RMTTF

December 5, 2019

ERCOT Met Center

9:30 am

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Attendees: On the phone:

Tomas Fernandez, NRG Eric Blakey, Just Energy

Kathy Scott, Centerpoint Jim Lee, AEP

Kyle Patrick, NRG Diana Rehfeldt, TNMP

Sheri Wiegand, TXUE

Debbie McKeever, Oncor

Jordan Troublefield, ERCOT

Art Deller, ERCOT

Sheri opened the meeting reading the Antitrust Admonition.

Minutes from 10/31/19 were reviewed and approved with one correction on the MT stats.

**LMS Stats**

|  |  |  |  |
| --- | --- | --- | --- |
| **LMS Stats** | In Progress | Complete | Total |
| MT YTD | 44 | 75 | 119 |
| MT All Time | 300 | 714 | 1014 |
| Retail 101 YTD | 203 | 86 | 289 |
| Retail 101 All Time | 577 | 236 | 813 |

**TDTMS MarkeTrak User’s Guide Revisions**

TDMTS is undertaking the task of updating the MT User’s Guide and would like to leverage the scripts from the MT On-line Modules as a basis for the overhaul.

ACTION: Art will provide the scripts to Kyle for all modules.

**Training Plan for 2020**

Dates are still proposed for Feb/Mar training in Austin and April training in Dallas

Kathy and Debbie are still negotiating with Hilton Garden Inn for February/March Austin training and may consider utilizing ERCOT Met Center for one of the days

|  |  |  |  |
| --- | --- | --- | --- |
| MONTH | LOCATION | TRAINING | COMMENTS |
| JANUARY 14th | AUSTIN | RETAIL 101 | Art confirmed Room 206 for availability |
| FEBRUARY/MARCH | AUSTIN | TX SET | DEB AND KATHY negotiating location |
| FEBRUARY/MARCH | 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 6 | HOUSTON | RETAIL 101 | Confirmed at CNP, RMTTF on Fri, 8/7 |
| SEPTEMBER 23 | HOUSTON | TX SET | Tentative due to remodel at CNP |
| SEPTEMBER 24 | HOUSTON | MARKETRAK/INADVERTENT | Tentative due to remodel at CNP |

Kathy and Debbie reported the room at HGI would accommodate 50, includes microphones/projectors, with lunch in the front area of the hotel. The meeting room would be at no charge provided the group can guarantee minimum # of rooms (10) and purchase lunch through the hotel. Reviewing budget numbers. Training plan should be finalized by the next meeting.

ACTION: Sheri to send out a follow up market notice ‘piggybacking’ ERCOT’s training notice for the January 14th training on December 9th

ACTION: Another training plan email will be sent 1/16 for the 2020 Training Plan

ACTION: Art will send another ERCOT training notice as soon as proposed training is confirmed

**January 14th, 2019 Austin Training** - Retail 101

|  |  |
| --- | --- |
| Retail 101 | 11 Registered |

Logistics:

* Name tags, markers, candy – “the box”
* Jim will order 2 boxes of the large candy bars – it was decided someone from the host city will be responsible for ordering the candy
* ERCOT – to provide books and printouts
* Lunch – TDSPs – Jason’s Deli (sandwiches, tea/lemonade, potato salad) – Kathy will order
* Lisa and Art will be presenters for Retail 101

**RMTTF Meetings 2020**

ACTION: Tomas to send ERCOT a note to change August 2020 meeting to August 7th in Houston

**Retail 101 Revisions**

Art presented the revised Retail 101 training deck. The following revisions were noted/suggested:

* Relationship room is back
* Vertically integrated slide transitioning
* Slide 22 - add SESCO ESI prefix and bracket for DOEs
* ACTION: Tomas to provide voice over notes to Art for ESI discussion
* Slide 23 - no purple for SharyMac
* Websites are linked in the presentation
* Bringing back the PUC rules slides
* Added TXSAET flow
* Slide 62 – suggestion to add demand
* Slide 71 – change to show monthly consumption to CR as orange arrow from ERCOT to the CR
* Slide 72- update with 2.0 version
* Slide 78- data extract example – move to data section
* Slides 89-92 – reworking EMIL slides
  + What is EMIL and how does it work
  + May use PP from ERCOT workshop
* Slide 97- how to construct workable extracts – led discussion
* LSEG after slide 86
* Slide 115 – MT and TXSET training

Art will make necessary revisions for the Jan 14th training.

**MarkeTrak/IAG Training revisions**

The plan is once the Instructor led training is solid, ERCOT will work on the Web Based training version

* Slide 5 – reordering agenda
* Slides 8 & 9 – update before the Feb/Mar training ACTION
* ACTION: Jim will review the Switch Hold process and add a comment on the process –“review if current ROR, and if a SH exists in MIS, then submit a 650\_01 to remove”
* ACTION: Tomas and Sheri to review current occupant situation and fraud management best practices – slide 156
* Bulk Inserts – pause on consolidation and see how material flows before make any changes

**Mass Transition On line Module**

ACTION: Sheri and Jim will work to develop script and plan for Mass Transition module based on early outline.

Feb – Jim and Sheri to have near-finished product (using material from RMS Workshop)

March – finalize and review on-line module

April – Launch

NEXT MEETING – Thursday, January 9th

Proposed Agenda for 1/9

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