

Role Play Scenario 1 v2

Task 1.2 - Luke Wright

Characters

- You (Candidate)
- Luke Wright (Supervisor)

Scene 1, Act 1 v2

(The Candidate approaches Luke Wright's office and knocks on the door.)

****Candidate**:** *[Knocks]* Morning, Luke. Got a few minutes to chat about a new client?

****Luke**:** Come on in. Sure, what's up?

****Candidate**:** I met with Billy Green, potential client for our bookkeeping services. He runs Hydroponics Galore and needs help with his accounts. The meeting went well, and I wanted to go over the next steps with you.

****Luke**:** That's great! How did the talk about his business needs go?

****Candidate**:** We covered a lot. He's interested in services like accounts payable, receivable, payroll, end-of-year duties, record-keeping, and handling accounts to trial balance. I did let him know we don't handle tax stuff or software training and referred him to specialists for that.

****Luke**:** Sounds like a solid start. Is he leaning toward working with us?

****Candidate**:** Yeah, he's on board for help with accounts payable. But I think we might need some extra hands to manage the workload. I made sure he knew what's within my qualifications, but there are some tasks outside my scope.

****Luke**:** Fair enough. We've got Susie on the team, and she's a pro at accounts payable. I'll set up a time for you to chat with her, and she can help out with Hydroponics Galore.

****Candidate**:** Perfect. Susie's awesome at this, so I'll loop her in to make sure everything runs smoothly for Mr. Green.

****Luke**:** Good. Keep Mr. Green updated regularly, especially if there are any changes or delays.

****Candidate****: Absolutely, I'll stay in touch with him and keep things transparent.

****Luke****: Great. Just remember—accuracy and timeliness. Those are key.

****Candidate****: Got it. Thanks for the advice, Luke.

****Luke****: Anytime. If anything comes up, just let me know. We're here to support each other.

****Candidate****: Appreciate it. I'll get in touch with Susie and start the process.

(The Candidate leaves Luke's office, ready to follow up.)

****Scene 1, Act 2****

(The Candidate enters Luke Wright's office again.)

****Candidate****: *[Knocks]* Morning, Luke. The meeting with Mr. Green went well.

****Luke****: That's good to hear! Tell me more.

****Candidate****: I introduced myself as the bookkeeper from Accountability Right and ran through my qualifications—Certificate IV in Bookkeeping, BAS agent, TPB registration. I let him know I'm fully capable of handling his bookkeeping needs.

****Luke****: Excellent. How'd the conversation about his expectations go?

****Candidate****: We agreed on what I'd handle for his business: accounts payable, receivable, payroll, year-end tasks, and record-keeping. I was clear about what I couldn't do, like tax services, and pointed him to the right people for those things.

****Luke****: Did he seem interested in moving forward?

****Candidate****: Yeah, the vibe was positive. He's happy I'll be his point of contact and knows I'm available for any bookkeeping questions he has.

****Luke****: Any concerns about managing his business solo?

****Candidate****: His business seems straightforward, so I reassured him that I could handle it. I'll keep everything organized, on time, and in line with legal requirements. I stressed keeping communication simple to avoid any confusion.

****Luke****: And what else came up during the meeting?

****Candidate****: We talked about setting up the workflow, privacy policies, how often we'll meet, and communication options like phone, Zoom, or email that fit his schedule.

****Luke****: Sounds like you covered all the important stuff. Nicely done.

****Candidate****: Thanks, Luke. I'm ready to get started on his accounts.

(The scene wraps as the Candidate prepares to move forward with the client.)
