

## Possible Titles for Session:

- ⌘ Courtesy and Customer Service
- ⌘ The Power of Nice
- ⌘ Corporate Courtesy: The Basics
- ⌘ Being Good Company – Encouraging Client Relationships
- ⌘ P's and Q's for Profitable Corporate Entertaining

## Length of Session:

When combined with meeting etiquette in Lesson 4, dining etiquette from Lesson 1 and, networking guidelines in Lesson 2, there is sufficient knowledge material in this lesson plan to present a full-day session on corporate civility. Trainer should review the entire content and then pick-and-choose the material that best fits the needs of the client and the audience.

## Sample “Sell” Segment:

Whether you're picking a client up from the airport, hosting a company golf tournament or entertaining suppliers at a formal dinner event, you are expected to present a polished and professional image of yourself and your company. This means knowing what is appropriate dress, what food or beverage to provide, how to make guests comfortable, and what the guidelines are for mixing business and pleasure in any situation. Attention to the details and surpassing clients' expectations is key to creating a memorable positive impression.

## Who Would Benefit From This Session?

If you are called upon to plan company events, entertain clients, or attend mixing functions, this practical and interesting session is for you. Anyone who wants to boost his/her corporate courtesy quotient, young professionals who are just beginning to mix and mingle with higher-ups and clients or interviewing with perspective employers would also benefit.

## Rationale for This Session:

These days many professionals find that the boundary between business and pleasure is narrowing. In order to balance personal and professional commitments to any degree, people often have to combine their responsibilities and plan tasks that overlap—at least in terms of time spent and scheduling, if they hope to accomplish their goals. For example, a busy executive might plan to attend a business networking event with a client and then ask a perspective employee to attend that same event. If the event is not too formal, the executive might also invite a spouse or friend to meet them at the event after the majority of the business at hand will have been addressed. This enables the executive to accomplish two business goals (client relationship building, interview perspective employee) and one personal goal, (spend some social time with spouse) while saving time and energy.

Most professionals are busy and tired and some days accomplishing all the tasks on our to-do lists may seem impossible. Knowing what the guidelines are for mixing business and social responsibilities and understanding what courtesies are expected by clients and hosts, eliminates unnecessary stress, saves time, energy (and sometimes money) and helps us feel confident in any situation.

In addition, these days (due in part to downsizing and budget cuts) many employers expect employees and especially managers and higher-ups in the workplace to be able to “cross-over task” and manage multiple roles at once. For example, rather than hire an event manager, many companies will split event management tasks between three department managers or elect special project committees to handle short-term projects. Knowing this, and being deliberate about learning new skills, shows a willingness to adapt to change, versatility, and flexibility; all of these are essential skills for anyone who wants to be successful in modern business.

### **Session Outcomes:**

Upon completion of this seminar, participants will be better able to:

- ⌘ Save time and money with strategic planning for corporate events
- ⌘ Understand the nuances of modern business etiquette
- ⌘ Exceed client expectations for corporate hospitality
- ⌘ Lead by example to encourage appropriate mixing conduct
- ⌘ Facilitate guest and client comfort in any situation
- ⌘ Maximize positive impressions through follow up and proper thank yous

### **Topics Covered in this Session:**

- ⌘ Best practices for surpassing client expectations
- ⌘ Tips for entertaining clients
- ⌘ Corporate gift-giving
- ⌘ Guidelines for hospitality for out of town clients

Trainer asks participants to turn to Sample Client Profile Handout and explains:

The idea is not that you have clients fill out a form, the idea is that as you are getting to know your client you listen and you ask appropriate questions. Some of the profile questions are personal information but the reality is that in mixing settings, most people will disclose all the information on the profile without even realizing it. Just be careful to keep your profiles up to date and don't always accept information from someone else as the truth.

Making a note about what you learn becomes a handy reference for extending future courtesies. For example, knowing if the client has a favorite restaurant means you don't have to think about where to take him/her to lunch. If you know the client loves golf, gifts related to golf or conversations about golf will most probably be welcomed by that client.

### Sample Client Profile

Name \_\_\_\_\_  
*First Last Nickname*

Title \_\_\_\_\_ Time in Position \_\_\_\_\_

Company \_\_\_\_\_ Location \_\_\_\_\_

How did I meet this person? \_\_\_\_\_

Male \_\_\_\_\_ Female \_\_\_\_\_

Approximate Age \_\_\_\_\_ Level of Education \_\_\_\_\_

Office address \_\_\_\_\_

EXERCISE