



Task Title: Taking Messages at Work

OALCF Cover Sheet – Learner Copy

Learner Name: _____

Date Started: _____

Date Completed: _____

Successful Completion: Yes ☐ No ☐

Goal Path: Employment ☒ Apprenticeship ☐

Secondary School ☐ Post Secondary ☐ Independence ☐

Task Description: The learner will record business phone messages.

Main Competency/Task Group/Level Indicator:

- Find and Use Information/Read continuous text/A1.2
- Communicate Ideas and Information/Interact with others/B1.2
- Communicate Ideas and Information/Write continuous text/B2.1

Materials Required:

- Conversation partner (instructor)

Learner Information

Administrative assistants often answer the phone at work. They regularly write down caller information and share it with the right person. This may happen when people are in meetings or out of the office.

Your instructor will call Dollars and Cents Bookkeeping Services and you will answer the phone as the administrative assistant. Today is April 2 at 10:00am. Both accountants are busy with client meetings all week. The accountants will try to get back to them within 24 hours. If this is about tax returns that are currently being completed, please let clients know that they will not receive regular updates before April 20.

Read the “Company Information” and “Phone Answering and Message Protocol” to prepare for the phone calls.

Company Information

Dollars and Cents Bookkeeping Services provides bookkeeping, general accounting, and tax services for small businesses. Most of their clients are in rural communities across southern Ontario.

There is a full-time administrative assistant who takes phone calls, makes appointments, and provides general assistance for two accountants, Emillie Bouchard and Alice Lee. Both accountants are typically in the office between 9am and 4pm. They like to schedule client meetings in the mornings, finishing by 12:30pm. They will both respond to phone and walk-in inquiries in the afternoons, but prefer not to have regularly scheduled afternoon meetings.

During tax season (March 1 -May 1 each year), all staff work extra hours and the accountants will meet with clients anytime between 9am and 7pm. They both work on the weekends when tax deadlines are approaching, but only meet with clients Monday-Friday unless it's an emergency.

Dollars and Cents provides tax services for existing clients during tax season. They do not take on new clients between March 1 and May 1. Any inquiries received during this time are asked to call back or make an appointment for May or June.

Phone Answering and Message Protocol

When answering the phone, the preferred greeting is "Good morning/afternoon, you've reached Dollars and Cents Bookkeeping Services, my name is _____ How may I help you?"

If a call is received for an accountant who is in a meeting, take a message with the caller's name, number, and reason for calling. Always record the date and time of the call.

Work Sheet

Task 1: Write down a message in two or three sentences based on the call you received.

Answer:

Task 2: Write down a message in two or three sentences based on the call you received.

Answer:

Task 3: Write down a message in two or three sentences based on the call you received.

Answer:
