

# **Extracted Conversations and Notes**

## **USB project PFF.docx**

Defined and proposed a way to support program manager...

Coordinated Redesigned steering committee deck

Assistant project manager role – ACAPS, Provisional Credit, E-sign

## **Revised Summary Reorged.docx**

Performance Goals, Utilization 78.6%, Key client/project deliverables, trusted advisor role, positive client feedback, billing expertise and \$6M win contribution, multiple trainings and leadership initiatives, areas for development.

## **Performance Note IWG Leadership.pdf**

Documented participation in managing Issuer Working Group (IWG). Contributions in pursuits, operations, research and thought leadership. Recognized proactive leadership, little oversight required, integral role in IWG design and development.

## **Credit Cards training PFF.docx**

Proactive involvement in payments training development. Acted as PM and content developer. Formed a team, created project plan, outlined training, ensured mid-June delivery.

## **FY14 Annual Summary.docx**

Utilization 77%. Exceeded expectations on multiple engagements (USB VCP, Prepaid IC Team Leadership, USB PMO, Billing). Recognized SME in Billing and Prepaid. Trusted advisor. Contributed to \$6M ICE/NYSE win. Led multiple trainings and teams. Positive client feedback.

## **Manager Readiness Self Evaluation.docx**

Self-assessment: exceeded expectations across engagements. SME in billing and prepaid. Demonstrated manager-level capacity in client and internal leadership roles. Contributions to firm growth, training, and onboarding. Areas of concern: limited risk/regulatory exposure.

## **Performance Note - Prepaid Comcast Council.pdf**

Recognized contribution to Comcast Payments Council. Developed sophisticated prepaid market study. Incorporated Fandango program info. High-quality, CPE-credit session. Strong analytical, writing, and presentation skills.

## **Performance Note \_ Instructor for Intern Training.pdf**

Positive feedback on intern training delivery. Used client examples, taught Excel, PowerPoint, visualization, coaching. Panelist for 350 interns. Strong teaching/coaching. Evaluations averaged 1.25–1.51 (1=best).

## **PFF Reviewer Comments.pdf**

Reviewer feedback across USB, Prepaid IC, ICE Billing. Praised initiative, independent work, building trust, PM and BA capacity. Suggested development in succinct communication, project management tools, and training in billing systems.

## **Performance Note - Billing and Revenue Management.pdf**

Appreciation note from PwC Director Laurie Fleet. Recognized SME in billing and revenue mgmt. Secured \$6M ICE/NYSE win. Contributions positioned firm for LSE, StateStreet, Northern Trust, Citi, Blackstone. Praised client engagement and relationship skills.

## **Performance Note ProjMgr CC Training.pdf**

Recognition from Director Kathleen McDowell for leading development and delivery of Credit Card 201 training. Managed team, project plan, comms, content framework. Praised proactive, organized leadership.

## **Partner and Director Feedback - Fidelity.pdf**

Feedback from Fidelity VP and PwC partners. Recognized early project value-add, insightful observations. VP impressed, shifted perception positively. Partner praised Ore and team for strong delivery.