

ROLE PLAY: GOING TO THE BANK

B1-B2 | Teens / Adults | Speaking + Functional Language | 45-55 minutes

1. USEFUL PHRASES

Customer

I'd like to compare the account options.
Is there a monthly charge?
What documents would you accept?
Could you clarify that for me?
I don't recognise this payment.
It seems to have appeared twice.
What happens while it's being checked?
Could I have a reference number?

Bank adviser

What would you use the account for?
That depends on the account.
Let me check which documents we can accept.
One entry is still pending.
Could you confirm the date and amount?
I'll record the details.
I can't confirm that yet.
Here's how to follow up.

2. MODEL CONVERSATIONS

A. CHOOSING AN ACCOUNT

Customer: Hello. I'd like to compare the account options. I've just moved here for work.

Adviser: Certainly. What would you use the account for?

Customer: My salary and everyday spending. Is there a monthly charge?

Adviser: Our basic current account has no monthly fee. The other includes extra services for eight pounds a month.

Customer: I probably don't need those. What do I need to bring to open the basic one?

Adviser: Photo ID and proof of your address. Have you got either with you?

Customer: My passport, yes. All the household bills are in my flatmate's name, though. What documents would you accept?

Adviser: Let me check which documents we can accept. A tenancy agreement may be suitable.

Customer: I have a digital copy. Would you need to see the original?

Adviser: Bring the copy to your appointment. We'll check it before confirming the application.

Customer: All right. I'd rather make sure than come back with the wrong thing.

Adviser: Of course. I'll write down the requirements and book you an appointment.

B. CHECKING TWO ENTRIES

Customer: Could you help me check my statement? A cafe payment seems to have appeared twice.

Adviser: Could you confirm the date and amount?

Customer: Yesterday, twelve pounds fifty. There's one entry in each section of the app.

Adviser: I see. One entry is still pending. The other is a completed payment.

Customer: Could you clarify that for me? Have I actually paid twice?

Adviser: I can't tell that from the two entries alone. I'll check the transaction details.

Customer: Thanks. I still have the cafe receipt if that would help.

Adviser: Yes, please. It shows one payment, so I'll include it with the enquiry.

Customer: What happens while it's being checked? Should I contact the cafe too?

Adviser: I'll explain this bank's process and whether we need anything from the cafe.

Customer: All right. Could I have a reference number so I don't have to explain everything again?

Adviser: Certainly. Here it is, with the contact details and the next update date.

Notice how the speakers give details, ask follow-up questions and respond to each other.

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3. ROLE-PLAY CARDS

Work in pairs. Read only your own role. Decide what to say; don't write a full script. Find a solution, then swap roles and change one detail.

ROLE PLAY 1: OPENING AN ACCOUNT

Student A - Customer

You need an account for your salary. You want to avoid monthly fees and have photo ID, but the bills aren't in your name. You have a tenancy agreement. Ask what is acceptable and agree on an appointment you can attend after work.

Student B - Bank adviser

The basic account has no monthly fee; the account with extras costs eight pounds a month. Proof of address must be checked. Offer an appointment at four thirty Tuesday or six Thursday. Explain requirements without guaranteeing that an unexamined document will be accepted.

ROLE PLAY 2: AN UNFAMILIAR PAYMENT

Student A - Customer

You don't recognise a 32-pound payment on your statement. It may be from a shop that uses a different trading name, but you're unsure. Give the date and any receipt details. Ask how to check it and what to do if it isn't yours.

Student B - Bank adviser

The statement name is different from the shop name, but this alone doesn't prove the payment is legitimate. Ask for details and compare the records. Explain that you can arrange a secure check. Don't dismiss the concern or ask for a PIN.

ROLE PLAY 3: A CARD BEFORE A TRIP

Student A - Customer

Your replacement card may arrive after you leave for a trip in four days. Ask about timing and ways to access your account meanwhile. You can visit a branch tomorrow, but can't collect mail while away.

Student B - Bank adviser

The stated delivery estimate is five working days, and you can't guarantee an earlier arrival. Ask what access the customer needs. In this scenario, you can arrange an appointment to discuss branch access and secure options. Agree on a realistic next step.

After each role play: Say what you agreed and which phrase helped. Repeat with one new detail.

Teacher note: Prepare for 2-3 minutes and speak for 3-4 minutes. Encourage follow-up questions, not memorised scripts. Prices, times and service rules in this lesson are fictional.