



Lesson Plans

Lesson Plan:

Sector: Financial / Banking Services

Occupation: Customer Service
Representatives – Financial Services
(NOC 1433)

Theme: Working with Numbers

Occupational Task: Fill in deposit slips,
explain changes in rates and calculate foreign
exchange rates

Essential Skills (ES) developed during the learning activities:

Reading Text: Locate a single piece of information and read a short text and make slight inferences about word meaning to determine the required information. (ES 2)

Document Use: Enter a few pieces of information and locate a single piece of information by matching information. (ES 1)

Numeracy: Enter the numbers needed for addition, locate the numbers needed for subtraction, multiplication and a combination of operations and calculate foreign exchange conversions. (ES 2)

Oral Communication: Obtain specific information and follow and give detailed multi-step instructions. (ES 2)

Thinking Skills: Remember the multiple requests of clients who are making several transactions at once. (ES 2)

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

Speaking

- Give clear instructions or directions for moderately complex familiar technical and non-technical tasks. (Uses correct sequences of steps, clear reference, correct stress and intonation.) (CLB 7)

Listening

- Understand conceptualized short sets of instructions and directions. (CLB 6)

Reading

- Locate 3-5 pieces of specific, detailed information in charts and schedules for analysis, comparison and contrast. (CLB 6)
- Language of the text is mostly concrete and factual with some abstract, conceptual and technical vocabulary items, and may require low-level inference to comprehend it. (CLB 6)

Language and culture focus for the learning activities:



Grammar

- Convention for grouping and reading numbers
- Sequence markers
- North American conventions for writing money
- Pronunciation : Word stress in numbers

Vocabulary

Calculate, Canada Savings GIC rate, Canada Savings Bond, currencies, per annum, sterling

Culture

Customer Service Representatives are required to remember multiple requests of clients making several transactions at once. Banking rates and fees for various services may also be requested during these transactions.

Suggested teacher resources and classroom materials needed:

- TOWES website (Test of Workplace Essential Skills) is a resource for Instructors looking for authentic materials to use in the classroom to practice three Essential Skills (reading, document use and numeracy) needed in all types of occupations. Go to: <http://measureup.towes.com/english> for choices of activities to test learners' skills.
- Copies of blank and completed deposit slip, foreign exchange rate chart and Memo: RATE CHANGE
- Two sets of copies of answer sheets for 3 problem sets (1 set with the answers handed out at the end of lesson and one with answers eliminated for each problem set for learners to fill in). Copies of deposit slips charts and memo and the answers are found on <http://measureup.towes.com/english/testskills.asp>

(Click on Self assessment, numeracy)

Estimated time for the learning activities: 1.5 hours

Learner Profile: This lesson plan is the third in a module. The learners are familiar with customer interaction for everyday banking transactions. The lesson will build on this and give learners practice with math skills necessary to perform the banking transactions required for a CSR in a bank. The ESL learners may have professional backgrounds in accounting and have worked for financial institutions and therefore have the math skills necessary to perform the tasks in this lesson. 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.

Learning Objectives

Students will be able to:

- Use the mathematical operations necessary to fill out a deposit slip, adjust a rate change and change money from one currency to another.
 - Read and match information on a Foreign Exchange Chart in order to complete a currency exchange transaction.
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- Read and explain rate change based on information in a bank memo.
 - Follow instructions to complete a specific banking transaction.

Learning activities:

For the Instructor:

N.B. You don't have to be online in order to use *How do your skills Measure Up* in your classroom. If you have Adobe Reader 5.0, you can open and print one document that contains the questions and answers for each problem set. Then you have paper versions that you can distribute to learners.

In terms of the complexity of the math skills for this lesson, the instructor should start with the least complex problem set and then to the more complex problem sets as organized in the lesson.

1. Learners brainstorm a list of tasks requiring math skills that CSR perform frequently in a bank. Put the examples on the board to create a math skills profile for a CSR in a bank. Instructor ensures that learners include filling out a deposit slip, changing money from one currency to another and explaining rate changes based on information in a memo. (15 minutes)

2. Explain to the learners that they will be doing a test of Workplace Essential Skills taken from a website for Bank Tellers. There will be 3 different problems with a set of tasks. They will complete the first problem set and receive the correct answers. Upon completion, they will then be given the next two problem sets which will be handed in for evaluation. The Instructor should provide the answer sheets for problem sets 2 and 3 at the end of the class.

- a) Instructor selects *filling out a deposit slip* as the first task from the board.
- b) Each learner receives a copy of the first problem set with 4 tasks, called **Deposit Slip** along with a copy of a blank deposit slip. The copy reads: **Bank Tellers help customers fill in deposit slips**. The instructor also distributes a copy of the answer sheet with the steps for learners to fill in, but eliminates the answers in each step. This way learner knows how many steps are required to complete each task.
- c) In pairs, learners work through the 4 tasks, complete the answer sheet and fill in the blank deposit slip.
- d) When tasks are completed, one learner walks the other learners through his/her steps for each task. Instructor hands out the example of the completed deposit slip along with the correct answers to the 4 tasks so learners can check and compare their own answers. (25 minutes)

3. Instructor selects *reading a memo informing CSR of a rate change* from the board and distributes copies of the second problem set with tasks and answer sheet called



a **Rate Change Problem** to each learner. The copy reads: **Bank Tellers read memos about changes to rates. Sometimes they explain information to customers. Look at the memo: RATE CHANGE.**

- a. In pairs, learners read the memo, ask for clarification of the vocabulary in the memo if needed, complete tasks 1 through 3 and fill in the answer sheet.
 - b. A volunteer from the class puts his/her answers on the board and explains steps for solving the problems and answers questions from other learners. Meantime, the instructor collects the answer sheets from the rest of the learners and clarifies the answers if needed. (25 minutes)
4. Instructor selects *changing money from one currency to another* from the board and distributes copies of the third problem set with tasks and answer sheet called **Foreign Exchange** to each learner. The copy reads: **Bank Tellers deal with currencies from different countries and assist customers in changing money from one currency to another. Look at the Foreign Exchange Rates chart.** It is important for the Instructor to give a note here to the learner about solving the problem in Task 3 of this problem set. (Note: it is included on the answer sheet.) There are 2 acceptable ways to solve this problem.

In pairs, learners read the Foreign Exchange Rates chart, ask for clarification of the vocabulary in the chart if needed, complete tasks 1 through 3 and fill in the answer sheet. The instructor finds a different volunteer and repeats the directions from activity 3. (25 minutes)

Additional and/or extension learning activities:

- For a little variety, activity one in the lesson could be expanded to include a role play of the dialogue exchange between a CSR helping a customer fill in the deposit slip.
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Evaluation: Formal evaluation: Students hand in their answer sheets for Problem sets 2 and 3 for evaluation of their math skills and the instructor returns them to the learners with corrections.

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