

Make It Stick

*Activity Pack*

Business Etiquette

 **Helping lessons learned through training become part of *how we work*.**

**To the Learner Leader…**

This suite of activities has been designed to reinforce the key learning from the **Business Etiquette** course. They have been designed to be led by Team Leaders or designated Trainers and do not require training experience, though for best results we recommend that whoever is leading the activities understands the principles of adult learning and has some experience in leading learning activities.

The suite of activities will provide you with up to six months of learning reinforcement. We recommend that an activity is run each month following the Business Etiquette course.

When running each activity:

* Ask the group to reflect back on the original course they attended:
* What takeaways did they have?
* What have they tried to implement?
* When revisiting some of these activities for a second time, ask them what additional ideas or thoughts they have in applying the concepts and tools in the activities to their job.

Each activity will take 10-15 minutes to run depending on the size of the group.

There is one activity to a page. Each activity has a brief introduction followed by instructions for the trainer.

We suggest the following to optimise your learning experience:

* Have the group meet away from their normal workspace
* Make sure mobile devices are switched off so that everyone fully engages
* Make the environment ‘safe’ and encourage everyone to contribute
* Run these activities with everyone standing – try running them outdoors in the fresh air
* Have other team members take the lead and run an activity – this will build confidence and leadership skills
* Don’t be afraid to improvise – the learning needs to be about you and your group so make it meaningful
* When debriefing an activity get the group to reflect on what the activity means for them and what they will do differently or continue to do that underscores the learning points from the activity

**Activities in this pack**

1. Social media in the workplace
2. Making introductions
3. Remembering names
4. Starting a conversation
5. Socialising after hours
6. Ethical dilemmas

**Activity 1: Social media in the workplace**

**Introduction**

As with other areas of the workplace, incivility can also occur online. You should not accept or tolerate incivility in any medium including online. Incivility can occur in emails, on blogs, via tweets, in instant messaging, via company social media accounts – in any medium and in any way in which messages are communicated.

**Instructions**

Discuss with the group what they believe should be the standard set in the workplace for each of the following. You may choose to break the group into smaller groups then regroup to debrief so that everyone has the chance to contribute.

|  |  |
| --- | --- |
| Using your work internet account to conduct personal online business or browse the internet for personal interest |  |
| Responding to company blog posts or chatrooms |  |
| Responding to external blogs as a company employee |  |
| Responding to angry, vulgar or obscene comments left on social media about you or your company |  |
| Representing yourself as someone else online |  |
| Downloading commercial software |  |
| Sharing proprietary information with others |  |

Note – there are no right or wrong answers here and you may already have policies in place to guide behaviour in these areas. Even if there are policies in place what should be explored in this activity is the reasons why, and how they relate to respect and courtesy.

**Activity 2: Making introductions**

**Introduction**

How to introduce others may have some cultural differences but generally the following rules apply:

* The host meets, greets and introduces guests to other guests
* If you join a group in which introductions have already been made, it is expected that you will introduce yourself
* Never use first names only. In formal settings use a person's title. Only use first names if invited to do so by the person themselves
* Introductions are based on rank and position in the company. Always introduce a more junior person to a more senior person, naming the senior person first and the junior person last
* Clients take precedence. Always introduce your boss to a client, not the other way around
* In a group, introduce several people to one person at a time following hierarchy and using the important person's name first
* Help people to initiate conversation by giving them some basic information about what role or position they hold

**Instructions**

Use sticky labels as name tags and ask each person to write their character’s name on it clearly including which company they are representing.

Assign a participant to each of the following characters:

* Ms Jane Briggs – Managing Director of Polo International **and host** for the evening
* Mr Mike Jones – Senior Vice President of Marketing with Polo International
* Ms Linda Gomez – Personal Assistant to Ms Jane Briggs
* Mr George Kallis – a new employee in Polo International who has just started as a junior sales person
* Mr Fumio Tanaka – Head of Toll Corporation, a top 10 client of Polo International
* Mr Kichiro Yamada – Chief advisor to Mr Fumio Tanaka

Use different variations:

* Jane Briggs to introduce Mike Jones to Fumio Tanaka and Kichiro Yamada
* Linda Gomez to introduce Jane Briggs and Mike Jones to Fumio Tanaka and Kichiro Yamada
* George Kallis to introduce himself to the whole group

As much as possible, practice using the introduction tips discussed above.

Also note that introductions may not always be with a handshake – a bow would be appropriate if this was happening in Japan.

**Activity 3: Remembering names**

**Introduction**

It can sometimes be challenging to remember names of people in business settings. One way of remembering names is to convert the name into a mental image and an associated feature of that person. For example:

* Imagine a ham that weighs a ton spinning on the end of Mrs. Hamilton’s nose.
* Picture an old-fashioned car jack under Jack’s prominent jaw.
* See margarine melting through Margaret’s curly, blond hair.

If you are more attuned to sounds, make a rhyme, associating the name with your impression of the person. Or link the person’s name to a song lyric.

* Dave needs a shave.
* Latrice is Patty’s niece.
* Michelle, ma belle. (The Beatles’ tune)

**Instructions**

* In this activity the participants are to give themselves a new name and role within their workplace. If they want to, they can use their middle name if they have one.
* Once everyone has decided on their new name, they are to introduce themselves in turn to the rest of the group stating their name and their role within their workplace.
* Instruct the group that as this is happening, they should try to think of a mental image to remember each person by.
* Make sure that this is not rushed, as people need time to create a mental image.
* No one is permitted to take notes during this time.
* Once everyone has spoken give participants a couple of minutes to write down all the names they can remember.

Debrief

Get feedback from the group on whether this technique worked for them and what images they created to assist their memory.

**Activity 4: Starting a conversation**

**Introduction**

The three principles of polite conversation are:

* Ease – put the other person at ease
* Sincere – engage in a genuine exchange of conversation
* Care – show that you care what the other person is saying

**Instructions**

Depending on the group size – break into pairs and have each pair introduce themselves then start a conversation. After five minutes, combine pairs into fours, have them introduce each other to the new pair, then restart a conversation. Make sure that each person has the role of doing the introductions. Then change pairings and repeat. Ask the participants to use one of the topics below:

* Current events – what is a current topic in the news either domestically or internationally
* International or national events – sporting events, national holidays, festivals
* Cultural events – exhibitions, films, theatre, the arts
* Industry related news – government announcements, company announcements

**Debrief**

Ask the group how they felt and if they believe practice will give them confidence.

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Now go through the following conversation tips and discuss the pros and cons with the group and ask them for examples of where they have or haven’t used these tips and what the consequence was.

* Avoiding certain topics
  + Religion
  + Politics
  + Sex
  + Money
* Avoiding asking personal questions
  + Relationship status
  + Stereotyping women and other groups
* Avoiding using inappropriate language and humour
* Not dwelling on one topic
  + After 5-10 minutes changing topic
  + Knowing when to discuss business and when not to
  + Filling embarrassing voids in the conversation
* Listening politely
  + Listening more than talking
  + Asking questions to allow others to speak
* Accept and give compliments with grace
* Never repeating gossip

**Activity 5: Socialising after hours**

**Introduction**

Many workplaces encourage staff socialising after hours as it can help build stronger bonds between employees. It can also trap the unwary as social environments can lower the guard of people as they become more relaxed. The important thing for people in supervisory or management roles to realise is that their role and the power they have as a result of that remains the same in social settings.

**Instructions**

You can break the group into smaller groups if desired then debrief as one group. It is important that everyone has the chance to reflect and contribute to the conversation. Ask participants to reflect on the following behaviours and to suggest what the consequences are for them as either a co-worker or a manager. Some suggestions are given in the table below.

|  |  |  |
| --- | --- | --- |
| Behaviour | What are the consequences for you as a co-worker? | What are the consequences for you as a manager? |
| You engage in gossip | Lose others’ trust in you  Lose credibility  Lose integrity | As with co-workers, however the effect is more pronounced as people will be reluctant to raise personal or business issues with you |
| You drink too much alcohol | Seen as irresponsible | Seen as irresponsible  Not seen as demonstrating leadership qualities |
| You are attracted to a co-worker and make your feelings known to many | This will cause tension in the workplace if the feelings are not reciprocated | As with co-workers – also, if the other person reports to you this could compromise the integrity of your relationship |
| You disclose sensitive information | Loss of trust  Seen as reckless and irresponsible | As with co-workers – also an affront to the seniority of your role |
| You either tell jokes or laugh at humour that is disrespectful | Disrespect  Loss of integrity | Disrespect  Promoting a culture that is disrespectful  Loss of integrity |

Debrief questions:

* What should you be mindful of in any business social setting?
* What should you do when you feel uncomfortable in such settings or when things are getting out of control?

**Activity 6: Ethical dilemmas**

**Introduction**

Ethics refers to the values and principles held by individuals or enshrined in an organisation that guide workers in making the right decisions. During ethical dilemmas, the ethics of an individual can be sorely tested, and one can agonise over what is the right thing to do. Business etiquette and ethics are closely related. In a 2014/2015 report, Kessler International conducted a national survey which found 84% of management observed rudeness and a lack of courtesy in their staff and 65% believed their staff lacked a moral compass. Manners, such as extending courtesy to others, helps imprint a moral code in people that aids in ethical practice.

**Instructions**

Discuss with the group what they would do in the following situations.

**Scenario 1**

You work in accounts. Your supervisor enters your office and asks to be reimbursed for $150.00 for expenses he tells you he incurred entertaining a client last night. He submits receipts from a restaurant and bar. At lunch your supervisor’s girlfriend stops by to pick him up for lunch and you overhear her telling the receptionist what a great time she had at dinner and dancing with your supervisor the night before.

**Scenario 2**

You’ve been promoted to senior management at last – the first woman in the company to be so. But you suddenly find that the boss is in the habit of taking the other senior managers to a local strip club periodically after senior team dinners. They excuse themselves apologetically to you when it comes time to do this, but they still head off together. You discover these evenings are a key part of the senior team bonding process, and realise some important things get informally decided during these evenings.

**Debrief**

Things to consider for Scenario 1:

* Does he trust his boss?
* Did the girlfriend attend as his partner along with a client?
* Discrete enquiries on who the client may have been.
* Review company expenses policy on what expenses can be met.
* If in doubt confront the boss respectfully.

Things to consider for Scenario 2:

* Raise the issue of respect with the boss and how this reflects on you and him as a leader.
* Strongly express your disapproval.
* Ask how this behaviour complies with the values and principles of the organisation.
* Raise the issue of whether work issues are discussed informally and if so make it known that this should be stopped.