



Internal Audit Advisory and Consulting Skills Training Course

4 – 8 October 2027
San Diego

Internal Audit Advisory and Consulting Skills Training Course

Ref: 365_130029 **Date:** 4 – 8 October 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Internal Audit Advisory and Consulting Skills Training Course is a five-day course for internal auditors, audit managers, assurance professionals, and audit practitioners moving into advisory assignments who leave with an Advisory Engagement Toolkit. The course connects advisory engagement scoping, stakeholder diagnosis, problem framing, meeting facilitation, evidence-based recommendations, professional influence, communication, role boundaries, and action follow-through while protecting independence and objectivity. Agile Leaders Training Center delivers this course on internal audit advisory services.

Who Should Attend

- Internal audit functions responsible for advisory assignments and stakeholder insight
- Audit management functions responsible for selecting, governing, and reviewing advisory work
- Assurance functions responsible for maintaining evidence quality and professional boundaries
- Risk and compliance functions responsible for governance and control improvement
- Audit professionals transitioning from assurance work into consulting assignments

The course assumes participants already contribute to audit, assurance, risk, or compliance work and leaves out management decision-making and external certification preparation.

Departments and Industries

The course supports advisory work across governance, operational, and service settings.

- Internal audit, assurance, risk, and compliance departments
- Financial and professional-services organizations
- Manufacturing and supply-chain operations
- Healthcare and education institutions
- Technology and digital-service functions
- Public-service and nonprofit organizations

Learning Objectives

By the end of this course, participants will be able to:



- Apply independence and objectivity boundaries to advisory requests
- Diagnose stakeholder needs and frame consulting problems
- Build an advisory scope, roles, deliverables, and engagement plan
- Use facilitation, questioning, and influence techniques
- Evaluate evidence and formulate actionable recommendations
- Build communication, follow-through, and closure controls

Course Agenda

Day 1: Advisory Context and Professional Boundaries

- Assurance and Advisory Service Comparison Matrix
- Independence and Objectivity Boundary Checklist
- Management Responsibility Safeguard Map
- Advisory Request Acceptance Criteria
- Engagement Conflict and Disclosure Register

Day 2: Stakeholder Diagnosis and Problem Framing

- Stakeholder Expectation Interview Guide
- Consulting Problem Statement Canvas
- Root-Cause Questioning Method
- Influence and Interest Mapping Grid
- Advisory Value Hypothesis Template

Day 3: Scope and Facilitation

- Advisory Engagement Scope Charter
- Roles and Decision-Rights Matrix
- Facilitated Meeting Design Plan
- Evidence Collection and Validation Log
- Issue Prioritization Decision Matrix

Day 4: Recommendations and Follow-Through

- Evidence-to-Insight Reasoning Chain
- Recommendation Options Appraisal Matrix
- Advisory Communication Structure
- Action Ownership and Follow-Through Register
- Engagement Closure and Feedback Checklist



Day 5: Advisory Practice and Capstone

- Suggested Exercise: Advisory Request Boundary Review
- Suggested Exercise: Stakeholder Diagnosis and Problem Framing
- Suggested Exercise: Facilitation and Evidence Challenge
- Suggested Exercise: Recommendation and Influence Briefing
- Capstone Exercise: Advisory Engagement Toolkit

Practical Exercises

The course uses suggested activities to connect advisory judgment with stakeholder and evidence decisions.

- Suggested activity: assess a technology advisory request for scope, independence, objectivity, and management-responsibility boundaries.
- Suggested activity: diagnose manufacturing stakeholders and convert competing concerns into a consulting problem statement.
- Suggested activity: facilitate an evidence review and compare recommendation options.
- Suggested activity: present an advisory insight and document ownership, follow-through, closure, and feedback.

FAQs

Who suits internal audit advisory and consulting skills, and what does the course assume?

Internal audit advisory and consulting skills suit professionals who already contribute to audit, assurance, risk, or compliance work and need a structured approach to advisory assignments.

How do internal audit advisory services differ from management consulting?

Internal audit advisory services provide evidence-based insight within audit independence, objectivity, governance, and role boundaries, while management consulting may assume broader delivery or decision-support responsibilities.

How should auditors scope an advisory engagement?

Auditors should define the request, stakeholders, objective, boundaries, deliverables, evidence needs, roles, decision rights, communication, conflicts, and closure criteria before advisory work begins.

How can auditors influence stakeholders without assuming management responsibility?

Auditors can influence stakeholders through questions, evidence, options, consequences, facilitation, and clear recommendations while leaving decisions and implementation ownership with management.



What makes an internal audit advisory recommendation actionable?

An actionable recommendation links verified evidence to the problem, compares feasible options, identifies implications, assigns decision and action ownership, and defines follow-through.

Conclusion

Participants leave with an Advisory Engagement Toolkit linking acceptance, boundaries, diagnosis, scope, facilitation, evidence, recommendations, communication, and closure. The toolkit changes informal consulting requests into governed advisory assignments. It provides a working basis for offering insight, preserving objectivity, documenting decisions, and following actions through.