



SOCIETY OF ACTUARIES


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SOA ePoll

Which feature would you most like to see in a networking Web site for the EA Section?

- Profiles of Section members describing what services they provide
- Postings of projects for which Section members are seeking assistance
- Postings by Section members seeking peer review help
- Postings by providers outside the Section describing their services
- None - I would not be interested in this Web site

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Eight Tips to Establish Professional Boundaries

by *Maureen C. Costello*

Between socializing, dining and traveling with colleagues and clients, being a successful player in the business world requires proper business etiquette both inside and outside of the office. Here are a few tips for establishing professional boundaries in business social situations.

1. Set meetings with clients in public spaces when traveling. Many people in business are strangers to us until we establish a relationship. Trust in this relationship is built by maintaining both your professional behavior and reputation. Set meetings in public locations such as hotel lobbies or airport lounges. This will not only help new clients feel comfortable and at ease, but also ensure that perceptions of the business meeting remain professional.

2. Ask a colleague to join you. Many business events involve alcohol. When someone drinks too much, unprofessional behavior can ensue, from trade secrets being revealed to overly-familiar physical gestures being made. Seeking the support of a colleague cannot only help monitor and curtail such behavior, but can also provide a second perspective when debriefing about the client and key meeting points.

3. Use eye contact and physical distancing. We establish boundaries in many non-verbal ways. To show confidence and sincerity, begin with a firm handshake and steady eye contact. Showing confidence using a firm handshake leaves a clear message that you are about the business at hand. Physical distancing is another way to set boundaries. A typical western business distance is one arm's length around the body. By keeping proper physical boundaries, all parties will feel more at ease.

4. Emphasize formality vs. familiarity. Failing to make the distinctions between being physically comfortable at home and being comfortable in a work environment is another way boundary messages with others get confused. Sitting tall and looking attentive at meetings is key to being perceived as a caring and strong leader. Extremely relaxed lounging type posture at work, physical touch and casual conversational content (including text messaging and e-mails) are all ways in which formality gives way to over familiarity with others. It is very difficult to recover in a relationship once you have become too familiar since that is the pattern that has been established. It's best to maintain a level of formality in all business settings including business social events.

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5. Keep the conversation professional. Conversational content is an area that can create boundary issues for business people. With increased media access and the relaxing of social etiquette, it is easy to overstep boundaries with a client or colleague. What you deem acceptable conversational topics may be different in a business setting than with friends and family. Keep to topics that are an easy link into deeper business conversations, such as weather, sports, cultural events, vacations and local restaurants. Additional safe topics are hobbies and lighter business/industry updates. Avoid talking about sex, money, religion, politics and unsettling news stories.

6. Change the subject. When group conversations do become inappropriate, the best strategy is to ignore the behavior. Simply turn to a person in the opposite direction and ask an open-ended question. If you are with the individual who is speaking inappropriately, ignore the comment and change the subject. Depending on the nature of the comment and your relationship with the person, making an "I" statement may also be effective, for example: "I would appreciate it if you would not talk about _____. It makes me feel uncomfortable."

7. Dress for business. Fashion vs. professionalism is an on-going discussion in the work press. With four generations making up the workforce, each with different guidelines for what is appropriate, there can be missteps. No matter the generation, being clean and pressed is an expected minimum. Watch as you push the dress code with new fashion trends, for these can tip the scales to inappropriate. Each company has their own code of what is inappropriate. For some it's messy and dirty clothes; for others, jackets are required. When it comes to maintaining your outer appearance, make professional choices and apply them consistently so as to decrease your risk for boundary issues. Clothes do send messages; make sure your choices signal your intentions for success.

8. Use written communication. Once you put something in writing, it is permanent. Many companies monitor e-mails and instant messaging. Well-crafted and thoughtful responses to clients and colleagues can make a difference in the way you are perceived professionally. Gear your missives to the other person's communication style. For example, when writing to a colleague who is very conversational, include more detail in the e-mail. When working with a driver type colleague, on the other hand, keep communication direct and to the point.



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