

CSSC: Scheduling a Visit

Scheduling Process

1. Ambassador decides to have Team present to their customer.
2. Ambassador contacts Team through IRM_Information@nationwide.com.
3. Team explains process and provides relevant documentation. This could include curriculum summary, actual curriculum, etc.
4. Ambassador presents information to Customer.
5. If customer is interested, Ambassador can:
 - a. Set up a meeting between customer and Scheduling to schedule presentation
 - b. Request open dates from Scheduling to present to customer to choose
 - c. Request open dates from customer to request from Scheduling.
6. Once date is set, Scheduling will post on Volunteer Network and send opportunity email to Lead Presenter Pool.
7. Scheduling will set up meeting with Ambassador and Lead Presenter for introduction
8. Lead Presenter will monitor Volunteer Network event to make sure that enough presenters sign up.
9. Lead Presenter and Ambassador follow up and confirm with Customer details of event 1 week prior to event

Roles/Responsibilities

Ambassador – Is the person who has approached the Team about presenting to their customer.

- Act as primary contact between customer and Team.
- Attend presentation(s), if possible. At least try to be at the initial meeting between customer and Team. This will help facilitate introductions.
- Work with customer to determine the topics allowed during presentation
- Work with Scheduling to set dates of presentation
- Follow up with customer 1 week before event for confirmation
- Help set up for presentation if needed.

Initial Contact – Person from CyberSecurity Challenge that is the primary contact between Ambassador and Team

- Explain process to Ambassador
- Provide relevant documents to Ambassador
- Provide Ambassador Scheduling contact

Scheduling – Jason and Cherise

- Work with Ambassador and customer to schedule date of presentation
- Do not schedule too many presentations too close together
- Communicate opportunities for presentations to Team
- Determine Lead Presenter for each engagement
- Work with lead presenter to determine # of volunteers needed for each event.
- Set up meeting between lead presenter and Ambassador

Lead Presenter – Person who is chosen or volunteers for a presentation.

- Lead Presenter will experience presenting material.
- Will monitor the events they are lead presenter to determine if they have enough volunteers
- Work with the presenter pool to get volunteers for their events
- Escalate if not enough volunteers sign up quick enough to Ambassador
- Make sure all presenters are trained and have event date, time, address, and contact information.
- Finalize presentation details with Ambassador 1 week before event.
- Provide order for handouts to Handout Assembler. Require 2 weeks lead time.
- Try to make sure at least one presenter is from Information Security

Handout Assembler – Associates who copy and count out needed handouts to provide to students during or after presentation.

- Prepare handouts for presentations.

Questions for Scheduling

- Name of group
- Contact Name, Phone, Email
- Address
- Number of Sessions wanted: # of students per session
 K-2 _____ _____
 3-5 _____ _____
 6-8 _____ _____
 High School _____ _____
- Timeframe for Sessions (i.e. Morning/Afternoon) _____