Rules of protocol govern our behavior, from the seemingly benign (your professional attire) to the more complex (your decorum during a client meeting). It is widely assumed, rightly or wrongly, that good manners make good business. But etiquette rules aren’t etched in stone; they shift and adapt to help identify potential stumbling blocks in the ever-changing business environment.

The A-Z Business Etiquette Guide provides current tips and insight on everything from managing professional and personal obligations to navigating the sometimes-tricky waters of client gift-giving. The maxim is true that you never get a second chance to make a first impression and this guide will provide tools to make your professional contacts take notice.

A: Attire

“It is only shallow people who do not judge by appearances.”
– Oscar Wilde, The Picture of Dorian Gray

• A professional image instills confidence in your ability to get the job done. While wearing a suit may not be required in all settings, neat, clean clothing is mandatory. You may punctuate your outfit with an item or two to reflect your personal style.

• Choosing your clothing style depending on that of your client (slightly more conservative if your client is in banking, for example) will make both of you more comfortable.

• If your law firm or corporation has no written dress policy, pay particular attention to unofficial dress codes by observing what your managing attorney and other supervisors are wearing. Even if you know the dress code is business casual, make sure you are dressed on the higher end of the scale. When in doubt, it is better to be too formal than too casual.

• Scuffed shoes, bags or briefcases don’t convey a favorable impression.

• The classic uniform for women is a two-piece suit: a jacket paired with either pants or a skirt. Wool-blend suits in basic colors like navy, grey, beige or brown, always work. Shoes with conservative heels, like closed-toe pumps in leather or fabric, also are a safe bet.

• Men, like women, should wear classic suits in natural fibers. A conservative sports coat with a light-colored shirt and pressed slacks will work. Dark shoes and socks are a must.
B: Balance

“We come into this world head first and go out feet first; in between, it is all a matter of balance.” – Paul Boese

• Balancing professional and personal obligations in the legal industry can be complicated, especially when working on numerous cases or with large groups of people. If you telecommute from home or other offices a few days a week or have a flexible schedule, be sure to communicate your work hours to your coworkers.

• Conversely, be respectful of others’ schedules. If you need to reach someone regarding several issues or requests, bundle your queries and send them all at once so your colleague isn’t interrupted multiple times.

C: Cell Phones

“This ‘telephone’ has too many shortcomings to be seriously considered as a means of communication. The device is inherently of no value to us.” – Western Union internal memo, 1876

• This may seem obvious, but the point is often overlooked: During business meetings, turn off the ringer of your cell phone and let voice mail answer any calls. Your phone or BlackBerry might still make noise if on “vibrate,” so double-check to make sure it’s silenced.

• When you must take an incoming call or answer an urgent e-mail during lunch with a client, excuse yourself from the table and make it brief. Your guests and the tables next to you don’t want to hear you set up your next appointment or watch you type an e-mail response.

• If you’re in your car or a bustling building, be mindful of background noise. If you’re doing more listening than talking, put your phone on mute.

D: Dining

“You can tell a lot about a fellow’s character by his way of eating jellybeans.” – Ronald Reagan

• Contrary to its name, the business lunch is not really about eating. Have a snack before your meeting so you’re able to focus on the conversation and aren’t distracted by pangs of hunger.

• Steer clear of unshucked oysters, crab legs, a rack of ribs, fish with lots of tiny bones, and other complicated or saucy foods. The only thing that should make a splash is you, not the marinara.

• Two faux pas: drinking too much alcohol and ordering the most expensive item on the menu. Indulge in the conversation instead.

• Your table setting could include up to three forks, three spoons, two knives, two plates and multiple glasses. Know which utensil or plate is yours (food plates to the left, beverages to the right), and when in doubt, take your cue from your fellow diners.

• If you’re entertaining a client, arrive at the restaurant early and arrange to have the bill handed directly to you when the meal ends. Or
better yet, provide a credit card to your server or the maitre d’ before your guests arrive.

E: E-mail

“When it comes to the mail, I feel it is better to receive than to give.”
– Joseph Epstein

• Use the same rules of punctuation and capitalization with e-mail communication you would in a letter. Abandoning either appears lazy when you’re writing a message to a client or internal staff member, and using all capital letters looks like you’re shouting.

• Emoticons should be used sparingly, if at all. If you find you need to use them to keep your message from being misinterpreted, you might want to have an in-person conversation instead.

• Your e-mail address is just as important as the body of your message in conveying professionalism. Anything too cute or racy is simply inappropriate.

• Use the subject field to telegraph the content of your message. As your e-mail string gets bigger and more topics discussed, consider changing the subject line to reflect the new discussion points. When you browse your archive, you’ll find the correct e-mail without opening every message.

• Be judicious when using “reply all” or copying and blind copying others on messages. Make sure those who are receiving your e-mail really do need to be kept in the loop.

• Even the most advanced spell-checker won’t catch words that are correct yet out of context. Proofread your message carefully before hitting “send.”

F: First Impressions

“We rarely forget that which has made a deep impression on our minds.” – Tryon Edwards

• Communicate with your whole body: Stand when someone enters the room, make eye contact, smile and shake the person’s hand firmly, but without crushing his or her fingers.

• Create a 30-second synopsis of who you are and what you do. A memorable, snappy sound bite will keep your name and background top of mind long after you’ve left.

• Listen attentively, don’t interrupt and don’t monopolize the conversation.

G: Gratitude

“Gratitude is not only the greatest of virtues but the parent of all others.” – Cicero

• Don’t overlook the power of appreciation. Everyone likes to be acknowledged for hard work or dedication to a business goal.

• Let your coworkers know they’ve done a good job – and do it sooner rather than later.

• Money isn’t the only reward. Be creative in your recognition. You can include a mention in your law firm or company newsletter, make a public acknowledgement at a meeting or simply write a thank-you note. All are powerful and motivational ways to illustrate your appreciation.
• Don’t shower each person you encounter with excessive praise. Basing positive comments on specific actions will make it far more meaningful.

H: Holiday Cards

“The manner of giving is worth more than the gift.” – Pierre Corneille

• Avoid sending cards with religious messages. Consider sending a New Year’s card instead so your message will stand out from the scores of other holiday notes. Link the occasion with your message – express how grateful you are for the client’s business or how you look forward to another year of working together.

• Always include a handwritten message, for a personal touch.

• While time-consuming, address your envelopes by hand, too. Computer-printed labels are too businesslike.

I: Introductions

“I always have trouble remembering three things: faces, names, and – I can’t remember what the third thing is.” – Fred Allen

• Do you have trouble remembering names? Don’t worry – many people do. To avoid embarrassment, restate the name of the person you’re meeting once he or she has made the introduction. (“Tom.”) And you can help others remember your name by stating it slowly and clearly.

• Wear your name tag near your right shoulder, not your left. When people shake your hand, their eyes will go directly to the tag, which will help them remember your name. And make sure it’s visible at all times.

• When you’re speaking to someone, and another person you know walks up, always make introductions.

• Making proper business introductions is quite logical if you base them on hierarchy: Introduce the junior person to the more senior one. Therefore:
  o A paralegal would be introduced to a senior partner
  o An associate would be introduced to a client
  o A nonofficial person would be introduced to an official person
  o A peer in your own company would be introduced to a peer in another company
  o A law firm partner or executive would be introduced to a client

• Explain who people are and offer a memorable piece of information when you make the introduction, which will also serve as a conversation starter. For example, “This is Bill Johnson, general counsel for XYZ Corporation. He just returned from a fly fishing trip in Idaho.”
J: Jokes

“A difference of taste in jokes is a great strain on affections.”
– George Eliot, *Daniel Deronda*

• Humor is tricky business in the workplace. Avoid off-color jokes or snide, sarcastic remarks. And never make comments on sensitive topics such as religion, age, gender, race, disability or sexual orientation.

• Don’t send or forward jokes via e-mail to business acquaintances. You might think it’s a knee-slapper, but there’s no guarantee your recipient will, too.

• Stay good-natured and positive. An affable personality will make your coworkers and clients feel comfortable.

K: Keeping Confidences

“Whoever gossips to you will gossip about you.” – Spanish proverb

• While what is discussed between attorneys and their client is always confidential, when a colleague tells you something privately, assume he or she means it for your ears only. If the person wants others to know, he or she will make that decision.

• Don’t gossip about former clients to current or prospective ones – they’ll wonder if you’ll do the same about them.

L: Listening

“There are people who, instead of listening to what is being said to them, are already listening to what they are going to say themselves.”
– Albert Guinon

• Listening means more than waiting for your turn to talk. Concentrate on the other person’s words; don’t let your mind wander. You may miss an important point and ask a question that’s already been addressed.

• When someone pauses, try not to jump into the conversation. He or she might be searching for words, not inviting a new comment. Wait a beat or two and then respond.

• Be an active listener and use body language to show you’re paying attention – smile, nod or agree as appropriate.

• Watch people’s facial expressions and gestures for cues that you’ve lost their attention. If you catch them repeatedly breaking eye contact with you, fidgeting or edging away from you, quickly finish what you’re saying.
M: Meetings

“Talk of nothing but business and dispatch that business quickly.”
– Aldus Manutius, placard on the door of the Aldine Press

• Timing is everything, especially when you’ve called a meeting. Start the session when the clock strikes the appropriate hour. Commencing at 3:15 when you’ve specified 3:00 will only reward and encourage tardiness.

• Similarly, specify an ending time so others can plan their schedules accordingly. If it looks like you’ve got too much to cover, set aside the last five minutes to schedule a follow-up.

• You wouldn’t speak with a new client without knowing about their case or the company, and you shouldn’t go into a meeting cold, either. Ask attendees for topics of discussion and review the agenda beforehand.

• If you look around the room and aren’t sure why someone is there, you might have over-invited. Make sure every person attending has expertise on the subject or will be affected by the topic of discussion.

N: Negativity

“I let negativity roll off me like water off a duck’s back. If it’s not positive, I didn’t hear it.”
– George Foreman

• Negativity is like a virus – it spreads. Denial of an obvious problem isn’t productive; it’s far better to identify what’s wrong and then collaborate on a solution.

• News shared by gossip is often more bad than good. It might be tempting to talk about the latest personal ongoings of your coworker; however, it’s best to leave that information to him or her to share. Gossip can be like a game of telephone: No matter how accurate information is at the beginning, it changes as it travels.

O: Office Politics

“Politics is a blood sport.”
– Aneurin Bevan

• Pay attention to political undercurrents, which may help you navigate tricky situations, but avoid becoming directly involved in office politics.

• Watch out for overly ambitious colleagues, who might do whatever it takes to advance their careers, even if it means saying unkind or untrue things about another coworker.

• Maintain cordial but professional relationships with your superiors, coworkers and clients. Be friendly and open, but don’t share intimate details about your personal life – a little distance is healthy.

P: Presentations

“Lead the audience by the nose to the thought.” – Laurence Olivier

• Even the most seasoned trial attorneys rehearse before presenting in front of a jury. Do the same with as many variables as possible – microphone,
PowerPoint, projector—to uncover potential glitches.

• Check—and double-check—your presentation slides or PowerPoint file. It might sound elementary, but make sure all visuals are correct, including spelling, grammar and design.

• The day of your presentation, provide clear visuals and handouts of key points. Information presented both visually and aurally will be retained more easily.

• Follow the Golden Rule: Present unto others as you would like others to present unto you. Speak clearly and audibly, don’t exceed the time limit and allow sufficient time for Q&A.

• When attending a speaking event, arrive on time, turn off electronic devices, refrain from eating or drinking, and don’t participate in side conversations.

• If you must arrive late, slip in the back unobtrusively. Conversely, if you must leave early, make sure to take a seat near the door and exit as quietly as possible.

• During the question and answer period, ask concise questions; however, don’t try to outshine the speaker by showing off your knowledge of the subject.

Q: Quitting

“When work is a pleasure, life is joy! When work is duty, life is slavery.”
– Maxim Gorky, *The Lower Depths*

• Give at least two weeks’ notice, or more if it will take additional time to train your replacement or finish all your projects. Be prepared, however, to be asked to leave that day.

• Plan your departure so that it’s a smooth transition for those you’re leaving behind. Create documents to update your supervising attorney on the status of each project you’re working on and provide an outline of next steps to take to advance their progress.

• Leave on the best possible terms, even if the feeling is acrimonious. Avoid expressing anger to your boss or coworkers—you might need them as references down the line.

• Don’t use the exit interview as a forum for venting your pent-up frustrations or seeking revenge, but do offer honest, constructive feedback.

R: R.S.V.P.

“Consideration for others is the basis of a good life, a good society.” – Confucius

• Too many people confuse R.S.V.P. with “regrets only,” which means just that—call only if you cannot attend. When R.S.V.P. is printed on an invitation, you must contact the event host or sponsor to either accept or decline. Correct head counts allow the host to accurately account for food, seating, handouts and the like.

• Do your utmost to respond well before the date specified on the invitation. Avoid putting it off until the last minute—it will look as if you were waiting for a better offer to come along or you are disorganized.
S: Speakerphones

“Well, are you there?”
– Greeting of telephone operators before 1895

• Always ask permission before placing a caller on speakerphone. Never put someone on speaker if he or she is unaware that others can hear the conversation. This isn’t just etiquette; failing to do so could also have legal consequences.

• At the beginning of a conference call, introduce all participants, including those who might be in the room but not speaking. If your call is attended by a large group, or even a small one of people who might not know each other, introduce yourself each time you speak. Likewise, if you’re addressing a question to a particular individual on the other end, use his or her name to avoid confusion.

• Speak clearly and slowly. Pause before responding to what those on the other end of the conversation have said. Speakerphones have a tendency to cut out at times, and participants might not have finished speaking.

• Always ask if it’s OK – and wait for an answer – before putting someone on hold.

• Avoid calling people when you are distracted, under time constraints or have bad cell phone reception. Aim for ideal conditions to make your client feel as important as he or she is to you.

• When leaving a voicemail message, clearly state your name (spell it if you’ve never called the other person before), phone number, law firm or company, the date and the reason for your call. Repeat your name and number at the end of the message.

• Don’t leave an overly lengthy voice-mail message.

• Your voice-mail greeting should contain your name, firm name and the assurance that you’ll return calls promptly. Try to return messages within 24 hours.

T: Telephone Manners

“I’ve suffered from all of the hang-ups known, and none is as bad as the telephone.” – Richard Armour

• When you call someone, always ask if he or she has the time to speak to you before launching into the subject at hand.

U: Utensils

“The more he talked of his honor, the faster we counted our spoons.”
– Ralph Waldo Emerson

• A good rule of thumb is to start from the outside of your place setting and work your way in, beginning with the first course. For example, your salad fork is on the far left of your plate and the one for your entrée is to its right. Dessert utensils get top billing above your plate.

• Put used silverware on your plate, not directly on the tablecloth.
• If you drop a piece of silverware, don’t disappear under the table to retrieve it. Flag the waiter and ask for a replacement.

• When finished eating, place your knife and fork across your plate, pointing at 11 o’clock.

• Don’t use chopsticks unless you’re adept at it. No one wants to watch you chase a piece of kung pao chicken around your plate.

V: Vacation Planning

“Vacation used to be a luxury; however, in today’s world, it has become a necessity.” – Unknown

• Leave your desk clean and well organized (and make sure your team knows where to find important documents and files). Your inboxes – physical and electronic – should be as empty as possible, as well.

• You don’t need to tell people where you’re going, but you need to let them know you’ll be gone. Update your voice-mail and out-of-office message on your e-mail, and be sure to include an alternate point of contact for immediate requests.

• Avoid skipping out when major projects are reaching their peak. And converse with your coworkers so you’re not all out at the same time, especially during prime vacation times, like summer and the winter holidays.

W: Working a Room

“As is our confidence, so is our capacity” – William Hazlitt

• Brush up on your small talk by reading the newspaper, listening to talk radio or visiting your favorite online news site before going to a networking function. Even a cursory knowledge of current events will give you more confidence in discussions on these topics.

• Develop a one- or two-sentence statement that concisely describes what you do. Be careful, though, to not talk too much about yourself or your business.

• To start a conversation, approach someone standing alone or a group of three or more. Don’t interrupt a discussion between two people. Ask questions – and remember the answers. By fully engaging your conversational partner, you can then make introductions to others by adding a personal bit about him or her.

• Since networking events are often noisy, no one expects you to have a substantive interaction. Interesting, brief conversation can help instigate a meeting or luncheon in the near future, during which you will be able to discuss a business matter more seriously. When it’s time to move on, tell the other person that you enjoyed your conversation.
X: Xerography

“No act of kindness, no matter how small, is ever wasted.”
– Aesop, The Lion and the Mouse

• If you have a lengthy copy job that will tie up the machine for more than a minute or two, let your coworkers know so they can plan accordingly.

• Never copy your resume or personal correspondence on your office’s copier.

• If you use the last sheet of paper, refill the tray. The same goes for toner – replace the cartridge if it’s running low.

• Don’t walk away from a paper jam you’ve caused, pretending it was “already like that.” Get help if you can’t fix it yourself.

Y: Year-end Gift Giving

“The excellence of a gift lies in its appropriateness rather than in its value.”
– Charles Dudley Warner, Eleventh Study

• Ask your client about their corporate gift policy before you buy. Some companies don’t allow their employees to receive presents greater than a certain value. Gifts needn’t be expensive; however, they should be thoughtfully chosen, in good taste and attractively presented.

• While giving small holiday gifts to your colleagues and managing attorney is a nice gesture, it’s not required. Most supervisors, in fact, do not expect gifts from their direct reports, so there’s no need to reciprocate if your manager delivers a holiday gift. A simple thank-you note will suffice.

• If you’re unsure of your recipient’s tastes, consider giving a renewable gift card to a coffeehouse, bookstore or other general-interest store.

• Consider a gift that keeps on giving. Make a contribution to your contact’s favorite charity on his or her behalf. You will support a worthwhile cause while demonstrating interest in your client beyond the scope of the project.

• Because many people have dietary restrictions, be careful with gifts of food or alcohol. The exception, however, is taking your client out to lunch or dinner.

Z: Zeal

“Nothing great was ever achieved without enthusiasm.”
– Ralph Waldo Emerson, Circles

• If you show real excitement about your job, you’ll be the type of person with and for whom others enjoy working, making for a pleasant, productive business environment.

• Let your enthusiasm come through in your facial expressions (alert eyes, relaxed smile), your words (warm, friendly greetings) and your overall style (cooperative, positive, solution-oriented).

• Passion for your work can translate into a compelling image – you’ll be perceived as a confident, competent, talented legal professional.
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