UTAH SAFETY CONSULTANT

TALKING POINTS

# Opening and closing meeting scripts

Read these in the room, filling in the blanks. Then enter attendees, times, and notes in the app before you leave the table.

**Use with: App Step 3 Opening and Step 7 Closing. Fill the blanks out loud. Then type attendees, time, and notes into the app before you leave the room.**

## Opening meeting script

Hold this in a quiet office or conference room, about 15 minutes, before anyone walks the site. Speak to the owner, superintendent, or site lead and anyone else they want in the room.

Good morning. My name is **[your name]**, and I am here on behalf of Utah Safety Consultant. Thank you for having me at **[site / project name]** today.

This is an advisory safety audit, not an OSHA, MSHA, or DOT inspection. I am not a compliance officer, and I cannot issue a citation. The purpose is to walk the site and look at records with you, write down what I see, and give you a clear report with recommended fixes. You remain responsible for your safety program, for correcting hazards, and for regulatory compliance. I do not direct your employees or run the work.

The scope we agreed to in quote **[quote number]** is **[areas, operations, and records]**. If we need to add a site or a shift, we will talk about that before I start that extra work.

Here is the plan for the day. After we finish talking, I would like to review records first, for about 30 to 60 minutes. Then I will walk the site with **[escort name]**. I would like to have a short, private conversation with several employees — that is voluntary and confidential. I will not put names in the report unless the person agrees. I would like to close with you at **[time]** before I leave, to go over the main items.

While I am here I will follow your site rules and wear the required PPE, which I understand is **[PPE list]**. If there is an emergency, the muster point is **[muster point]**, and I will follow your lead.

Do I have your permission to take photographs of conditions for the report? Photos stay in the report and are not posted or shared except with you. **[Yes / no, and any limits]**.

One important point: if I see something I believe is an imminent danger — a condition that could kill or seriously injure someone right now — I will tell you immediately and ask you to get people out of that danger. I cannot shut the site down. That decision is yours. I will also call my office.

The written report is due **[agreed date]**. I will send it as a PDF to **[client contact email]**.

What questions do you have before we start on the records?

> After they answer, write the attendees, the time, photo permission, and any limits in App Step 3. Then go to Step 6 and start the records review.

## Closing meeting script

Hold this before you leave, about 20 to 30 minutes, with the same site lead and anyone they want in the room. Do not skip it because you are late for the drive home.

Thank you again for the time today at **[site / project name]** . I appreciate **[escort name]** walking with me and the crew making time for questions.

I want to start with what is going well. I noticed **[two or three specific positives — not fluff]** .

Now the items that need attention, starting with the most serious.

High:
**[each High finding, in one or two sentences: what, where, why it matters, and the fix you recommend]**
. If any of these were imminent danger, we already talked at the time. Has that condition been controlled? **[status]** .

Medium: **[short list]** .

Low and records gaps: **[short list]** .

I will put all of this in the written report, with photos, the standards I cited, a risk rating, a recommended action, and a suggested owner and due date. You decide how to correct the items and on what schedule, except where a condition is still dangerous today.

The report will go to **[contact]** by **[agreed date]** . After you have had a chance to read it, I will call in a few days to walk through questions.

If you want help writing a missing program, training, or a follow-up visit to verify the High items, I can send a separate quote. Nothing else starts unless you ask for it in writing.

What questions do you have? Is there anything I saw that you want me to look at again before I leave?

If you are willing, I would like you to sign an acknowledgement that we held this close-out and that you received the main findings verbally. The written report will follow. Signing it is not an admission of a violation and does not mean you agree with every item.

> Get the acknowledgement in App Step 7 (or on paper if they prefer). Write their questions and anything they already corrected. Then thank them and leave. Finish the report off site.

Templates and training tools only. Confirm regulations against the current CFR and any Utah (UOSH) state-plan rules. The client remains responsible for its own safety program and compliance. No credentials or licenses are claimed on these pages.