



434S2A – SOFT SKILLS II - BUSINESS ETIQUETTE

Case Study: “The Professional Divide at Nexora Global Solutions”

Background

Nexora Global Solutions (NGS) is a rapidly growing multinational technology consulting firm headquartered in Bengaluru, India, with operations across Southeast Asia and the Middle East. Known for its emphasis on client-centric innovation, NGS has built strong relationships with several Fortune 500 companies. To maintain its global service standards, the company heavily invests in leadership development and soft-skills training for its young managers.

The Scenario

In early April, NGS secured an opportunity to present a digital transformation proposal to **Cortland AeroTech**, a European aerospace components manufacturer planning to expand its avionics division in India. The presentation would determine whether NGS would be shortlisted for a multi-year consulting contract valued at USD 6 million.

To lead the project pitch, the Strategy Head appointed **Rahul Menon**, a recently promoted Assistant Manager known for his technical knowledge and problem-solving skills. Rahul, excited about the opportunity but overconfident in his abilities, assured the leadership team that he could “handle everything smoothly.”

Events Leading Up to the Meeting

The meeting was scheduled for **Monday, 10:00 AM**, at Cortland AeroTech’s India office in Pune. Rahul was expected to arrive with his team—Anita (analyst), Kiran (technical consultant), and Farah (business communication specialist).

However, the preparation phase did not go as planned:

- Rahul conducted **no pre-meeting briefing** with his team, assuming everyone knew their role.
- He **skimmed the company profile** of Cortland AeroTech instead of examining the client’s expectations and pain points in detail.
- When Farah suggested rehearsing the pitch deck to ensure flow and timing, Rahul replied, *“We’ll figure it out in the room. It’s just a conversation.”*
- Anita was unclear about the final version of the financial model because Rahul shared three different drafts and asked her to “pick the most relevant one.”



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The Meeting Day

Rahul and his team were expected to reach the client's office by 9:45 AM. Instead:

- Rahul reached at **10:07 AM**, citing heavy breakfast-time traffic.
- Anita and Kiran waited in the lobby because Rahul had not informed security about their visit.
- Farah arrived on time but felt uncomfortable entering the meeting room without the team lead.

When the team finally assembled and entered the conference room:

- Rahul **did not apologise** for the delay.
- He casually said, *"Let's get started, folks,"* instead of using professional salutations.
- While greeting Cortland's Country Director, Rahul extended a half-hearted handshake while glancing at his smartwatch.

During the Presentation

Several etiquette issues emerged:

1. **Lack of Preparedness:** Rahul struggled to articulate the project roadmap and frequently flipped through slides saying, *"I think this is the updated version."*
2. **Ignoring Team Members:** He interrupted Anita twice when she tried to explain the financial projections. He avoided giving Kiran a chance to speak at all.
3. **Distracted Behaviour:** Rahul's phone buzzed repeatedly because he hadn't switched it to silent mode. At one point, he read a notification while the client CFO was presenting a question.
4. **Unprofessional Communication Style:** Rahul used phrases like *"You know how these things work,"* and *"Let's not complicate the numbers,"* which annoyed the client's finance team.
5. **Cultural Insensitivity:** Cortland AeroTech followed formal European business norms. Rahul, unaware of this, addressed senior executives by their first names without permission.

By the time the presentation ended, the client's body language had shifted from curiosity to disappointment.



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The Aftermath

Two days later, NGS received an email from Cortland's procurement division stating that they would **not be moving ahead** with NGS for the project due to:

- Lack of preparedness
- Unprofessional conduct
- Poor meeting etiquette
- Insufficient clarity in the proposal

The CEO of NGS called for an internal review. Although the technical content of the proposal was strong, the leadership concluded that the failure stemmed almost entirely from **deficiencies in business etiquette and professional conduct**.

Rahul, disheartened but reflective, admitted that he underestimated the importance of soft skills in high-stakes corporate engagements.

Discussion Questions

1. **Identify the key business etiquette lapses** made by Rahul before, during, and after the meeting.
2. How did Rahul's behaviour impact team dynamics and overall client perception?
3. What role do soft skills play in building trust and credibility in a global business environment?
4. How could proper preparation and communication have strengthened the pitch?
5. What corrective actions or training programs should NGS implement to prevent such failures in the future?
6. If you were the CEO, how would you address Rahul's conduct while still supporting his development?
7. Discuss how cultural awareness influences etiquette when dealing with international clients.