

Business Etiquette

Sample



Corporate Training Materials

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Preface

What is Courseware?



Welcome to Corporate Training Materials, a completely new training experience!

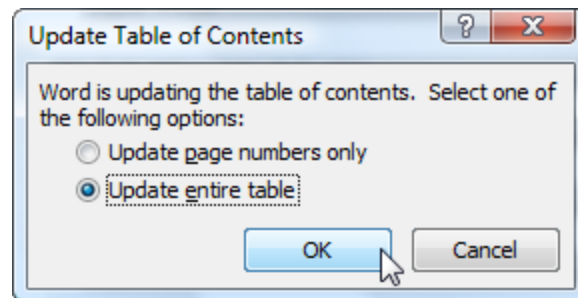
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

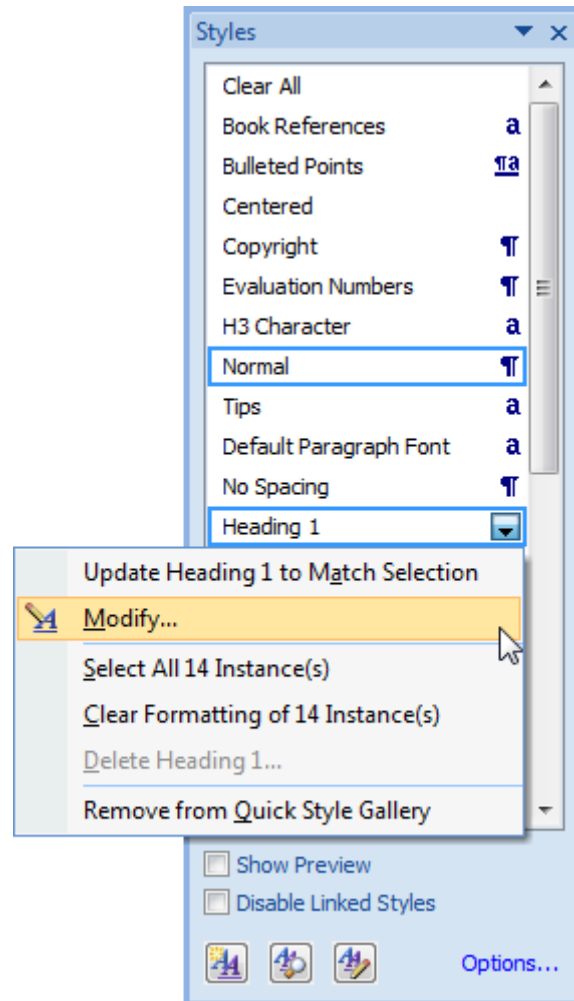


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
 - Use examples, case studies, and stories that are relevant to the group.
 - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
 - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest [Experiential Learning](#) by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

Icebreakers

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

Icebreaker: Friends Indeed

Purpose

Have the participants moving around and help to make introductions to each other.

Materials Required

- Name card for each person
- Markers

Preparation

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

Activity

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.

Training Manual Sample

On the following pages is a sample module from our Training Manual. Each of our courses contains twelve modules with three to five lessons per module. It is in the same format and contains the same material as the Instructor Guide, which is then shown after the Training Manual sample, but does not contain the Lesson Plans box which assists the trainer during facilitation.

The Training Manual can be easily updated, edited, or customized to add your business name and company logo or that of your clients. It provides each participant with a copy of the material where they can follow along with the instructor.

An unbelievable number of client interactions start with a phone call.

David Gerson

Sample Module: Phone Etiquette



This time we will look at telephone etiquette. Particularly, we will discuss how to develop an appropriate greeting, how to deal with voicemail and cell phone do's and don'ts.

Developing an Appropriate Greeting

How to create an appropriate phone greeting:

- Say your greeting:

Business telephones should always be answered with a phrase like, "Good morning" or "Good Afternoon." Speak clearly and distinctly, in a pleasant tone of voice. Some trainers recommend smiling before one answers the phone in order to project a positive energy into one's voice.



- Identify yourself and the company. It's only polite to tell the other person on the line that they've reached the right place.

"This is ABC Company, Carol speaking." Or "You've reached Marks and Spencer, this is Jonathan."

- Inquire how you might be of assistance.

"How may I be of service?" or "How can I help you?" can set the tone.

Dealing with Voicemail

Tips on leaving a voicemail message:

- State your name, affiliation and phone number.
- State your reason for calling.
- State any action plan or action required on your message.



Tips on managing your own voicemail:

- Record your own personal greeting. Include in your greeting your name, the department and or company name so that people know they have reached the correct person.
- Give people information that can help them, to save you time as well. *Example: "Please leave a brief message stating how I can help you, along with your phone number, and I will call you back."*
- Stay on top of your messages. The number of times you check voicemail each day will vary depending on your job function and industry. However, if you have not told people differently, at a minimum you should check messages once a day and return those calls. State when you would be unavailable if you can't respond within 24 hours. *Example: "I'm out of the office today, January 3rd. I will be returning January 5th. I will not check voicemail until I am back. If this is an emergency or you need immediate assistance, please call Bill Withers at 555-555-6789."*

Cell Phone Do's and Don'ts

Here are some cell phone do's and don'ts.



- Don't take calls in the middle of a business meeting or a conversation with another person. Exceptions are when you receive an urgent call, but excuse yourself first before taking it. Likewise, set your ringer to silent or your phone to just vibrate mode when in a social conversation.
- Never talk in intimate settings or places where silence is imperative. Examples of these are elevators, libraries, museums, restaurants, cemeteries, theaters, dentist or doctor waiting rooms, places of worship, auditoriums or other enclosed public spaces, such as hospital emergency rooms or buses.
- Don't talk on a cell phone in a public place. A good rule to keep is the 10 feet rule --- answer calls at least 10 feet away from the next person!
- If you really have to take a call in public, step out or to a secluded area to take that call. You can also set your phone to voicemail when going out in public. If you really must take the call, answer briefly to tell that you're in a public place and that you would return the call as soon as possible.
- Keep business calls within business hours. Just because it's a cell phone doesn't mean that you can call anytime.

Instructor Guide Sample

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box. Each Instructor Guide and Training Manual mirrors each other in terms of the content. They differ in that the Instructor Guide is customized towards the trainer, and Training Manual is customized for the participant.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

An unbelievable number of client interactions start with a phone call.

David Gerson

Sample Module: Phone Etiquette



This time we will look at telephone etiquette. Particularly, we will discuss how to develop an appropriate greeting, how to deal with voicemail and cell phone do's and don'ts.

Developing an Appropriate Greeting

Estimated Time	10 minutes
Topic Objective	To know the 3 steps in creating an appropriate telephone greeting.
Topic Summary	<p>Steps in creating an appropriate greeting:</p> <ol style="list-style-type: none"> 1. Say your greeting. 2. Identify yourself and the company. 3. Inquire how you may be of assistance.
Materials Required	<ul style="list-style-type: none"> • Flip chart • Markers
Recommended Activity	Divide the group into pairs. Assign each person as a caller and a receiver. Let the person assigned as receiver practice the three steps in creating an appropriate greeting. Afterwards, exchange places. Provide each other feedback.
Delivery Tips	Model the steps. Illustrate the difference tone of voice, enunciation and intonation can make on a phone call.

How to create an appropriate phone greeting:

- Say your greeting:

Business telephones should always be answered with a phrase like, "Good morning" or "Good Afternoon." Speak clearly and distinctly, in a pleasant tone of voice. Some trainers recommend smiling before one answers the phone in order to project a positive energy into one's voice.



- Identify yourself and the company. It's only polite to tell the other person on the line that they've reached the right place.

"This is ABC Company, Carol speaking." Or "You've reached Marks and Spencer, this is Jonathan."

- Inquire how you might be of assistance.

"How may I be of service?" or "How can I help you?" can set the tone.

Dealing with Voicemail

Estimated Time	10 minutes
Topic Objective	To list etiquette guidelines in leaving a voicemail message. To list etiquette guidelines in managing one's voicemail.
Topic Summary	<p>When leaving a voicemail message, state:</p> <ol style="list-style-type: none"> 1. Your name, affiliation, and phone number. 2. Your reason for calling. <p>Your action plan or action you're expecting.</p> <ol style="list-style-type: none"> 1. Tips on managing your voicemail: 2. Record your own personal greeting. 3. Give people information that can help them help them, to save you time as well. 4. Stay on Top of Your Messages. 5. State when you'd be unavailable if you can't respond within 24 hours.
Materials Required	Flip chart paper and markers 2 Voice Recorders or a means to play the recording to the plenary.
Planning Checklist	Prepare two voice recorders beforehand. They can be a tape recorder or even just an MP3 player with a record function. Have a means to play the recording to the plenary. Test both before the workshop.
Recommended Activity	Ask for two volunteers from the group. Assign one to create a receiving voicemail message that uses the guidelines shared. Assign another to record a voicemail message as if he's a client needing a meeting with the voicemail owner. Play the recordings in the plenary and discuss.
Delivery Tips	Volunteers can do the recording while the group is on a restroom break, or while the group is in the middle of an icebreaker. If you don't want to do this activity, you can also just prepare beforehand samples of voicemail messages for discussion.

Tips on leaving a voicemail message:

- State your name, affiliation and phone number.
- State your reason for calling.
- State any action plan or action required on your message.



Tips on managing your own voicemail:

- Record your own personal greeting. Include in your greeting your name, the department and or company name so that people know they have reached the correct person.
- Give people information that can help them, to save you time as well. *Example: "Please leave a brief message stating how I can help you, along with your phone number, and I will call you back."*
- Stay on top of your messages. The number of times you check voicemail each day will vary depending on your job function and industry. However, if you have not told people differently, at a minimum you should check messages once a day and return those calls. State when you would be unavailable if you can't respond within 24 hours. *Example: "I'm out of the office today, January 3rd. I will be returning January 5th. I will not check voicemail until I am back. If this is an emergency or you need immediate assistance, please call Bill Withers at 555-555-6789."*

Cell Phone Do's and Don'ts

Estimated Time	10 minutes
Topic Objective	To present 5 basic guidelines in using cell phones.
Topic Summary	<p>When using cell phones, remember:</p> <ol style="list-style-type: none"> 1. Don't interrupt conversations you have to answer your cell phone. 2. Never talk in intimate settings or places where silence is imperative. 3. Don't take calls in public settings. 4. If you really have to take a call, go to a secluded area. 5. Keep cell phone calls within business hours.
Materials Required	<p>Flip chart paper and markers</p> <p>Worksheet 3 (see activities folder)</p>
Planning Checklist	Print a copy of the 'How Well Do You Use Your Cell phone Checklist' (Worksheet 3) for everyone.
Recommended Activity	Before presenting the tips, ask everyone to answer the checklist for self-reflection.

Here are some cell phone do's and don'ts.

- Don't take calls in the middle of a business meeting or a conversation with another person. Exceptions are when you receive an urgent call, but excuse yourself first before taking it. Likewise, set your ringer to silent or your phone to just vibrate mode when in a social conversation.
- Never talk in intimate settings or places where silence is imperative. Examples of these are elevators, libraries, museums, restaurants, cemeteries, theaters, dentist or doctor waiting rooms, places of worship, auditoriums or other enclosed public spaces, such as hospital emergency rooms or buses.
- Don't talk on a cell phone in a public place. A good rule to keep is the 10 feet rule --- answer calls at least 10 feet away from the next person!
- If you really have to take a call in public, step out or to a secluded area to take that call. You can also set your phone to voicemail when going out in public. If you really must take the call,



answer briefly to tell that you're in a public place and that you would return the call as soon as possible.

- Keep business calls within business hours. Just because it's a cell phone doesn't mean that you can call anytime.

Activities

During the facilitation of a lesson Worksheet or Handout may be utilized to help present the material. If a lesson calls for a Worksheet or Handout it will be listed in the Lesson Plan box under Materials Required. The trainer can then utilize the Activities folder for the corresponding material and then provide it to the participants. They are all on separate Word documents, and are easily edited and customized.

Below you will see the Worksheets or Handouts that are utilized during the training of the above lesson. They are located in the Activities folder and can be easily printed and edited for the participants.

Sample Worksheet: How Well Do You Use the Cell Phone?

Take the quiz below and see if you can score 100%

True or False

1. When your cell phone is ringing, it's only polite to answer it, regardless of who you were talking to in person at the time. True or False
2. If you really must take a call, excuse yourself. True or False
3. Libraries and churches can take exceptions when it comes to loud ring tones; therefore it is okay to not silence your phone from time to time when entering these kinds of places. True or False
4. You should take calls at least 10 feet away from the next person. True or False
5. Cell phones, unlike land lines, mean that you can call a person anytime. True or False

(Answers: 1. F, 2. T, 3.F, 4. T, 5. F)

Quick Reference Sheets

Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Business Etiquette

The Importance of Business Etiquette

- **Branding:** Everything we do will reflect on our company and our products. By acting professionally, we send the message that our business is credible and trustworthy. Personalized care may very well be your edge against the competition.
- **Customer Care:** The best way to show customers that their patronage is valued is to treat them with respect and consideration. This in turn can inspire customer loyalty and positive feedback.
- **Employee Engagement:** Good manners will help improve morale and confidence between employees and team members.
- **Team Synergy:** Good manners will help establish smooth working relationships within a team, which contributes to greater productivity.



Remembering Names

Remembering names may be difficult for some people, but it's not impossible. It's a skill: something that you can improve with constant application.



Here are some ways to remember names:

- **Repeat:** When someone is introduced to you, repeat their name. "It's a pleasure to meet you, Mark." This can help reinforce your memory of the name. You may also introduce them to someone else so that you can create an opportunity to use their name.
- **Use mental imagery:** We think in pictures, therefore associating an image with a name can help in assisting recall.
- **Put it on paper:** Write the name down as soon as you can. Or write their details on the business card they give you so that you would remember them the next time you see them around.
- **Use their name in creative sentences:** Mentally construct sentences that are fun and a bit frivolous, to make name recall less stressful. Alliterations, or repeating consonant sounds in succession, are a great way to remember names.
- **Be genuinely interested:** Remembering names begin with attitude. If you are sincerely interested in a person, then they would make an impact on you.

Tipping



Tip appropriately. The standard is 15% for moderate service and 20% for excellent service of the pre-tax cost of the meal. Deal with bad food or service by talking to the manager. Remember that many get a portion of the waiter's tip, not just the waiter, so you may be punishing the chef for a server's lack and vice-versa.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Business Etiquette

Awarded this _____ day of _____, 20____

Presenter Name and Title

PowerPoint Sample

Below you will find the PowerPoint sample. The slides are based on and created from the Training Manual. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

Sample Module: Telephone Etiquette

This time we will look at telephone etiquette. Particularly, we will discuss how to develop an appropriate greeting, how to deal with voicemail and cell phone do's and don'ts.

An unbelievable number of client interactions start with a phone call.

David Gerson

Developing an Appropriate Greeting

- How to create an appropriate phone greeting:
- Business telephones should always be answered with a phrase like, , "Good morning" or "Good Afternoon."
- Identify yourself and the company.
- Inquire how you might be of assistance.



Dealing with Voicemail

- Tips on leaving a voicemail message:
 - State your name, affiliation and phone number.
 - State your reason for calling.
 - State any action plan or action required on your message.
- Tips on managing your own voicemail:
 - Record your own personal greeting.
 - Give people information that can help them, to save you time as well.
 - Stay on top of your messages.



Cell Phone Do's and Don'ts

- Here are some cell phone dos and don'ts.
- Don't take calls in the middle of a business meeting or a conversation with another person.
- Never talk in intimate settings or places where silence is imperative.
- Don't talk on a cell phone in a public place.
- If you really have to take a call in public, step out or to a secluded area to take that call.
- Keep business calls within business hours.



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