



SOCIETY OF ACTUARIES

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Avoiding the Hidden Pitfalls of Business Dining

by Maureen Costello

Business dining is an effective relationship-building tool, and yet it's important to recognize and prepare for the hidden dangers and opportunities.

Business dining is a great way to build relationships, especially if you don't golf. It's an opportunity to spend quality time with a client in a neutral setting away from ringing telephones and "urgent" meetings. Offering clients a pleasant experience with good food and a nice ambiance can impress them and allow you to get to know them in a different way.

Of course, whenever you move a business relationship into a social setting, you have to be careful. Mixed signals or embarrassing events, for example, from over-serving, can damage your business relationship forever. With a little foresight and preparation, you can ensure that your business meal is a resounding success.

Here are several principles to follow that will help ensure the success of your business dining experiences.

Set Clear Goals for Your Event

For your business dining experience to be effective, you need to be clear on what you are trying to achieve. Are you celebrating a big deal or completion of a large project? Are you hoping to develop trust with a potential client? Or do you intend to discuss a delicate situation?

Before each event, you should set your objectives and determine what information you want to cover. Of course, one of your objectives

should be that your client has a pleasant experience!

Be a Gracious and Generous Host

A gracious host's primary role is to ensure that the guest is comfortable throughout the experience. You have to think of everything, from parking to food to social interaction. That means you have to know what your guests prefer, including:

- What kind of food do they like?
- Do they have any food allergies?
- Is the location convenient?
- Is parking close, well-lit, and safe or is there a valet?
- What is their relationship to alcohol?
- Do they prefer quiet places where they can talk, or loud, bustling environments?

Remember that in spite of all your preparations anything can happen, and you need to be flexible and open-minded. One time a client of mine showed up at dinner on crutches, with a massive cast on her right leg. The restaurant I had selected was small, so she had a tough time maneuvering around the table. She also had to have her foot elevated during the meal!

You may want to go to a restaurant you know well. That way, you ensure you will have a good table and will receive exemplary service. You may even want to special order a menu in



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INTERPERSONAL SKILLS

advance, based on your guest's preferences and favorite foods.

In some situations, the host orders all the food as a way to impress or take care of the guest. It's considered an honor to be able to feed another person—in essence to keep them alive. If this happens when you are a guest, go with the flow and enjoy the bounty!

Many people have serious allergies. For example, someone with nut allergies may have trouble with a Thai restaurant, and a person with a gluten intolerance may be lost at a crepe restaurant.

Allergy surprises can come in the smallest of food items. One time I ate an appetizer the size of a quarter and it nearly sent me to the hospital. I have nut and buckwheat allergies and have learned that double-checking with multiple kitchen personnel is essential to avoiding an ambulance coming to the rescue in front of other diners. What a way to ruin a meal.

Another sensitive issue is alcohol. If a client doesn't drink at all, he or she may be a recovering alcoholic. While that is an issue you probably shouldn't broach, you may want to avoid imbibing in front of that person or taking him to a place that focuses on drinking.

If, on the other hand, your client is a big drinker, you have a host of issues to contend with. In fact, alcohol may be the biggest challenge you face in business dining.

Don't Get Drunk!

Granted, this tip is obvious, but it bears repeating. As the host, you are in control of the event. You need to be on your toes to deal with any problems that arise and to ensure that your guests are having fun and that your business objectives are being met.

Beware of Drinking and Driving

When you are entertaining clients, you have legal liability issues that could impact you per-

sonally as well as your company. There are several ways you can minimize your exposure when you are entertaining clients who like their alcohol, or planning an event that you know will be extra festive.

(1) Meet for lunch instead of dinner.

You can lessen the likelihood that a client will get drunk by meeting for a nice lunch instead of dinner. Most lunches are shorter, and if clients need to attend meetings or work in the afternoon, they will drink much less.

(2) Arrange for alternate transportation.

Provide a car to pick up and deliver clients, or pay for cab service if that is appropriate. If the client has driven himself and becomes intoxicated, pay for a cab or car to get him home, and deliver the car to his home or a safe place like the work parking lot. If clients insist on driving when they are intoxicated, try humor. One client of mine in this situation joked to his guest, "Hey, we're a full-service provider here—we get you and your car home safe!"

(3) Discuss expectations with the wait staff in advance.

Let the restaurant personnel know that you don't want your guests over-served. Ask the wait staff not to continuously refill glasses, and to refuse service if the client is getting out of control.

Avoid the Money Trap

Obviously, you should never bring guests to restaurants that will break your budget. Once you've chosen the restaurant, guests should feel free to

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order what they would like, within reason. Or you can ask them in advance what their favorite foods are and special order a menu to control costs.

At fine restaurants, be aware that top shelf after-dinner drinks can routinely run up to \$150 a shot. I recently ended up with an extra \$300 on top of an already expensive bill when I joined a client in an exotic drink, without realizing it until it was too late.

Also, it helps if you have a basic understanding of good wine. One client of mine allowed her dinner guest to choose a wine he enjoyed, realizing when the bill came that it cost hundreds of dollars! One way to avoid this trap is to ask your client in advance what types of wine he or she enjoys, and then have a couple of suggestions for good reds and whites in certain price ranges ready to go. You can also choose to work with the restaurant staff in advance to choose wines for the table.

Reserving a table at a restaurant where you are a regular patron is helpful when you need a special favor, like getting a sense of what wines are in house at a reasonable price range in both the white and red varieties. This way you can order knowledgeably and within your price range. To take this a step further, take a class at your local wine shop so you know what to look for in a decent bottle of wine.

Recognize the Importance of Etiquette

Basic rules of dining etiquette are important for a variety of reasons. Dining etiquette is a universal language. If you can speak it, you're part of the group that knows. And also, knowing basic etiquette provides you with personal comfort. You don't have to worry about how you're eating and can worry about the content of your meeting.

Most people exhibit basic table manners, such as placing their napkin in their lap, keeping their elbows off the table and not talking with their mouth full. However, many people lack an understanding of etiquette beyond those most basic principles. For example, do you know what to do if you sneeze? (Answer: Always bring a tissue to avoid sneezing into the napkin!).

As you ascend in your career—and especially if you work with people from other countries—it's a good idea to brush up on dining etiquette. The clients I work with on dining etiquette are amazed at what they didn't know, and often report that understanding basic American and European etiquette has had a surprising impact on their careers.

The Continental (also known as European) dining style is less cumbersome and quieter. Using the cutlery in both hands without switching allows more attention to go towards the client. In fact, when you are dining with a globally minded client, handling your plate in the same way your client does is a compliment and positively mirrors the way your client dines.

At the higher levels, business professionals make judgments about your attention to detail, how you handle yourself at the table, and—the most important facet of etiquette—how you treat others, including the hosts, wait staff and busepersons. The CEO from Raytheon, for example, has said he takes measure of a person based on how he or she treats the wait staff, asserting that the way you treat waiters is indicative of how you would treat his people.

And remember, turn off that cell phone!

Watch Out for Mixed Signals!

Now for a sensitive area ... When business relationships are moved into social settings, especially when alcohol is added to the mix, situations can arise that are embarrassing at best and damaging or even dangerous at their worst.

If you are concerned that a business dining partner may have non-business intentions, here are some guidelines to follow:

(1) Always meet the client there.

One female colleague of mine always chooses restaurants with valet parking and insists on meeting clients there. A male client of hers once recommended an Italian restaurant near his corporate condo and suggested she park in his garage and they walk over together. She responded by recommending a similar, nearby Italian restaurant with valet parking (claiming a craving for their calamari), and said she'd meet him there. With this approach, she never ends up alone with this client and avoids any potentially uncomfortable situations.

(2) Watch the alcohol intake.

Many uncomfortable interpersonal situations arise when a little too much alcohol has been imbibed.

(3) Use humor and avoidance to deflect uncomfortable situations.

If a business dining partner is making unwanted advances, try giving him the hint by making a pointed joke or changing the subject.

(4) If that doesn't work, state your feelings clearly.

If the person you're with doesn't take the subtle hint, be clear about your situation, such as, "I'm

not interested in anything but a healthy business relationship."

(5) If that doesn't work, leave.

Remember, your personal safety and well-being comes first. If you ever feel you are in danger, ask someone from the restaurant to walk you to your car or help disentangle you from the situation.

Prearrange Payment if There's Any Question About Who Pays

In America, whoever invites usually pays. If you want to avoid any discussion of it, prearrange payment with the wait staff.

In some cultures, especially in Asia, the person who is treated to dinner owes a favor to the person who paid, so when they're fighting for the check, it has a whole different meaning!

Another cross-cultural difference involves the end of the meal. In America, the host stays at the table until everyone leaves. In Asia, it is polite to wait for the host to leave before you depart.

In any case, you can see how a little preparation and thought goes a long way. So do your homework and enjoy! □

