what you overheard later as you’ll simply garnish a reputation for being the office gossip.
Communal Kitchen Etiquette

Everybody uses the kitchen at some point during the day. There is nothing more annoying, and frankly unhealthy than a dirty kitchen. This section will offer guidelines on how to keep the kitchen a clean and friendly place for all.

The Refrigerator

- Put someone in charge. That doesn’t mean the person has to do the cleaning, but they can make sure it’s done. Whether it’s creating the cleaning schedule or enforcing the rules.
- Be courteous. Don’t fill the fridge, freezer and pantry with so much food, no one else has space.
- Don’t smash someone else’s sandwich to make sure your food tin fits. Take the time to re-organise the contents of the fridge to make space for your containers.
- Label all food, including unopened cans (someone might think they are left from a meeting) and condiments. Labels also help co-workers know who to ask if they want to use something.
- Don’t store anything with a pungent smell. Someone’s desk may be close to the refrigerator, which means a strong whiff in their direction each time the door is opened.
- Be responsible. If you know you are going on vacation for a week, do something with your food, whether it’s taking it home or giving it away.
- Clean the fridge regularly. How often depends on how big the office is, but at least twice a month. Post the date and time the fridge will be cleaned out on the fridge door. Take your used food containers home regularly!

The Coffee Pot

- If the company has a coffee percolator in the office make sure you make a new pot if you drink the last of the coffee.
- If your office has glass jars filled with tea, coffee and sugar, make sure you fill it when you are using the last tea bag or coffee.
The Microwave
- Be conscious of foods that have lingering smells like popcorn
- Do not cook meals in the microwave. Office microwaves are meant for heating food – not cooking it.
- When you are done microwaving, check to make sure nothing spilled. If food seeped or exploded, clean it up immediately.

The Kitchen Sink
- Do not leave dishes in the sink unless there is someone hired to wash dishes. The rule applies to coffee mugs as well.
- Wash your dish after using it and put it in the drying rack immediately.

The Counter
- Throw your trash away. Make sure you are not leaving crumbs behind.
- Don’t use the counter to thaw frozen food; it is a cleanliness and health issue.

Stealing Food
- If someone is stealing, talk to the boss and then bring it up at a staff meeting.
- Post a sign on the refrigerator door. ‘DO NOT TAKE FOOD OR DRINKS THAT DO NOT BELONG TO YOU!’
Office Party Etiquette

An annual event sponsored by your company is more commonly known as ‘The Office Party’. Office parties often have a stigma attached to them as they usually lead to red faces the morning after as attendees are notorious for throwing away the professional image they have worked so hard to create.

An extract from The Telegraph, dated 23 December 2011, gives us an insight into the phycology of an office party attendee:

**Scientists explain why the office party so often ends in embarrassment...**

Now scientists have come up with an explanation for why the office party is so often the cause of embarrassing and inappropriate behaviour.

Researchers have found that drinking in environments not normally associated with alcohol consumption can leave drinkers less able to control their behaviour.

The brain learns to compensate for the inhibition lowering effects of alcohol when in a familiar setting, such as a pub or at home with friends, they discovered.

However, if they drink in an unfamiliar environment such as the workplace, where they are usually sober and focused, drinkers do not benefit from tolerance and lose control of their inhibitions.

Whether this scientific research is plausible or not, it is true that the common denominator for inappropriate behaviour in a party setting is due to the attendee’s inability to control and cope with their alcohol intake.
### Surviving and Thriving at a Function

| Alcohol: | Don’t feel you need to drink excessively just because it’s an open bar.  
| | Appoint a designated driver or hire a taxi yourself if the company is not willing to provide the rides home. Don’t drink and drive. |
| Attendance: | Not attending could hurt your reputation. Spend at least 30 minutes at the party for appearances.  
| | At the same time don’t overstay your welcome by partying until the early hours of the morning. |
| Attire: | Don’t pull the nightclub attire from your closet for the event, and do ask whether the attire for the party is formal or casual. The party is still a business function, so conservative party clothes are a good choice. So, do remember to skip anything too revealing or too flashy. Keep your reputation for good taste intact. |
| Behaviour: | Remember that although office parties are intended as social events to reward employees and raise morale, they remain strictly business events. Act as though your behaviour is being observed every minute.  
| | Conduct yourself professionally at all times. Don’t use the office party as an excuse to blow off steam. It’s still a company function, so proper etiquette matters. |
| Conversations: | Keep all conversations positive and upbeat. Don’t spend the evening complaining, bragging, correcting, and whining.  
| | Avoid controversial subjects (such as religion, politics, etc.).  
| | Don’t monopolise conversations, and, especially, don’t talk about yourself or your accomplishments all night. Show interest in others.  
| | Be gracious and thank co-workers and team members for all their help and hard work during the past year. |
| Food: | Don’t over eat at the food buffet; moderation is key. You can always eat and drink more after the party. |
### Interactions:

- Keep your hands to yourself. Don't flirt, and do avoid any other inappropriate interactions.
- The office party is not the time to end your career with the company by doing something inappropriate or illegal.
- Don't assume everyone celebrates the same holiday, so don't go overboard with the “Merry Christmas.”
- Don't forget to thank the person responsible for the planning and co-ordinating of the party. Consider sending a thank-you note to top management for hosting the party.

### Introductions:

- Take the time to network with people at the party who can influence your career or who you may not see regularly, such as top management, people from other departments, and employees from other locations.
- A holiday party is a great event to begin building or strengthening business relationships, so introduce yourself and build your network.
- Keep one hand free during the night so that you can offer handshakes to people as they come by.
- Keep your drink in your left hand, so you are not offering people a cold, wet handshake all evening.
Confidentiality: Code of Professional Conduct

As an employee to an organisation you would have been asked to sign a confidentiality agreement in your contract of employment, or when you attend to an external client they might have requested that you sign a confidentiality agreement with them. The reason for this is that you know as an employee that if certain things are to be disclosed it might hurt a colleague, or client or your company.

There are two kinds of confidentiality, proprietary company information and information on people. You know a great deal on your organisation's proprietary information such as clients, information about jobs, retrenchments, salary increases, job performance and assessments, company profits and losses. The list goes on and on.

So what should you do to avoid disclosing confidential information? Some guidelines have been provided in the Code of Professional Conduct written by SAICA (The South African Institute of Chartered Accountants).
For your own benefit the excerpt on confidentiality is given below:


### Application of the Code, 140 Confidentiality

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
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</table>
| 140.1   | The principle of confidentiality imposes an obligation on professional accountants to refrain from:  
(a) Disclosing outside the firm or employing organization confidential information acquired as a result of professional and business relationships without proper and specific authority or unless there is a legal or professional right or duty to disclose; and  
(b) Using confidential information acquired as a result of professional and business relationships to their personal advantage or the advantage of third parties. |
| 140.2   | A professional accountant should maintain confidentiality even in a social environment.  
The professional accountant should be alert to the possibility of inadvertent disclosure, particularly in circumstances involving long association with a business associate or a close or immediate family* member. |
| 140.3   | A professional accountant should also maintain confidentiality of information disclosed by a prospective client or employer. |
| 140.4   | A professional accountant should also consider the need to maintain confidentiality of information within the firm or employing organization. |
| 140.5   | A professional accountant should take all reasonable steps to ensure that staff under the professional accountant’s control and persons from whom advice and assistance is obtained respect the professional accountant’s duty of confidentiality. |
| 140.6   | The need to comply with the principle of confidentiality continues even after the end of relationships between a professional accountant and a client or employer. When a professional accountant changes employment or acquires a new client, the professional accountant is entitled to use prior experience. The professional accountant should not, however, use or disclose any confidential information either acquired or received as a result of a professional or business relationship. |
### Application of the Code, 140 Confidentiality

**140.7** The following are circumstances where professional accountants are or may be required to disclose confidential information or when such disclosure may be appropriate:

(a) Disclosure is permitted by law and is authorized by the client or the employer;

(b) Disclosure is required by law, for example:
   (i) Production of documents or other provision of evidence in the course of legal proceedings; or
   
   See Definitions.
   (ii) Disclosure to the appropriate public authorities of infringements of the law that come to light; and

(c) There is a professional duty or right to disclose, when not prohibited by law:
   (i) To comply with the quality review of a member body or professional body;
   (ii) To respond to an inquiry or investigation by a member body or regulatory body;
   (iii) To protect the professional interests of a professional accountant in legal proceedings; or
   (iv) To comply with technical standards and ethics requirements.

**140.8** In deciding whether to disclose confidential information, professional accountants should consider the following points:

(a) Whether the interests of all parties, including third parties whose interests may be affected, could be harmed if the client or employer consents to the disclosure of information by the professional accountant;

(b) Whether all the relevant information is known and substantiated, to the extent it is practicable; when the situation involves unsubstantiated facts, incomplete information or unsubstantiated conclusions, professional judgment should be used in determining the type of disclosure to be made, if any; and

(c) The type of communication that is expected and to whom it is addressed; in particular, professional accountants should be satisfied that the parties to whom the communication is addressed are appropriate recipients.
Dealing with Confidential Issues in the Office

Computers, fax machines and printers:
When possible, computers, fax machines and printers that might be used for confidential data should be placed in secure areas where access is restricted to only those individuals with permission to access confidential information.

Computer display:
- Remove confidential data from screens where it is not required.
- Be aware of the position of computer screens. Unauthorised individuals should not be able to read screens containing confidential information.
- Be sure to log off from applications that show confidential data so that no data is accessible after you are finished.
- Computers that are used to access confidential data should have a time-out feature so that when a person steps away from their computer for a period of time, the person is required to re-enter their password.
- The use of a password protected monitor is highly recommended.

Fax machines and printers:
- Verify correct fax numbers when sending confidential information, and always use a confidentiality cover sheet. If you receive an unintended fax that contains confidential information, immediately inform the sender and either secure or destroy the information.
- Stand at public fax machines or printers or have documents containing confidential information retrieved immediately so that unauthorised individuals have no opportunity to see the information.
- All faxes should state the confidential nature of the contents of the communication and have instructions should the fax be misdirected.
Telephone, internet (email) and other communications:

- Limit information that is to be provided to others, to what is required / needed / requested. Do not use a general form that contains additional confidential information not required to satisfy a request. For example, if another office needs to verify name and address information, and that information appears on a form that also contains other confidential information (such as remuneration information) either black out the unnecessary information on the form or else use another means for providing the requested information.

- Conversations (between staff members or staff and other individuals) containing confidential information must be restricted to private and non-traffic areas where the conversations cannot be overheard by others. Have the discussion in a boardroom.

- Avoid discussing confidential information in public spaces such as elevators or cafeterias.

- Verify the identity of individuals to whom you are providing confidential information. Do not disclose confidential information to unauthorized individuals (including family members and friends).

- Never leave voice mail messages containing confidential data.

Passwords:

- Computers that are used to access confidential data must be password protected.

- Employee should only be given access to those computers and information to which they are entitled. Each employee must use their own password to access computers containing confidential data.

- Passwords need to be kept confidential (not shared with anyone else) and need to be changed on a regular basis to ensure security. Passwords must never be left on ‘Post-it’ notes next to the computer.
Storage and Access

Storage of confidential information:

- Store copies of confidential information, in locked file cabinets or desks.
- Store non-reproducible confidential information in areas designed to safeguard it from unauthorised viewing and damage from natural cause.
- Administrative data should be stored on the network drive rather than physical drive on your Personal Computer (PC). Caution should be used when storing administrative information on portable computers.
- Regularly back up locally maintained confidential information stored on disk to ensure that information is not lost in the event of disk failure and store backups in a locked facility with limited access.
- Keys and access cards that permit entry into storage facilities where confidential data is stored must not be loaned or left where others could use them to access the secure areas.
- All confidential information must be protected from cleaning staff, maintenance staff and others who may have a need to access the facility where confidential information is located.
- Records and reports (paper and electronic) containing confidential information should be stored in locked rooms, cabinets and / or desks when not in use. Access to these rooms, cabinets and desks must be limited to those who are authorized to access the confidential information.
- Employees should ‘clean’ their desks of all materials containing confidential information prior to leaving at the end of the day, and store the materials securely.
Access:

- Ensure that all keys and other items that allow access to confidential information, both physical access and computer access, are returned when the individual’s access to the information is no longer appropriate.

- Do not look up confidential information pertaining to yourself or anyone else unless you are authorised to do so.

- Limit access to confidential information to the minimum need to do the job.

- Implement electronic audit trail procedures to monitor who is accessing what.

- Use logs or electronic audit trails to monitor employees’ access to records with confidential data.

- If you are required to share confidential data with other (third-party) organizations, including contractors, use written agreements to protect their confidentiality. Such agreements should prohibit such third parties from re-disclosing the confidential data, except as required by law; require such third parties to use effective security controls on record systems containing confidential data; require the return or secure disposal of the data when the agreement ends, and hold such third parties accountable for compliance with the restrictions you impose, including monitoring or auditing their practices.
Session 8

Business Entertainment the Professional Way

There are few business endeavours today, which do not require some degree of business entertaining. This can be an enjoyable task or a ‘nightmare’. In order to create a good impression with those you are entertaining it is wise to brush up on the etiquette of entertaining.

Half the secret of successful business entertaining is that you should relax and enjoy yourself just as much as you would like to see your guests doing.
Entertaining Associates

Entertaining colleagues and potential clients, or being entertained by them, can be an agonising experience for a person who is shy, or who is unfamiliar with the environment.

When you are promoted to a managerial position it may be one of the first social roles that you are asked to perform. It is common practice for a newly appointed manager to be introduced through a social gathering to both colleagues and clients. The event may take the form of a cocktail party or a brief drinks session around the company bar after working hours.

However nervous your stomach feels, it is wise not to show this on your face or through your actions. Try and think of the functions as a social gathering with your close friends and family.

Adequate Preparation

Give Sufficient Notice:

The first issue is the length of time before the event when an invitation is issued. Casual, last minute are fine for friends and acquaintances from the office, but for people outside the office such as clients, potential customers, and agents it is wise to give sufficient warning. Two weeks is sufficient for most people, but if you wish to see people on a Friday or Saturday, an extra week’s warning is needed.

Choose the venue and the menu wisely:

Choosing a venue to take a new business associate to lunch or dinner can be a minefield if the manager’s secretary has not been briefed to find out from their counterpart what type of food the guest does and does not eat.

Imagine taking a new associate to a seafood restaurant only to find out he or she is either allergic to fish or does not eat it for religious reasons. Such scenarios can be avoided by doing homework.
Similarly, taking a casual person to an extremely upmarket restaurant can cause considerable embarrassment, especially if you attempt to show off your gourmet tastes to a person who has no idea of the calibre of restaurant to which you have invited them. Some people do not appreciate rich or fancy food and would be happier with a plain steak. More successful business partnerships are struck by ensuring your guest’s stomach is happy than by an unwilling guest picking their way through a plateful of snails and desperately attempting to appear polite.

Restaurants that brandish large silver platters and whisk fancy tops off the platters in flamboyant style can be overpowering to a person who neither enjoys such behaviour nor feels relaxed in such surroundings; while a fast-food type eatery may not satisfy a gourmet.

**Wining and Dining**

**Watch your budget:**

Avoid being tempted to show off by ordering something, which is outrageously expensive because you think it will make a good impression. You could be made to feel the fool when your guest leaves their glass half full, and the bill is presented to you for payment and is substantially higher than you budgeted for.

**Ordering a meal:**

- Ordering food or drink for somebody else is generally not a good idea unless you are certain of their tastes. Eel may be a delicacy to one person, but it can be inviting instant nausea for another.

- The manner in which food is cooked is an individual’s preference ranging between raw and overcooked. Whichever your guest chooses is probably they like, and their choice should be respected. Don’t advise or criticise.

**Ordering beverages:**

- Pre-lunch or pre-dinner drinks are not considered an essential, particularly if you have concern for your guest returning to their office or home in a state to drive safely.

- The choice of wines, if you are not an expert, is best recommended by a sommelier (a wine expert, employed by a restaurant) or a good maitre d’in a top restaurant, or by the senior wine steward elsewhere.

- Alternatively, ask your guest whether they favour a particular wine. This would be a good way of ensuring that they are at least drinking what they like.
Speak out when you must:

If you, as the host, find yourself in the embarrassing situation that the service, food or general ambience at your chosen venue is bad, a quick apology will speak volumes for your discretion. Ignoring it will cause your guest to wonder about your business acumen if in a social situation you set such low standards. However, kicking up an unseemly scene will certainly not endear you to either the restaurant or your guest.

Restaurant Etiquette and Manners

Behaving correctly during a formal dinner can often be a minefield. The following guidelines are intended to get you through the meal with professional aplomb:

<table>
<thead>
<tr>
<th>Rule</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Sit up straight</td>
<td>Try not to slouch or lean back in your chair, even when attending an informal function.</td>
</tr>
<tr>
<td>2. Don't speak with your mouth full of food</td>
<td>Not only is it bad manners to talk with food in your mouth, it is also a potential choke hazard. When someone ask you a question and you have a mouth full of food, make a gesture with your hand to indicate you will answer in a minute. If you feel you must speak immediately, if you have only a relatively small bite, tuck it into your cheek with your tongue and speak briefly.</td>
</tr>
<tr>
<td>3. Chew quietly, and try not to slurp</td>
<td>Making noises is not only unappetising, and distracting, but it can also interrupt the flow of conversation. It is very rude to chew with your mouth open. People do not want to see what you are chewing.</td>
</tr>
<tr>
<td>4. Keep bites small</td>
<td>In order to facilitate the above rules it is smart to keep bite sizes to a moderate forkful. Cut meat and salad so that it doesn't hang from your mouth. Don't cut all of your meat at one time, this tends to remind people of feeding small children; and the messiness associated with this activity.</td>
</tr>
<tr>
<td>Rule</td>
<td>Guidelines</td>
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<tr>
<td>5. <strong>Eat at a leisurely pace</strong></td>
<td>This rule, besides being good for the digestion, also shows your host that you want to enjoy the food and the company. Eating quickly is a sign of disrespect for the host, as it shows that your focus is on the food and that you would rather be at home than passing time with your host.</td>
</tr>
<tr>
<td>6. <strong>Don't wave utensils in the air</strong></td>
<td>Especially knives or if there is food on them. Besides the danger of knocking over glasses, piercing waiters or launching a pea into the eye of your host or guest, this is a sign of over-excitedness that may be unappealing to those present.</td>
</tr>
<tr>
<td>7. <strong>Keep your elbows off the table</strong></td>
<td>Elbows take up table space and can be a danger in knocking plates or glasses. Elbows on the table give you something to lean on and tend to lull you into slouching.</td>
</tr>
<tr>
<td>8. <strong>Don't reach</strong></td>
<td>You don’t want to get in the way of people either eating or talking. Not only is it as impolite, but there is always the possibility of upsetting glasses or running your sleeve through someone’s mashed potatoes.</td>
</tr>
<tr>
<td>9. <strong>Don’t forget please and thank you</strong></td>
<td>These are handy words in most situations but especially vital at the table where common courtesies are noticed by everyone present.</td>
</tr>
<tr>
<td>10. <strong>Excuse yourself when leaving the table</strong></td>
<td>You don’t want people to think that you are tired of their company. If you must leave the table make your excuses somewhat obvious and appear to be pressing. You want to leave people with the impression that you would rather remain at the table talking with them than doing anything else, but the matter at hand is so pressing that it must be attended to at once.</td>
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<tr>
<td>11. <strong>Compliment the cook</strong></td>
<td>Even if the food is perfectly awful say something nice. You don’t have to lie, simply find the positive side of the burnt leg of lamb...“Gee, the sauce was delicious.” It is always pleasant to end a meal on a positive note.</td>
</tr>
<tr>
<td>12. <strong>Wipe your mouth before drinking</strong></td>
<td>Ever notice that disgusting smudge on the edge of your wine glass? This can be avoided by first wiping your lips with your napkin.</td>
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<tr>
<td>Rule</td>
<td>Guidelines</td>
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<tr>
<td>13.</td>
<td>Use cutlery properly&lt;br&gt;According to dining etiquette, food should be cut and eaten with the fork in the left hand and your knife in your right hand. Once cut, the knife should be used to assist you in placing your food on your fork.&lt;br&gt;Many people struggle with which utensil to use in an extremely formal restaurant. As each course arrives, simply use the outermost utensils at your place setting. Once used, the utensil is left on the serving dish and taken away by the server. When the next course arrives, the outermost remaining piece of flatware will be the appropriate choice.</td>
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<td>14.</td>
<td>Waiting for your guest&lt;br&gt;If you arrive at the restaurant before your guest, politely wait in the bar area. If you are meeting with someone you have a long-standing business relationship, ordering a drink is acceptable. If this is a fairly new business partnership, hold off until everyone can order together.</td>
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<tr>
<td>15.</td>
<td>Hold a wine glass where the stem meets the bowl&lt;br&gt;According to proper table manners etiquette this is the preferred way to hold any glass of wine. If, however, you are incapable of holding the glass securely that way, hold it however feels comfortable.</td>
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Comprehending the Formal Table Setting

Formal table settings can be intimidating to the uninitiated fine diner, but once you understand the basic layout common to formal table settings, you’ll find fine dining to be an absolute joy.

Why all the cutlery?

In most cases, the rule of thumb would be to work from the outside in. For example; soup is normally served as a starter and therefore the soup spoon is placed on the end (to your right) because it is used first.
Tipping in South Africa:

- Tipping is widely practised in South Africa.
- In restaurants and bars, 10% is the accepted tipping standard.
- Parking attendants and security guards are common in parking lots and at roadside bays. They generally ask if they can watch your car while you are going about your business. If you agree, a tip of R2 and upwards should be offered, depending on the length of your stay.
- In South Africa we still have the luxury of petrol attendants at gas stations to fill up our vehicle tanks, check oil, water and tyre pressure, and clean the windscreens. How much to tip for this special South African service? From R2 upwards.
- The going rate for porters at airports is around R5 per piece of luggage.
- South Africa has a tradition of roadside newspaper vendors. It is custom to give the seller some change; rounding off the cost of your newspaper should be sufficient.
- Some of the other service providers you may want to tip are taxi drivers, tour guides and assistants in hairdressers and beauty salons. Should you need assistance in taking your purchases from supermarket to your vehicle, you may want to show your gratitude to your helper with a small monetary reward.

Get Down to Business

Initiating business talk:

- Many people find it awkward to decide when it is the best time to start discussing business.
- They feel that if they start too early during the meal they will appear too pushy, but to leave it too late leaves the guest with the feeling that you are wasting his time.
- Each situation really needs to be judged on its own merits. Sometimes it is better to gently veer the conversation round to business especially when negotiations could prove to be a little difficult.
- Other people prefer a more direct approach, which may be interpreted as honest and up front. This also giving the opportunity for business to be discussed, and out of the way during the commencement of the meal, making the remainder of the time a pleasant social affair.
- Keep the conversation going. Awkward silences during business entertaining are not always easy to overcome, although if everyone speaks the same language, it is easier.
Taking control:

The person hosting the meal is responsible for ensuring that the event proceeds smoothly and that it does not turn into a boring affair. However, making jokes with people you don’t know well is not the answer, since you cannot be certain of their brand of humour and to what degree they may find your humour distasteful.

It is safer to find a topic, which, aside from the business at hand, will encourage people to talk about themselves and their interests. Travel tends to be a popular topic since there are always places that people want to visit. It can be to your advantage to learn more about your guest.

Showing Appreciation

If you are invited to the home of a local business associate, arriving empty handed is considered neither polite nor thoughtful. A gift of some sort is welcome, whether it is a bottle of wine for the host or a box of chocolates or a bouquet of flowers for the hostess.

A friendly phone call or SMS, the following day, to the host / hostess, is generally appreciated, especially if you know that they have gone to considerable effort to put together a pleasant evening.

The hand-written note of thanks is seen all too rarely these days. It is still a sign of good etiquette, also when you have received birthday gifts or other presents.

Do not be afraid to discreetly ask your host whether there is anyone whom you should thank personally. People behind the scenes often make a bigger contribution than those in front, and a word in the right direction can ensure ongoing ease of communication in the business environment. Cultural differences.
International Associates
In an international society, the world is becoming more like a global village with the amount of travel which is undertaken daily by business people. As a result you will find yourself meeting people from all walks of life and with many different cultural backgrounds. Sometimes the mannerisms and behaviour shown by these people will be totally alien to your own and it may leave you wondering what to expect next.

EXAMPLE
Examples of this are particularly prevalent in Africa and the Far East, where direct eye contact is often considered extremely rude, which is the opposite of how it is perceived in the Western world. Similarly men preceding women through doors can be seen as being extremely rude but in African, Far Eastern and certain European countries, it is common practice, as the man is seen to be protecting the woman.

Tolerance and acceptance of others’ behaviour in the work place is vital to ensure harmony between the many people of the world. Even though you may be tempted to tell someone that they are doing something in the wrong way, in their eyes, they may be acting with perfect grace and etiquette.

When you travel overseas it is important to learn about the traditional customs of the place you are going to visit, but it is equally important to learn about the different customs that are prevalent in your own country. More and more people are transferred to different parts of the world and just as you would appreciate someone understanding your habits if you moved, it is good etiquette to try and understand those of the people you work with on a daily basis.
Annexure
Activity 1: The Brand called You - Building Me Inc

Authentic Personal Branding is a process that requires you to understand and focus your natural strengths, talents, passions, ideals, values and experience so that your daily actions, connections and accomplishments move you ever closer to achieving your ultimate personal vision.

Our unique brand maps give us the directive guidance we that enables us to navigate through the kinds of lives we want and keep our achievements on track with our desired “end games.”

Work through this exercise to set you on track to start developing your own professional brand.

1. Identify three brands that you like. Write them down

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2. Why do you like them? Write down your specific reasons for liking each one.

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3. Now look for common themes across all three brands. You may have chosen all three because they represent “quality” or “reliability.” The traits that come up repeatedly are likely a match to your own personal brand values.

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Take a few minutes to discuss the brand values you uncovered with your colleagues, at your table. Later, check out the brand of the company you work for, the brands of the stores you like to shop at and the brands of the causes you support. There will be far more common values between you and the people and product brands you really love, and less between you and the brands that you don’t like as much.

4. Now that you know some of your personal brand values, use them as the basis of professional messages that you could use to advance your career or to grow your business.

5. Review your brand messages. Are they powerful and convincing? Write down your brand messages and keep them somewhere where you can review them regularly.
Activity 2: E-mail Etiquette

Brainstorm the e-mail etiquette no-no’s at your table. Appoint a spokes person to provide feedback to the plenary.