



Task Title: Taking Messages at Work

OALCF Cover Sheet – Practitioner 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)

Notes for Instructors/Practitioners

You will participate in short verbal exchanges with your learner. The learner will be an administrative assistant answering the phone at an accounting company and you will be calling to leave a message with an accountant. A sample script of questions follows below. If you and your learner both have access to a phone, you could go into a different room and actually phone your learner to simulate a phone call to the office.

Task 1: You are John Woods and you would like to know if your tax returns are ready yet. You sent in the information two weeks ago and would like to know if there's anything missing. Your phone number is 519-555-1234.

Task 2: Your name is Mrs. Soong and you opened the new bakery in town a few months ago. You're looking for someone to do your taxes. Your phone number is 519-555-9900.

Task 3: You are Ms. Lee asking for an update on your tax returns. Please call back at 519-222-2345.

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:

Answers

Answers will vary if you have chosen to create your own phone script or have changed details from the suggested scenarios. Sample message responses are as follows:

Task 1:

Message received at 10am for Emillie Bouchard.

John Woods called about his tax returns. He wants to know if anything is missing and he would appreciate a call back.

His number is 519-555-1234.

Task 2:

Message received at 10:30am for either Ms. Bouchard or Ms. Lee.

Mrs. Soong called from the new bakery in town. She's looking for someone to do her taxes this year. I explained that you're not taking new clients until after May 1. Please call her back at 519-555-9900.

Task 3:

Message received at 10:45am for Ms. Lee asking for an update on her tax returns. I explained that there won't be regular updates before April 20 and asked her to call back then. She would still like someone to call her if possible. Her number is 519-222-2345.

Performance Descriptors

Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
A1.2	obtains information from detailed reading			
B1.2	demonstrates some ability to use tone appropriately			
	uses strategies to maintain communication, such as encouraging responses from others and asking questions			
	speaks or signs clearly in a focused and organized way			
	rephrases to confirm or increase understanding			
B2.1	writes simple texts to request, remind or inform			
	conveys simple ideas and factual information			
	demonstrates a limited understanding of sequence			
	uses sentence structure, upper and lower case and basic punctuation			
	uses highly familiar vocabulary			

This task: Was successfully completed ☐ Needs to be tried again ☐

Task Title: TakingMessagesAtWork_E_A1.2_B1.2_B2.1

Learner Comments:

Instructor (print):

Learner (print):
