

**Creating Impactful Relationships
with the C-Suite**

The Institute of
Internal Auditors
Chicago

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Speaker Bio

Margie Bastolla, CIA, is an Orlando-based trainer who helps internal auditors write clear, impactful reports; reduce report revisions; and quicken report issuance. She is author of the 2023 book *Clarity, Impact, Speed: Delivering Audit Reports that Matter, 2nd Edition*, published by The IIA.

Margie has taught thousands of auditors in hundreds of organizations to think critically and write clearly. She also teaches auditors how to build productive, supportive relationships in the workplace. Margie's clients include the Fortune 500, the U.S. military, the international agencies, and many private and public organizations globally. She has worked in over 40 countries.

Before forming her training company, Margie spent 20 years in executive and leadership roles at The Institute of Internal Auditors in Lake Mary, Florida. To learn more about her training, consulting, and executive coaching services, visit www.auditreportwriting.com.




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Benefits of Strong Relationships

- Happiness
- Productivity
- Consensus
- Freedom
- Advancement



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Let's get this conversation started!

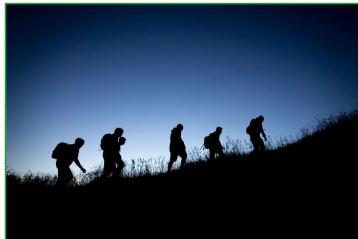
What does relationship-building have to do with your success as an internal auditor?



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Attributes of Strong Relationships

- Trust
- Respect
- Common goals
- Healthy interdependency



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Building relationships requires:

- Time
- Commitment
- Determination
- Communication
- Active participation




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Relationships further your ability to influence change.

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Executives are positioned to:


- Support your strategy
- Fund your idea
- Reframe your need
- Consider your solution
- Align support of other key stakeholders



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The Executive Mindset

- Strategic
- Big-picture-oriented
- Quick
- Focused
- Driven
- Bottom-line-centric



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However ...

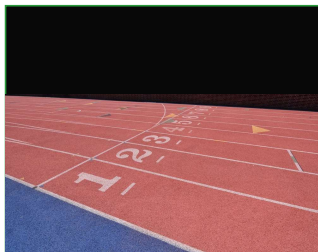
C-suite folks are people, too!



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Prerequisites

1. You must have a qualified internal audit activity.
2. You must understand the business fully.



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What You Can Do

1. Provide value.



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What You Can Do

- 2. Speak strategically.



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What You Can Do

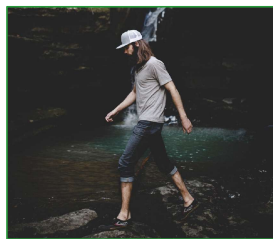
- 3. Offer ideas for improving the bottom line.



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What You Can Do

- 4. Replace hang-ups with authenticity.



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What You Can Do

5. Be a connector.



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What You Can Do

6. Be:

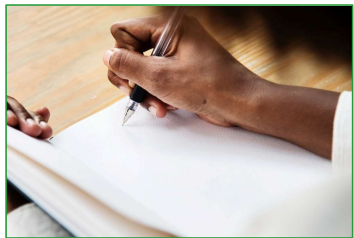
- Direct
- Transparent
- Specific
- Brief



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What You Can Do

7. Use clear, concrete language.



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7 DEADLY AUDIT REPORT Mistakes

Download & share these helpful tools!

THINK THINGS THROUGH
25 Questions to Report-Writing Excellence
The Audit Observation

Condition

1. Does the condition describe "the world as it is"?
2. Is the condition opposite the criteria?
3. Does the condition infer risk?
4. Can the reader tell that something is wrong?
5. Is the condition objective and factual?
6. Can the condition be quantified?
7. Does the condition describe the problem in terms of yesterday and today?
8. If needed, is brief background information included?

Criteria

SCAN ME

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Let's get personal!

Are you ready to start building?

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