

Audit Report Writing

Writing Quality

Executive Summaries

Root Cause Analysis

Risk Management

Conflict Resolution

Interviewing Skills

Problem-Solving

Internal Control

Consensus-Building

Communications

Customized Workshops for Audit, Compliance, and Risk Management Professionals

Whether your audit, compliance, or risk management team needs help with writing reports, interviewing clients, or identifying risks, you need look no further than Margie Bastolla Facilitations. For more than 25 years, Margie's impressive facilitation, training, and speaking skills have wowed clients who invite her to return again and again. **Contact Margie today to discuss your team's training needs and objectives.**



Margie Bastolla

SAMPLE WORKSHOPS AND PRESENTATIONS

- *Mastering the Essentials of Audit Report Writing*
- *How to Write Clearly and Concisely*
- *Editing with Ease*
- *How to Write Persuasive Executive Summaries*
- *Writing Effective Policies and Procedures*
- *Maximizing the Audit Interview*
- *Win-Win Conversations: Transforming Conflict into Collaboration*
- *Leadership Skills for Positive Outcomes*
- *Performance Auditing: Measuring Impacts and Results*
- *The Essentials of Risk-Based Auditing*
- *New Auditor Bootcamp*

IT'S ALL ABOUT PASSION!

Contact Margie
today!

Once you experience Margie Bastolla, CIA, CRMA you will understand why she is in demand globally for her enthusiastic, informative sessions on the soft skills and technical business practices. Traveling the world to train thousands, Margie has led hundreds of workshops and conference sessions for Fortune 500 companies, the U.S. Military, UN agencies, government entities, and IIA chapters. She has worked in over 40 countries. Before forming her training company in 2014, Margie was an executive and leader at The Institute of Internal Auditors, Inc. for 20 years.

Writing Workshops

In-person and
virtual training
options

**CONTACT
MARGIE
TODAY TO
DISCUSS
YOUR TEAM'S
TRAINING
NEEDS!**

*Topics of your
choice are
available
upon request.*

Mastering the Essentials of Audit Report Writing

- Write compelling reports that engage your readers.
- Follow a disciplined approach for developing each audit observation.
- Identify root causes and recommend appropriate solutions.
- Engage in writing exercises that result in real-time improvement.

How to Write Clearly and Concisely

- Eliminate ambiguity and confusion in your writing.
- Use precise, direct wording.
- Learn how active and passive voice impacts clarity.
- Remove jargon, pompous words, and wordy phrases.
- Engage in writing exercises that result in real-time improvement.

Editing with Ease

- Reduce edits, rewrites, and revisions.
- Study an approach to editing others' writing that inspires learning and pride of authorship.
- Master the techniques of professional writers to improve report readability.
- Practice editing writing samples and reports.

How to Write Persuasive Executive Summaries

- Write to capture the executive's attention.
- Create a five-point message.
- Use wording that is clear, direct, and strategic.
- Practice writing an executive summary.

Writing Effective Policies and Procedures

- Write with your readers in mind.
- Write P&P's that employees read and operationalize.
- Delineate policies from procedures and create clear lines of responsibility.
- Eliminate ambiguity and confusion from written documents.
- Revise or create your organization's P&P's during the workshop

Soft Skills & Auditing Essentials

In-person and
virtual training
options

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Maximizing the Audit Interview

- Employ 15 essential steps during the interview's three phases.
- Ask the right questions and ask questions right!
- Practice four critical skills that ensure interview success.
- Deal with challenging personalities and build rapport.

Win-Win Conversations: Transforming Conflict into Collaboration

- Learn why conversations and negotiations fail.
- Employ effective listening and problem-solving skills.
- Discuss five ways to manage conflict and build trust.
- Discover how personalities and thinking styles impact communication.

Leadership Skills for Positive Outcomes

- Assess your leadership strengths and weaknesses.
- Foster trust and open communication.
- Motivate, mentor, and support team members.
- Build a culture of accountability and high performance.
- Monitor and evaluate performance effectively

Performance Auditing: Measuring Impact and Results

- Compare performance auditing to financial and compliance auditing.
- Identify criteria for auditing effectiveness, efficiency, and economy.
- Learn an approach to apply to any operation or initiative.
- Develop the audit objectives, scope, and test steps.
- Measure inputs, processes, outputs, and outcomes.

The Essentials of Risk-Based Auditing

- Understand the nature, categories, and characteristics of risk.
- Assess risk at the entity and activity levels.
- Study COSO's risk and control frameworks.
- Use strategies and tools to identify, measure, and prioritize risks.
- Plan and implement a risk-based audit.

New Auditor Bootcamp

- Study *The Standards* and the audit life cycle.
- Plan, conduct, and document an audit from beginning to end.
- Perform a risk assessment and identify control gaps.
- Gather audit evidence and document the audit.
- Practice interviewing and communication skills.

**In-person and
virtual training
options**

*Topics of your
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upon request.*

With Customized Training You Get:

- Tailored training that meets your department's specific objectives.
- Customized materials based on your department's policies, methodologies, reports, and templates.
- In-person and virtual training options.
- Expert feedback and coaching.
- Travel savings.
- Post-training follow-up.

Working with Margie is Easy.

1. Listen

She will learn about your team's training needs, challenges, and goals.

2. Customize

She will customize a workshop to meet your team's learning objectives.

3. Execute

She will deliver the training at your location and on your schedule.

4. Evaluate

She will provide post-workshop support to maximize learning.

Contact Margie Today!