

Demonstrate Proper Business Etiquette: Face-to-Face Meetings

Unit: Communication Skills

Problem Area: Demonstrate Business Communication Etiquette

Lesson: Demonstrate Proper Business Etiquette: Face-to-Face Meetings

- **Student Learning Objective.** Instruction in this lesson should result in students achieving the following objective:

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

- **Resources.** The following resources may be useful in teaching this lesson:

Fox, Sue. *Business Etiquette for Dummies*. Wiley, 2008.

Reynolds, Donna. "How to Practice Business Meeting Etiquette," *How to Do Things.com*. Accessed June 5, 2009. <<http://www.howtodothings.com/careers/a2494-how-to-practice-business-meeting-etiquette.html>>.

"Robert's Rules of Order," *Robertsrules.org*. Accessed June 5, 2009. <<http://www.robertsrules.org/>>.

Schroeck-Singh, Karin. "Thirty Tips on Meeting Etiquette," *LearnHub*. Accessed June 5, 2009. <<http://tips.learnhub.com/lesson/2779-30-tips-on-business-meeting-etiquette>>.



■ **Equipment, Tools, Supplies, and Facilities.**

- ✓ Overhead or PowerPoint projector
- ✓ Visual(s) from accompanying master(s)
- ✓ Copies of sample test and/or other items designed for duplication
- ✓ Materials listed on duplicated items
- ✓ Computers with printers and Internet access
- ✓ Classroom resource and reference materials

■ **Key Terms.** The following terms are presented in this lesson (shown in bold italics):

- ▶ action items
- ▶ agenda
- ▶ meeting minutes
- ▶ Robert's Rules of Order

■ **Interest Approach.** Use an interest approach that will prepare the students for the lesson. Teachers often develop approaches for their unique class and student situation. A possible approach is included here.

Introduce the topic of business etiquette and the idea that there is a set protocol for face-to-face meetings. Have the students pair up. One student should assume the role of the meeting “organizer,” and the other student should be the meeting “invitee.”

Have them discuss how their roles are similar and different. Ask them to prepare a list of what the given business meeting protocol may be before, during, and after the actual meeting. Then, discuss their ideas and thoughts as a class.

SUMMARY OF CONTENT AND TEACHING STRATEGIES

Objective 1: Demonstrate proper business etiquette in face-to-face meetings.

Anticipated Problem: What is the proper business etiquette for face-to-face meetings?

- I. Proper business etiquette for face-to-face meetings—Many things must be considered when planning or attending a meeting. Specific responsibilities depend on if the person is the meeting organizer or an invitee. Both have very important jobs before, during, and after an actual face-to-face meeting.

- A. Prior to the meeting
 - 1. Etiquette for the meeting organizer
 - a. The meeting organizer should schedule the meeting.
 - b. The meeting organizer should send meeting invitations or announcements.
 - c. The meeting organizer should prepare the meeting **agenda** (speaking points or topics to be discussed) and supporting documents, including sign-in sheets and nametags.
 - d. The meeting organizer should arrive to the meeting early and prepare the room.
 - 2. Etiquette for the meeting invitee
 - a. The meeting invitee should respond to the meeting invitation.
 - b. The meeting invitee should review the agenda.
 - c. The meeting invitee should prepare his or her documents or necessary information.
 - d. The meeting invitee should arrive early and make the proper introductions.
- B. During the meeting
 - 1. Etiquette for the meeting organizer
 - a. The meeting organizer should facilitate introductions.
 - b. The meeting organizer should silence electronics.
 - c. The meeting organizer should start on time.
 - d. The meeting organizer should respect the agenda.
 - e. The meeting organizer should consider using **Robert's Rules of Order**, which is the most recognized form of meeting management. It provides rules and procedures for deliberation and debate.
 - f. The meeting organizer should take notes.
 - g. The meeting organizer should make the goals of the meeting clear.
 - h. The meeting organizer should drive the agenda.
 - i. The meeting organizer should summarize the action items and outcomes.
 - j. The meeting organizer should end on time.
 - 2. Etiquette for the meeting invitee
 - a. The meeting invitee should introduce himself or herself.
 - b. The meeting invitee should listen attentively.
 - c. The meeting invitee should silence electronics.
 - d. The meeting invitee should participate accordingly.
 - (1) He or she should contribute to the meeting success.
 - (2) He or she should understand the meeting goals.
 - e. The meeting invitee should take notes.
 - f. The meeting invitee should thank the chairperson of the meeting before leaving.

- C. After the meeting
1. Etiquette for the meeting organizer
 - a. The meeting organizer should review the notes and make additional notes as needed.
 - b. The meeting organizer should prepare the formal **meeting minutes** (notes often taken in shorthand by an assistant while the speakers are talking and then transcribed 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.
 - c. The meeting organizer should prepare the **action items** (documented tasks, activities, or actions that need to be completed) and documents and send them to invitees with follow-up tasks.
 - d. The meeting organizer should follow up with invitees who have been given outside tasks, reminding them of due dates.
 - e. The meeting organizer should schedule a follow-up meeting as needed.
 - f. The meeting organizer should file paperwork accordingly.
 2. Etiquette for the meeting invitee
 - a. The meeting invitee should review notes.
 - b. The meeting invitee should complete action items as assigned.
 - c. The meeting invitee should file paperwork as needed.

Use VM–A, VM–B, VM–C, and VM–D to help students practice business meeting etiquette. Divide the class into four teams: the meeting organizer, the meeting minute taker, and the third and fourth groups are the meeting invitees. The meeting topic is the preparation for the senior class float for the Homecoming Parade.

Have the groups separate into their respective break-outs and consider their roles and jobs. As a class, the students should prepare for the meeting, conduct the meeting, and prepare the proper follow-up items. Use the discussion as a review of the proper business etiquette for a face-to-face meeting.

- **Review/Summary.** Use the student learning objectives to summarize the lesson. Have students explain the content associated with each objective. Student responses can be used in determining which objectives need to be reviewed or taught from a different angle. Questions at the end of chapters in the textbook may also be used in the review/summary.
- **Application.** Use the included visual masters to apply the information presented in the lesson.
- **Evaluation.** Evaluation should focus on student achievement of the objectives for the lesson. Various techniques can be used, such as student performance on the application activities. A sample written test is provided.

■ Answers to Sample Test:

Part One: Matching

1. d
2. c
3. b
4. a

Part Two: Short Answer

1. Answers will vary but should include three of the following:
Etiquette for the meeting organizer—during the meeting
 - a. Facilitate introductions.
 - b. Start on time.
 - c. Respect the agenda.
 - d. Use Robert’s Rules of Order, which is the most recognized form of meeting management. It provides rules and procedures for deliberation and debate.
 - e. Encourage note-taking.
 - f. Make the goals of the meeting clear.
 - g. End on time.
2. Answers will vary but should include three of the following:
Etiquette for the meeting organizer—after the meeting
 - a. Review the notes and make additional notes as needed.
 - b. Prepare the formal meeting minutes (notes often taken in shorthand by an assistant while the speakers are talking and then transcribed 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.
 - c. Prepare the action items (documented tasks, activities, or actions that need to be completed) and documents and send to invitees with follow-up tasks.
 - d. Follow-up with invitees who have been given outside tasks. Remind them of due dates.
 - e. Schedule a follow-up meeting as needed.
 - f. File paperwork accordingly.

Part Three: True/False

1. F
2. F
3. T
4. F
5. F

Demonstrate Proper Business Etiquette: Face-to-Face Meetings

► Part One: Matching

Instructions: Match the term with the correct definition.

- a. action items
- b. agenda
- c. meeting minutes
- d. Robert's Rules of Order

- ____ 1. The most recognized form of meeting management
- ____ 2. Notes often taken in shorthand by an assistant and then transcribed and sent to the meeting participants afterwards
- ____ 3. Speaking points or topics to be discussed
- ____ 4. Documented tasks, activities, or actions that need to be completed

► Part Two: Short Answer

Instructions: Answer the following.

1. Describe three protocols for the meeting organizer during the meeting.



2. Describe three protocols for the meeting organizer after the meeting.

► **Part Three: True/False**

Instructions: Write *T* for true or *F* for false.

- ____ 1. It is generally okay to relax during a meeting and to review the notes later.
- ____ 2. The job of the meeting organizer is to take notes, exclusively.
- ____ 3. Meeting preparation is important for the organizer and the attendees.
- ____ 4. Meeting minutes are distributed in shorthand.
- ____ 5. You should try to avoid being given an action item.

MEETING AGENDA TEMPLATE

Agenda		
[Time allotted]	[Topic]	[Presenter]
Discussion		
Conclusions		
Action items	Person responsible	Deadline

Agenda		
[Time allotted]	[Topic]	[Presenter]
Discussion		
Conclusions		
Action items	Person responsible	Deadline

Agenda		
[Time allotted]	[Topic]	[Presenter]
Discussion		
Conclusions		
Action items	Person responsible	Deadline

Observers	
Resource persons	
Special notes	

MEETING ACTION ITEM TEMPLATE

Meeting Purpose:		Date:	
Task to be completed:	Person responsible:	Deadline:	Additional needs: