From Rookie to Rep: Speaking the Language of Tax & Accounting

Overall Course Objectives:

- Identify common tax and accounting terminology.
- Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
- Apply tax and accounting terminology during customer conversations.
- Communicate confidently with customers using appropriate tax and accounting terminology.

Target Audience:

- New sales representatives

Training Time:

- 30 minutes

Notes for Reviewer:

- Please focus on the accuracy and completeness of the content during this review cycle. “Page breaks” for the outline course will be adjusted after the content is edited.
- Questions for reviewers are indicated with green highlighting. All questions will need to be resolved before programming can begin.
- The **Slide/Layer** column will contain the number and name of each slide. Base layers will be indicated with letters in parenthesis (a).
- The **Visuals** column will contain a combination of image descriptions, sample images, inspirational images, and actual images for the course. (Each will be labeled)
- The **Descriptions** column will be broken into four subheadings: Objective, Audio, On Screen Text, Navigation.
- The **Objective** box will refer to the course objective being referenced on the slide.
- The text in the **Audio** box will be narrated audio.
    - There will be “connecting” words and phrases that would not appear in a written procedure. If the wording seems awkward to you, try reading the text aloud to see how it fits, then make changes if it still seems necessary.
    - Formatting is merely to aid the voiceover talent: Learners will only hear the text.
    - Capitalization and punctuation are not important in the Audio box but is very important in the On-Screen text box
- The **On-Screen Text** will contain any text that will be on the slide as well as the purpose it will serve (Title, subheading, etc.)
- The **Navigation** box will be used to describe how the learner will move from screen to screen.
- The **Notes** box will be used to add notes to the slide for all stakeholders.

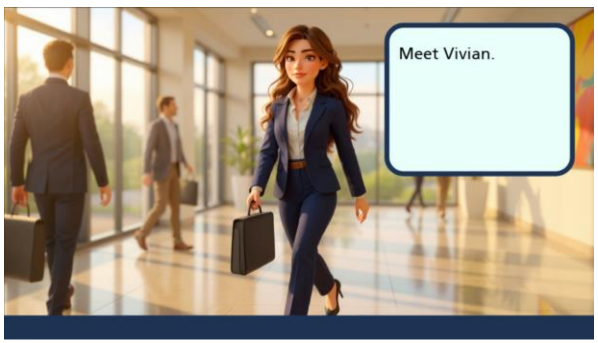
Contents

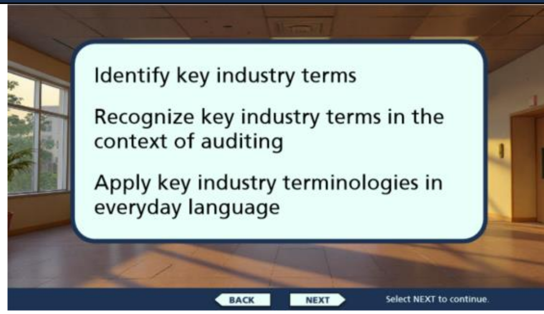
From Rookie to Rep | Review 360

Course Information

Course Fonts	Course Colors
Identifier	D64045
Headline	E9FFF9
Intro text	9ED8DB
Body text headline	467599
Body text	1D3354
Call To Action	

Slide/Layer	Visuals	Description
Scene 1 1.1 Welcome		Objective: N/A
		Audio: Welcome to From Rookie to Rep, Speaking the Language of Tax and Accounting. Get ready for a crash course into the world of words in tax and accounting. When you are ready, select Start to begin.
Notes:		On-Screen Text: From Rookie to Rep: Speaking the Language of Tax and Accounting Start
		Navigation: Learners will use the START button to advance.

Slide/Layer	Visuals	Description
Scene 1 1.2 Meet Vivian	Office lobby 	Objective: N/A
		Audio: Meet Vivian. Today is her first day as a sales rep at Tax and Accounting Software Inc. There's only one problem… Vivian doesn't speak the language of tax and accounting…yet. Video plays. Help Vivian learn the language, gain confidence, and ace her first industry convention.
Notes:		On-Screen Text: Meet Vivian. Today is her first day as a sales rep at Tax and Accounting Software Inc. There's only one problem… Vivian doesn't speak the language of tax and accounting…yet. Video plays. Help Vivian learn the language, gain confidence, and ace her first industry convention.
		Navigation: Slide auto-advances when audio ends.

Slide/Layer	Visuals	Description
Scene 1 1.3 Learning Objectives		Objective: N/A
		Audio: By the end of this course, you will be able to: Identify key industry terms. Recognize key terms in the context of auditing. And, apply key industry terminologies in everyday language Select Next to advance.
Notes:		On-Screen Text: • Identify common tax and accounting terminology. • Recognize appropriate use of tax and accounting terminology in realistic business scenarios. • Apply tax and accounting terminology during customer conversations. • Communicate confidently with customers using appropriate tax and accounting terminology.
		Navigation: Learner selects the NEXT button to advance.

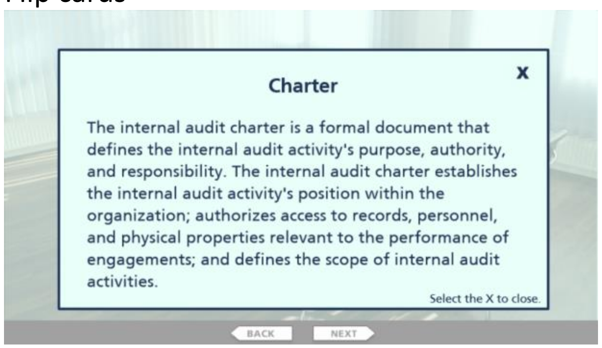
<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 2

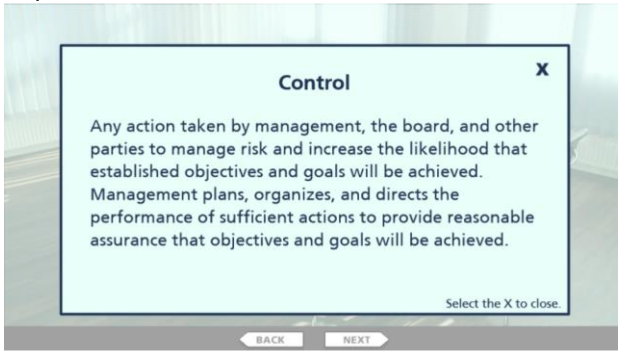
2.1 Mentor Intro</td><td rowspan="5">Vivian’s onboarding training room with facilitator Paul.

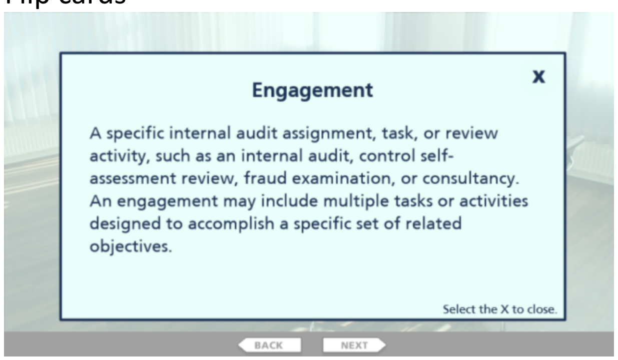


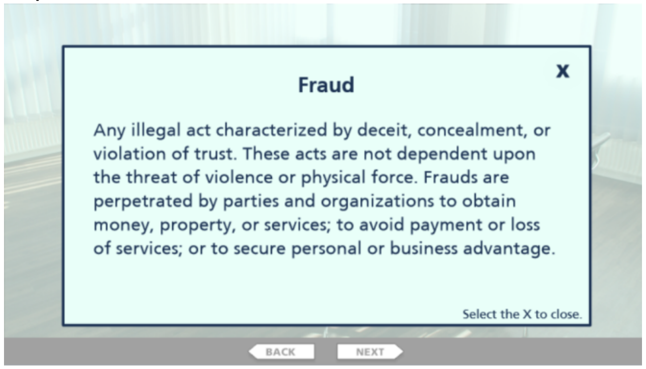
</td><td>Objective:
Identify common tax and accounting terminology.</td></tr>
<tr><td>Audio:
Paul:
Vivian, I know you’re here to sell software, not become an accountant. But here’s the thing: in this industry, the words we use carry weight. When a client talks about their risk appetite or an audit charter, they’re telling you exactly what matters most to them.
If you understand their language, you can ask better questions, uncover their real needs, and position our solution as the perfect fit. Without that fluency, conversations stay surface-level; and so do your sales.
By the time we’re done, you won’t just know the terms… you’ll be speaking your client’s language with confidence.
Vivian:
That makes sense. Honestly, half the time I’m just nodding along hoping they don’t ask me to explain something. If learning these terms helps me actually join the conversation, I’m in. Where do we start?</td></tr>
<tr><td rowspan="3">Notes:</td><td>On-Screen Text:
Vivian, I know you’re here to sell software, not become an accountant. But here’s the thing: in this industry, the words we use carry weight. When a client talks about their risk appetite or an audit charter, they’re telling you exactly what matters most to them.
If you understand their language, you can ask better questions, uncover their real needs, and position our solution as the perfect fit. Without that fluency, conversations stay surface-level; and so do your sales.
By the time we’re done, you won’t just know the terms… you’ll be speaking your client’s language with confidence.
That makes sense. Honestly, half the time I’m just nodding along hoping they don’t ask me to explain something. If learning these terms helps me actually join the conversation, I’m in. Where do we start?</td></tr>
<tr><td>Navigation:
Learner selects the NEXT button to advance.</td></tr>
</table>

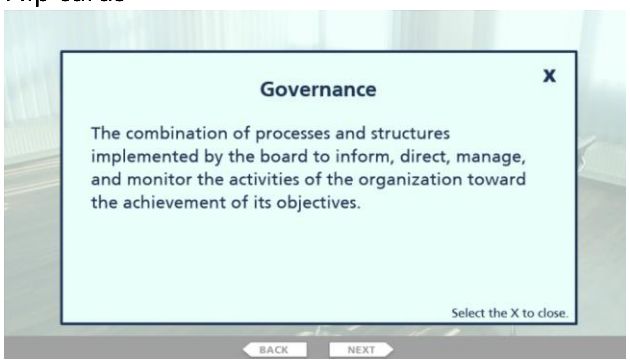
Slide/Layer	Visuals	Description
Scene 2 2.2 Term Cards	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Let’s learn some tax and accounting terminologies. Select each card to learn the definition.
Notes:		On-Screen Text: Select each card to learn the definition. Charter, Control, Engagement, Fraud, Governance, Objectivity, Risk, Significance, Standard
		Navigation: Learner will be able to select each card to go to a layer that explains the definition of each card. The NEXT button becomes available after all interactions are completed.

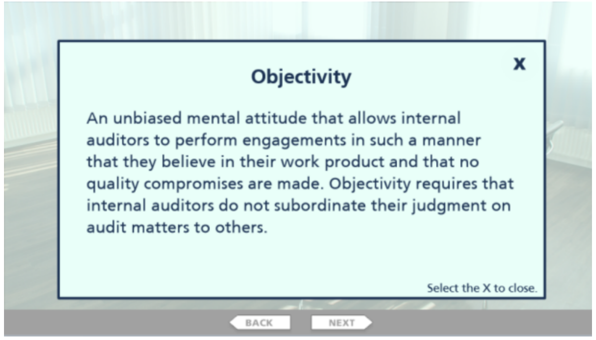
Slide/Layer	Visuals	Description
Scene 2 2.2(a)Charter	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Charter
Notes:		On-Screen Text: Charter The internal audit charter is a formal document that defines the internal audit activity's purpose, authority, and responsibility. The internal audit charter establishes the internal audit activity's position within the organization; authorizes access to records, personnel, and physical properties relevant to the performance of engagements; and defines the scope of internal audit activities. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

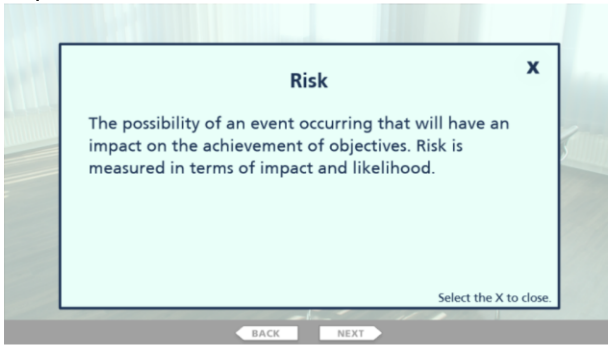
Slide/Layer	Visuals	Description
Scene 2 2.2(b)Control	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Control
Notes:		On-Screen Text: Control Any action taken by management, the board, and other parties to manage risk and increase the likelihood that established objectives and goals will be achieved. Management plans, organizes, and directs the performance of sufficient actions to provide reasonable assurance that objectives and goals will be achieved. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

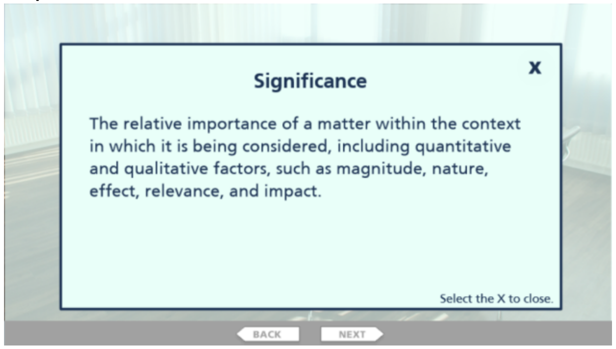
Slide/Layer	Visuals	Description
Scene 2 2.2(c)Engagement	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Engagement
Notes:		On-Screen Text: Engagement A specific internal audit assignment, task, or review activity, such as an internal audit, control self-assessment review, fraud examination, or consultancy. An engagement may include multiple tasks or activities designed to accomplish a specific set of related objectives. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

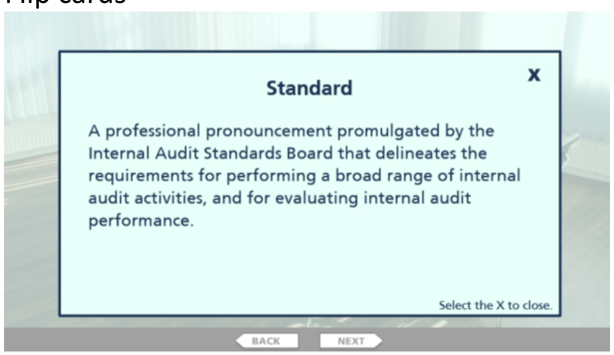
Slide/Layer	Visuals	Description
Scene 2 2.2(d)Fraud	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Fraud
Notes:		On-Screen Text: Fraud Any illegal act characterized by deceit, concealment, or violation of trust. These acts are not dependent upon the threat of violence or physical force. Frauds are perpetrated by parties and organizations to obtain money, property, or services; to avoid payment or loss of services; or to secure personal or business advantage. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 2 2.2(e)Governance	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Governance
Notes:		On-Screen Text: Governance The combination of processes and structures implemented by the board to inform, direct, manage, and monitor the activities of the organization toward the achievement of its objectives. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 2 2.2(f)Objectivity	Flip cards  	Objective: Identify common tax and accounting terminology.
		Audio: Objectivity
Notes:		On-Screen Text: Objectivity An unbiased mental attitude that allows internal auditors to perform engagements in such a manner that they believe in their work product and that no quality compromises are made. Objectivity requires that internal auditors do not subordinate their judgment on audit matters to others. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

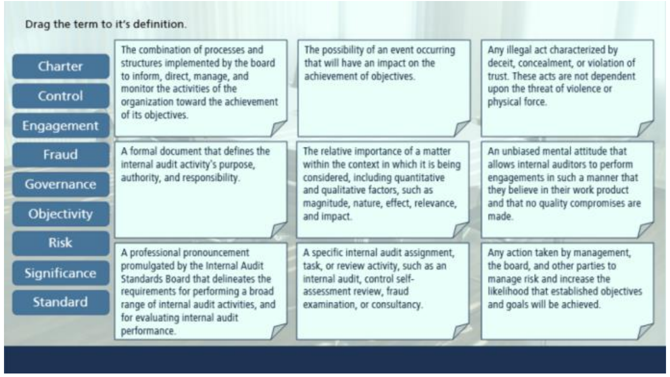
Slide/Layer	Visuals	Description
Scene 2 2.2(g)Risk	Flip cards  	Objective: Identify common tax and accounting terminology.
		Audio: Risk
Notes:		On-Screen Text: Risk The possibility of an event occurring that will have an impact on the achievement of objectives. Risk is measured in terms of impact and likelihood. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 2 2.2(h)Significance	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Significance
Notes:		On-Screen Text: Significance The relative importance of a matter within the context in which it is being considered, including quantitative and qualitative factors, such as magnitude, nature, effect, relevance, and impact. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 2 2.2(i)Standard	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Standard
Notes:		On-Screen Text: Standard A professional pronouncement promulgated by the Internal Audit Standards Board that delineates the requirements for performing a broad range of internal audit activities, and for evaluating internal audit performance. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description

<table>
<tr>
<td rowspan="2">Scene 2

2.3 Match Game</td>
<td rowspan="4">Word Match challenge

</td>
<td>Objective:
Identify common tax and accounting terminology.</td>
</tr>
<tr>
<td>Audio:
Now, let's see what you learned. Match the term to it's definition.</td>
</tr>
<tr>
<td rowspan="2">Notes:</td>
<td>On-Screen Text:
Charter, Control, Engagement, Fraud, Governance, Objectivity, Risk, Significance, Standard
(All definitions)</td>
</tr>
<tr>
<td>Navigation:
Learner will drag and drop vocab words to their definition.
Once all words have been placed in the correct place, the NEXT button becomes available.</td>
</tr>
</table>

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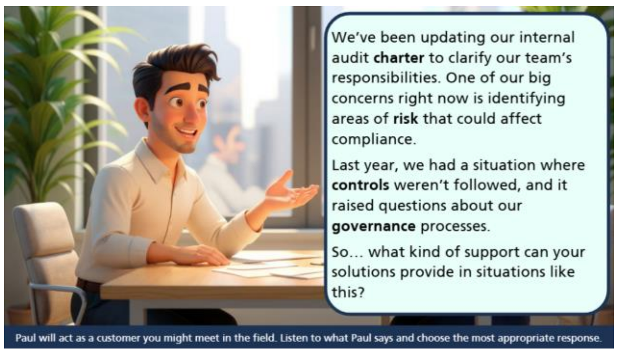
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr>
<td>Scene 2

2.4 Scenario Roleplay 1</td>
<td rowspan="2">In the office with Paul. In Vivian’s point of view, Paul is across from her and there is a notepad in front of Vivian on a table.



</td>
<td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
<hr>
Audio:
Paul will act as a customer you might meet in the field. Listen to what Paul says and choose the most appropriate response. Use your new vocabulary to show you understand their needs.
Paul (as the customer):
We’ve been updating our internal audit charter to clarify our team’s responsibilities. One of our big concerns right now is identifying areas of risk that could affect compliance. Last year, we had a situation where controls weren’t followed, and it raised questions about our governance processes. So… what kind of support can your solutions provide in situations like this?</td>
</tr>
<tr>
<td>Notes:</td>
<td>On-Screen Text:
We’ve been updating our internal audit charter to clarify our team’s responsibilities. One of our big concerns right now is identifying areas of risk that could affect compliance. Last year, we had a situation where controls weren’t followed, and it raised questions about our governance processes. So… what kind of support can your solutions provide in situations like this?
Choose the best response that shows you understand and can speak your customer’s language.
Answer Choices:
<ol type="A">
It sounds like your governance process and controls are critical to managing your risk. Our solutions can help by creating audit trails and reporting that align with your internal audit charter, making it easier to monitor compliance.
I understand you have risk and controls to think about. Our solution is great for tracking customer orders and inventory, which can help reduce those risks.
I’m sure our solutions can help with whatever you need. We can customize it to your business, so it will work for you.

Feedback Logic

If A (Correct Response):
"Excellent! You used the customer’s terms in the right context, showing you understand their priorities. This builds trust and positions you as a knowledgeable partner."
If B (Partial Response):
"You mentioned some of the terms, but your response didn’t directly address their audit and governance concerns. Try connecting the terms to the customer’s specific situation."
</td>
</tr>
</table>

		• **If C (Incorrect Response)**: *"You missed an opportunity to use the customer's language. This can make your solution seem less relevant to their needs. Let's try again."*
		Navigation: Learner is able to select the answer choices. When feedback is given, the NEXT button appears.

Slide/Layer	Visuals	Description
Scene 2 2.5 Rookie Badge	Rookie Badge – progress tracker 	Objective: N/A Audio: None On-Screen Text: Rookie Badge Navigation: Learner selects the NEXT button to advance.
Notes:		

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td>

Scene 3

3.1 Meeting Setup

</td><td rowspan="2">

Boardroom setting. Vivian (new rep) sits beside Rhonda (senior rep). Across the table is John (client, CFO type).

</td><td>

Objective:

Recognize appropriate use of tax and accounting terminology in realistic business scenarios.

Audio:

Rhonda (Senior Rep) *(smiling, greeting)*:
John, thanks for meeting with us today. I understand your **chief audit executive** recently completed a review of your **internal audit activity**.
John (Client) *(nodding)*:
Yes, and they flagged some gaps in **adequate controls**. We also have some lingering **residual risk** from last year that we want to address. Leadership has asked for more **assurance services** so they feel confident in our compliance posture.
Rhonda (Senior Rep) *(leaning forward)*:
That makes sense. And I imagine **compliance** requirements are only getting more demanding?
John (Client):
*Exactly. Plus, there's been concern about a potential **conflict of interest** in one of our divisions. We've set new **engagement objectives** to get ahead of it, but we need tools to track and report effectively.*
Rhonda (Senior Rep) *(smiling, glancing at Vivian)*:
That's where our solution comes in. Vivian, why don't you explain how we can help them meet those objectives and reduce risk?

</td></tr>
<tr><td>

Notes:

</td><td>

On-Screen Text:

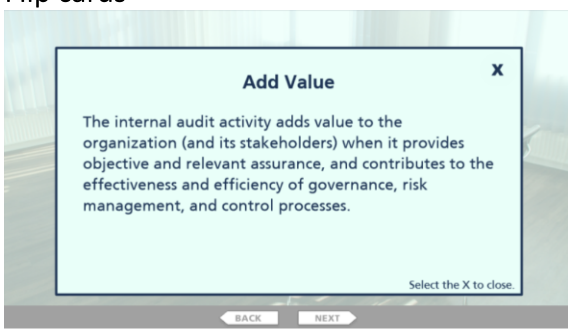
John, thanks for meeting with us today. I understand your **chief audit executive** recently completed a review of your **internal audit activity**.
Yes, and they flagged some gaps in **adequate controls**. We also have some lingering **residual risk** from last year that we want to address. Leadership has asked for more **assurance services** so they feel confident in our compliance posture.
That makes sense. And I imagine **compliance** requirements are only getting more demanding?
*Exactly. Plus, there's been concern about a potential **conflict of interest** in one of our divisions. We've set new **engagement objectives** to get ahead of it, but we need tools to track and report effectively.*
That's where our solution comes in. Vivian, why don't you explain how we can help them meet those objectives and reduce risk?

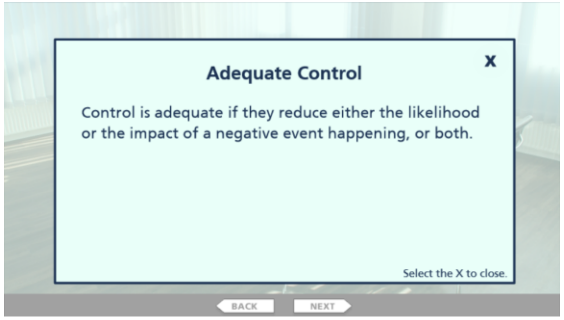
Navigation:

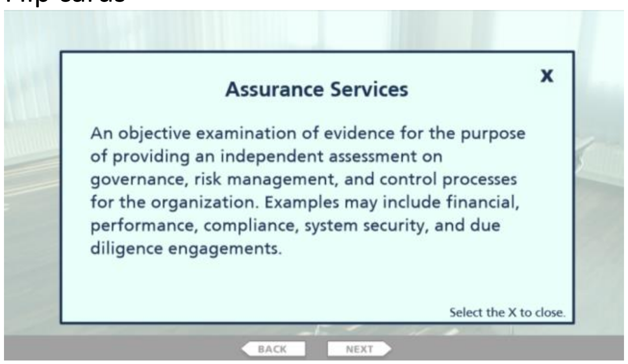
Learner selects NEXT button to advance.

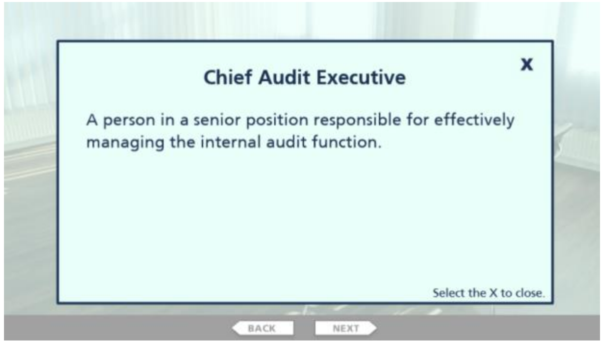
</td></tr>
</table>

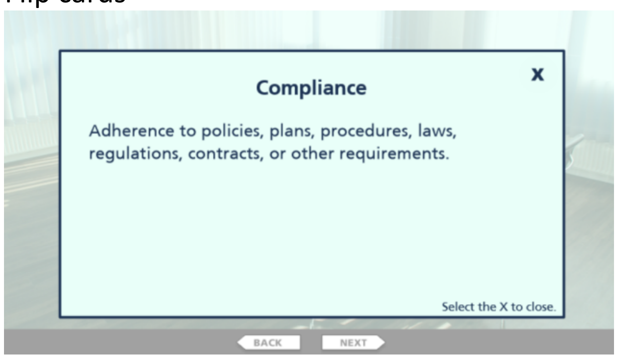
Slide/Layer	Visuals	Description
Scene 3 3.2 Terms 2		Objective: Identify common tax and accounting terminology.
		Audio: Here are more tax and accounting terminologies you will need to know. Select each card to learn the definition.
Notes:		On-Screen Text: Add Value, Adequate Control, Assurance Services, Chief Audit Executive, Compliance, Conflict of Interest, Engagement Objectives, Internal Audit Activity, Residual Risk
		Navigation: Learner will be able to select each card to go to a layer that explains the definition of each card. After visiting all cards, the NEXT button will appear so Learners can advance.

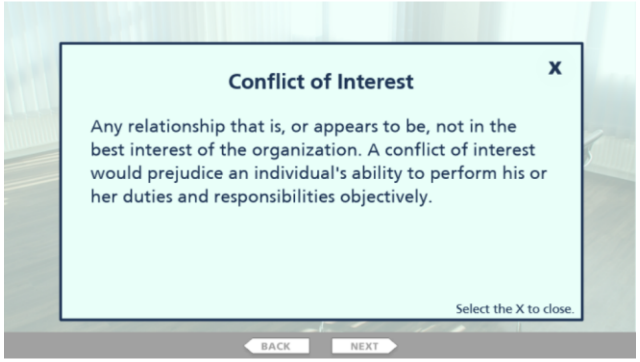
Slide/Layer	Visuals	Description
Scene 3 3.2 (a) Add Value	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Add Value
Notes:		On-Screen Text: Add Value The internal audit activity adds value to the organization (and its stakeholders) when it provides objective and relevant assurance, and contributes to the effectiveness and efficiency of governance, risk management, and control processes. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

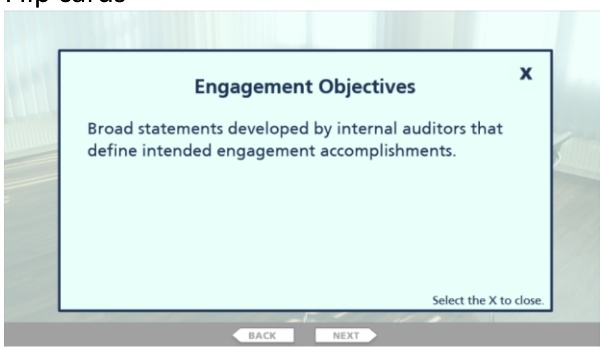
Slide/Layer	Visuals	Description
Scene 3 3.2 (b) Adequate Control	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Adequate Control
Notes:		On-Screen Text: Adequate Control Control is adequate if they reduce either the likelihood or the impact of a negative event happening, or both. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 3 3.2 (c) Assurance Services	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Assurance Services
Notes:		On-Screen Text: Assurance Services An objective examination of evidence for the purpose of providing an independent assessment on governance, risk management, and control processes for the organization. Examples may include financial, performance, compliance, system security, and due diligence engagements. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

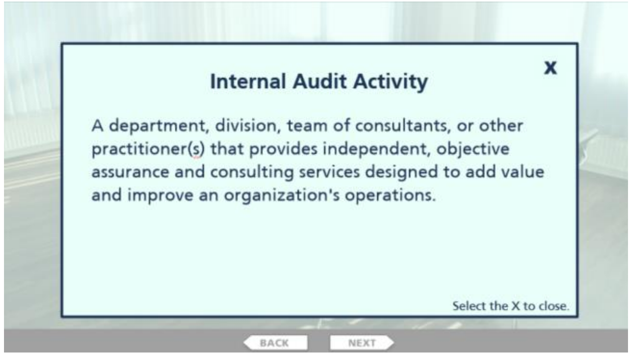
Slide/Layer	Visuals	Description
Scene 3 3.2 (d) Chief Audit Executive	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Chief Audit Executive
Notes:		On-Screen Text: Chief Audit Executive An objective examination of evidence for the purpose of providing an independent assessment on governance, risk management, and control processes for the organization. Examples may include financial, performance, compliance, system security, and due diligence engagements. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 3 3.2(e)Compliance	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Compliance
Notes:		On-Screen Text: Compliance Adherence to policies, plans, procedures, laws, regulations, contracts, or other requirements. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

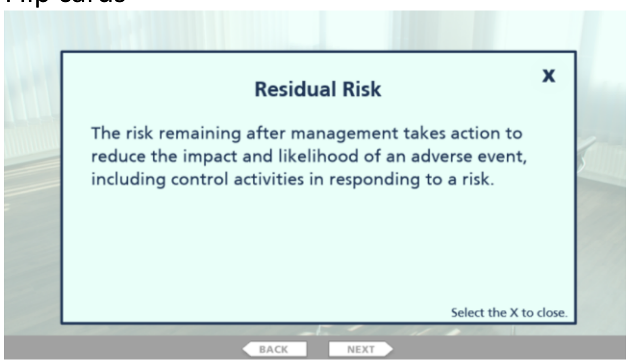
Slide/Layer	Visuals	Description
Scene 3 3.2 (f) Conflict of Interest	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Conflict of Interest
Notes:		On-Screen Text: Conflict of Interest Any relationship that is, or appears to be, not in the best interest of the organization. A conflict of interest would prejudice an individual's ability to perform his or her duties and responsibilities objectively. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 3 3.2 (g) Engagement Objectives	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Engagement Objectives
Notes:		On-Screen Text: Engagement Objectives Broad statements developed by internal auditors that define intended engagement accomplishments. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

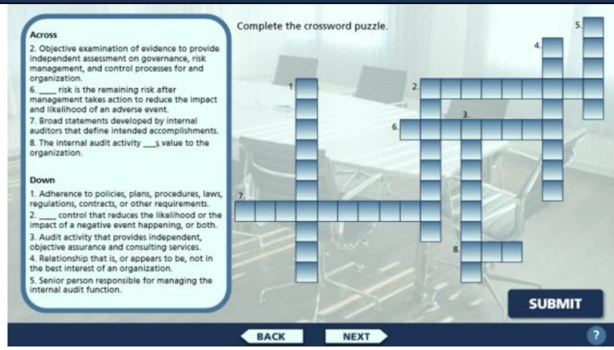
<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td>Scene 3

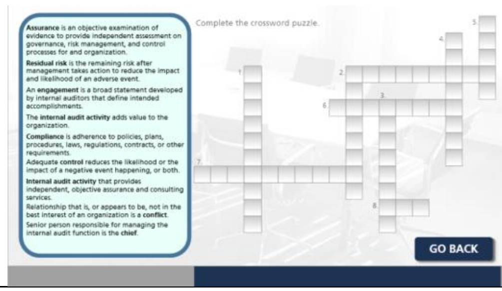
3.2 (h) Internal Audit Activity</td><td rowspan="4">Flip cards

</td><td>Objective:
Identify common tax and accounting terminology.</td></tr>
<tr><td rowspan="3">Notes:</td><td>Audio:
Internal Audit Activity</td></tr>
<tr><td>On-Screen Text:
Internal Audit Activity
A department, division, team of consultants, or other practitioner(s) that provides independent, objective assurance and consulting services designed to add value and improve an organization's operations.
Select the X to close.</td></tr>
<tr><td>Navigation:
Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td>Scene 3

3.2 (i) Residual Risk</td><td rowspan="4">Flip cards

</td><td>Objective:
Identify common tax and accounting terminology.</td></tr>
<tr><td rowspan="3">Notes:</td><td>Audio:
Residual Risk</td></tr>
<tr><td>On-Screen Text:
Residual Risk
The risk remaining after management takes action to reduce the impact and likelihood of an adverse event, including control activities in responding to a risk.
Select the X to close.</td></tr>
<tr><td>Navigation:
Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.</td></tr>
</table>

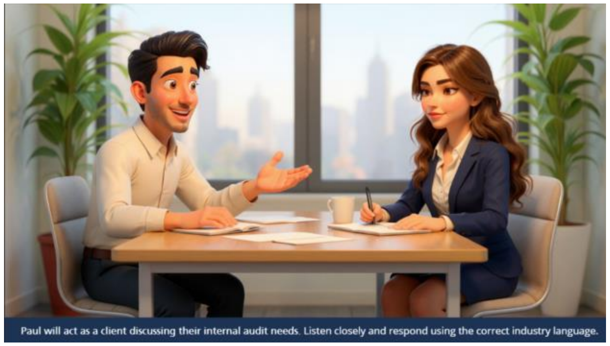
<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 3

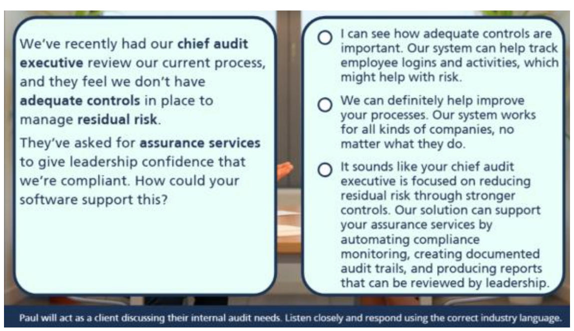
3.3 Crossword Puzzle</td><td rowspan="4">


</td><td>Objective:
Identify common tax and accounting terminology.</td></tr>
<tr><td>Audio:
Complete the crossword puzzle using the terms you just learned.</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Complete the Crossword Puzzle.</td></tr>
<tr><td>Navigation:
Learner selects the Down button and the down definitions appear.
Learner selects the Across button and the across definitions appear.
Learner selects the Down Hints button and shows a layer with terms and definitions.
Learner selects the Up Hints button and shows a layer with terms and definitions.
NEXT button appears once the crossword puzzle is solved.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr>
<td>Scene 3

3.4 Scenario Roleplay 2</td>
<td rowspan="2">Paul plays the role of a client meeting at their office; a laptop open with charts.





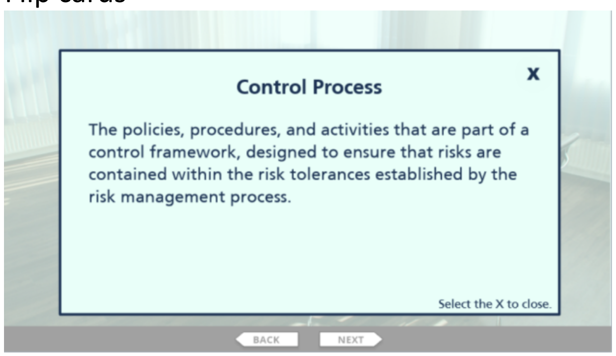
</td>
<td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
<hr>
Audio:
Paul will act as a client discussing their internal audit needs. Listen closely and respond using the correct industry language.
Paul (as a customer):
We've recently had our chief audit executive review our current process, and they feel we don't have adequate controls in place to manage residual risk. They've asked for assurance services to give leadership confidence that we're compliant. How could your software support this?</td>
</tr>
<tr>
<td>Notes:</td>
<td>On-Screen Text:
We've recently had our chief audit executive review our current process, and they feel we don't have adequate controls in place to manage residual risk. They've asked for assurance services to give leadership confidence that we're compliant. How could your software support this?
Choose the best response that demonstrates you understand their priorities and can use the correct vocabulary.
A. *"It sounds like your **chief audit executive** is focused on reducing **residual risk** through stronger **controls**. Our solution can support your **assurance services** by automating compliance monitoring, creating documented audit trails, and producing reports that can be reviewed by leadership."*
B. *"I can see how **adequate controls** are important. Our system can help track employee logins and activities, which might help with risk."*
C. *"We can definitely help improve your processes. Our system works for all kinds of companies, no matter what they do."*
Feedback
• **If A (Correct Response)**:
"Excellent! You tied their vocabulary directly to your solution, showing you understand their needs."
• **If B (Partial Response)**:
"You mentioned some terms, but you didn't clearly connect them to the customer's concerns. Be sure to show the link."
• **If C (Incorrect Response)**:
"You missed an opportunity to speak the customer's language. Let's try again."
<hr>
Navigation:</td>
</tr>
</table>

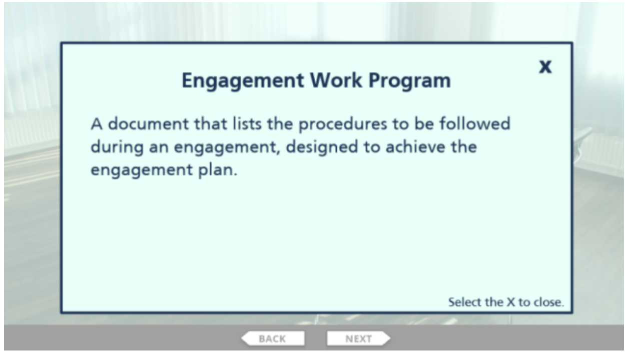
		Learner is able to select the answer choices. When feedback is given, a NEXT button appears to allow learners to advance.

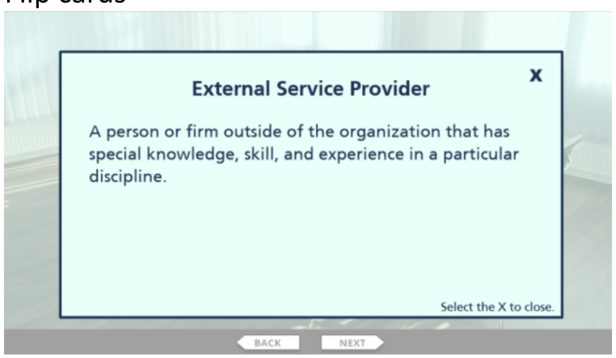
Slide/Layer	Visuals	Description
Scene 3 3.5 Pro-In-Training Badge	Pro-In-Training Badge – progress tracker 	Objective: N/A
Notes:		Audio: None
		On-Screen Text: Pro-In-Training Badge
		Navigation: Learner selects the NEXT button to advance.

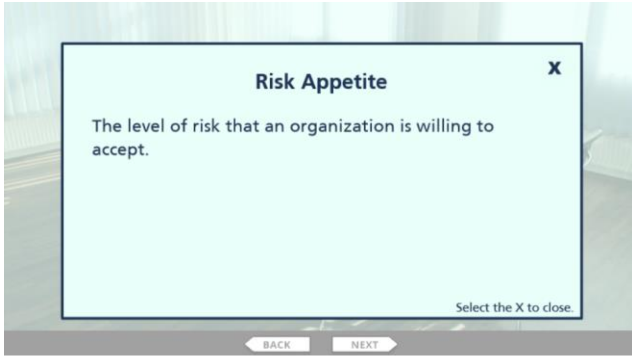
Slide/Layer	Visuals	Description
## Scene 4 4.1 The Convention		Objective: Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
		Audio: **Rhonda (Senior Rep)**: *Linda, it's great to see you here. I heard your **board** recently completed a review of your **risk management** framework.* **Linda (Client)**: *Yes, they've decided to lower our **risk appetite** for the upcoming fiscal year. That means we'll need to tighten some **control processes** and ensure everything aligns with our governance strategy.* **Rhonda (Senior Rep)**: *I imagine that requires updates to your **engagement work program** as well?* **Linda (Client)**: *Absolutely. We're also considering bringing in an **external service provider** for specialized testing in certain areas. But leadership wants to ensure we maintain **independence** in all our engagements.* **Rhonda (Senior Rep)**: *Vivian, this is exactly the type of situation where our solution can shine. Why don't you walk Linda through how it supports audit planning and aligns with the **audit universe**?*
Notes:		On-Screen Text: *Linda, it's great to see you here. I heard your **board** recently completed a review of your **risk management** framework.* *Yes, they've decided to lower our **risk appetite** for the upcoming fiscal year. That means we'll need to tighten some **control processes** and ensure everything aligns with our governance strategy.* *I imagine that requires updates to your **engagement work program** as well?* *Absolutely. We're also considering bringing in an **external service provider** for specialized testing in certain areas. But leadership wants to ensure we maintain **independence** in all our engagements.* *Vivian, this is exactly the type of situation where our solution can shine. Why don't you walk Linda through how it supports audit planning and aligns with the **audit universe**?*
		Navigation: Learner selects NEXT to advance.

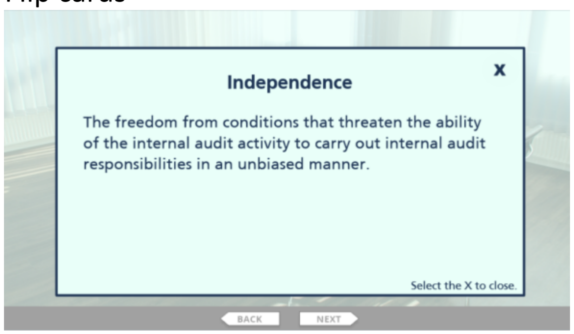
Slide/Layer	Visuals	Description
Scene 4 4.2 Terms 3		Objective: Identify common tax and accounting terminology.
		Audio: Here are the final tax and accounting terminologies you will need to know for this course. Select each card to learn the definition.
Notes:		On-Screen Text: Control Process, Engagement Work Program, External Service Provider, Independence, Risk Appetite, Risk Management, Board, Audit Universe Select each card to learn the definition.
		Navigation: Learner will be able to select each card to go to a layer that explains the definition of each card. After visiting all cards, the NEXT button will appear so Learners can advance.

Slide/Layer	Visuals	Description
Scene 4 4.2(a) Control Process	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Control Process
Notes:		On-Screen Text: Control Process The policies, procedures, and activities that are part of a control framework, designed to ensure that risks are contained within the risk tolerances established by the risk management process. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

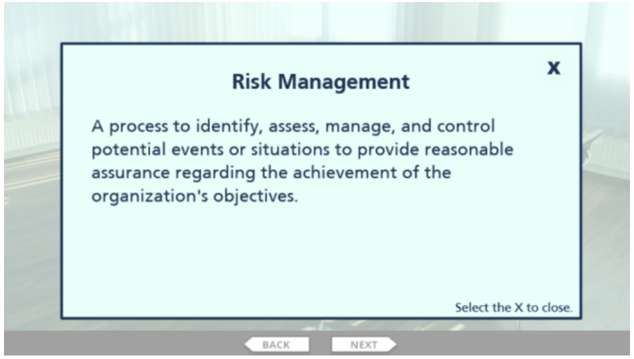
Slide/Layer	Visuals	Description
Scene 4 4.2(b) Engagement Work Program	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Engagement Work Program
Notes:		On-Screen Text: Engagement Work Program A document that lists the procedures to be followed during an engagement, designed to achieve the engagement plan. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 4 4.2(c) External Service Provider	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: External Service Provider
Notes:		On-Screen Text: External Service Provider A person or firm outside of the organization that has special knowledge, skill, and experience in a particular discipline. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 4 4.2(d) Independence	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Independence
Notes:		On-Screen Text: Independence The freedom from conditions that threaten the ability of the internal audit activity to carry out internal audit responsibilities in an unbiased manner. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

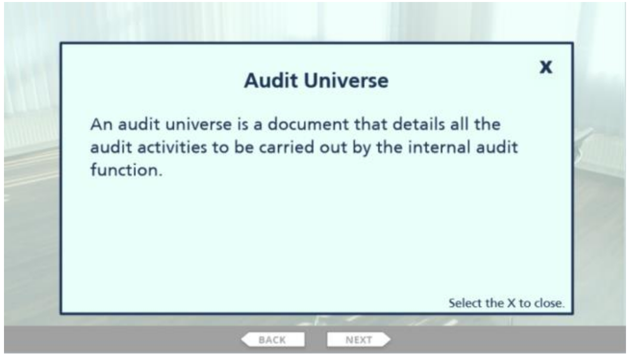
Slide/Layer	Visuals	Description
Scene 4 4.2(e) Risk Appetite	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Risk Appetite
Notes:		On-Screen Text: Risk Appetite The level of risk that an organization is willing to accept. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

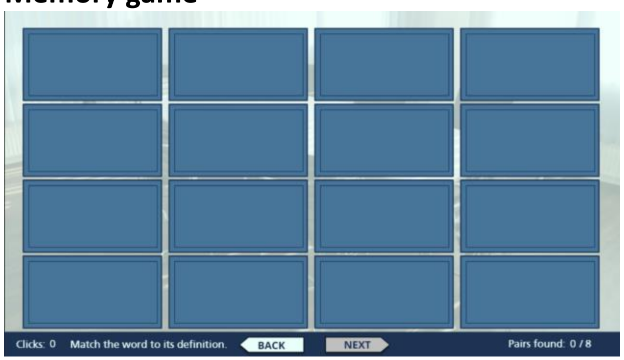
<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th colspan="1">Description</th></tr>
<tr><td>Scene 4

4.2(f) Risk Management</td><td rowspan="4">Flip cards
</td><td>Objective:
Identify common tax and accounting terminology.</td></tr>
<tr><td rowspan="3">Notes:</td><td>Audio:
Risk Management</td></tr>
<tr><td>On-Screen Text:
Risk Management
A process to identify, assess, manage, and control potential events or situations to provide reasonable assurance regarding the achievement of the organization's objectives.
Select the X to close.</td></tr>
<tr><td>Navigation:
Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td>Scene 4

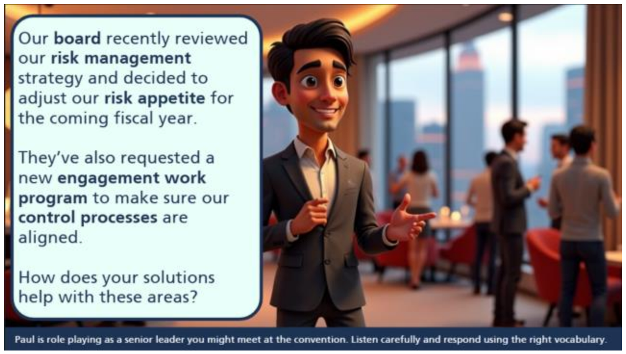
4.2(g) Board</td><td rowspan="4">Flip cards
</td><td>Objective:
Identify common tax and accounting terminology.</td></tr>
<tr><td rowspan="3">Notes:</td><td>Audio:
Board</td></tr>
<tr><td>On-Screen Text:
Board
A board is an organization's governing body, such as a board of directors, supervisory board, head of an agency or legislative body, board of governors or trustees of a nonprofit organization, or any other designated body of the organization, including the audit committee to whom the chief audit executive may functionally report.
Select the X to close.</td></tr>
<tr><td>Navigation:
Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.</td></tr>
</table>

Slide/Layer	Visuals	Description
Scene 4 4.2(h) Audit Universe	Flip cards 	Objective: Identify common tax and accounting terminology.
		Audio: Audit Universe
Notes:		On-Screen Text: Audit Universe An audit universe is a document that details all the audit activities to be carried out by the internal audit function. Select the X to close.
		Navigation: Learner will be able to select a Close button to hide the layer and return to Term Cards base layer.

Slide/Layer	Visuals	Description
Scene 4 4.3 Memory Game	**Memory game** 	Objective: Identify common tax and accounting terminology.
		Audio: Match the word to its definition.
Notes:		On-Screen Text: Board – Sets governance expectations and approves the audit plan. Risk Appetite – Defines the level of risk the organization is willing to accept. Risk Management – Identifies and evaluates risks to ensure they align with risk appetite. Control Process – Establishes policies and procedures to address identified risks. Engagement Work Program – Plans the specific steps for an audit engagement. Independence – Ensures auditors can work without conflicts of interest. External Service Provider – May be brought in for specialized audits if needed. Audit Universe – Comprehensive list of all possible audit areas to be considered.
		Navigation: NEXT button will appear once all terms and definitions have been visited.

Slide/Layer	Visuals	Description
Scene 4	Paul at a networking event.	Objective:

<table>
<tr>
<td rowspan="2">4.4 Scenario Roleplay 3</td>
<td rowspan="3">




</td>
<td>Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.</td>
</tr>
<tr>
<td>Audio:
Paul is roleplaying as a senior leader you might meet at the convention. Listen carefully and respond using the right vocabulary.
Paul (as the customer):
Our board recently reviewed our risk management strategy and decided to adjust our risk appetite for the coming fiscal year. They’ve also requested a new engagement work program to make sure our control processes are aligned. How does your solution help with these areas?</td>
</tr>
<tr>
<td>Notes:</td>
<td>On-Screen Text:
Our <u>board</u> recently reviewed our <u>risk management</u> strategy and decided to adjust our <u>risk appetite</u> for the coming fiscal year. They’ve also requested a new <u>engagement work program</u> to make sure our <u>control processes</u> are aligned. How does your solution help with these areas?
Choose the best response that demonstrates mastery of the terminology.
A. Best Response – Correct & Contextual
"It sounds like your board wants to ensure your risk management and control processes fully support your revised risk appetite. Our software can help build and track your engagement work program, ensuring each step is documented and easily reviewed."
B. Partial Response – Correct Terms, Weak Link
"Our system works well for companies that care about risk management and control processes. We can help keep your files organized."
C. Weak Response – No Relevant Vocabulary
"We help all types of companies stay organized and efficient, so I’m sure we can work something out."
Feedback
If A (Correct Response):
"Excellent! You demonstrated a strong command of advanced terms and linked them clearly to your solution."
If B (Partial Response):
"You used some terms, but your response wasn’t specific enough to their situation."
If C (Incorrect Response):
"You didn’t use their language, which makes your response less credible."</td>
</tr>
</table>

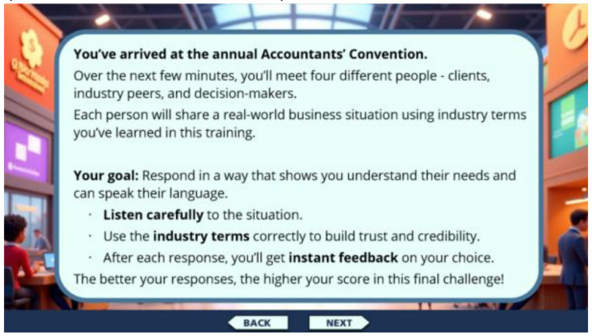
		Navigation: Learner is able to select the answer choices. When feedback is given, a NEXT button appears to allow Learners to advance.

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 4

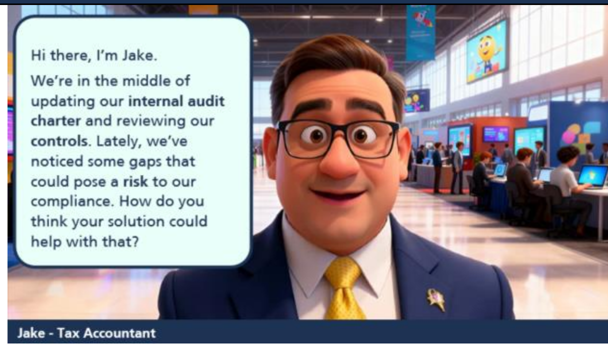
4.5 Convention Conversationalist Badge</td><td rowspan="4">Convention Conversationalist Badge – progress tracker

</td><td>Objective:
N/A</td></tr>
<tr><td>Audio:
None</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Convention Conversationalist Badge</td></tr>
<tr><td>Navigation:
Learner selects the NEXT button to advance.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

5.1 The Convention</td><td rowspan="4">Convention hall with 4 people to speak with (animated characters)

</td><td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
Communicate confidently with customers using appropriate tax and accounting terminology.</td></tr>
<tr><td>Audio:
You’ve arrived at the annual Accountants’ Convention.
Over the next few minutes, you’ll meet four different people — clients, industry peers, and decision-makers.
Each person will share a real-world business situation using industry terms you’ve learned in this training.
Your goal: Respond in a way that shows you understand their needs and can speak their language.
Listen carefully to the situation.
Use the industry terms correctly to build trust and credibility.
After each response, you’ll get instant feedback on your choice.
The better your responses, the higher your score in this final challenge!</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
You’ve arrived at the annual Accountants’ Convention.
Over the next few minutes, you’ll meet four different people — clients, industry peers, and decision-makers.
Each person will share a real-world business situation using industry terms you’ve learned in this training.
Your goal: Respond in a way that shows you understand their needs and can speak their language.
Listen carefully to the situation.
Use the industry terms correctly to build trust and credibility.
After each response, you’ll get instant feedback on your choice.
The better your responses, the higher your score in this final challenge!</td></tr>
<tr><td>Navigation:
Learner selects the NEXT button to advance.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

5.2 Jake – Tax Accountant</td><td rowspan="4">

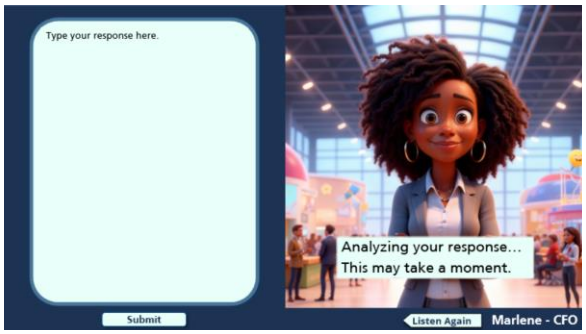

</td><td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
Communicate confidently with customers using appropriate tax and accounting terminology.</td></tr>
<tr><td>Audio:
Hi there, I'm Jake. We're in the middle of updating our internal audit charter and reviewing our controls. Lately, we've noticed some gaps that could pose a risk to our compliance. How do you think your solution could help with that?</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Hi there, I'm Jake. We're in the middle of updating our internal audit charter and reviewing our controls. Lately, we've noticed some gaps that could pose a risk to our compliance. How do you think your solution could help with that?
Type your response.</td></tr>
<tr><td>Navigation:
Learner selects the Submit button to advance.
Use Listen Again to replay Jake speaking.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

5.3 Jake Feedback Slide</td><td rowspan="4">
</td><td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
Communicate confidently with customers using appropriate tax and accounting terminology.</td></tr>
<tr><td>Audio:
None</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Text reflects personalized AI feedback</td></tr>
<tr><td>Navigation:
Learner selects the Next button to advance.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

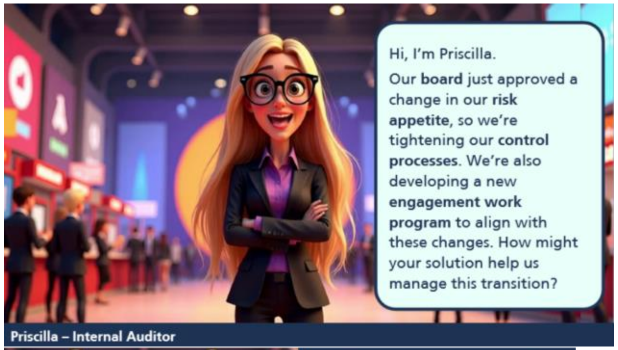
5.4 Marlene – CFO</td><td rowspan="5">


</td><td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
Communicate confidently with customers using appropriate tax and accounting terminology.</td></tr>
<tr><td>Audio:
Nice to meet you, I'm Marlene. Our chief audit executive recently raised concerns that our controls aren't adequate enough to reduce residual risk. We've decided to engage assurance services to get a clearer picture. What would your software bring to the table in that situation?</td></tr>
<tr><td rowspan="3">Notes:</td><td>On-Screen Text:
Nice to meet you, I'm Marlene. Our chief audit executive recently raised concerns that our controls aren't adequate enough to reduce residual risk. We've decided to engage assurance services to get a clearer picture. What would your software bring to the table in that situation?
Type your response.</td></tr>
<tr><td>Navigation:
Learner selects the Submit button to advance.
Use Listen Again to re-play Marlene speaking.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

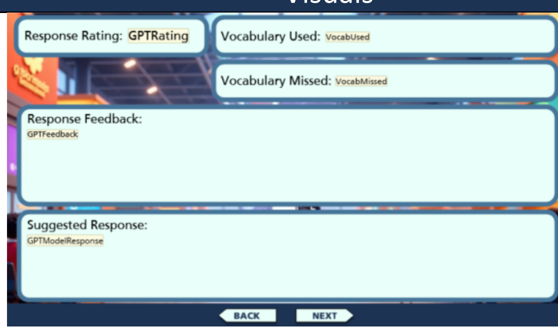
5.5 Marlene Feedback Slide</td><td rowspan="4">
</td><td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
Communicate confidently with customers using appropriate tax and accounting terminology.</td></tr>
<tr><td>Audio:
None</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Text reflects personalized AI feedback</td></tr>
<tr><td>Navigation:
Learner selects the NEXT button to advance.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

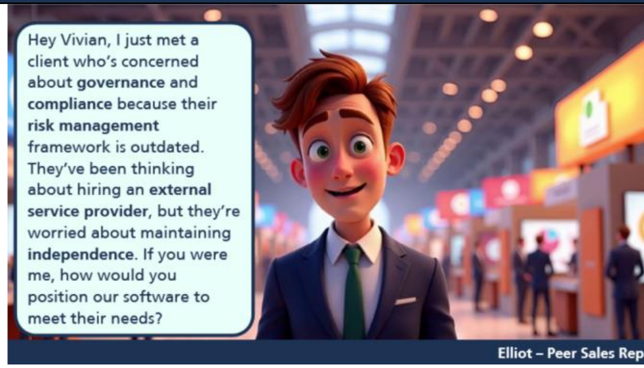
5.6 Priscilla – Internal Auditor</td><td rowspan="4">

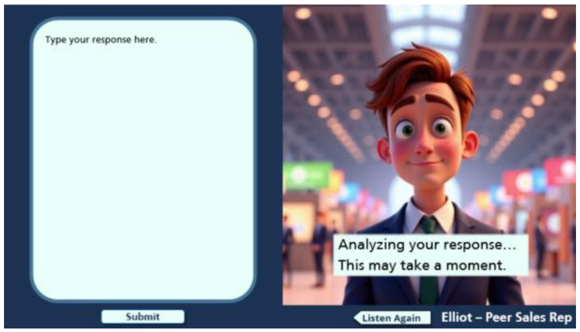

</td><td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
Communicate confidently with customers using appropriate tax and accounting terminology.</td></tr>
<tr><td>Audio:
Hi, I'm Priscilla. Our board just approved a change in our risk appetite, so we're tightening our control processes. We're also developing a new engagement work program to align with these changes. How might your solution help us manage this transition?</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Hi, I'm Priscilla. Our board just approved a change in our risk appetite, so we're tightening our control processes. We're also developing a new engagement work program to align with these changes. How might your solution help us manage this transition?
Type your response here.</td></tr>
<tr><td>Navigation:
Learner selects the Submit button to advance.
Use Listen Again to replay Priscilla speaking.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

5.7 Priscilla Feedback Slide</td><td rowspan="4">
</td><td>Objective:
Recognize key terms in the context of auditing
Apply key industry terminologies in everyday language</td></tr>
<tr><td>Audio:
None</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Text reflects personalized AI feedback</td></tr>
<tr><td>Navigation:
Learner selects the NEXT button to advance.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

5.5 Elliot – Peer Sales Rep</td><td rowspan="5">

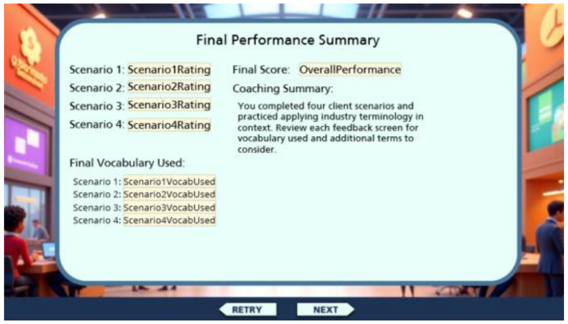

</td><td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
Communicate confidently with customers using appropriate tax and accounting terminology.</td></tr>
<tr><td>Audio:
Hey Vivian, I just met a client who's concerned about governance and compliance because their risk management framework is outdated. They've been thinking about hiring an external service provider, but they're worried about maintaining independence. If you were me, how would you position our software to meet their needs?</td></tr>
<tr><td rowspan="3">Notes:</td><td>On-Screen Text:
Hey Vivian, I just met a client who's concerned about governance and compliance because their risk management framework is outdated. They've been thinking about hiring an external service provider, but they're worried about maintaining independence. If you were me, how would you position our software to meet their needs?
Type your response here.</td></tr>
<tr><td>Navigation:
Learner selects the Submit button to advance.
Use Listen Again to replay Elliot speaking.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

5.5 Jake Feedback Slide</td><td rowspan="4">
</td><td>Objective:
Identify common tax and accounting terminology.
Recognize appropriate use of tax and accounting terminology in realistic business scenarios.
Apply tax and accounting terminology during customer conversations.
Communicate confidently with customers using appropriate tax and accounting terminology.</td></tr>
<tr><td>Audio:
None</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Text reflects personalized AI feedback</td></tr>
<tr><td>Navigation:</td></tr>
</table>

<table>
<tr><td></td><td></td><td>Learner selects the NEXT button to advance.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

5.6 Results</td><td rowspan="5">Will show the final graded result from the assessment.

</td><td>Objective:
N/A</td></tr>
<tr><td>Audio:
None</td></tr>
<tr><td rowspan="3">Notes:</td><td>On-Screen Text:
Final Performance Summary (personalized AI generated feedback)
Scenario 1: (Score)
Scenario 2: (Score)
Scenario 3: (Score)
Scenario 4: (Score)
Final Score: (Overall Score)
Final Vocabulary Used:
Scenario 1: (Vocabulary learner used in their response)
Scenario 2: (Vocabulary learner used in their response)
Scenario 3: (Vocabulary learner used in their response)
Scenario 4: (Vocabulary learner used in their response)
Coaching Summary:
You completed four client scenarios and practiced applying industry terminology in context. Review each feedback screen for vocabulary used and additional terms to consider.</td></tr>
<tr><td>Navigation:
Learner selects the Next button to advance.</td></tr>
</table>

<table>
<tr><th>Slide/Layer</th><th>Visuals</th><th>Description</th></tr>
<tr><td rowspan="2">Scene 5

5.6 Celebration</td><td rowspan="4">Vivian networking confidently.

</td><td>Objective:
N/A</td></tr>
<tr><td>Audio:
You did it! You’re ready for the industry.</td></tr>
<tr><td rowspan="2">Notes:</td><td>On-Screen Text:
Your performance demonstrates strong alignment of solution positioning to client needs. Continue refining your use of specialized vocabulary to enhance clarity and confidence.</td></tr>
<tr><td>Navigation:
Learner selects the EXIT button to leave the training.</td></tr>
</table>