



## Lesson Plans

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### Lesson Plan:

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**Sector: Financial/Banking Services**

**Occupation: Customer Service  
Representatives- Financial Services  
(NOC 1433)**

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**Theme: Client Interaction**

**Occupational Task: Provide information  
and instruction to clients for daily  
banking transactions**

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### Essential Skills (ES) developed during the learning activities:

**Reading Text:** Read simpler text to locate multiple pieces of information. (ES 2)

**Document Use:** Information needed is evident, document is simple, multiple documents of same type. (ES 2)

**Numeracy:** Count, add and subtract money during banking transactions. (ES 1)

**Oral Communication:** Interact frequently one-on-one on detailed and complex matters. (ES 2)

**Working with Others:** Listen to customers describe their needs and respond to customer inquiries. (ES 2)

**Thinking Skills:** May need to help solve a banking problem. (ES 3)

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### Canadian Language Benchmarks (CLB) competencies developed during the learning activities:

#### Speaking

- Understand and respond to instructions or requests from customers. (CLB 7)
- Give instructions and respond to questions. (CLB 7)
- Greet customers, offer assistance, ask for additional information if required. (CLB 6)
- Make a suggestion on how to solve a banking problem. (CLB 7)

#### Listening

- Understand factual details and some implied meanings. (CLB 6)
- Listen and respond to customer instructions and requests. (CLB 7)

#### Reading

- Get factual details from a moderately complex brochure. (CLB 6)
  - Obtain information & interpret orally from an authentic dialogue transcript. (CLB 7)
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## Writing

- Fill out a bank form such as deposit slip and application form. (CLB 6)

## Language and culture focus for the learning activities:

### Grammar

- Modals of request and offering assistance
- Questions: Wh-embedded
- Numeracy Skills: basic mathematical operations
- Pronunciation: intonation for giving instructions, word stress in numbers

### Vocabulary

Account balance, cash a cheque, debit card, deposit, endorse, interest, joint account, postdated, overdrawn, withdrawal, Personal Identification Number (PIN), signature, service charges

### Culture

Customer Service Representatives are in public view and should interact with customers in a professional manner to positively reflect the financial institution they work for. They are expected to be knowledgeable about various banking transactions.

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## Suggested teacher resources and classroom materials needed:

- CLB Listening/Speaking Resource: Stage II, Banking dialogues 34-37
- Tape script (Instructors will find what they need in the text)
- Question sheet for Listening Activity (attached)
- Helping you Bank brochure, published by The Canadian Bankers Assoc., <http://www.cba.ca>
- Teacher produced cards with banking scenario, blank slips
- TOWES, How do your skills measure up?: [www.towes.com](http://www.towes.com)

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## Estimated time for the learning activities: 1.5 hours

This lesson plan can be integrated into an ESL curriculum with themes that include banking, money management and numeracy, and workplace culture.

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## Learner Profile

This is the second lesson of a module around a banking theme for a customer service course for ESL learners. This lesson will build on the previous lesson which provided a customer service foundation. The ESL learners may have professional backgrounds in accounting and have worked for financial institutions or have customer service experience related to the retail sector. They are considering work as Customer Service representatives in Banks or similar financial institutions/the retail sector. The learners should have a minimum CLB level 6 or higher.

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## Learning Objectives:

### Learners will be able to:

- Relate the details in a spoken exchange between a customer and CSR in a bank.
- Demonstrate comprehension of brochures by finding authentic banking information about filling in bank account applications, withdrawing and depositing money and reading a monthly bank statement.
- Fill out various banking forms correctly based on information provided.
- Interact with clients by responding to queries and make suggestions about a banking problem.
- Give clear instructions to clients/customers to help them meet their banking needs.

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## Learning activities:

### For the Instructor: The TOWES website can provide the authentic deposit and withdrawal slips for the learners and examples of banking scenarios.

1. Teacher creates two columns on a flipchart: first column - customers/clients request Customer Service Representative in banks to...

Second column -CSR asks clients to...

As a group, learners brainstorm as many request and questions as they can. Teacher puts the learners' responses on the board.

Examples:

**Clients request CSR:** To open up a bank account, cash cheques, make cash withdrawals and ask how to get debit cards.

**CSR ask clients:** To fill out an application, endorse a cheque, fill out withdrawal slips, show proper identification. (10 minutes)

2. Listening Activity based on Dialogues from Listening/Speaking Resource pg.33.

a) Learners will listen to three different dialogues between a customer/client and customer service representative in a bank.

b) The Instructor will play each dialogue twice.

c) After the first time listening, distribute the question sheet for learners to use during the listening task.

d) Students answer questions and listen a second time. The Instructor will pause the tape between each dialogue to give learners an opportunity to answer questions. (10 minutes)

e) Learners check each others' answers in pairs and then get group feedback. (10 minutes)

3. Teacher distributes a copy of the script of the dialogue to each learner, reviews the vocabulary and discusses each situation with the students. Based on the dialogues, students add to the list on the flipchart from activity 1 to create a task profile for CSR and a range of requests made by clients. (15 minutes)

4. In pairs, have the learners practise the dialogues and reverse roles. Teacher monitors to ensure students are using correct intonation and using a friendly tone of voice. (15 minutes)

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minutes)

5. Teacher distributes copies of the "Helping You Bank" brochure. Learners scan the brochure and locate samples of a monthly bank statement to identify the bank transactions recorded, a deposit and withdrawal slip to check information and follow the instructions on how to fill them in, and a bank account application which learners then personalize with their own information. With this information, learners can then proceed to activity 6 below. (15 minutes)

6. Teacher distributes blank withdrawal and deposit slips, blank application forms and mock monthly statements, along with bank scenario on a cue card to each learner.

Examples of scenarios on cue cards :

1. A customer wants to make a \$500.00 deposit in different denominations including a cheque for \$130.00
2. A withdrawal of \$150.00
3. Open up a savings account
4. Need to speak to a CSR to obtain an explanation about their monthly statement.

In pairs, learners choose one of the client scenarios and assign roles for each other. Clients fill out deposit/withdrawal slips and show them to the CSR. Learners role-play the customer/ client interaction. CSR answers questions from a client who needs assistance with a monthly statement/ gives instructions to a client filling out an application to open a bank account. Learners reverse roles and select another scenario. Instructor drops in on each pair to facilitate and ensure learners understand the instructions for each of the bank transactions. (25 minutes)

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### **Additional and/or extension learning activities:**

- As an extension learning activity, learners are asked to visit the TOWES website (How do your Skills Measure Up?), find the NOC 1433 Bank Tellers and test their skills. Learners report back on their results. Their results can be brought into another lesson on Numeracy.
- Additional reading activity: learners are encouraged to read The Canadian Newcomers Magazine: Issue 7- Fall 2005 and read the article on **The Changing Face of Banking in Canada**. This article will be used to generate discussion in the classroom about visible minorities in the Canadian workplace, particularly in the Financial Service sector.

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### **Evaluation**

This is an informal evaluation. Instructor asks for feedback from each pair to find out if the role plays helped give them confidence in performing daily banking tasks. The instructor takes note of any difficulties during the role play and makes individual corrections either on the spot or at a later date.

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Canadian Language  
Benchmarks/  
Essential Skills

Niveaux de compétence  
linguistique canadiens/  
Compétences essentielles

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## **Lesson Plan 2- Customer Interaction**

### **Listening Activity**

**Based on Dialogues from Listening/Speaking Resources (pg.33)**

**Please listen and answer the following questions**

#### **Dialogue # 34**

1. Explain the difference between a chequing and savings account?
2. What three pieces of identification did the customer produce for the CSR?

#### **Dialogue #35**

1. What was the problem with the customer's cheque?
2. What was the customer's Account number?
3. What was the balance in the customer's account?
4. How much money did the customer withdraw and what denominations did she ask for?

#### **Dialogue # 36**

1. What was the problem with the customer's account?
2. What were the bank transactions on his monthly statement?
3. How did the CSR resolve the problem?
4. Was the customer satisfied with the explanation? Why or why not?

#### **Dialogue #37**

1. Where do you go for a bank card in a bank?
2. What is another banking term for bank card?
3. What are the CSR instructions to select a secret code number?
4. What shouldn't you do when choosing a secret code number?