

Re: Credit Payments training date
 Kathleen McDowell
 to:
 Olubusayo O Phillips
 03/22/2013 02:01 PM
 Hide Details
 From: Kathleen McDowell/US/FAS/PwC
 To: Olubusayo O Phillips/US/FAS/PwC@americas-us

I am free that time. Question is for you do you think we can have it done by then from a project managers perspective?

Regards,
 Kathleen

Director, PwC Payments Advisory
 m 415 608 7068

On Mar 22, 2013, at 11:43 AM, "Olubusayo O Phillips" <olubusayo.o.phillips@us.pwc.com> wrote:

Kathleen,

Sandeep is wondering if we can do the end of may... (I'm unavailable Wed 29th to Friday May 31st) but otherwise i'm available.

Thanks

Ore Phillips

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Sandeep Gupta---03/22/2013 11:50:14 AM---Can Kathleen do end of May? Sandeep Gupta

From: Sandeep Gupta/US/FAS/PwC
 To: Olubusayo O Phillips/US/FAS/PwC@Americas-US
 Cc: Aditya Betala/US/FAS/PwC@Americas-US
 Date: 03/22/2013 11:50 AM
 Subject: Re: Credit Payments training date

Can Kathleen do end of May?

Sandeep Gupta

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Olubusayo O Phillips---03/22/2013 12:45:33 PM---Sandeep/Aditya, Kathleen has noted below that she cannot make the July 9th date...
 She has suggested

From: Olubusayo O Phillips/US/FAS/PwC
 To: Sandeep Gupta/US/FAS/PwC@Americas-US, Aditya Betala/US/FAS/PwC@Americas-US
 Date: 03/22/2013 12:45 PM
 Subject: Credit Payments training date

Sandeep/Aditya,

Kathleen has noted below that she cannot make the July 9th date... She has suggested an earlier date June 18th/19th... Will this work?
 Does it need to be later?

Thanks,

Ore Phillips

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----- Forwarded by Olubusayo O Phillips/US/FAS/PwC on 03/22/2013 11:43 AM -----

From: Kathleen McDowell/US/FAS/PwC
 To: Olubusayo O Phillips/US/FAS/PwC@Americas-US
 Date: 03/22/2013 10:23 AM
 Subject: Re: Credit Payments Training Outline and First meeting Agenda

Thanks very much. A few thoughts

- I had mentioned to the training person that the date below doesn't work for me as I will be on holiday. June 18 or 19 would work. If that works for you can you reach out to the person who coordinates these for Payments COI and see if we can get that date on the calendar? Can you rework the timeline you outlined below based on those new dates and see if it's still feasible?

I think it's a great start to the deck and we can review/discuss at our first mtg. Thanks for following up
 Regards,

Kathleen

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Olubusayo O Phillips---03/19/2013 07:21:31 AM---Kathleen, Please find attached an outline/presentation shell for the credit payments training.

From: Olubusayo O Phillips/US/FAS/PwC
 To: Kathleen McDowell/US/FAS/PwC@Americas-US
 Date: 03/19/2013 07:21 AM
 Subject: Credit Payments Training Outline and First meeting Agenda

Kathleen,

Please find attached an outline/presentation shell for the credit payments training.
 [attachment "Credit_Card_Payments_201-June_2013.pptx" deleted by Kathleen McDowell/US/FAS/PwC]

Also the following is my proposed agenda for our first meeting on Friday March 29th. I've included more detail for you here (sub bullets) to get your perspective prior to the meeting. Sub bullet points will be excluded when I create the agenda document for the meeting.

Agenda (March 29th 11am PST?)

1. Introductions (All)

1. Team is
 1. You
 2. Aditya Betala (Banking ST&O Manager out of charlotte)
 3. Myself (Banking Risk Senior Associate out of minneapolis)
 4. An Experienced associate (TBD)
 - 5.
2. Opening Comments (Kathleen)
 1. Any overarching comments you have
 - 2.
3. Project Plan - Our deliverable and how we intend to work to get it delivered (Ore)
 1. Roles
 1. Kathleen M. - Content Direction/Oversight, SME insights, Overall Review
 2. Rest of Team - Content Development and Review
 3. Ore - #2 + project management
 - 2.
 3. Content Development & Review
 1. Content Development occurs individually
 2. Content Review occurs during weekly meetings
 3. Other arrangements as needed
 - 4.
 4. Deliverable and Timelines
 1. Deliverable is training deck with content for a 1 hour training session with Q&A
 2. Key administrative dates for our team
 1. Tentative Training date 7/9/13
 2. Course Outline and Confirmed training date to people team 5/28/13
 3. Complete CPE Design Document and get partner sponsor approval 6/11/13
 4. Complete deck including Partner sponsor review 6/25/13
 3. *Ore to create a 14 week mini project plan which we can discuss at the meeting*
 - 5.
 5. Meetings: The training date is 7/9/13 which is 14 weeks away from our first meeting
 1. Meet every 2 weeks for first 6 weeks
 2. Meet every week for last 8 weeks
 3. Plan to have training completely done and undergoing final review by end of week 11 (June 14), as partner sponsor review should be complete by June 25th (Middle of week 13).
 - 4.
 6. Walkthrough of Initial Credit Payments Outline (Ore)
 1. Once you have had a look, I will provide this outline to all participants in advance and ask them to spend about a half hour thinking through anything they want to add to the overall outline and areas they will be interested in. All participants can provide their input during the meeting
 2. Splitting up the Content development based on the Topics in the outline
 7. Other discussion points/questions/comments (All)
 - 8.
 9. Next Steps (Ore)
 1. Next meeting date: April 12
 2. Expectations for next meeting
 1. Provide view of the direction of your content area... (a fairly detailed outlined with the direction of content)...

Allows team to give input/ensure content is flowing together early on.
 - 3.

Regards,

Ore Phillips

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Re: assisting with trainings 
Kathleen McDowell to: Olubusayo O Phillips
Cc: Sandeep Gupta, Aditya Betala

03/12/2013 03:03 PM

Thanks. See my notes below.
Regards,

Kathleen

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Olubusayo O Phillips Kathleen, Happy to take the lead from a pr... 03/11/2013 06:37:46 AM

From: Olubusayo O Phillips/US/FAS/PwC
To: Kathleen McDowell/US/FAS/PwC@Americas-US
Cc: Sandeep Gupta/US/FAS/PwC@Americas-US, Aditya Betala/US/FAS/PwC@Americas-US
Date: 03/11/2013 06:37 AM
Subject: Re: assisting with trainings

Kathleen,

Happy to take the lead from a project management perspective..... To your points below:

a. **Organization of resources** - I can work with Sandeep and Aditya to identify two other resources that would be interested in joining the team. Let me know if any names pop into your mind and i can follow up with them. With regard to structure, do you want to try to get a manager on the team or are you fine with two seniors and an experienced associate or 3 seniors.

I THINK ONE MANAGER PLUS SA'S OR ASSOC

b. **30 minute touchbases** - I can take responsibility for setting these up including driving the agenda for the meetings... I suggest Friday 29th March (or we can do 22nd as well) for the first one.

LETS DO 29TH.

c. **Outline of course topics** - I can comb through the previous trainings (you've mentioned) and put together a proposed outline. I can share that with you a little bit before our first meeting and then that will be the topic of discussion for our first meeting.

PERFECT. SHARE END OF NEXT WEEK IF YOU CAN

Sound good?

THANKS

Ore Phillips

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Kathleen McDowell	Thanks everyone for offering assistance. I...	03/10/2013 04:31:43 PM
Olubusayo O Phillips	awesome thanks... P.S. feel free to let me...	03/08/2013 12:06:43 PM
Sandeep Gupta	Fantastic ! Count yourself in. Sandeep Gupta	03/08/2013 08:00:44 AM
Olubusayo O Phillips	Sandeep, I'd like to assist with the payme...	03/08/2013 10:43:24 AM