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COURSE BROCHURE

Auditee Communication and Closing Meetings Training Course

23 – 27 August 2027
New York

Auditee Communication and Closing Meetings Training Course

Ref: 799_30347 **Date:** 23 – 27 August 2027 **Location:** New York **Fees:** 7900 GBP

Auditee Communication and Closing Meetings is a 1-week training course for internal auditors and audit team leaders who run fieldwork interviews and exit meetings, ending with an Engagement Conversation Kit of meeting agendas, interview guides and a closing meeting script. Findings that auditees accept in the room are far more likely to be fixed than findings they first meet on paper. Jupiter Prime Training runs this course for auditors who lead those conversations.

Why Auditee Communication and Closing Meetings Matters Now

Three groups shape auditee conversations today: business managers who expect auditors to explain scope and criteria plainly before any testing starts, audit committees that want management responses and action owners agreed before a report is issued, and hybrid teams where many interviews now happen on video calls. An audit function that communicates well earns cooperation, faster evidence and fewer disputed ratings; one that does not meets defensiveness, delays and findings challenged at the last minute. The course rests on the IIA Global Internal Audit Standards for engagement communication, and on the Three Lines Model Three Lines that frames auditees as first line owners of risk.

Who Gains Most from Auditee Communication and Closing Meetings

- Auditors who interview process owners and record walkthrough evidence
- Audit team leaders who chair opening and exit meetings
- Auditors who present draft observations to department heads
- Audit seniors who coach junior staff through tense fieldwork exchanges
- Quality and compliance reviewers who meet operational managers about gaps

Audit teams who send a leader and two or three auditors together gain most, since they return with one shared meeting format and the same interviewing habits.

Auditee Communication and Closing Meetings Capabilities

Participants practise each spoken moment of an engagement, from the first scoping call to the handshake on agreed actions.

- Design opening meeting agendas that set scope, criteria and evidence requests — auditee managers
- Apply open, probing and confirming questions in fieldwork interviews — walkthrough evidence quality
- Communicate emerging observations early and without surprise — department heads and process owners
- Weigh resistance signals and respond with de-escalation techniques — engagement timelines
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Build closing meeting scripts that secure management responses and action owners — audit committee reporting
- Test agreement on facts before ratings are discussed — report sign-off

Key Auditee Communication and Closing Meetings Terms

- Auditee — The unit, process owner or manager whose activities an engagement examines.
- Opening meeting — The first formal meeting where auditors explain objectives, scope, criteria, timing and information requests.
- Probing question — A follow-up question that asks for an example, a document or a reason behind an answer.
- Fact confirmation — Agreeing the accuracy of conditions observed before discussing their cause, effect or rating.
- Closing meeting — The exit discussion where observations, ratings and management responses are agreed before the written report.
- Management action owner — The named manager accountable for delivering an agreed response by a target date.

Auditee Communication and Closing Meetings Day by Day

Day 1: The Auditee Relationship

- Three Lines Model — Positioning Auditees as First Line Risk Owners
- IIA Global Internal Audit Standards on Engagement Communication — Expectations
- Auditee Mapping Grid — Influence, Interest and Likely Concerns
- Engagement Letter and Scoping Call — Setting Tone Before Fieldwork
- Opening Meeting Agenda — Scope, Criteria, Timing and Evidence Requests

Day 2: Interviewing in Fieldwork

- Interview Guide Design — Sequencing Open, Probing and Closing Questions
- Active Listening and Note Capture — Accurate Walkthrough Records
- Remote Interview Etiquette — Video Calls and Screen Sharing
- Body Language and Tone Cues — Reading Hesitation and Gaps
- Document Request Follow-Up — Keeping Evidence Flowing Without Friction

Day 3: Resistance and Difficult Conversations

- Defensiveness Triggers Map — Anticipating Objections Before Meetings
- De-escalation Phrases — Moving From Blame to Shared Facts
- Disputed Evidence Protocol — When Auditees Contest Conditions
- Escalation Ladder — When to Involve the Audit Leader
- Cultural and Hierarchy Awareness — Speaking Up to Senior Managers

Day 4: Agreeing Findings and Closing Meetings

- Fact Confirmation Sessions — Accuracy Before Cause and Rating
- Rating Conversations — Explaining Severity Without Argument
- Closing Meeting Script — Order of Observations and Responses
- Management Response Capture — Actions, Owners and Target Dates
- Post-Meeting Summary Note — Bridging Agreement and Written Report

Day 5: Practising the Engagement Conversation Kit

- Role Play From a Banking Branch Audit — Applying the Opening Agenda
- Role Play From a Hospital Supply Audit — Applying Interview Guides
- Resistant Manager Simulation — Applying De-escalation and Escalation
- Peer Feedback on Recorded Closings — Refining Script and Tone
- Engagement Conversation Kit — Completing Agendas, Guides and Closing Script

Applying Auditee Communication and Closing Meetings After the Course

- Use the opening meeting agenda and auditee mapping grid on the next engagement and ask the auditee for feedback on clarity of scope
- Run a fact confirmation session before the next exit meeting and record management responses with owners and target dates in the closing script

Auditee Communication and Closing Meetings Questions FAQ

What is Auditee Communication and Closing Meetings training and why does it matter now?

It is training in the spoken side of an audit, from opening meetings to exit discussions. It matters now because committees expect agreed responses before reports are issued, and many interviews now happen remotely.

Which roles gain most from Auditee Communication and Closing Meetings training?

Auditors who interview process owners gain most, together with team leaders who chair opening and exit meetings and seniors who coach junior staff.

How does Auditee Communication and Closing Meetings training differ from an audit report writing course?

It covers what is said in the room rather than what is written. Report writing shapes the final document; this training shapes interviews, resistance handling and the closing meeting that comes before it.

What do you bring back from Auditee Communication and Closing Meetings training?

You bring back an Engagement Conversation Kit with an opening agenda, interview guides, de-escalation phrases and a closing meeting script ready for your next engagement.

Auditee Communication and Closing Meetings: The Way Forward

The Engagement Conversation Kit becomes the standard set of agendas, interview guides and closing scripts for the audit team. Its first use is the opening meeting of the next engagement, where scope and evidence requests are agreed. Team leaders and auditors share it, and its closing script is worth revisiting after the first exit meeting to see which responses still needed chasing.