

UNIT 7

Setting up an Appointment



I. Express Yourself



II. Vocabulary

Read and familiarize yourself with the following word/s or phrases.

appointment

manager

promotion

III. Conversation Practice

Practice the conversation with your teacher by doing a role play.

Steve: Hello. Is Mr. Simpson there, please?

Carl: Yes, this is Carl Simpson.

Steve: Hi, Mr. Simpson. I'm Steve Bernstein at Relix Securities and I'm calling to introduce myself.

Carl: Thanks for calling.

Steve: I recently took over as Global Sales Manager for the Equity Sales Division, and I'm calling to say hello and hopefully set up an appointment to come visit your office and introduce myself properly.

Carl: I appreciate that. Our company has been doing business together for quite a long time. What happened to Joseph Davis, the previous manager?

Steve: Joseph is still with our company but has switched to the Research Department. You should be getting a letter from him soon.

Carl: I hope it's a promotion for him. Please send him my best regards.

Steve: I most certainly will.

Carl: When would you like to visit? I have time next Tuesday afternoon, say 3 pm?

Steve: Next Tuesday at 3pm works for me. I look forward to meeting you in person and if there's anyone else on your staff you would like me to meet, I'll make myself available.

Carl: I'd like to introduce you to my head trader and our three portfolio managers.

 **Comprehension Check**

1. What is Steve's position at Relix Securities?
2. When is Steve and Carl's appointment?
3. Who will Carl introduce to Steve on the day of the appointment?



| | |
|--|---|
| When would you like to visit? (date/time) works for me. | Usual expression when setting up an appointment |
| I appreciate that. | <ul style="list-style-type: none"> - Thank you very much. - Much appreciated. - That's kind of you. - It's much appreciated. |
| I most certainly will. | <ul style="list-style-type: none"> - I surely will. - Absolutely. - Definitely. - Of course. - For sure. |
| Head trader | the manager of a trading business, responsible for the positions, risk, and ultimately, the profitability of that business |
| Portfolio manager | either a person who makes investment decisions using money other people have placed under his or her control or a person who manages a financial institution's asset and liability portfolios |

IV. Exercises

Exercise A

Vocabulary Building

Fill in the blanks with the correct words from the box.

appointment manager promotion

1. Gary is one of the most skilled and hardworking employees in the company. He truly deserves a _____.
2. I would like you to meet Will Carter. He is our Regional Sales _____.
3. Please don't forget about your _____. That would be tomorrow at 2 pm.

 Exercise B

Complete the table by using your own words. Use different expressions, and try to make longer sentences in each box.

| Making Appointment | Positive Response | Negative Response |
|--|--|---|
| Do you have free time this Thursday? | | |
| | Yes, I'm definitely available at 3pm this afternoon. | |
| | | I'm afraid I'm not available on the 12 th . I have an appointment with my clients on that day. |
| I have time this Friday. If you're free, you can swing by my office. | | |

 Exercise C

Below is your schedule for the week. Set an appointment with the following people, and agree on the schedule based on your availability.

| | | | |
|---|--|---|--|
| <p style="text-align: center;">MONDAY</p> <p>-Staff meeting at 4pm</p> <p>-Meeting with business partner at 5:30pm</p> | <p style="text-align: center;">TUESDAY</p> <p style="text-align: center;">Seminar from 1-5 pm</p> | <p style="text-align: center;">WEDNESDAY</p> <p style="text-align: center;">Meeting at 8am</p> | <p style="text-align: center;">THURSDAY</p> <p style="text-align: center;">Business Meeting (out of the office)</p> |
| <p style="text-align: center;">FRIDAY</p> <p style="text-align: center;">Whole morning (out of the office)</p> | <p style="text-align: center;">SATURDAY</p> <p style="text-align: center;">Meeting with clients 8-10 am</p> | <p style="text-align: center;">SUNDAY</p> <p style="text-align: center;">Rest Day</p> | |

Laura:

- Only available on Monday and Tuesday morning
- Travel time: 1 hour
- Duration of meeting: 2 hours

Clint:

- Not available on weekends
- Business meeting on Wednesday
- Prefers having a meeting in the morning
- Duration of meeting: 3 hours

Barry:

- Only available on Wednesday and Friday
- Travel time: 2 hours
- Duration of meeting: 3 hours

 **ROLEPLAY**

Set an appointment with your client, and agree upon your preferred schedules.

