



Leadership and Business Etiquette

ALLISON CAREY

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Overview

► **This session examines common social practices and expectations in the workplace**

- Expectations regarding work practices
- Interaction with supervisors and colleagues
- Out of work events

► **How to identify, meet, and at times challenge expectations to create a positive work environment.**

► **Who Am I?**

Allison Carey, accare@ship.edu

Director of the MS in Organizational Development and Leadership
Shippensburg University



Assessing the Expectations



- ▶ **Poll: Thinking about social expectations in your workplace, how narrow and pre-determined are the social expectations, or how much flexibility is there? On a scale of 1-5 with 1 being that my workplace has clear, set, and very narrow social expectations and 5 being my workplace has very flexible social expectations, how would you rate your workplace?**
- ▶ In your office, what are the most important social or business expectations/etiquette practices to adhere to? Why do you think that is?

Professional Expectations

Diligence

Hard work
Attention to detail
Dedication to the mission
Finish and follow-up

Respect and Consideration of Others

Learn names and titles
Adhere to hierarchy
Give credit
Be thoughtful
Be inclusive

Integrity

Do your work
Be a good teamplayer
Admit and address errors
Avoid false excuses

Etiquette in Introductions



- ▶ How to Introduce Yourself
- ▶ Breakout rooms
 1. Introduce yourselves
 2. Consider, in the workplace:
 - How should you introduce yourself?
 - When/why should you introduce yourself?
 - What do you want to learn from the other person?
 - How does the etiquette vary (or not) by organizational position or event?

Etiquette in Introductions



- ▶ How to Introduce Yourself
- ▶ Learn names and positions
- ▶ Consider titles and how to address people
- ▶ The physicality of introducing yourself

Supervisor/Staff-Intern Interaction

- ▶ Ask questions, it's OKAY if you don't know things (*really*)
- ▶ Take notes on your tasks to do and deadlines
- ▶ Follow-up, letting your supervisor know what work is complete and what still needs to be completed. **They should not have to follow-up with you.**
- ▶ If you have free time, ask if there is anything you can do to help. If there is nothing for you to do for the organization, do something that appears professional.
- ▶ Time is power – you need to be on-time; your supervisor can be late
- ▶ Accept feedback graciously, even if supervisors are changing their mind or asking you to re-do something you did to their specifications. Working through drafts is often part of a work process.

Supervisor/staff-Intern Interaction

POLLS

- ▶ You are working on a report as per your supervisor's instructions and you realize that you forgot how to access the data that you need. You can't proceed without this information, and it requires a detailed explanation. You are embarrassed because your supervisor told you the information in your last meeting, but it was complicated and you didn't understand it. Your supervisor is down the hall and is probably available. Do you:
 1. Stop into their office
 2. Email
 3. Call on the phone
 4. Text
- ▶ You have experienced what you perceive as harassment in the workplace and you are upset about it. You are not sure whether or how to report it. Your supervisor is in a meeting. Do you:
 1. Stop in during the meeting
 2. Email the details in depth
 3. Set up a F2F meeting for the near future
 4. Text that you are upset with a short reason why
- ▶ Your supervisor calls you to discuss your next project and leaves a voice mail asking you to call back. You should:
 1. Stop in their office
 2. Email asking for the project information
 3. Call back soon, when you have time and where you can take notes
 4. Text "What can I do for you?"
- ▶ **How do you decide between F2F, phone, email, or text?**

Supervisor/staff-Intern Interaction

- ▶ **F2F is often best**, especially if there may be conflict or confusion. If you feel embarrassed or scared to communicate, do it F2F.
- ▶ Picking up the phone and speaking to someone is also often quicker and easier than multiple emails. “Gen z uses their phone for everything other than calling”
- ▶ Emails are best for (a) when something needs to be in writing, (b) when communication can be staggered in time, (c) when there are multiple people and no meeting scheduled

Email etiquette

- ▶ **Email is the official office means of communication**; use texting only with permission and for specific reasons. Do not use slang, abbreviations, and emojis in general.
- ▶ An initial email should include
 - * their name and your signature line, e.g..
 - * Be direct and clear in what you want/need, usually relatively short
 - * If asking for something, ask (rather than direct) and use please and thank you.
 - * Should be well-written, with complete sentences and words spelled out.

Ms. Harrison,

I am working on the fiscal report and am unsure how to find past statistics. Will you please point me in the right direction?

Thank you for your assistance.

All my best,

Allison

Meeting Etiquette

Why are there SO MANY MEETINGS?

- ▶ Stay organized – Don't miss meetings, need reminders, or arrive late
- ▶ Review disseminated materials ahead of time; have what you need with you
- ▶ Think about your involvement and seating position
- ▶ Arrive a few minutes early and use that time to meet people, ask how they are, to build rapport
- ▶ Once the meeting starts, focus on meeting (do not pass notes, text others, be on your phone)
- ▶ Be prepared to take notes and to participate
- ▶ Note patterns of interaction – do they raise hands, use Roberts Rules of Order.

Robert's Rules are a highly formalized pattern of meeting interaction, See

https://assembly.cornell.edu/sites/default/files/roberts_rules_simplified.pdf

https://www.youtube.com/watch?v=PGOSZKIS9_4

- ▶ Don't use technology for non-meeting purposes, even if you are bored or others are
- ▶ In general, do not eat during a meeting
- ▶ Follow through after the meeting

Meeting Etiquette

Poll: Scenario

- ▶ You are at a meeting that is running late and you have no significant role in the meeting. You are worried about completing work related to a report due by the end of the day. Do you:
 1. Start working on the report during the meeting
 2. Excuse yourself, explaining that you have other work to do, and then work on the report
 3. Quietly ask your supervisor if they prefer if you stay or go do the report
 4. Stay at the meeting and do the report afterwards, staying late if necessary

Intern- Broad staff Interaction

- ▶ Be respectful of EVERYONE. They all play a role. Learn their names and jobs.
- ▶ Thank people informally for informal assistance
- ▶ Acknowledge people more formally for formal contributions
- ▶ **Think of the people who you interact with. How might you professionally show your appreciation for their work?**

Cross Generational expectations/ etiquette

Generational Differences

Gen Z 12-26 years old

Digital Natives
Expansive use of smart phones
Public lives on social media
Preference towards texting
At times uncomfortable with using phone for conversation
Aware of mental health issues
More socially progressive
Often non-hierarchical
Value Diversity

Gen X 43-58

Tech savvy but not tied
Frequent email use
Social Media - Facebook
Value of F2F and phone
Aware of gender/race diversity, less so gender identity & sexuality
More hierarchical, they have worked hard and want respect

Boomers 59+

Value hard work, Accomplished
Meritocracy, respect hierarchy
Material success
Goal focused
Skeptical of mental health
Skeptical of diversity initiatives
Appreciates F2F or phone
Resistant to new technology

**Break out: What issues of expectations might arise when Older generations supervise younger?
What issues of expectations might arise when Younger generations supervise older?
Examples?**

Informal Interaction At the Office

- ▶ It is important to build social relationships, BUT they are not your family or BFFs
 - “We are like a family here” vs.
 - “Don’t take it personally; it’s business”
- ▶ Why is “small talk” important?
- ▶ WHAT, HOW, and WHEN to engage in small talk
- ▶ What not to do in small talk (what, when and how)
- ▶ Etiquette of break and lunchrooms



Colleague Informal Interaction At the Office

Scenario

You enter the breakroom and two other interns are having lunch together. Can you sit with them? Should you? Can you not sit with them if you prefer to eat alone?

You sit with them and they are criticizing what one woman wore to the office that day. What do you do?



Colleague External Official Interactions

- ▶ You are representing the business
- ▶ Consider what your role is and how to meet those expectations

At meals/functions

<https://www.youtube.com/watch?v=G2uhWxaARmA>

- ▶ Identify three problems and how to correct it
- ▶ How might the supervisor have handled these problems?

[Breakout rooms to discuss]



Colleague External Official Interactions

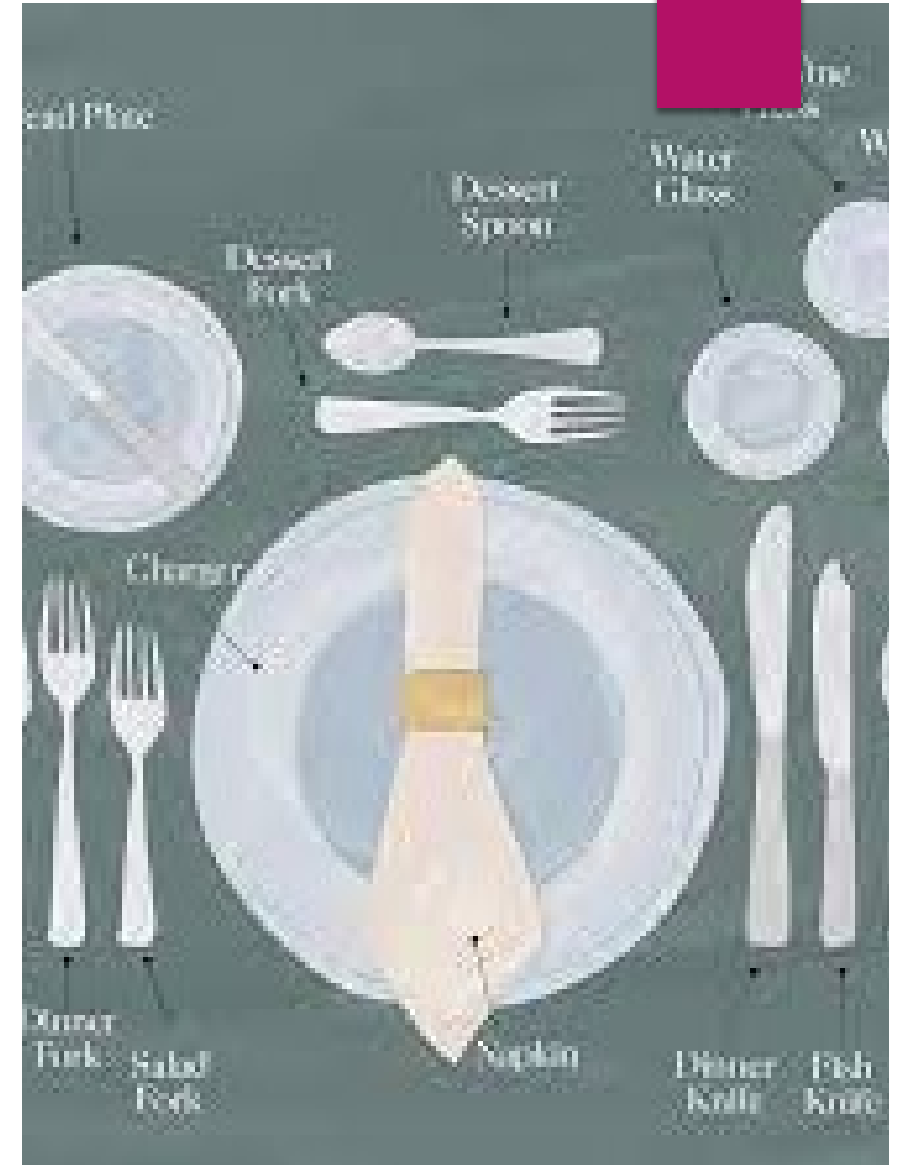


At meals/functions

- ▶ Introduce yourself and learn names/roles
- ▶ Consider who is paying and why
What are the general rules of paying?
- ▶ In general, do not order very expensive meals unless you are hosting and offering to pay for others.
- ▶ Do not drink alcohol if others are not. Do not drink more than one glass of alcohol even if others are.
- ▶ Be attentive to the time allotted for meals and courses (don't order an appetizer and make others wait, especially if there's only 45 minutes for lunch)

Colleague External Official Interactions

- ▶ Ordering – in general guests should order first, let the senior staff choose who will order first, follow their lead on courses and cost
 - ▶ Eating - Place napkin on your lap
 - ▶ Avoid “sloppy” foods
 - ▶ Physical demeanor at the table
 - ▶ The place settings
 - ▶ Making conversation – what do you want to “show”
 - ▶ Thank your host and guests and briefly discuss follow-up
- How much does etiquette at business functions matter?



Is it ok to challenge expectations/ etiquette

Expectations and Etiquette often serve a purpose so in general you should try to meet the standards of your workplace, but...

ACCOMMODATIONS – people with disabilities have a right to reasonable accommodations in the workplace to fulfill their essential job functions.

Examples

Ted is a marketing/sales intern. Going to luncheons with clients is an essential part of his internship. Due to physical disability, he cannot stand when guests arrive at the table. What should he do? He might shake hands and say something like “Excuse me for staying seated. I’m so pleased to meet you.”

Tasha has diagnosed social anxiety and is a data analyst intern. Luncheons are generally expected but not essential to her job. It’s great to build experience, but she may also ask for an accommodation to be excused from them. **When others go to an official luncheon, how might she as the person with social anxiety handle that? If you are going to the luncheon and don’t understand why Tasha isn’t going, what should you do?**

Seeking Accommodations

- Identify your disability to HR if you are seeking accommodations
- In a F2F meeting with your supervisor, discuss accommodations
- Bring HR into the discussions
- No one else needs to know about your disability, but consider how to address differences
- Do not assume or enact accommodations without discussing/securing them.

Is it ok to challenge expectations/ etiquette

Discrimination/Inequality/Identity – Some workplaces may have etiquette sharply divided by identities such as gender. These identity-based expectations may be unfair.

Examples

Lydia is an IT intern. She is asked to prepare coffee for the team and clean the break room microwave, but the male interns are not. In general, the female staff provide snacks and clean up. **What should she do? What should others do?**

Josephina dresses professionally and in a fashion that is more masculine, with pants, button-down shirt and tie. Her supervisor suggests she should dress in a gender appropriate way. **What should she do? What should others do?**

Exercise

Write a thank you email to a faculty member, staff member, colleague, friend and family member who has assisted you in the last three months in your professional career path.

Take Aways

- ▶ What is a lesson that you can take back and apply in your internship?
- ▶ What are some of the most important expectations or matters of etiquette for you to meet in your office? How can you better achieve meeting these expectations?
- ▶ What questions remain?