

The Etiquette Behind Professional Success

BY B.J. RUDELL AND JAY BRINSON

In our fast-paced, deadline-driven world, it's not always easy to take a step back and process how our decisions and behaviors impact our standing within our firm. Likewise, we might not always recognize how our personal style impacts our firm's reputation among business partners and potential clients. But when it comes to business success, there is no substitute for good manners.

Personalize Technology

Not long ago, conduct and communication were conveyed through letters, phone calls, and in-person meetings. Now, e-mails, social media, and video conferences add interlocking layers of complexity and possibility to our daily lives. Good etiquette goes hand in hand with applying these tools.

- When leaving a voicemail—particularly for someone you don't know—be brief and to the point. The same goes for e-mails. Rambling and repeating oneself lessen your message's impact.
- Customize phone and e-mail communications to your audience. Receiving a cold call from someone who clearly understands your organization's unique mission and identity is far more respectful than hearing from someone who is blanketing an entire industry with the same general message.
- Use social media to celebrate the achievements of industry partners and clients, not merely your own or your company's. These virtual "pats on the back" spread goodwill in a way that no self-promoting commendation can ever do.

Don't Leave People Hanging

Have you ever *not* heard back from someone after leaving a voicemail? Or after sending an e-mail? It's hard to understand why even the simplest requests sometimes go unanswered. As a result, we might be less inclined to contact that person in the future. Good etiquette requires a different approach.

Treat your co-workers the same way you would treat a potential client.

- Unless you are tied up in a meeting or pressed by a short-term deadline, answer any phone call. You will need to call back anyway, so choose to talk now and earn points for being responsive.
- Accept meeting requests. Some of the most successful marketers are interested in people regardless of their value to an organization. We learn through engagement; there is nothing to learn through inaction.
- Similarly, if a co-worker stops by to discuss a work-related issue, address it in that moment. Moreover, stop what you are doing, face the person, and engage them fully; it's more efficient (not to mention polite) to have a meaningful conversation once, rather than to drag it out over multiple encounters. Treat your co-workers the same way you would treat a potential client.
- However, suppose a co-worker stops by to discuss a work-related issue *while you are currently engaged in a work-related conversation with someone else?* There are two recommended approaches, depending on the situation.
 - a. If you and the person with whom you are meeting were aware at the outset that you might be interrupted—for example, for a scheduled meeting or anticipated conversation with the new person—then it's appropriate to postpone continuing your existing dialogue so that you can talk with the new person.
 - b. If the interruption is a surprise, then it's appropriate to tell the new person that you will meet with her/him after you are finished. One potential caveat: We work in a company where a "boss" does not pull rank when individuals are engaged in a work-related discussion. However, in some companies, the needs of a boss trump the needs of rank-and-file staff. In the aforementioned example, your etiquette should reflect the degree to which your organization adopts a hierarchical culture. Defer to authority when and where applicable.

Remember, Everyone Has Value

Everyone in an organization possesses value. There might be only a few decision-makers in each organization with the authority to contract with your company. But that doesn't make them the only people worth getting to know.

- Some of today's junior-level employees eventually will become leaders in various industries; many others are, or soon will become, decision-makers at certain organizational levels.
- Even if a potential business contact holds no value to you, he might hold significant value to someone you know. Getting to know that person might sap 15–20 minutes from your busy day. But in return, that person might serve as a valuable introduction to one of your more valued business contacts.
- When someone meets or talks with you to learn more about your organization, invest at least as much time learning about her organization. While that individual might not matter to you professionally, what they will say about you and your organization to others does matter.

Exhibit Grace in Victory and Defeat

If you are paid to focus on the bottom line—bringing in revenue for your company—“selling” becomes an everyday mindset. Internally, wins are celebrated, while losses are analyzed and learned from. But our external behavior in such situations significantly influences how others perceive us.

- Notify team members—both within your firm and within partner firms—as soon as you learn the fate of a pursuit. Don't keep others guessing. The prompt sharing of such vital information helps all parties adjust business expectations and establish fresh goals and strategies.
- Immediately after losing a pursuit, courteously contact the would-be client's point-person to ask how you could have better represented your firm's qualifications. Obviously, it's not about changing their mind; rather, it is about showing a strong interest in working for that entity—so much so that you want to learn from your mistakes, which is always viewed admirably.
- Once you begin working with a new client, inquire into your firm's weaknesses. No company is perfect. Encourage the client to share any reservations they might have had when selecting your firm, so that your company can learn and become stronger as a result.

Show Respect in Relationships

You won the job. Now is the time when the stakes are highest. A polite and respectful approach could mean the difference between a one-and-done assignment and a long-term client.

- Treat potential clients with the utmost respect; treat existing clients even better. The positive impact of unfailing loyalty in fulfilling a current client's immediate needs is far greater than the negative impact of failing to meet a potential client's immediate needs.
- Extend yourself and your firm to maintain a long-term relationship. It is important that you and your firm be seen as problem-solvers who are willing to make minor, short-term investments of time and personnel on the client's behalf. Clients cherish the feeling that you are on their team and appreciate companies that go the extra mile.
- Do not insert marketing/business development into project-related discussions. When seeking to sell new work to an existing client, set up a meeting specifically devoted to this aim, so your client does not feel that work discussions are being compromised.
- Seek a client contact's permission before listing them as a reference in marketing materials. Even if they consent, your work is never complete; drop them a note any time you plan to list them in a proposal, so they're not caught off guard if someone calls them.

Regardless of where you stand on the marketing or business development continuum, it is always the right time to display good etiquette. On its own, etiquette cannot win work or sustain relationships. But when combined with passion and expertise, it can channel a limitless potential that resides in every individual and company. **■**

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