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Preface

The IITTI ("ET") Standards and Guidelines have been compiled as a general indication of appropriate image and conduct in the international business arena based on the combined knowledge of a board of seasoned image consultants, each with over fifteen years experience in the international and corporate sectors of the image industry. We understand that there are regional and cultural differences but the information in the Guidelines is based exclusively on international business criteria.

All exam questions are derived from this material. End-users and employers will find the document useful in understanding and applying the contents of the IITTI Certification System. Image and etiquette training schools can also use this document to develop their own unique curriculum, and permission is granted for trainers to design their own seminars and workshops based on this information, with credit mention by way of:

"Source: Institute of Image Training and Testing International (IITTI)"

There are three certification levels: Level 1 Exam focuses on western etiquette (mainly North American unless explicitly stated otherwise). Level 2 Exam focuses on international etiquette. Level 3 Exam focuses on international etiquette, and cross-cultural sensitivity.

The IITTI testing environments are as follows. The Level 1 Exam consists of a computer test, of 50 questions within a one-hour timeframe. The Level 2 Exam consists of a computer test, also of 50 questions in 1 hour, plus a 1.5 hour of practicum. The Level 3 Exam has no written component, but a practicum for which the candidate is required to travel to a testing center which may not be in their own country.

We recommend choosing an etiquette trainer who can provide proof of expertise and certification, examples include but are not limited to one of the following: members of the Association of Image Consultants International (AICI) who are certified AICI FLC, AICI CIP, AICI CIM, Emily Post Institute, Protocol School of Washington, or Civility Experts Canada.

A large part of the Level 1 exam content was generously contributed by Kimberly Law with her book series *Personal Impact Guides*, and numerous subsequent contributions and enhancements from other Founding Directors Lynne Marks, Christina Ong, Riet de Vlieger, Deborah King, Patrick Chun, and Ambassador Lilian Bustamante.

Disclaimer

The IITTI Exams represent the highest standards of image and professional conduct in North America. Local practice and company policies may vary.

IITTI INSTITUTE OF IMAGE TRAINING AND TESTING INTERNATIONAL

Professional Appearance

Overview Business Attire Details

Details that are tailored are considered to be most professional:

Tailored details are:

Structured	Matching / Neutral, Solid Colours / Dark Light Contrast
Angular Shapes	Firm and Smooth Textures / Matching Fabrics
Straight Lines	Small Prints & Patterns
Form Fitted	Collar or Lapel

Details that are more formal are considered to be more professional (official and/or businesslike). Details that are more informal are considered more casual (unofficial and/or social).

- For women:

More formal	More Informal
Collared shirt, sweater/blouse/dress	No collar
Long-sleeved, 3/4 length-sleeved	Short-sleeved or sleeveless
Tailored style jacket	Coordinating vest or cardigan
Tailored trousers	Khaki's / Coloured or Dark denim jeans or corduroy (only if permitted)
No print (solid), small print	Medium to large print

- For men:

More formal	More Informal
Collared dress shirt	Golf or Polo style shirt / Short sleeved shirt
Tailored style jacket	Coordinating vest or cardigan

Collared shirt under jacket	Uncollared top under jacket (only if permitted)
Tailored trousers	Khaki's / Dark denim jeans or corduroy (only if permitted)
No print (solid), small print	Medium to large print
Neck tie	No necktie

Business Dress

The three main categories of business dress:

1. Formal Business Attire -- most formal
2. Semi-Formal Attire
3. Informal Attire -- most casual

1. Clothing & accessories appropriate for <u>formal business attire</u>
   - Tailored design details
   - Matching jacket and bottom
   - This category includes multiple layers predominantly tailored.

   - Most formal work attire is:
     - For women: **Skirt Suit, Pant Suit, Matching Jacket & Dress**
     - For men: **The Matched Business Suit**

   - Matched Suits are best when:
     - presenting yourself as a Leader, an expert or an authority figure
     - it is appropriate for your industry or the industry of your client
     - attending important meetings
     - at a job interview

- negotiating a deal
- doing international work
- making a presentation
- company expects formal business dress / business dress code is formal attire

- Suitable for positions such as:
  Executive, Management, Business Administration, Finance & Legal

2. Clothing & accessories appropriate for <u>semi-formal attire</u>
   - Everything same as formal attire except as noted below.
   - Always includes a tailored style jacket that coordinates with bottom, but is not a matched bottom (exception for women: long-sleeved, 3/4 length-sleeved dress with tailored details may be worn without a jacket).
   - Coordinated garments that are mainly tailored with some untailored details to soften the look
   - This category includes multiple layers that are predominantly tailored mixed with some untailored details.

   - The key garment for Semi-Formal Attire is: **the Tailored Jacket (Sport Coat / Blazer)**
     - When worn with a coordinating / non-matching tailored bottom (pant, skirt or dress) the tailored jacket creates an unmatched suit.
     - In Canada and the U.S., this is the highest level of Informal and the most relaxed Formal Business Attire.

   - Tailored Jackets with coordinating unmatched bottom are best when:
     - the dress code or company culture is Relaxed Formal to Informal
     - you are presenting yourself as credible, approachable, capable, knowledgeable and efficient
     - you are in a relaxed formal to semi-casual business situation
     - it fits with the client's company culture or lifestyle
     - Informal is expected yet you need to look more authoritative
     - you are attending conventions and conferences
     - you need flexibility in your clothing categories
     - you are interviewing for a job at a company with an informal dress policy

- Suitable for positions such as:
  Communications, Sales, Service, Retail or Hospitality Management, Customer Service, Reception

3. Clothing & accessories appropriate for <u>informal attire</u>
   - A mixture of tailored and untailored details
   - No jacket
   - This category includes one or more layers that are predominantly untailored mixed with some tailored details.

   - The key garments for Informal Attire usually means:
     - For women: **A tailored bottom** (dress pants, straight or A-line skirt) **and coordinating top, blouse, shirt / light-weight sweater with NO Jacket**, **or short-sleeve dress**
     - For men: **A collared shirt and slacks with NO Jacket**

   - Tailored Bottoms with a coordinating collared shirt (blouse, sweater, top for women or dress worn alone) are best when:
     - your company is informal
     - it fits with the client's company culture or style of dress
     - you want to appear accessible, approachable, informal or relaxed
     - you need functional clothing
     - you are attending casual business socials, off-site retreats, or casual time at conventions
     - entry level job interviews for a company with an informal dress policy that does not require a tailored jacket

   - Suitable for positions such as:
     Retail, Technician, Contractor, Creative Industries, Communications, Service, Trades & Food Services

Viewer perceptions of various categories of business dress:

1. <u>Formal Business Attire:</u>
   authoritative, credible, powerful, classic, stable, influential, conservative, formal, official or precise

2. Semi-Formal Attire:
   semi-approachable and receptive, while still appearing semi-authoritative, influential, capable, credible, dependable and polished
3. Informal Attire:
   functional, informal, easy going, unofficial, approachable, relaxed, agreeable, comfortable, task-oriented, unstructured

Appropriate shoe styles for business wear:

- For both men and women:
  - Quality leather or suede shoes.
  - Updated-classic styles with thinner soles.
  - Neutral colours such as- black, brown, taupe, cordovan.
  - Shoes should be the same tone or darker than your pant hemline.

- For women:
  - Pumps are most professional.
  - Closed-toe shoes are considered more formal.
  - Check company policy regarding open-toed shoes, sling-backs heels and backless styles.
  - Dress boots appear more casual than shoes – check company policy on what is appropriate.

Appropriate jewellery and accessories for business wear:

- For both men and women:
  - Watches are classic, analogue style.
  - Remove jewellery from visible body piercings (ex. eyebrow ring).
  - Laptops are carried in carry-cases or tote bags, not backpacks.
  - Briefcases should be quality leather in a functional style. (Black is the most traditional colour for a briefcase)
  - Cases for mobile phones should communicate professionalism and business. Black is the most conservative.

- For men:

- Silk ties are more formal and appropriate. Coordinate your tie with the colours in your shirt, jacket or both.
- Braces and belts are worn separately, not together.
- Metals should match metals, leathers should match leathers

- For women:
  - Jewellery is understated and coordinates with the classic look of business attire.
  - Jewellery materials -simple metal, pearl, precious stones (real or faux) and classic bead designs rather than ornate pieces.
  - Check company policy regarding earring size and quantity (one in each ear is most professional).
  - Scarves tied or draped around neck
  - Carry a briefcase, computer case or a handbag, not all.

Use of Colour

How to use colour to your advantage in business

Formal | Mature | Authoritative | Confident

- Darker shades of most colours are considered more formal.
- Dark cool colours such as navy or charcoal grey are the most traditional for business.
- Black is the most formal and authoritative colour.
- Too much black can be intimidating.
- When worn alone, dark shades are unapproachable.
- For men:
  - For a confident, authoritative professional presence, a dark suit with a light dress shirt and a brightly coloured tie make the most effective combination.
- For women:
  - For a confident, authoritative, professional presence, a dark matched-suit with a light-colour blouse, and simple accessories make an effective combination.

Caring | Reassuring | Calming | Gentle

- Lighter colours, especially pastels send the message that you care.
- Perceived as reassuring or gentle.
- They also have a calming effect on others.
- For men:
    - For this effect a lower contrast or monochromatic combination (suit, shirt and tie) in lighter tones works well.
- For women:
    - A lower contrast or monochromatic combination (suit and blouse) in lighter tones works well.

Team Player | Approachable | Dependable | Trustworthy

- Medium muted colours and neutrals are more approachable than dark colours yet still appear credible.
- You are a dependable team player who can get the job done.
- These colours work well for networking.
- Cooler neutrals such as grey and muted blue come across as more serious than warmer colours.
- For men:
    - Effective when worn with a monochromatic shirt and tie or a lighter shirt.
    - Combine with a richer coloured tie or one in the same tone.
- For women:
    - Effective when a suit is worn with a top and accessories that are either lighter, brighter or in a similar tone.

Energetic | Enthusiastic | Youthful

- Bright colours bring up the physical energy level and increase brain activity.
- Of all the bright colours, red has the greatest impact on physical energy which makes it a very powerful colour.
- Bright colours draw attention to the wearer.
- For men:

- Although men's business wear doesn't usually include bright coloured garments other than ties, they work well as accent colours.
- A brightly colour tie will draw focus to the face and keep the attention of the listener.

- For women:
  - These colours work well as accent colours for blouses and scarves.
  - A brightly coloured scarf will draw focus to the face and keep the attention of the listener.
  - Extremely bright colours, such as florescent colours, do not belong in the work place.

Fabrics, Prints, Patterns

Appropriate clothing colours, fabrics, prints, patterns & clothing styles for business

- General tips
  - Choose updated classics, not fads. Use accessories to accentuate personal style.
  - Garments are altered as necessary to fit the body.
- Fabrics:
  - Natural fabrics like wool, cotton and silk or natural fabrics with a small percentage of synthetic fibres.
  - Matte fabrics are more professional than shiny fabrics.
  - Outer layers (pants, skirts and jackets) appear most professional in structured fabrics and tailored designs.
  - Traditional men's wear prints and patterns are most appropriate (checks, plaids, stripes, paisley, foulards, etc.) and are considered more serious and credible in a business setting. As an alternative, small, non-descriptive patterns work well.

- For women:

  Sweaters & Knit Tops:
  - Refined fabrics, quality construction and modest styles.
  - Colours must coordinate with key garments.
  - Cotton (with high thread count) or cotton with a small percentage of Lycra for stretch is the best quality for tailored shirts.

- Cotton appears very casual in knit styles such as T-shirts. Opt for blends or silk instead.
- Collared styles appear more formal or serious.
- Classic styles and neutral colours appear more serious.

Blouses:

- silk and refined high-quality fabrics would be more professional

Hosiery:

- Skin tone or neutral tones that blend with your hemline are best.
- Fine, light-weight, "sheer" hosiery is more formal than opaque hose.
- Darker tones, heavier weights and opaque hose may be worn in winter (if permitted).
- Light weight trouser socks may be worn with pants and coordinating shoe style.
- Hosiery is always worn with Formal Business Attire unless no-hosiery is approved by the company. In hot countries or in summer, hosiery may be optional (but may still be required in some industries).
- Groomed legs and feet with no hosiery.

- For men:

Jackets:

- Bottom button is always left open.
- Hemline covers the seat.

Trousers / Slacks:

- Waistband is worn between the waist and navel. Jeans are the only exception.
- Classic trouser legs fall in a straight line to the top of the heel and a slight break in front.

Dress Shirts:

- Choose 100% cotton with high thread-count for highest quality, look and feel.
- Cotton with a small percentage of polyester or Lycra wrinkles less and travels well.
- Shirt cuff fits wrist, shirt collar fits neck.
- An undershirt is worn for a smoother look.

Knit Shirts & Sweaters:

- Refined fabric and blends are more professional than cotton knits which can appear too casual.
- Choose well-made, quality pieces.
- Coordinate colours with key garments.
- Collared styles appear more formal and business appropriate.
- Un-collared styles should only be worn under a tailored style jacket (if permitted).
- Neutral colours appear more serious.

Socks:

- Neutral tones that blend with your hemline are best.
- Thicker socks are more casual and not generally appropriate.
- Socks should cover shins when sitting (no skin showing).

Inappropriate clothing colours, fabrics, prints, patterns & clothing styles for business

- For both men and women:
  - Anything denim or corduroy (unless it is permitted by the company)
  - Uncoordinated clothing (colours or styles)
  - Digital watches
  - Extreme prints and patterns
  - Athletic shoes or clothing
  - Logos or slogans on clothing (unless it is your company logo)
  - Avoid sports socks for work.
  - Cargo style pants (unless part of a uniform or permitted by corporate dress code)
  - Wearing white socks with dark pants and shoes

- For men:
  - Fad accessories such as novelty ties
  - Ear or facial jewelery (jewelery must be removed from face and ears)

- For women:
    - Fad clothing and accessories - unless you are in the fashion industry
    - Necklines lower than 2 inches above cleavage
    - Skirts shorter than 3 inches above the knee
    - See-through garments
    - Large, noisy jewellery
    - Loud, florescent or metallic colours (except metal jewelery)
    - Because bright colours are stimulating, avoid wearing too much.
    - Bright colours and dramatic designs.
    - Any dramatic details: prints and patterns, accessories, hair colours and styles
    - Extensive frilly details: i.e. ruffles, tiers or lace
    - White shoes; even with white clothing (unless part of a uniform or permitted by corporate dress code)
    - Shoes that are too high or throw you off your balance
    - Undergarments that show (but please wear some)
    - Body baring, tight garments
    - Floral patterns unless worn only in small areas – they are more feminine and less professional.
    - Animal prints – they are considered fun and the wearer may not be taken seriously as a professional.

Grooming, Hygiene

Grooming and hygiene errors for business and social interaction

- Wrinkled or stained clothing
- Clothing and shoes that are worn out or in poor condition
- Clothing that needs repair: missing buttons, fallen hems, spots, etc.
- Brightly coloured hair or extreme styles
- Visible tattoos
- Extreme hair colours or styles

- Body odour, bad breath
- Check company policy on use of fragrance (many North American companies have adopted a fragrance-free policy)

Grooming and hygiene must-do for business and social interaction

- For both men and women:
  - Understated hairstyles (unless your industry is fashion-forward).
  - Well groomed hands and nails.
  - Use good posture.
  - Clean body and hair.

- For men:
  - Facial hair should be neat and clean.

- For women:
  - When wearing nail enamel most companies prefer neutrals, French Manicures, soft colours and traditional colours such as any colours from the red colour family.

Footnote on Professional Appearance

While traditional cultural attire may be worn in place of Formal Business Attire for some local and regional business events, it is not appropriate for international events unless specified by the host or organizer.

Business Etiquette

Definitions

Reference terms: manners, and etiquette.

- Etiquette is defined by the rules we live by, established over time as society evolves
- Manners are based on courtesy, polite behaviour and consideration for others. Manners are about human relations
- Etiquette was established as a way of creating civility

Networking

The purpose and expectations of the networking process in

North America / Europe

- The purpose of networking is to get to know more people, to build long-term relationships and uncover future opportunities. It is done from the attitude of “giving” rather than “getting.”
- Keep hands clean and available for hand shakes:
- Bring business cards, brochures or profiles and wear a name tag.
- Create a 10 Second introduction (Elevator Statement).
  This includes an introduction of yourself and description of your business in 30 words or less.
- Don't use nick-names. Listen to how people introduce themselves and follow their lead.
- Spend no more than 10 minutes with the people you meet.
- Give leads and referrals whenever possible.
- Follow up with a call, thank you or information of interest.
- Avoid using any sales pressure during conversations or initial follow-up. Instead, show interest with questions, small talk and light conversation.

Conversation gaffes

- Gossiping or swearing.
- Criticizing, complaining, making sarcastic or degrading comments.
- Condescending comments, feeling sorry for yourself: 'Poor me...'
- Talking about how much something costs or how much money you make.
- Saying anything designed to advance your career, including any direct selling.
- Interrogating people for any reason.
- Telling long stories, unless they're pertinent to the discussion.
- Dominating the conversation.
- Discussing or asking personal questions involving crime, politics, money, illness, food preferences or religion.
- Discussing any topics that might be received as controversial.
- Discussing topics like politics, religion, sex or money.
- Offering an opinion or giving unsolicited advice (including on appearance), or correcting someone's etiquette. This includes making personal comments.
- Boasting or name dropping.
- Expressionless or unfriendly facial expression when meeting or conversing.
- Excluding others.
- Scolding others in public.
- Practicing or encouraging underhanded tactics or manipulation
- Inappropriate speaking volume – too loud or too soft.
- Calling someone by the wrong name without apologizing and correcting the mistake.
- Listening to conversations that are not meant for your ears.

Introduction

How to make business introductions

- The person of lower rank or title is introduced to the person of higher rank or title.
  The easiest way to do this is to face the person with the highest title and say their name first.

e.g. *"Mary, I would like to introduce Dave Green who will be joining us as an administrative assistant. Dave, Mary White is the President of our company."*

- When introducing a client and a colleague, a colleague should always be introduced to your client first, regardless of rank.
  e.g. "*Glen, I'd like to introduce my colleague Bill Black. Glen Green is President of XYZ and will be working with us."*
- When making introductions with someone in public office or in an official position, they are considered the most important.
  e.g. The non-official is introduced to the official. *"Mayor Davies, may I present our host, Sam Chen."*

How to introduce oneself in a business setting

- Make eye contact, smile, and shake hands
- Repeating the person's name in the greeting. e.g. *"Hello, Mary. It's nice to meet you."*
- Introduce yourself with your first and last name.
- When getting the other person's name, make sure you have heard the name clearly and are able to pronounce it properly. Ask for clarification if needed.
- If you are sitting when someone approaches you, stand in order to shake hands.
- Ask questions to start a conversation. Open ended questions allow the other person to elaborate on the answer. Who, What, Where, When, Why, How?
- Find out who they are and what they are interested in. Discover what they know, what they need, etc.
- Don't talk about yourself unless asked. Don't monopolizes the conversation.
- Show appreciation for someone's help or assistance- give prompt and sincere thanks.

Handshakes

Inappropriate handshakes for business interaction

- Aggressive clasp.
- Limp or weak clasp.

- Hand held by clasping with two hands.
- Hand held by lightly by the fingertips.
- Hand held with your palm down.
- Patting the other person on the shoulder or arm with your free hand.
- Squeezing recipient's hand too hard.

Appropriate handshake for business interaction in Canada / US

- Shake hands firmly, web to web, hand held vertically parallel, 2 – 4 pumps.
- Make eye contact.
- The person of higher rank or title should initiate the handshake.
- If you are unable to shake hands say,
  "I'm very glad to meet you; I'm sorry I'm not able to shake hands." (An explanation may follow)

Name tags

Correct placement of name tags

- Name tags should be worn on the right, close to the shoulder (unless dictated by uniform or dress code).

Business Cards

How to give and receive business cards appropriately

- Exchange business cards with the people you meet, giving and receiving business cards respectfully.
- If the person's business is of interest to you, ask for his or her business card.
- When someone hands you a business card, hold it respectfully and take a moment to look at it before putting it away.
- Writing comments on the business card can help you remember details, but should be reserved for the back of the business card, not the front.
- Only present your card when asked.
- When offering your business card, present it so it can be read with the printing facing the person receiving the card.

- When giving and receiving cards, the card should be held by the corner with the thumb on top. And is received by holding the opposite corner of the card. (With Asian cultures, use both hands to present the card)

Behavior

Appropriate behavior in a work environment

- Treat everyone with equal courtesy and respect no matter what their position.
- Prepare ahead for each appointment.
- Bring only materials required for the appointment.
- Turn off personal cell phones and pagers.
- Be punctual for work.
- Respect your clients and colleagues by showing up on time for meetings. Don’t waste their time, stay on track and stick to the time frame.
- Follow up each appointment with a letter, email or call.
- Communicate clearly.
- Discuss any problems in a positive tone so as not to sound defensive, aggressive or apologetic.
- Keep your work area clean and well organized.
- Be respectful of your colleagues' work spaces.
- Eat lunch in designated areas only.
- Watch the clock at lunch and on breaks. Don't take longer than the time you are given.
- Keep non-work related banter with co-workers to a minimum, or restrict such conversation to break times.
- Smoking is prohibited indoors in most public places in North America.
- When smoking is permitted, be considerate of the people near you.
- When problems arise, be proactive and solution oriented.
- When raising issues with your employer, do so in an observational way rather than a judgmental way.

Business Mistakes

- Smoking in public areas that are non-designated for smoking.
- Not disposing cigarette butts in appropriate trash containers.
- Picking noses or any other body orifice
- Spitting on ground, in garbage cans, or drains.
- Biting your nails.
- Making bodily noises.
- Wearing too much fragrance.
- Applying make-up or combing your hair in public.
- Placing personal belongings on another person's space.
- Taking/borrowing without permission items from a co-workers office space/cubicle.
- Eating/taking someone else's packed lunch/drink from a common office fridge or food area.
- Using a wet towel in restaurants to wipe face/neck/arms.

Meetings

Meeting etiquette in Canada & the US

- Don't bring food into a meeting. (Unless you've been told to do so)
- Don't chew gum.
- Turn off cell phones, pagers and portable devices such as a BlackBerry.
- Arrive on time for the meeting prepared to contribute comments and ideas.
- When chairing a meeting, end on time.
- Only bring the materials required for the meeting.
- Follow the lead of the meeting Chair.
- Don't interrupt. One person at a time, whoever has the floor.
- Stay on track and adhere to the time limits posted on the agenda.
- Don't create distractions. (Shuffling paper, clicking your pen, etc.)

- Focus on the goal of the meeting.
- Treat everyone with respect; be open to ideas and freedom of expression.
- Do not make personal attacks.
- If you have to leave before a meeting ends, wait for an appropriate presentation or discussion pause before exiting. Hold the door gently until it is closed to minimize noise.
- Dress one category more formal than your client.

Job Interview

Appropriate behavior for a job interview

- Follow the lead of the interviewer.

The finer points about job interview

- Be prepared. Do research on the company.
- Prepare a list of questions such as:
  - What career path would the company offer?
  - Am I expected to work in a team or alone?
  - What kind of dress code is expected?
  - What is the company culture like?
  - What is the direction of the company?
- Always bring extra copies of your resume even though you have sent one to the company.
- Bring a list of three references printed out, including contact information for each reference.
- Research business dress policy and dress appropriately.
- Be prepared for appropriate small talk at the beginning.
- Be punctual.
- At the start of an interview, greet the interviewer with a handshake and introduce yourself.
- Follow the interviewer's lead and let them guide the direction of the conversation.

- Focus on:
  - Why you are a good candidate
  - How you can do the job
  - What you can contribute
  - How you will benefit the company
- At end of interview, always let the hiring manager know you think the job is a good fit and you are interested. Ask what is the next step and when you might expect to hear back from the employer.
- Always thank the interviewer for the time they spent interviewing with you.
- Follow up with a 'thank you' note (although sending via e-mail is increasingly common, hand-written note is still considered the most formal.).

Body Language

Acceptable personal space in North America

- Acceptable interpersonal space differs from country to country and region to region.

The following guidelines are for Canada and the US.

Intimate space	within ½ an arm length
Personal space	within ½ - 1 arm length
Social space	within 1 - 2 arm lengths
Public space	more than 2 arm lengths

Eye Contact

Appropriate eye contact for business interactions

- Maintained 70% of the time to show confidence

- Between 1.) an imaginary, upside-down triangle on the forehead,
  or 2.) an imaginary, upside-down triangle between forehead, eyes and nose

Appropriate eye contact for social interaction
- Between an imaginary, upside-down triangle from eyes and the mouth

Telephone & Techno-Etiquette

How to answer a business telephone
- Answer all incoming phone calls before the end of the third ring (or as required by company policy).
- Speak slowly and clearly, so your caller can understand you easily.
- Always ask the caller if it's all right to put them on hold. If needed, give progress reports every 30 to 45 seconds. If you think it will be a while before you can take the call or transfer the caller to the right person, offer to call them back instead.
- When transferring calls, ask first. And always tell the caller to whom they are being transferred. Make sure you are transferring them to someone who can help them. Always give the caller choices in this situation.
- Speaker phones should only be used when you need more than one person to be in on the conversation at your end. When using a speaker phone always make sure the person on the other end of the phone knows that they are on a speaker phone.
- Thank the person for calling.

How to make a business phone call
- Identify yourself and your business. (If applicable)
- State the purpose of your call and stay on track.
- Ask if it is a convenient time to talk.
- Be prepared with an agenda.

Inappropriate behavior on the business telephone

- Don't eat or chew gum while on the telephone.
- Don't carry on secondary conversations while on the phone.
- Don't multi-task while on the phone (unless required for conversation).
- Don't leave caller on hold for more than 45 seconds (or as company policy dictates).
- Don't make social calls from a business phone.

Appropriate mobile phone use

- Keep calls quick and to the point.
- Chat on cell phones when you are alone, and avoid noisy background interference.
- Use traditional ring tones in a business setting or for business purposes.
  When in a public place or business setting, set phones on silence, vibrate or use a traditional ring tone.
- In a business setting, personal cell phones should be turned off.
- Keep personal matters personal by having these discussions in private.
- Use hands-free devices while driving, for your safety and to alleviate the aggravation of those driving next to you.
- If the line is interrupted during a call, the person making the call should immediately dial through again.
- Texting is reserved for very casual communication only that is brief and to the point. When texting someone for the first time, identify who you are. They may not have your number saved in their phone.

Inappropriate mobile phone behaviour and use

- During a meeting, public event, lecture or in a classroom.
- In restaurants. (Unless you are alone)
- In places of worship, weddings & funerals.
- While watching a movie, play, or musical event.
- In someone else's home or office.
- Public transportation.
- Hospitals.

- Elevators.
- Any time you may be disturbing others.
- Don't disturb people around you while talking. Keep your distance from other people while talking.
- Don't yell. Monitor the loudness of your voice and keep it at a low to moderate level.
- Quirky ring tones in business setting or for business use.
- Note that inappropriate mobile phone use does not just include answering phone calls, but also checking cell phone for any purpose - calls, email, social media, etc.
- Answering cell phone in a thoroughfare and blocking the way.
- Engage in personal conversations when others are present.
- When in the presence of others.

Why telephone voice mail is important

- Some countries don't have the habit of installing a voice mail system, especially for land lines.
- Voice mail systems are important because they serve as a convenience for people calling you. It is a consideration of people calling you; it saves them time from calling you again.

How to leave a message

- When leaving a message on voice mail, leave sufficient information to cut down on "telephone tag."
- Never assume that the person you are calling has your number. You should always include it in your message.
- If you anticipate that you will be difficult to reach, indicate some options of when it might be a good time to return your call.

Email Etiquette

Good business practices for email etiquette

- Business emails should be written with the same formality as a business letter.
- Use Salutations like Dear… or Hello… or Greetings…

- Be polite in all written communication.
- Do not send sensitive information by email. Accidents do occasionally happen.
- Emails should be brief and to the point.
- Pay attention to spelling and grammar so that you are clearly understood.
- Do not use all capital letters in an e-mail message: it comes across as shouting.
- If you are sending an email to a group, and the individuals do not need to know who else is receiving the e-mail, use the "blind copy" box to type the email addresses in order to respect recipients privacy.
- When e-mailing different time zones, be clear about dates and times.
- Address people you do not yet know formally as Mr. or Ms. unless they specify a different title in their signature.
- Respond to e-mails as soon as possible; always within 48 hours of receipt. If it will take longer to obtain information, within 48 hours reply that it will take longer to get the required information.
- Do not use text message abbreviations.
- Do not use emoticons in a formal business email.

Elements of a business email

- State the subject in the "subject" box. Don't leave it blank.
- Your e-mail signature should include: your name, title, company name, company telephone number, your direct line and fax number.

Inappropriate communication for business emails

- Be respectful of other people's time; do not send junk-mail, chain letters or jokes.

Social Media Etiquette

Basic appropriate social media etiquette

- Social media should be treated as an open display of personal information.
- Be polite in all written communication.

- Don't place sensitive information on your site or others.
- Don't use text message abbreviations.
- Be very careful about your lifestyle, your associations with certain friends, your actions –
  you will never know who will post some negative photos about you that would affect your reputation.

IITTI

Dining Etiquette

(As Level 1, the 'Basic' Certification focuses on "keeping up" etiquette skills, we will focus on business dining. We will leave the social dining, and formal dining such as state dinner, etc. for our Level 2, the 'Standard' Certification.)

Business Dining Etiquette

Etiquette unique to dining for business situations

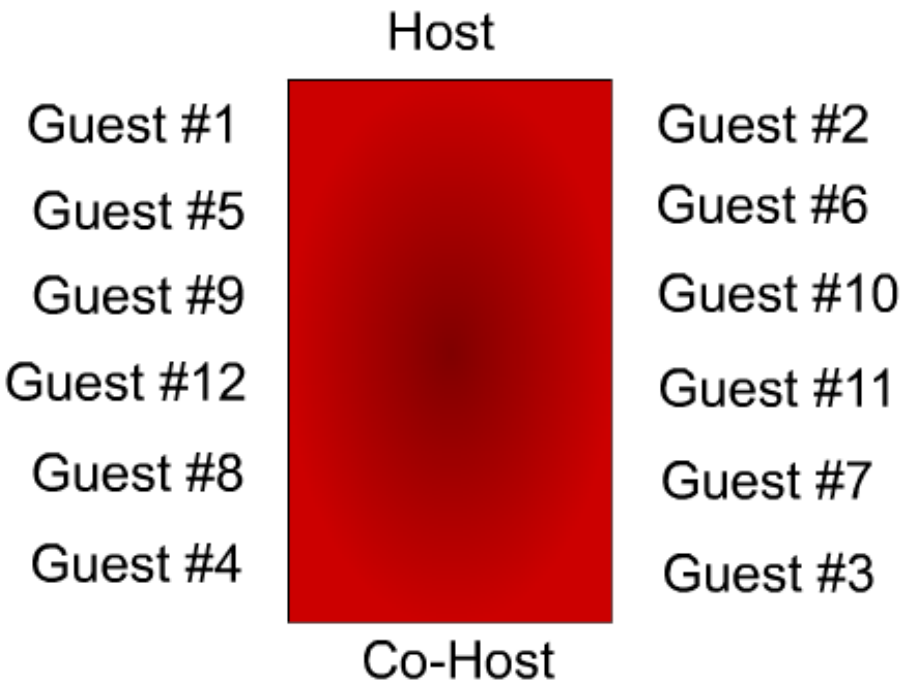
- Both genders are treated as equals. There are no gender considerations.
- Guest of honour is treated as most important.
- Guest with the highest rank is treated as most important in the absence of guest of honour.

Business Seating Arrangement

- For business, guests are seated by business position regardless of gender.

The guest with the highest business position, such as the CEO, is treated as the guest of honour (unless there is a guest of honour).
Usually a person in public office would outrank a person in business.
(This guest is traditionally given the “best seat” at the table--which usually means the one located farthest from the door or has the nicest view.)
The most important guest i.e. guest of honour or highest ranking guest, should be seated on the host’s right. The second most important person should be on the host’s left.

If there is a co-host, the third most important person would be seated on the co-host’s right and the fourth most important person would be on his/her left.



Business seating arrangement

Duties of Host & Guests

Compare host and guest duties when dining

For host:

- Take the lead while creating a comfortable atmosphere for your guests.

- At home:
  - Indicate the recommended attire in the invitation.
  - Let guests know what time to arrive and when the meal will be served.
  - Ask your guests if they have any food allergies or restrictions.
  - Ensure that all guests are introduced.
  - The host sees to it that the conversation runs smoothly, and steers it to neutral topics should it become awkward in a controversial discussion.
  - If a guest brings the host with wine, this is considered a gift to the host. It should not be assumed the wine will be served by the host.
  - The host should never allow a guest to drive home if they have a concern about alcohol consumption.

- At a restaurant:
  - It should be clear to the servers that you are the host.
  - Select a restaurant at a convenient location to your guest. i.e. close to your guest's home, office or easily accessible location to your guest.
  - Ask the guest if they have preference for a particular type of food.
  - Reconfirm with your guest the morning of the date.
  - Arrive at least 10 minutes prior to the arranged time.
  - You may wait for your guest in the lobby of the restaurant or at the table.
  - If waiting for the guest at the table, do not touch the water, napkin, or order a drink.
  - Stand as your guest is shown to the table and shake hands. Gesture where you would like

your guest to sit.
- If you arrive at the restaurant with your guest, precede your guest to the table.
- Offer your guest the opportunity to order a drink.
- Whether your guest drinks an alcoholic drink or not, you may order what you want.
- Give your guest the freedom to choose what they wish from the menu, offer guidance as needed.
- If the guest's order arrives first, ask her/him to begin. If your order arrives first, wait for your guest's meal.
- If you have an issue with the restaurant, take it up privately with the manager rather than in front of your guest.
- It's always a good idea to place your order and break the ice with small talk first.
    - At breakfast or lunch, the general rule is to let at least 10 minutes lapse before business is discussed.
    - At dinner, you may want to wait after the main course until the coffee is served.

For guest:
- Always follow the lead of your host.
- Show gratitude to the host by sending a hand-written "thank you" note.
- Let your host know if you have food allergies. Never indicate likes and dislikes unless you are asked.
- Always use coasters for glasses and cups when provided

- At home:
    - Wait until your host takes his or her seat first, unless directed otherwise by host or usher.
    - Bring a gift with you to present to your host: a bottle of wine, flowers in a vase, etc.
      If you bring wine, this is a gift to your host and is not meant to be served with the meal, unless it has been established before you arrive that you will be bringing wine for dinner.
    - Arrive on time, and dress according to the occasion.
    - If you must be late, call to let your host know, and insist that the dinner be served on time.
      When you arrive, accept the current course being served.
    - Offer to assist your host whenever possible.

- The general rule is to stay about two hours after dinner is finished, unless something else was suggested in the invitation.
- If there is a guest of honour, they should be the first to depart.
- On leaving, thank the host/s. Also say goodbye to guest.

- At a restaurant:
  - If you arrive first, you may wait at the table, but don't touch anything at the place setting while waiting. Wait for your host to arrive before ordering a drink.
  - If you are invited to have an alcoholic drink, and you wish it, go ahead. Limit your intake.

Categories of Meals

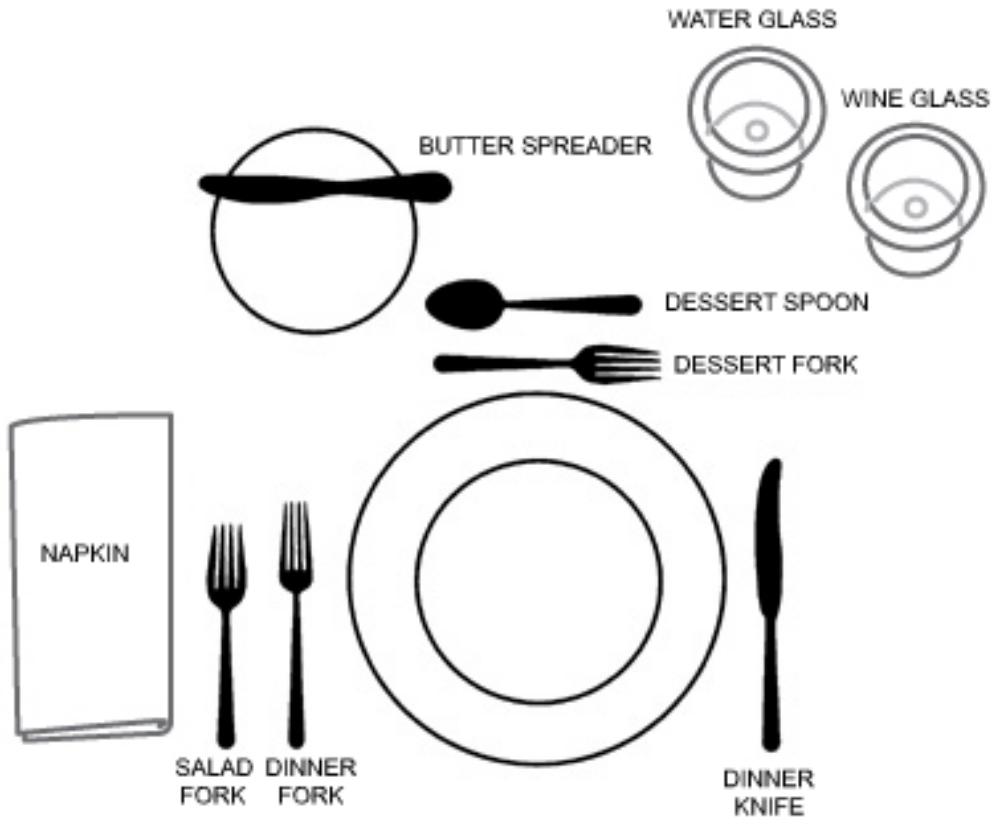
Identify the various categories of meals

- There are 3-course, 4-course, 5-course, 6-course and 7-course meals.
- 7-course meal being the most formal.
- For example, for a 3-course meal, may consist:
  - Soup or Salad
  - Main
  - Dessert
- For a 4-course meal, may consist:
  - Appetizer / Starter
  - Soup or Salad
  - Main
  - Dessert

Place Settings

Identify a specified place setting

- Cutlery arranged in order of use, from outside in.
- Soup spoons and knives are grouped together to the right of the place setting. Knives placed with the sharp edge towards the forks. Soup spoons are to the right of the knives.
- Forks are placed to the left of the place setting. The fork is never placed on the right with the exception of a seafood / oyster / cocktail fork.
- The dessert fork and spoon may be placed at the top of the place setting; the spoon above with the handle to the right, the fork below, with the handle to the left. Often only utensils that are required are laid on the table, e.g. a pudding dessert would only have a spoon laid on the table and no fork.
- The water glass is placed above the tip of the knife; the wine glass placed to the right of the water glass.
- Coffee spoons or teaspoons are placed on the saucer with the cup.
- The bread plate may be placed to the left or above the tip of the fork. If there is a butter knife it is placed across the bread plate, horizontal or at a diagonal from upper left to lower right, with the sharp edge toward the table edge.
- Salad may be served on the same plate as the main course unless there is a gravy or sauce. Then the salad is served on a separate plate placed to the left of the forks.
- The napkin is folded and placed to the left of the fork, on the dinner plate, in the centre of the place setting, on the bread plate or in the water goblet.



Typical place setting

Wine & Beverages

Basic knowledge of wine and wine pairing

- The general rule is: the lighter the fish, meat or poultry, the lighter the wine.
- At dinner, if only one wine is served, a light red is generally preferred.
- At lunch, dry white wines are generally preferred.

Utensils

Basic dining utensils

– dinner fork, salad fork, dessert fork, oyster fork, fish fork, dinner knife, salad knife, butter spreader, teaspoon, soup spoon, charger, dinner plate, bread plate.

Utensils based by placement

- If the table is set traditionally, use utensils and glasses starting from outside the place setting, and work in. If the table is incorrectly set, use the next utensil that is appropriate.
- For all cases, never put knife in mouth at all times!

Use of Coffee Spoon

Identify the proper use of coffee spoon

- For all cases, never put a coffee spoon or tea spoon in mouth!
- Coffee spoon and tea spoon are used for stirring after adding cream and/or sugar.
- Avoid leaving spoons in the cup after stirring. Place the spoon on a saucer, or if saucer is not available, place spoon on a paper napkin instead. Avoid soiling the tablecloth.

Dessert Utensils

Identifying dessert utensils

- Dessert spoon, also known as a tablespoon, is larger than a teaspoon and smaller than a soup spoon.
- Dessert fork is also smaller than a dinner fork provided to consume the main course.

Identify proper use of dessert utensils

- Both the dessert spoon and dessert fork are often placed above the place setting.
- When provided, fork is held in the left hand and the spoon in the right.
- Cut the dessert using the spoon. In many regions, the dessert is pushed onto the spoon with the fork and eaten with the spoon. Deserts such as ice cream and puddings should be eaten with a spoon even when the fork and spoon is made available for all diners. Both fork and spoon should be brought together in the finishing position even when only one utensil is used.

Table Manners

Table manners appropriate in Western society

- Sit up straight. No slouching, slumping, or tipping your chair.
- If it is necessary to leave the table before the host indicates it is time, ask the host for permission.
- Elbows may be placed on the table only when the dishes have been cleared and the meal is finished.
- To refuse a dish, politely say “No thank you”.
- If the food is served to you, eat what you can and leave the rest.
- Taste your food before you season it.
- Chew with your mouth closed.
- Eat quietly; avoid slurping, smacking, crunching, etc.
- Keep voice volume loud enough to be heard by others dining with you but not so loud to disturb others around you.
- If you have a drink with a spoon and there is no service plate, then you can keep the spoon in the glass and hold it to one side while you drink; otherwise, remove the spoon and place it on the service plate.
- If you have a drink with fruit in it, you may eat the fruit when the drink is finished.
- If someone requests that you pass the salt, the salt and pepper are to be passed as a pair.

- Only begin eating when everyone has been served. The host picks up his or her cutlery first unless directed otherwise by host.
- Once a piece of cutlery is picked up, it is never put back on the table. It lies on the plate with the handle resting on the rim.
- You should strive to have the table cloth as clean after dinner as before dinner.
- When taking butter, use the serving butter knife or serving utensil to place it on your bread plate. Then use your butter knife to butter your bread.
- Leave spoons on the service plate or saucer. An exception is made if the soup plate or soup cup has no service plate.
- To cut salad and meat, always anchor with the fork and cut with the knife. Never hold the fork with a clutched hand.
- If a utensil drops to the floor, in a restaurant don't pick it up. The server will provide a clean one.
- If you have a pit or something inedible in your mouth, ideally it should be removed in the same way you put it in (subtly, when no one is looking!). Put it on the side of your plate.
- If something is stuck in your teeth, excuse yourself and go to the powder room to remove it. Do not pick your teeth at the table.
- If you need to blow your nose, do it discretely with a tissue… not your napkin.
- If smoking is permitted in the environment, do not smoke at the dining table.
- Smoking is not permitted in most public buildings and many homes in North America and an increasing number of countries/cities.
- Food is passed from left to right.

Other behavior to watch for while dining:

- Do not speak or drink with food in your mouth.
- Do not leave any personal objects (purse, keys, glasses, cell phone, clutches, handbags, etc.) on the table while dining. Nothing goes on the table that isn't part of the meal, until the meal is completely finished.
- Don't reach for food. Ask the closest diner to pass something to you.
- Don't eat with your arm leaning on the table.
- Do not push your empty plate away from you; it remains in front of you until your host or waiter clears it.
- Do not say things like "I'm full" or "I'm stuffed".

- Do not touch your hair or scratch while eating.
- Avoid hawking (raising phlegm or spits).
- Do not blow on the food even if it is too hot.

European vs. American Dining Style

Note: European Dining Style is also known as Continental Dining Style.

How to use the fork and knife when dining American vs. European styles

European Dining:

- The fork is held in the left hand with the prongs (tines) of the fork facing down.
- The knife is held in the right hand with the index finger along the back edge of the knife with the blade facing the plate.
- The food is cut and speared or pushed onto the back of the fork with the knife. The knife remains in the right hand while eating.

American Dining

- In the U.S. and Canada, it is appropriate to eat with the fork in the right hand, prongs facing up.
- When cutting your food, hold the fork in your left hand and the knife in your right hand. This is the same as the European method.
- After one piece of food is cut, the knife is placed at the top right corner of the plate, with blade facing the plate.
- Transfer the fork to the right hand. Food is eaten with the prongs facing up. The left hand stays in your lap.

Recognize that in Canada, **both** European (Continental) and American Dining styles are commonly used and considered appropriate dining styles.

Most commonly used utensil resting position using European or American Dining Styles

- For European dining style, place the fork and knife at right angles on the plate, prongs facing down. Blade of knife facing in the direction of fork.

- For American dining style, place the fork with the tines facing up, diagonally at the 10:20 clock position. The knife is placed on the upper right corner of the plate with the blade facing inward towards the plate.

The placement of napkin when dining

- There are two different napkins: a luncheon napkin and a dinner napkin.
    - The luncheon napkin is small and is placed on your lap, opened up fully.
    - The dinner napkin is large and is placed on the lap (over both legs) in half with the fold towards you.
- As soon as you are seated, place your napkin on your lap.
- As needed, wipe your fingers on your napkin; blot your mouth with a corner of the napkin.
- The napkin stays on your lap throughout the meal.

The placement of napkin when leaving the table before finishing a meal

- If you need to leave the table and will return to eat, place the napkin on your chair.

The placement of hands while resting when dining American vs. European

- When dining American Style, hands go in the lap. Wrists, arms and elbows stay off the table.
- When eating European Style, keep hands and wrists above the table at all times.
- With either dining style the elbows stay off the table until the meal has ended and dishes are removed.

The most common finished position when dining European & American style

- Place your fork and knife on the plate diagonally like the 10:20 clock position. The knife sits above the fork with the blade facing toward it, tines up. In some regions it is customs for the fork to be placed tines down. In some regions (e.g. the U.K.) it is the custom to place the fork and knife vertically (i.e. 6 o'clock) in the centre of the plate instead of the 10:20 position.

The placement of napkin when a meal is finished

- Napkin is placed to the left of your place setting, never on the plate.

Difficult Foods

How to eat specific foods common in Canada and the US such as: bacon, artichoke, clams, spaghetti, asparagus, bread, soup, fish, chicken, salad

Bread

- Break a moderate, bite-sized piece of the bread using your fingers.
- Using a butter serving utensil or your butter knife, place some butter on your bread plate.
- Butter each piece as you eat it; hold the bread on the plate while spreading the butter.

Caviar

- A finger food when eaten on toasted triangles or crackers.
- Using a spoon, place caviar onto plate. Place small amount onto toast triangles with spoon or knife. Other toppings are spooned sparingly onto caviar.

Mussels & Clams

- Steamed mussels and clams may be served in their shells and broth. Remove from their shells with a fork, then dipped into the sauce and eaten in one bite. Empty shells are placed in a separate bowl or plate. The remaining broth may be eaten with a spoon or sopped up with pieces of bread speared onto your fork.

Shrimp Cocktail

- If not too large, shrimp is eaten in one bite with a fork. If it is large, and the tail has been removed, cut with the side of the fork.

- Eaten as a finger food when served as a shared appetizer with the tail on. The tail is removed by squeezing it free.

Oysters or Clams in the Half-Shell

- Generally served on cracked ice and arranged around a container of cocktail sauce.
- Hold the shell with one hand and the shellfish fork with the other.
- Spear the oyster or clam with the fork. Dip it into the sauce and eat it in one bite. If preferred, squeeze lemon onto shellfish before eating it.
- Raw clams and oysters may be picked up in the shell with fingers. Suck the shellfish and its juice right off the shell.

Soup

- With French onion soup, the spoon or knife can be used to cut the cheese along the edge of the bowl.
- Soup is spooned away from you.
- The soup bowl, soup cup or soup plate may be tipped away from you to get the last spoonfuls.
- When finished, place the spoon on the plate beneath the bowl.

Salad

- Cut large pieces with a fork, or a fork and knife.
- If the salad is served with cheese and crackers, the cheese is eaten with the fork and the crackers with your fingers.

Bacon

- If the bacon is dry and crisp, it may be eaten with your fingers. If limp, use a fork and knife.

Chicken

- Use fork and knife to cut the meat from the bone. Only use fingers when eating in a very casual setting.

Fish

- In fillet form, it is eaten with a fish fork and fish knife.
- You may ask your server to fillet the fish for you.
- If you are filleting the fish yourself, cut the head off, and then insert the tip of the knife under the backbone, slide the knife under the skeleton, and then lift it with the knife and place it on the side of the plate.

Lobster & Crab

- Lobster and crab claws are squeezed with a nutcracker along the shell until it cracks open enough for the meat to be taken out with a shellfish fork.
- A large napkin or bib may be worn to keep clothing clean while eating.

Artichokes

- Whole artichokes are eaten with the fingers.
- Begin at the outside base and pull off one leaf at a time.
- Place the base of the leaf between your teeth and pull it outward.
- Place the inedible portion on your plate, to the side.
- With a knife, scrape the fuzzy inedible portion off the heart of the artichoke.
- Cut the heart into bite-sized pieces with a knife and fork.

Grains, Rice and Peas

- May be speared with a fork, prongs down or pushed onto the fork with a knife, prongs up.
- When eating European style – if served with mashed vegetables such as potatoes, the mashed vegetables are pushed onto the back of the fork and the peas or grains may be stacked onto the other vegetable or meat.
- When eating American style – these items would simply be lifted/scooped up onto the fork tines up. No knife is used.

Asparagus

- When it is prepared al dente, and not covered in sauce, it may be eaten as a finger food.
- If you are not able to cut the hard ends, don't eat them; leave the inedible portion on your plate.

Corn on the Cob

- Butter and season only a few rows at a time and eat with fingers.
- Corn is generally not served on the cob at a formal dinner.
- Corn may be cut off the cob with a knife and eaten with a fork.

French Fries

- When eaten with finger foods such as hamburgers or sandwiches, they may be eaten with the fingers.
- During other times, they should be cut into bite-sized pieces and eaten with a fork.

Pasta

- To eat long pastas, such as spaghetti, is to twirl the pasta around the fork, holding the prongs against the plate. In the U.S. and Canada, spoons are often provided to twirl the pasta into the spoon.

Oriental Foods

- Large pieces of food may be picked up with the chopsticks and eaten by biting off small pieces at a time.
- Chopsticks may be used to transfer food from a platter to a plate, but they are turned around and the larger end is used (to prevent transfer of germs). In more modern settings, there are "public" chopsticks or serving utensils shared among all solely for the transfer of food from platter to plate.

Pizza

- In North America, pizza may be eaten with the fingers, or a fork and knife. If you're in a restaurant and wish to use fingers, cut the pizza into smaller pieces and eat with your fingers as gracefully as possible. Try not to get sauce on your face and clothing.
- In a casual situation, large pieces may be folded in half and eaten.

Gravies and Sauces

- To sop up the gravy or sauce with bread, place a piece of bread on the plate and eat it with your fork.

Dessert

- If served on a plate, use a fork. If served in a bowl, use a spoon.
- If served with ice cream or sauce (a la mode), use a fork and spoon. Use the spoon to cut and eat, use the fork to hold and push the dessert onto the spoon. It is the custom in some regions to use the spoon for cutting and pushing and the fork for eating.

Fruit

- Large fruit is peeled if needed, then cut into quarters with a sharp fruit knife and eaten with a fork. Seeds are removed and placed on the side of the plate.
- Grapes are eaten with your fingers.

Tea

- If you are served tea with the teabag, remove the teabag and place it on the saucer.

Tipping

Identify general guidelines (for North America):

15-20% before tax based on service

Note: Some states in the U.S. don't pay minimum wage and then the tip is a significant part of their pay.

Glossary

Court shoes = In the UK, closed-toed pumps or a simple business shoe with a heel.
In the US, athletic shoes worn to play tennis.

Tights = In the UK, hosiery (20 denier for very fine, 60 denier is almost opaque). The lower the number, the finer the gauge or the more sheer.
In the US, tights refer to a heavier, opaque pantyhose, sheer hosiery refers to a fine-denier hose. Very sheer hosiery is 5-7 denier and sold in the UK and other places. In the US they call it ultra sheer but in the UK they mark the number.

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