RMTTF

October 31, 2019

Centerpoint Offices - Houston

8:30 am

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Attendees: On the phone:

Tomas Fernandez, NRG Eric Blakey, Just Energy

Sam Pak, Oncor Art Deller, ERCOT

Kathy Scott, Centerpoint

Jim Lee, AEP

Sheri Wiegand, TXUE

Debbie McKeever, Oncor

Debbie opened the meeting reading the Antitrust Admonition.

Minutes from 10/3/19 were reviewed and approved.

**OCTOBER 31, 2019 Houston Training** - MarkeTrak/IAG Training

|  |  |
| --- | --- |
| MT/IAG | 51 Attendees |

17 REPs attending

31 surveys received

**LMS Stats**

|  |  |  |  |
| --- | --- | --- | --- |
| **LMS Stats** | In Progress | Complete | Total |
| MT YTD | 37 | 75 | 112 |
| MT All Time | 293 | 714 | 1007 |
| Retail 101 YTD | 118 | 65 | 253 |
| Retail 101 All Time | 562 | 215 | 777 |

**Training Plan for 2020**

Proposed dates for April and August training

Art confirmed Tuesday, January 14th in Room 206 for Retail 101 training

Kathy and Debbie are still negotiating with Hilton Garden Inn for February Austin training

|  |  |  |  |
| --- | --- | --- | --- |
| MONTH | LOCATION | TRAINING  | COMMENTS |
| JANUARY 14th | AUSTIN | RETAIL 101 | Art confirmed Room 206 for availability |
| FEBRUARY | AUSTIN | TX SET | DEB AND KATHY negotiating location  |
| FEBRUARY  | AUSTIN | INADVERTENT/MARKETRAK | DEB AND KATHY negotiating location |
| APRIL | DALLAS | RETAIL 101 | Proposed 21st, 2nd, or 1st – RMTTF on 2nd or 3rd  |
| MAY 6 | DALLAS | TX SET | Confirmed at Oncor |
| MAY 7 | DALLAS | MARKETRAK/INADVERTENT | Confirmed at Oncor |
| AUGUST | HOUSTON | RETAIL 101 | Proposed 6th, 11th, 12th RMTTF on 7th  |
| SEPTEMBER 23 | HOUSTON | TX SET | Tentative due to remodel at CNP |
| SEPTEMBER 24 | HOUSTON | MARKETRAK/INADVERTENT | Tentative due to remodel at CNP |

**RMTTF Meetings 2020**

|  |  |  |
| --- | --- | --- |
| DATE | TIME | LOCATION |
| THURSDAY, 01-09-20  | 9:30 | ERCOT MET CENTER |
| THURSDAY, 02-06-20 | 9:30 | ERCOT MET CENTER |
| THURSDAY, 03-05-20 | 9:30 | ERCOT MET CENTER |
| THURSDAY, 04-02-20 | 9:30 | ERCOT MET CENTER (relook at changing)  |
| FRIDAY, 05-08-20 | 9:30 | ONCOR, 1616 WOODALL RODGERS FRWY DALLAS ,TX 75202 |
| THURSDAY, 06-04-20 | 9:30 | ERCOT MET CENTER |
| THURSDAY, 07-09-20 | 9:30 | ERCOT MET CENTER |
| THURSDAY, 08-06-20 | 9:30 | ERCOT MET CENTER (relook at changing) |
| THURSDAY, 09-03-20 | 9:30 | ERCOT MET CENTER (relook at changing) |
| THURSDAY, 10-08-20 | 9:30 | ERCOT MET CENTER |
| THURSDAY, 11-05-20 | 9:30 | ERCOT MET CENTER |
| THURSDAY, 12-03-20 | 9:30 | ERCOT MET CENTER |

Tentatively changing 9/3 due to Labor Day

Will modify plan based on training schedule as noted above

**MarkeTrak/Inadvertent Training Feedback Review**

Reviewed surveys and discussed suggested revisions…

* Location of RMS IAG reports reference
* Scheduled breaks
* Training – visit on line module
* Switch Hold – minimize slides and discuss “clean” submission
* Possibly remove Verification section or revise and consolidate
* ACTION: Sheri and Tomas to research the “current occupant” process
* Slide 70 and 71 j6 for Appendix
* Slide 121 – remove the first 1st bullet for ‘Other’ issues
* Consider box lunches to shave some time
* Review ‘Bulk Inserts’ and consolidate information
* Developed new schedule

IAG and MarkeTrak Presentation

Section & Slide Numbers Per Presenters

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Topic Name** | **Slide Numbers** | **Presenters**  |  **Timing** | **Comments**  |
| HOST WELCOME | N/A | Host Company | 10min | 9:00 |
| Intro to MarkeTrak, What Is MarkeTrak  | Slides 1 Thru 9  | Debbie  | 6min | 9:10 |
| MarkeTrak Navigation  | Slides 10 Thru 20  | Tomas  | 10min | 9:20 |
| Admin Functionality  | Slides 21 Thru 22  | Tomas | 5min | 9:25 |
| Email Notification  | Slides 23 Thru 25  | Tomas | 2min | 9:30 |
| ERCOT Listserv | Slides 26 Thru 28  | Tomas | 4min | 9:35 |
| Missing Enrollment | Slides 29 Thru 30  | Sheri | 25min | 10:00 |
| Usage and Billing | Slides 31 Thru 62  | Sheri | 30min | 10:30 |
| **BREAK (15min) 10:30-10:45am** |
| Switch Hold | Slides 63 Thru 87  | Jim | 1h 15min | 10:45-12:00 |
| **LUNCH (45min + 10min Restroom) 12:00-12:55pm** |
| Inadvertent Gains | Slides 122 Thru 129  | Tomas | 17min | 12:55 |
| Rescission Walk Thru  | Slides 130 Thru 151  | Jim | 20min | 1:10 |
| IAS Walk Thru | Slides 152 Thru 173  | Tomas | 30min | 1:30 |
| **BREAK (10min) – 2:00pm – 2:10pm** |
| Verification  | Slides 174 Thru 184  | Kathy | 15 | 2:10 |
| Best Practices  | Slides 185 Thru 194  | Tomas  | 15 | 2:25 |
| IAG Reporting  | Slides 195 Thru 212  | Sheri | 15 | 2:40 – 2:55 |
| **BREAK (10min) 2:55-3:05** |
| Siebel Change  | Slides 88 Thru 90  | Kathy | 5 | 3:05Change slide location in deck  |
| DEVs | Slides 91 Thru 94  | Kathy | 8 | 3:10 Change slide location in deck |
| Bulk Insert  | Slides 95 Thru 115  | Tomas & Kathy | 15 | 3:20Change slide location in deck |
| Additional Day to Day Subtypes  | Slides 116 Thru 119  | Sheri | 10 | 3:35Change slide location in deck |
| Other Issues  | Slides 120 Thru 121  | Sheri | 2 | 3:40Change slide location in deck |
| Background Reports | Slides 213 Thru 216  | Tomas | 5 | 3:45 |
| Survey | Slide 217 |  | 5 | 3:50 |
| Jeopardy | Slide 218 |  | 30 | 3:55-4:25 |



**Discussed Goals for 2020 and Accomplishments for 2019**

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NEXT MEETING – Thursday, December 5th

Proposed Agenda for 12/5

1. Review LMS Stats
2. Review MT/IAG deck
3. Finalize Goals and Accomplishments
4. Review Training Plan 2020