RMTTF MEETING NOTES

Thursday, February 4, 2021

9:30 AM

WEBEX ONLY

Debbie opened the meeting and read the Antitrust

INTRODUCTIONS OF THOSE ATTENDING:

* TOMAS FERNANDEZ NRG
* SHERI WIEGAND TXU
* DIANA REHFELDT TNMP
* MATT TSCHETTER ERCOT
* JORDAN TROUBLEFIELD ERCOT
* JIM LEE AEP
* KATHY SCOTT CENTERPOINT
* DEBBIE MCKEEVER ONCOR
* ERIC BLAKEY JUST
* MARTY ALLEN ONCOR

Meeting Minutes from January 15th were approved.

LEARNING MANAGEMENT SYSTEM STATISTICS

LMS STATS WERE PROVIDED BY MATT WHICH INCLUDED:

|  |  |  |  |
| --- | --- | --- | --- |
| LMS WBT STATS | IN PROGRESS | COMPLETE | TOTAL |
| MARKETRAK - YEAR TO DATE | 11 | 14 | 25 |
| MARKETRAK – THRU 12/31/20 | 367 | 819 | 1186 |
| MARKETRAK – ALL TIME | 378 | 833 | 1211 |
| RETAIL 101 YEAR TO DATE | 34 | 10 | 44 |
| RETAIL 101 ALL TIME | 798 | 373 | 1171 |

Matt noted MT modules on LMS were ‘reset’, therefore ALL TIME stats will need to add participation #s through 12/31/20

MASS TRANSITION TRAINING NUMBERS IN LMS – MODULE RELEASED NOVEMBER 2020

7 INPROGRESS

7 COMPLETE

14 TOTAL

UPCOMING RETAIL MARKET TRAINING CLASSES REGISTERED ATTENDEES

ALL VIA WEB-EX

RETAIL 101 40 REGISTERED FOR MARCH 30

MARKETRAK-INADVERTENT GAIN 23 REGISTERED FOR MARCH 31

ACTION ITEM: Sheri will send out reminder notices on Retail and MT training on 3/8 and 3/24.

REVIEW OF SURVEYS

**Retail 101**

* 11 of 36 responses
* Most of participants enrolled via referral
* Strong results
* Comment noted class was presented at a good pace
* Suggested a slide of acronyms, possibly Top 10, send out to participants prior to class
* Technical difficulties were experienced, Zoom was suggested, however noted some companies do not support the Zoom platform
* Make sure panelists are accepted otherwise they will lose visibility of chat

**MarkeTrak/IAG Training**

* 15 of 29 responses NOTE: allowed time for surveys to be completed while Jeopardy game was loaded
* Strong results
* Comments noted pace was good, interactive and found checkpoint questions valuable
* “the presenters were friendly and enjoyed providing detailed information for better business practices/better customer service experience”
* “very knowledgeable facilitators and helpful information. Everything was clearly organized. Thank you”
* Noted it was important to go through introductions and suggested after the first break
* Other comments noted course was long and suggested more breaks
* Suggested agenda – 2- 10 minute breaks in AM, 2 – 10 minute breaks in PM, 1 – 45 minute lunch and let participants know at the beginning
* Housekeeping slide should be updated to reflect WebEx agenda and instruction on ‘re-opening’ participant list after change in presenters
* ACTION ITEMS:
  + Sheri will update timings on presentations including proposed breaks
  + Sheri will update trend analysis on subtypes and reporting slides based on year end data through 2020

Modifications to MarkeTrak/IAG training deck will be reviewed next meeting in March.

MARKETRAK MODULES REVIEW

Marty Allen and Marina Grady reviewed MT Administration and Reporting modules.

Marty noted the audio was cutting out on MT Administration and after the second checkpoint question, the module would not advance.

Matt Tschetter indicated ERCOT was ‘redoing’ all audio on modules to ensure clarity and this could be corrected.

ACTION ITEM: Marty suggested the following content revisions to the Reporting module and will send a note summarizing to Debbie to forward to Matt @ ERCOT.

* ‘Help’ feature shows options that are not available on Report Types (slide 1 of 6), Distribution Reports
* New screen shots are needed on a few slides, yet the content is accurate
* Only content change noted is where user needs to subscribe to a notification email, however, system will automatically send email

TXSET WBT Training

Matt presented Art’s framework concept for TXSET WBT training.

It will be presented as a ‘menu of options’ so learners can select specific sections and module does not have to be completed start to finish. TF agreed with structure.

Module will begin with foundations and behind each selection of transaction examples it was suggested to display arrows and swimlanes as a reference.

Same EDI guides should be provided at the end.

A Mass Transition selected was suggested to be inserted after Reconnect for Non-Pay.

Suggested moving TXSET Working Group near the beginning, after ‘How it is used’.

TRAINING PLAN for 2021

Schedule mid-year ILT WebEx training mid year

Retail 101 – 6/8

MarkeTrak/IAG – 6/15

ACTION ITEM: Matt will forward note to Art to approve scheduling.

Task Force will focus energy on WBT on line module for TXSET

In June, the Task Force will decide if ILT is possible for late Q3/Q4. If not, ILT WebEx for TXSET will be discussed.

RETAIL TRAINING NEWSLETTER

At RMS it was suggested a newsletter or notice be drafted by RMTTF for circulation to RMS listserve providing training learnings, ‘did you know’ topics, etc. with the goal of reaching more market participants who may not be able to attend training or attend RMS. This will be discussed at the next meeting for suggested topics. Some examples might be the no current occupant process, mass transition information, or the IAG performance report.

DRAFT AGENDA for 3/4/21

* LMS Stats
* Enrollment for ILT WebEx training
* Retail Training Newsletter discussion – goal/scope, suggestions
* Modifications for MarkeTrak / IAG training deck
  + Updates on Subtype Analysis
  + Reporting IAG data
  + Housekeeping slide
  + Other modifications
* Continue discussion on TXSET WBT development