

# Taking Your Business Etiquette



**To the NEXT Level!!**

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# Taking Your Business Etiquette to the Next Level

“What sets one organization apart from another and distinguishes one individual from the other are interpersonal skills. Knowing how to treat others with courtesy and respect, being at ease in all situations, and most importantly being able to put other people at ease are the qualities that give people and organization the competitive edge. So what is business etiquette? Business etiquette, simply stated, is a set of rules that allow us to interact in a civilized fashion with one another. It is a code of behavior that is grounded in common sense and basic courtesy.”

Lydia Ramsey  
Manners That Sell

- I. How does business etiquette apply to real estate?
  - A. The license law vs. ethics vs. etiquette vs. standards
  
  - B. What is “customary” and what is “mandatory”
  
- II. Real Estate Standards
  - A. Customer Care and Communication
  - B. Technology Proficiency
  - C. Professional Development
  - D. Risk Management
  - E. Transaction Management
  - F. Professional Relationships
  - G. Customer Dispute Resolution
  
- III. Real Estate Professional Courtesies
  - A. Respect for the Public and Fellow Realtors
  - B. Prepare for Showings
  - C. Showing the Property
  - D. After the Showing
  - E. Presenting the Offer
  - F. After the Sale
  
- IV. Business etiquette and it’s place in the real estate education formula
  - A. Georgia Real Estate Survey
    - 1. 50% of the claims against licensees were not a violation of any license law
    - 2. 35% were minor infractions
    - 3. 15% were major infractions
    - 4. Are we teaching the “right stuff”

- B. The consumer expectations have not been met and one minor frustration festers a major frustration which leads to the perception of wrong

The class is going to determine the correct etiquette for each of the following categories and affect our communication with not only the consumer in the transaction but also fellow REALTORS and affiliated business as well. Within the work groups, you will set the standards that you feel are appropriate for your business environment and compare them to the “expected” and “exceptional” business etiquette.

- V. First Impressions: “You only get one change to make a first impression and it takes a few seconds to make a negative impression and a lifetime to overcome one.”

- A. Studies show that 55% of how people judge you is based upon what they see, 7% is based on the words they hear, and 38% on the tone of voice.

1. Your dress and outward appearance
2. Body language in the way you walk, eye contact, facial expressions
3. Hands and gestures
4. Words and tone of voice

- VI. Much has been made of the “appropriate attire” for the real estate professional. But when is “casual” too casual? The Queen of England is reported to have told Prince Charles, “Dress gives one the outward sign from which people can judge the inward state of mind. One they can see, the other they cannot”.

- A. Clothing

- B. Hair, makeup, facial hair for men

- C. Jewelry and accessories

- D. Business cases

- E. The new “business casual”

**“If you have to apologize to your customers or explain what you are wearing, then you made the wrong decision when you got dressed.”**

Avoid business casual when:

- You have a meeting or luncheon outside the office
- You are in negotiations
- You are expecting a client in your office
- You are dealing with an international client
- You are in doubt about the appropriateness of your clothes
- Your performance review is scheduled for that day

VII. Telephone Etiquette: The telephone may be the first and only contact you have with a customer. 75% to 80% if all business is conducted over the phone today. Make it your best.

A. When you meet someone face to face, remember, voice counts for 35% of the first impression. However, on the phone, the tone of voice soars to 70% of the impression.

B. Cellular phone/Beepers/Blackberry manners. In your group discuss what you believe to be appropriate rules of behavior for usage of all of the previously mentioned electronic devices. Consider different situations that a REALTOR would find themselves involved in throughout the day.

C. Answering the phone etiquette

D. Voice Mail etiquette

E. Placing callers on hold

F. Leaving messages

G. Conference calls.

H. Speaker phone

VIII. "Netiquette" is the new term used to refer to civil behavior on the net.

A. Companies must have policies on using company time for emailing, etc.

B. Rules of email etiquette:

While E-mail is a convenient means of communicating in business, it can also lead to embarrassing mishaps and misunderstandings. Consider the following suggestions before you shoot off your next e-mail.

### 1. Spell check

Spelling errors detract from your message and diminish your credibility. Once you use spell check, also proofread your e-mails for errors that spell check can't catch. e.g. "I will swing bye at too!"

## 2. Responding to E-mails

- **Include Earlier E-mail String:** If you are replying to an e-mail, or chain of e-mails, be sure to include the earlier e-mail sequence (or at least that part of the message that corresponds with your reply). For example, replying “yes, that’s fine” to an agent’s e-mail requesting a showing on your Dale Street property this Thursday at 2 p.m., without including the agent’s initial e-mail request, is confusing.
- **Reply to the Right Person!** When you receive e-mails that have been forwarded for your review, make sure you do not reply to the original e-mail sender. For example: Seller’s Agent forwards an e-mail to Buyer’s Agent that originated from Seller stating that Seller insists that all prospective buyers take off their shoes before entering the property. Buyer’s Agent responds to the Seller’s original e-mail by accident, rather than responding to the Seller’s Agent, by making snide comment about the Seller being too anal retentive

## 3. Be Concise

E-mails are most effective when they are short and to the point. Avoid using an abundance of exclamation points or smiley faces, as this diminishes your credibility. And make sure not to use all capital letters ... IT IS THE SAME AS YELLING AT THE PERSON.

## 4. Create a “Signature”

Make sure to include your name, company, e-mail address and phone number with every e-mail you send. This reduces confusion when there are multiple parties to the e-mail string.

## 5. Personal E-mails

Companies have the right to monitor their employees’ computer usage. Some companies prohibit the use of personal e-mail period. However, even if that’s not the case where you work, make sure any personal e-mails are brief and impersonal. Anything more than a quick e-mail to your wife saying your going to be late for dinner should be discussed over the telephone. Even if the culture of your office condones personal e-mails amongst each other, e.g., forwarding jokes, the best practice is to stay away. You never know who you might accidentally offend, and what may be humorous to you may be grounds for another’s lawsuit!

- IX. Correspondence in business...the art of letter writing is gone. Yet there is no better way of building business relationships than through letters. They bring a human touch to our sometimes impersonal business dealings.
- A. Grammar, punctuation and spelling will most noticed if incorrect.
  - B. Your closing should match your salutation  
“Dear Joe,” “Sincerely, Mary” or “Dear Mr. Brown” “Sincerely, Mary Smith”
  - C. The power of a handwritten note

- X. **Etiquette in the Office**  
Receiving business callers in your office requires the same courtesy and attention as hosting a guest in your home. Your goal is to make the visitor feel welcome, comfortable and, most of all, important. Take each one of the following situations and within your group outline your perceived accepted behavior.
- A. Respecting the workspaces at the office
  
  - B. Cubicle etiquette “The absence of a door is not tantamount to a welcome sign.”
  
  - C. Between door and floors: Elevators, escalators, revolving doors, etc  
“The rule of the door: Whoever gets there first opens it!”
- XI. **Gift –Giving in Business:** When handled in the right way, gifts bring pleasure to the giver and the recipient. Done improperly, gift giving can create problems and generate negative feelings. When is it appropriate to give a gift?
- A. To clients
  
  - B. Co-workers
  
  - C. Superiors
  
  - D. Multi-cultural considerations
- XII. **Driving etiquette:** This is probably the most overlooked part of the REALTOR etiquette policies. The safety of your client is paramount.
- XIX. **Etiquette to fellow Realtors**
- A. The Code of Ethics covers the conduct of your business practice. The Code of Etiquette covers the conduct for you professional courtesies. What “violations” do you see in simple professional courtesies amongst Realtors?
  
  - B. Can relationships between the agents and consumers be improved by “minding one’s manners?”



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Here for all of your legal/ethical/risk management training needs.”

“Your content was simply the best MCE course content I have ever participated in, even including the ones I take at the University of Texas Law School (I am not a lawyer, but take legal MCE courses). “

Charles Porter, CE Instructor, Austin Board of REALTORS

Insights: Focusing on the Hispanic/Latino Client course is done professionally and is easy to follow. The information in this course is priceless, since the Hispanic population is growing dramatically in the U. S. Armed with this information and the resources in this course, you will be able to expand your clientele far beyond what you thought possible. Carla Cross, CRB, MA President, Carla Cross Seminars, Inc.

Marcie Roggow has served the real estate profession well since 1971, when she was first licensed in Iowa. She has worked in virtually every aspect of the real estate industry from being an agent, broker/owner, manager, developer, educator, and her favorite position – a tireless volunteer to the industry that has given her a “life time career”.

As the talk of agency disclosure surfaced in 1985, Marcie was serving her as the Political Affairs Chair for the Iowa Association of REALTORS as well as Board President in Iowa City, Iowa. The discussion of having to make disclosures to the consumer about representation was not a top priority for the agents in Iowa, at that time. As a member of the NAR License Law Committee, Marcie developed an interest in understanding how all of these disclosures were going to affect the real estate professional and became a local expert on those issues. That keen sense of wanting to be on the cutting edge of information regarding disclosures has remained with her through today. Marcie served on the Agency Subcommittee of the Risk Management Committee in 1994-95 just as Buyer Representation was being enacted by the Boards of REALTORS nationally. She became a trainer of trainers to help associations, boards and companies nationally to implement agency policies. Her company, Creative Learning Concepts, developed a Broker’s Policy and Procedures Manual, Agency Company Policies, and Risk Management Forms for the Brokerage Company all of which are available through the Council of Real Estate Brokers (CRB). Her book, Buyer Representation for the Real Estate Professional, is a fabulous “tutorial” for buyer representation.

Recently Marcie’s focus has been on Realtor’s Professionalism. As a result of the Real Estate Standards initiative, Marcie created **The Professional Excellence Series**. A series of 5 courses that will dramatically improve the behavior of the agent to the pleasure of their clients, fellow real estate professionals, and vendors. The first in the series: **Personal Skills for Professional Excellence** has recently received recognition through CRS as one credit elective toward their designation. Exceeding the Expectations of the Seller, Exceeding the Expectations of the Buyer, Insights: Multicultural Competency Initiative: Connecting with Multicultural Homebuyers, which has also been recognized by CRS as one credit elective toward the CRS designation, and Risk Management for the Real Estate Specialist make up the balance of the courses.

Her new endeavor, Insight: Focusing on the Hispanic/Latino Clients, is an interactive learning CD produced with collaboration with Amy Tolbert, Ph.D. Understanding the culture, the communication skills, marketing strategies, and the home buying process including risk management forms translated in Spanish is the focus of the CD.

When it comes to education regarding Disclosure Issues, Risk Management, Agency Legislation, and Buyer’s Representation...this is the lady you want!

