



# Socialising with Clients

## What should you do?:

### 1 Maintain Professional Boundaries

- **Always maintain professionalism:** Even in social settings, remember that you are representing the company. Conduct yourself in a manner that reflects professionalism and integrity.
- **Limit personal disclosures:** While building rapport with clients is important, avoid sharing overly personal information that could blur the line between personal and professional relationships.
- **Be cautious with physical interactions:** A handshake is the professional norm; other forms of physical contact should be avoided to prevent discomfort or misunderstandings.

### 2 Set Expectations for After-Hours Socialising

- **Clarify your availability:** While attending client dinners or social events outside working hours may be expected at times, ensure that these engagements are within reasonable time limits. Avoid excessive after-hours socialising.
- **Feel empowered to decline:** If an invitation feels uncomfortable or unnecessary, or if it is too frequent, it is acceptable to politely decline by offering an alternative, such as a lunch meeting or virtual meeting.
- **Prefer group settings:** Where possible, socialise in group settings rather than one-on-one meetings, which helps maintain a more professional environment and reduces the likelihood of boundary-crossing.

### 3 Alcohol Consumption

- **Limit alcohol intake:** If alcohol is served at a client event, limit your consumption. Overindulgence in alcohol can impair judgement and lead to unprofessional behaviour.
- **Respect client preferences:** Some clients may have cultural or religious preferences regarding alcohol consumption. Be respectful of their views and adapt accordingly.

### 4 Respect Cultural and Social Differences

- **Be aware of cultural norms:** Different clients may have different cultural expectations for social interactions. Take time to understand these norms and adapt your behaviour, while always maintaining professionalism.
- **Avoid sensitive topics:** Discussions about politics, religion, or other sensitive matters should be avoided in social settings with clients to prevent misunderstandings or disagreements.

### 5 Manage Communication Outside Working Hours

- **Be cautious with digital communication:** Avoid informal communication with clients via personal messaging apps or social media. Use professional platforms, such as email or company-approved messaging tools.
- **Set boundaries on availability:** It is important to be responsive to clients, but establish clear working hours. Politely communicate that any non-urgent matters sent after hours will be addressed the next working day.

### 6 Reporting Uncomfortable Situations

- **Report inappropriate behaviour:** If a client behaves inappropriately or makes you feel uncomfortable during a social event, report the incident promptly through the appropriate channels (such as HR or your line manager). Anonymous reporting should be available if needed.

- **Document the situation:** In cases of inappropriate behaviour, it is advisable to keep records of what was said or done, especially if the behaviour is repeated.

## **7 Limit Social Media Connections**

- **Be selective with social media:** Avoid connecting with clients on personal social media platforms unless there is a clear business reason (such as LinkedIn). This keeps the boundaries between personal and professional relationships clear.

## **8 Know When to Leave**

- **Plan your exit:** If a social situation with a client becomes uncomfortable or goes on too long, politely excuse yourself. Having a planned exit strategy (e.g., citing a prior engagement) can help you leave gracefully.

## **9 Understand Company Policies**

- **Familiarise yourself with company policies:** Ensure you are aware of the company's code of conduct and specific policies regarding social interactions with clients. These may include restrictions on accepting gifts, attending certain types of events, or other boundaries for socialising.

## **10 Follow Up Professionally**

- **Send a professional follow-up:** After a client social event, follow up with a professional email thanking the client for their time, reiterating any business discussed, and keeping the focus on the professional relationship.



## What to Avoid

- **Excessive alcohol consumption:** This can impair judgement and lead to unprofessional behaviour.
- **Overly personal conversations:** Keep discussions focused on professional topics and avoid personal matters that could lead to awkward situations.
- **Inappropriate jokes or comments:** Maintain professionalism in all conversations, and avoid jokes or comments that could be seen as inappropriate or offensive.
- **Late-night solo events:** Try to avoid late-night, one-on-one events as these can create unnecessary risks for misunderstandings or boundary-crossing.