

Demonstrate Proper Business Etiquette: Face-to-Face Meetings

THE PROPER BUSINESS ETIQUETTE for face-to-face meetings will facilitate the building of relationships while allowing you to accomplish the work for which you have been hired. Without the use of proper business etiquette, misunderstandings may occur. Perceptions may be negative. In addition, clients or accounts could be lost due to a lack of confidence in the business, solely based on inappropriate behavior.



Objective:



Demonstrate proper business etiquette in face-to-face meetings.

Key Terms:



action items
agenda
meeting minutes
Robert's Rules of Order

Face-to-Face Meetings and Etiquette

Using proper business etiquette for face-to-face meetings will facilitate the building of relationships while allowing you to accomplish the work for which you have been hired. Knowing the proper business etiquette gives you comfort in almost any business situation. It also helps lay the foundation for work success. The situation for face-to-face meetings is no exception. Etiquette rules outline the skills involved for the meeting organizer and the invitee before, during, and after the meeting.

PRIOR TO THE MEETING

Meeting Organizer

The meeting organizer has many responsibilities, including the scheduling of the meeting. The actual scheduling will depend on the specific work situation, the reason for the meeting, and the logistics for the invitees. Most meetings are scheduled via the telephone or the computer. The meeting planner generally has an idea of how many attendees to expect, how much room will be needed, and any equipment requirements (e.g., a microphone, screen, or Internet). It is best for the organizer to locate a room and to reserve it before sending invitations.

The meeting invitations must be clear in the message regarding the date, time, and location. It is helpful if a map or any other specific information regarding parking or permits is attached, if it is applicable.

Included with the meeting invitation should be the meeting **agenda** (the intended speaking points or topics to be discussed). As a result, the purpose of the meeting is clear, which reduces the likelihood that the meeting topic will be hijacked by unhelpful interruptions. The organizer should also prepare other supporting documents for the meeting (e.g., sign-in sheets, nametags, and handouts). It is imperative that he or she arrive at the intended meeting location at least 30 minutes prior to the start of the meeting to verify that everything is as it needs to be.



FIGURE 1. An attendee being greeted at a meeting.

Meeting Invitee

The meeting invitee also has responsibilities. Among the first is to respond promptly to the meeting invitation. Then the date should be marked on the calendar and the proposed agenda should be reviewed. While reviewing the agenda, it is vital for the invitee to prepare any documents or information necessary to support the agenda. This preparation will add to the success of the meeting. If the prepared information is complex, it should be sent to the organizer prior to the meeting so he or she can review it. Also, attendees should arrive at least 10 minutes early and make the proper introductions prior to the start of the meeting.

DURING THE MEETING

Meeting Organizer

During the actual meeting, the meeting organizer has many responsibilities. The first is to facilitate introductions for the attendees, which typically occurs as guests arrive. When making introductions, the person of lesser title is introduced to the person of greater title, and men are introduced to women. When or if these rules conflict, the organizer should introduce the outside guest or customer to the internal colleague first. When making introductions, people should be face-to-face, shake hands, and exchange business cards. In addition, nametags should be placed on the right shoulder for ease of reading.

At the start of the meeting, the meeting organizer should openly silence his or her electronic devices and ask that others do the same. In addition, the meeting should begin on time. As the organizer works down the agenda, he or she should keep to it and not wander far from the anticipated agenda.

Many formal meetings follow **Robert's Rules of Order** because the rules are the most recognized form of meeting management. It provides rules and procedures for deliberation and debate. However, less formal meetings do not require that degree of formality. As long as the organizer and attendees know the meeting ground rules, the meeting will be successful.

Careful note-taking of what occurs at the meeting is vital. The meeting organizer should assign someone the task, unless an assistant is present. The notes must indicate the words said, the speaker, and all pertinent comments. Shorthand can be used to make these notes.

The meeting goals should be clear. If it becomes apparent that the goals are being revised by the group (intentionally or unintentionally), the meeting organizer should draw the group's attention to that evolution and regroup. He or she should work to drive the agenda and its supporting points. The group should not talk about the topics and flounder. The discussions should help produce the results needed to further the outcomes. In addition, the action items should be summarized, and the meeting should end on time.



FIGURE 2. Taking notes during a meeting is extremely important.

Meeting Invitee

During the meeting, the invitee has specific responsibilities, such as making a proper introduction. He or she should practice handshakes and eye-to-eye contact and have an up-to-date

business card ready for sharing. When a card is received, it should not be put away immediately. The recipient should look it over, thank the person for the card, and keep the card in his or her hand (or on the desk if he or she was already sitting).

During the meeting, the invitee should silence any electronics, listen attentively, and participate accordingly. He or she should assist the meeting organizer by contributing to the meeting success and outcomes, which is easier if the agenda and meeting goals have been studied. The meeting organizer will take note of participant assistance. Careful notes should be taken for future reference. At the close of the meeting, the chairperson should be thanked.

AFTER THE MEETING

Meeting Organizer

After the discussions have ended, the meeting organizer must review the notes of the assistant or volunteer and make any needed corrections or additions. It is important for this to be done soon after the meeting while the information is still fresh.

The meeting organizer, an assistant, or some other designated individual will prepare the formal **meeting minutes** (notes often taken in shorthand by an assistant while the speakers are talking and then transcribed into full text and sent to the meeting participants afterwards). The meeting minutes for certain entities, such as a corporate board of directors or a government body, are important legal documents.

It is crucial to document any **action items** (documented tasks, activities, or actions that need to be completed) or deadlines. The information needs to be sent to invitees who have follow-up tasks, and they should be reminded of the needed items as deadlines approach. Sometimes frequent follow up is needed.

It is imperative to schedule a follow-up meeting. Sometimes this is best accomplished during the meeting because participants can review their calendars and reserve the date early. When the organizer returns to his or her office, the paperwork from the meeting should be filed. Binders can be helpful.



FURTHER EXPLORATION...

ONLINE CONNECTION: Meeting Organizer Practice

Assume the role of a meeting organizer, and prepare for a meeting of your peers on the topic of preparing a senior class parade float. Begin by creating an agenda. The agenda should include the purpose of the meeting, the specific topics, times for those topics, and the facilitator of each topic. Then create the other supporting documents (e.g., the meeting sign-in sheet, the meeting minute template, and the action item template).

Visit the following links for assistance in creating your own documents:

<http://office.microsoft.com/en-us/templates/TC010175911033.aspx?ofcresset=1>

http://workplaceculture.suite101.com/article.cfm/meeting_agenda_template

Meeting Invitee

After the meeting, the invitee also has some additional responsibilities. He or she should review the meeting notes. Then it is important to complete any action items as assigned and to file the meeting paperwork.

Summary:



The proper business etiquette for face-to-face meetings facilitates the building of relationships while allowing you to accomplish the work for which you have been hired. The proper business etiquette gives you comfort in almost any business situation and helps lay the foundation for work success. For face-to-face meetings, specific rules exist for the organizer and the invitee. Additionally, there are rules for before, during, and after the meeting.

Checking Your Knowledge:



1. Describe three protocols for the meeting organizer during the meeting.
2. Describe three protocols for the meeting organizer after the meeting.
3. Define meeting minutes and who is responsible for completing them.
4. Create an example agenda.
5. When are Robert's Rules of Order required for a meeting?

Expanding Your Knowledge:



Visit one of the administrative assistants at your school. Inquire about the system he or she uses to file meeting documents and outcomes. Ask about the style of note-taking used and how the minutes are transcribed. Ask the person to describe the most challenging portion of his or her job as it pertains to meetings.

Web Links:



How to Lead Effective Business Meetings

http://www.ehow.com/how_3814_lead-effective-business.html

The Three Most Important Secrets of Successful Meetings

<http://www.openthis.com/secrets.htm>

Meeting Templates

<http://office.microsoft.com/en-us/templates/results.aspx?qu=meetings&av=TPL000>