

# Business Communication Etiquette



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While “operations as usual” may look different for many businesses, business etiquette is still a vital part of the equation. Whether an employee is communicating via email, on the phone, on a video call, or the old-school in-person way, poor etiquette can turn off a customer/client, harm communication, and lower morale.

In this special report, we’ve collected the best of Business Management Daily’s advice on what proper business etiquette looks like in today’s workplace. Just because some forms of communication have changed, doesn’t mean that all the rules of decorum can be thrown to the wayside. Whether you’re a small business, Fortune 500 company, in-person, remote, or hybrid — we’ve got the insight you need

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# Email etiquette — Making a good impression

Ever experience any of the following when going through your email inbox?

- A message with a blank subject line.
- A long email containing so many questions that it would take an hour to respond.
- A note in such a small font that your best reading glasses aren't of much help.
- A typo-filled memo that makes you wonder if you should trust any of the info presented.

People generally find such things annoying. Most modern workers receive a ton of emails each day. We don't welcome time-consuming obstacles to comprehension. While you can't control how others correspond, you can monitor your own email etiquette. Such attention speaks volumes about your professionalism. It also raises the odds of the recipient reading the message in a timely manner and correctly understanding what you say.

Here, we look at important aspects of email communication and how you can improve this vital method of business correspondence:

## **To email or not to email**

With its ability for people to send at any time from any place, email has emerged as the default communication method in many workplaces. While nobody can deny the convenience, resist the temptation to rely exclusively on email messages. A major part of business email etiquette is knowing when not to use email.

Times exist when a face-to-face meeting, a video chat, or even a phone call prove a better choice. Examine the nature of the topic. Is the matter confidential or sensitive in nature? Is there any risk of being misunderstood? Might the recipient get hostile or emotional from the news? If the answer to any of these questions is

“yes,” pick a more personal route than email. (And, yes, this includes not taking the coward’s way out when needing to terminate someone.)

Don’t rely on email when it is important or useful to be able to judge the reaction of the recipient. For example, when discussing work with a client, you often want to be able to see the client’s initial reaction and choose your next words based on her response. For this interaction, email would not be appropriate.

Watch, too, for situations requiring a good deal of discussion. Email is wonderful for presenting information and gathering a straightforward "yes or no" response. For matters requiring debate, input from multiple team members, or longer answers, getting together improves the flow of conversation.

## **Impressions**

Before composing an email, reflect a moment on your state of mind. Sitting behind a computer screen often empowers people to say things that they wouldn’t when face to face — and later regret the words. Once hitting “send,” there is no going back.

Even if you are in a perfectly fine mood, it pays to proofread all emails before sending to ensure the right tone. Phrasing that seems perfectly polite in our minds becomes something edgier when typed out and sent without a second thought. Perhaps you have been on the receiving end of such an email message. A seemingly docile coworker repeatedly comes off as strangely hostile when his words are stripped of body language and vocal intonation. You’re left to wonder if something is wrong.

The voice you use with someone in person and the voice that comes through when you write an email are two very different things. Email does not convey emotions nearly as well as a face-to-face conversation or even a phone call. Your recipient may not be able to tell if you are serious or kidding, happy or upset,

sarcastic or not. Thus, avoid attempts at humor, and reword anything you think the reader might interpret incorrectly.

Remember, too, that the person you are communicating with will make judgments about you by your wording, grammar, and other contextual clues. Because your correspondent won't have access to physical cues — such as dress, diction, and dialect—she may make assumptions about you based on the little information she does have: your email address, name, spelling, and word usage.

**To enhance your image, generally, avoid the following in professional emails:**

- Emojis, emoticons, weird fonts, and text colors other than black — they come off as immature (save the smileys for your personal email).
- Writing in all caps or overusing exclamation points — it looks like you're yelling.
- Grammatical errors and typos — they make you appear careless or too lazy to proofread and spell-check.

## **The importance of the subject line**

While you may be eager to compose the body of the email, don't overlook the subject line. A subject line that foretells your message can be extremely helpful in the business context. When the subject line summarizes the most important details of the message, there is less chance the recipient will fail to read it, or file it and not be able to find it later.

Because many email programs will truncate long subject lines, keep the subject line brief and to the point (i.e., "Subject: Meeting, 3 p.m. Tues"). For time-critical messages, it is a good idea to start with a heads up, especially if you know the person gets a lot of emails. Try something like "Subject: Urgent – Follow up on Jones account" or "Subject: Time-sensitive — Payroll forms due at noon." For requests, starting with REQ can signal that action is needed (as in "Subject: REQ –

Update emergency contact card"). If your information isn't urgent and doesn't require a response, preface the subject line with "FYI" or "Low Priority."

Sometimes, people recycle an old email chain rather than begin a new one. If you decide to piggyback on a message already in your inbox, replace the old subject line. This action clues the recipient in on the new topic rather than thinking the body of the email relates to a previous matter.

## **Making yourself known**

Since emails contain "To:" and "From:" lines, including a salutation and signature might seem redundant. However, without them you may convey a presumption of informality in certain situations where you need to show respect — not just for the recipient's status, but for their time.

In the United States, it is usually OK to use someone's first name. Thus, you can get away with a "Dear" or "Hi" and the first name. Beware of using a diminutive if you aren't certain your correspondent uses one. William might not like being called Bill.

In other cultures, first names are probably not appropriate. Err on the side of formality if you are not sure.

If the email is to someone who does not know you or may not remember you, focus immediately on self-identification. Within the first few lines of text, try to answer these questions:

- Who are you?
- What do you want from your correspondent?
- How did you learn of your correspondent?
- Why should your correspondent pay attention to you?

The level of familiarity then influences the extent of your sign-off. For coworkers you know and email regularly, your first name at the end should be a sufficient

identifier. Signing off becomes more complex when writing to outsiders. It is important to add a detailed signature line to email messages sent outside your company or immediate workgroup.

Many email programs allow you to set up a default email signature to include at the end of every message. This block of information provides vital contact information and often looks something like this:

*Your full name*

*Your company's name*

*Company address*

*Office phone number*

*Cell phone number*

*Your email address*

Other things people sometimes choose to include are their job title, their URL for LinkedIn or other social media, and their preferred pronouns. Watch, though, that the amount of information presented does not become overwhelming.

Also, seriously consider limiting mottos or inspirational quotes to personal emails only. They add unnecessary length to the signature lines of business emails. Some employers frown upon their use because of the potential for the message to not reflect the company image.

## **Constructing a good email message**

At the heart of an email is the contents. Aim to convey your thoughts in a polite, effective manner. Words such as “please” and “thank you” are appreciated as much in an email as in an actual conversation!

Long blocks of text scare readers and run the risk of them overlooking important details. Edit your work to summarize rather than belabor. Consider formatting in



ways that draw attention to critical takeaways. Use bullet points to break down key actions. Put essential dates and times in bold.

## **Other email etiquette rules**

Many businesses establish a timeframe in which workers should respond to emails. If you are going to need additional time to think about something or gather information, send a short email saying that's what you are doing. This action keeps others from worrying that you did not get the email or perhaps are angry over it.

When on vacation or in a situation where you won't be answering emails in a timely fashion, set up an automated out-of-office message. This response acknowledges receipt while also letting the sender know not to expect a quick answer. Arrange with a coworker to include his name and contact information in case someone requires immediate assistance.

With the abundance of emails received each day, people greatly appreciate efforts that respect their time. A few email etiquette tips that advance this cause include:

- Avoid content-less responses. Be judicious in your use of email that merely says "Great" or "Thanks."
- When your email doesn't necessitate an answer, include the phrase "No need to respond" at the end.
- Think before hitting "reply all." Direct your email only to those who need to see it.
- Similarly, stay away from blindly hitting CC or BCC on your outgoing messages. Pause for a second to determine who truly needs a copy.

Lastly, do everything in your power to ensure each email you send is correct from the get-go. Double-check details such as dates and places. Make sure promised attachments are actually attached. Needing to resend something to correct an error wastes everyone's time and opens up the door for confusion.

# Proper phone etiquette is still a necessity

While email may be the main form of communication for many businesses, phone calls are still a frequent necessity, especially when interacting with the public. However, phone etiquette is something that many employees at businesses seem to lack. Have you ever experienced any of the following scenarios?

- You get a voice mail from someone unfamiliar. The person rushes and fails to speak clearly. You end up wasting time replaying the message over and over to decipher the caller's number and name.
- You place a call to the workplace of someone you met at a recent conference. The staff member who answers asks who you are. Upon providing your name and the title of your small business, she informs you that her boss is suddenly unavailable. You get the feeling you're being brushed off.
- You need to inquire about a product that has not arrived. You weren't necessarily expecting the person on the other end of the line to provide a snap answer. However, what you encounter is someone who puts you on hold for so long that you wonder whether the phone call is dead.

Such situations prove frustrating and leave a bad taste in one's mouth. Learning proper telephone etiquette is a must, even if you only make calls occasionally. For businesses that have frequent phone interactions, it's vital that all employees are properly-versed in good etiquette.

Successful organizations prioritize customer experience. They aim to make a positive first impression and to continue demonstrating the importance of the individual client every time they interact. Sloppy communication skills, lack of respect for a customer's time, and poor treatment cannot happen in the business world. Your image suffers, confidence in your services wanes, and people go elsewhere. The good news is that small changes can have a substantial impact.

Whether you are the person placing the call or the one on the receiving end of the phone, take action to ensure clear, thoughtful, effective results.

## **Phone etiquette tips when answering calls**

When it comes to business calls, do you know the importance of the number three? Experts often recommend that incoming calls to an office be answered within that amount of phone rings. This length allows time to compose oneself before picking up without making the caller start to get edgy that nobody is answering.

When you are out of the office or not taking calls due to a meeting or other uninterruptible situation, set voice mail to pick up even sooner than three rings. No sense in making callers sit through unnecessary rings when they can be delivered directly to the option to leave a message.

Work on making a positive impression from the get-go. As obvious as this sounds, always be conscious that the person on the other end cannot see you. Without the ability to witness facial expressions or body language, the caller will form judgments based on the tone of your voice and what you say. Be polite, informative, and helpful.

This advice holds true for call center reps, receptionists, office workers, and even managers. While each may tinker a bit with wording, an effective way to answer calls goes something like this: “Good morning. This is Anita with XYZ Industries. How may I assist you today?”

Why identify yourself and give the company name? It builds a personal connection. This act also assures the individual on the other end that he has reached the correct place.

## **Proper phone etiquette in sticky situations**

As hard as one may try to make a phone call go as seamlessly as possible, problems sometimes occur. Here are suggestions for tackling three common problems:

### **The caller speeds through his name**

First, be certain you are in a place without background noise and are giving the call your full attention. Then, politely ask the caller to repeat his name. If you still can't catch it, say, "My apologies, but could you spell that please?" This tactic takes any tension out of the situation because you make it sound like it is *your* fault.

### **The boss wants you to screen calls and only let select ones through**

As mentioned earlier, clients feel slighted if they get wind of a gatekeeper preventing their call from going through. Times do exist, though, when a leader needs to focus on other matters and must limit conversations to only the most important and urgent.

To avoid hurt feelings, create the impression that the boss is not available to anyone. Most of us work in companies where the standard practice is to ask, "Who's calling?" But if you ask this question too early in the conversation, you imply to the caller that the boss might be available for some people but not for all. To avoid this implication, get into the habit of first announcing the unavailability, then asking for the caller's name and message. If the caller ends up being someone approved to transfer through, you can then do so by saying, "Oh, one moment. Here he is."

### **You need to place someone on hold**

No caller enjoys sitting around waiting for an answer. Thus, smart companies start with a proactive strategy: Educate those who routinely answer phone calls. They

should know responses to frequently asked questions. They also should know the right person on staff to transfer someone to for specific issues so that customer calls do not get bounced around. To appear especially polite and helpful, use the word “connect” rather than “transfer.” It projects a vibe of direct action rather than raising suspicions of you trying to pass the buck.

The rules of phone etiquette say callers should not be kept on hold for longer than 20 seconds. If the call can’t be forwarded, the person answering the phone should offer to take a message or transfer the person to voice mail. If a verbal message is taken, ask for the caller’s full name, company affiliation, and phone number (unless absolutely certain you have the information from a previous call). Then, deliver the message promptly.

If you truly need to put the caller on hold, ask the person’s permission to do so. Resume the conversation within a minute, and thank the individual for holding. If further waiting proves necessary, explain the situation. Provide the choice to continue holding or to receive a return call. What you definitely want to avoid is a long wait time without any contact. The frustrated customer will wonder if the call has been forgotten or lost within the company’s phone system.

## **Voice mail etiquette**

When used properly, voice mail enhances business operations. Leaving a message on a machine often proves far superior to leaving it with a person, especially if what needs conveying is lengthy or detailed. Valuable business time can be saved when you no longer need to play phone tag with a client and can provide information right away if she leaves her question on your voice mail. But don’t just slap together any old voice mail recording.

### **Enhance both communication and image by sticking to these guidelines:**

- Be brief. There is no reason that frequent callers (who probably are the most important to your company’s bottom line) should have to wait

through a long message. Better yet, if your system has a feature that allows callers to push a button and be sent directly into voice mail, enable it and make the option prominent.

- Likewise, some people still resent being relegated to voice mail systems, so always give callers the option of speaking to someone immediately.
- Your outgoing message should include your full name and enough information so that first-time callers will know that they have reached the right person.
- If you have unusual business hours, include them in your message.
- In a business voice mail, never include jokes, music, or other frivolous material.

Be equally conscientious when you are the one leaving a voice mail. State your name and phone number at the beginning and the end of the message. This repetition is important because the first time you say it, the recipient may not be ready with a pen and paper to take down your number. Also, taped messages can be hard to hear, especially when there are other distractions. Repeating your number twice allows for some error-checking. To increase efficiency, also provide some information about when and where you can be reached for a return call.

### **Additional phone etiquette tips**

Finally, always remember the basics! Professionals worth their salt should already know the following, but here's a refresher.

- Give each call your full attention. Refrain from eating, reading, opening mail, or having side conversations with office colleagues. This concentration demonstrates respect for the person on the other end of the line, and it assists with catching what is being said.
- Make and take phone calls in a quiet area. This setting helps both sides hear well and cuts down on interruptions and distractions. Be especially vigilant if using a speakerphone.

- When you have a client or other visitor, accept only urgent telephone calls. A guest who is made to wait while his host takes several calls during a meeting may well conclude that his business is not important to the company.
- When using a cellphone, remember it is not good etiquette to place or receive calls during a meeting, in a restaurant, or anywhere your conversation may bother others. Set phones to vibrate in these settings; do not turn on bells or beeps.
- Be polite to everyone you call or who calls you. In the business world today, all relationships count. The most unlikely people may be able to help you in a way that makes a real difference.

## Video calls are the new-norm

At the beginning of the pandemic, virtual meeting etiquette and norms were still unclear to many. However, it's clear that virtual meetings are here to stay for many businesses. That means that mistakes and faux-pas that were permissible back in 2020 may be frowned upon now.

We've all been there — stuck on another video call and wondering what exactly is appropriate. Should you open up that bag of chips? Is it ok to drink your coffee? Put your feet up on the desk? Do you have to turn on your camera just because everyone else has? Do you really have to put on dress clothes and clean up your office?

Many of the same rules of etiquette apply to a virtual meeting that would apply to one in the office. Being prompt, making eye contact with the speaker, and paying attention will go a long way to making the meeting a success.

But how do you ensure your Zoom, Skype, or Microsoft Teams video meetings stand out, make an impact, and avoid any faux-pas?

## **Learn the features of the platform you're using**

Hosts and participants alike should familiarize themselves with the platform being used. How do you set a background? Where is the mute button? How do you turn the camera on and off? Doing so will ensure you're not fumbling around with the tech when it's time to get started or throughout the meeting.

## **Join early**

Without fail, if you try to jump on your call right at the start time, technical difficulties will pop up. Hop on at least 5 minutes early, or more if you are hosting. If you've never used the platform before, be sure to give yourself time for any downloads that might be necessary.

## **If you are hosting, set a plan**

In-person meeting etiquette and virtual meeting etiquette aren't that different in many cases. Like in-person meetings, your participants want to know what will happen during the video call, so set an agenda. Let anyone who needs to present know ahead of time so they can prepare.

Above all else, maintain momentum and stay on track as much as possible. As the meeting host, you also act as a moderator during the virtual meeting. Be sure to keep the conversation focused on the matter at hand so it doesn't become a meeting that could have been an email.

## **Get dressed**

Everyone will know if you are wearing your pajamas. Give your best shot at dressing professionally yet comfortably. If you wouldn't go into the office with uncombed hair and wearing your favorite college t-shirt, be sure to step it up before your video chat too. We've all seen the video meeting wardrobe mishaps, and you don't want that to happen to you.



## **Invite only those who are essential to the meeting**

Being respectful of others' time is important in the office and when working virtually. Just because you can invite someone to a Zoom call doesn't mean you should. Focus on inviting those who are essential and sending the meeting notes to those who would benefit from being in the loop. Also, keep in mind that fewer participants can make the meeting run smoother from both a technical and conversational perspective.

## **Introduce the participants**

Ensure that all participants have a chance to be introduced and welcomed. This is good etiquette normally, but even more so in a virtual meeting where it's harder to introduce yourself to others beforehand. One way to do that is to use the waiting room feature if the platform you are using has one. Just as you wouldn't let colleagues sit through an in-person meeting without an introduction, we shouldn't do so on video calls either. Give everyone a chance to say who they are and what they do.

## **Eat before the meeting**

Watching someone eat on video isn't very appealing. Try to limit snack and mealtime to before or after your call. On the other hand, it is generally acceptable to sip your coffee or water during video meetings.

## **Clean your workspace and stage your video area**

If you aren't going to use a background during your call, make sure you have a clear work area and a clean space behind you. Check to see what is in the background of your camera — and remove anything inappropriate or distracting. Make sure your lighting is working well, too. Facing a well-lit window works wonders, or even putting a lamp near your camera can help. In general, you need

a lot of light for video calls, so turn on those lamps and get a ring light for your camera if needed.

### **Look at the camera, and adjust it if it is too high or too low**

Your camera should be at eye level, but you might have to get creative to raise it to a better position if you are using a built-in camera on a device. There are many solutions available and products to purchase that will raise your device to the correct height. This will allow you to avoid those distorted views offered by a camera that's at the wrong angle.

### **Mute yourself if you aren't talking**

We know many people are working remotely with a full house of loved ones and beloved pets. This juggling act means there's sometimes background noise. Still, mistakes like this were more forgivable early on, and the expectation to understand virtual meeting etiquette is a bit higher.

Put yourself on mute to avoid embarrassing slip-ups or dogs barking in the background. Also, don't forget to un-mute yourself when you start talking!

### **Avoid distractions**

This one might seem impossible given the pandemic, but do your best to avoid distractions. Arrange for someone else to oversee the virtual schooling, let the dog out, or manage anything that might pop up during the meeting. If that isn't possible, do what you can to prep everyone that you'll be on a call for a time. Set up a signal with your kids, so you know if they have an emergency or can wait a bit. Close your door if you can.

## **If you are hosting, you should be the last one to leave**

Once the host leaves, most platforms shut down the video call. To avoid the issue of cutting off someone's final thoughts, be sure to wait until all others have left the meeting before shutting things down.

Many companies are considering long-term remote work, even after the pandemic passes. It's a good idea to perfect your video call etiquette and train your staff on best practices, as it doesn't look like those Zoom meetings are going anywhere any time soon.