RMTTF MEETING NOTES

Friday, March 17, 2021

9:30 AM

WEBEX ONLY

Sheri opened the meeting and read the Antitrust

INTRODUCTIONS OF THOSE ATTENDING:

* TOMAS FERNANDEZ NRG
* SHERI WIEGAND TXU
* Art Deller ERCOT
* JORDAN TROUBLEFIELD ERCOT
* JIM LEE AEP
* KATHY SCOTT CENTERPOINT
* DEBBIE MCKEEVER ONCOR

Meeting Minutes from February 4th 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  | 26 | 19 | 45 |
| MARKETRAK – ALL TIME | 392 | 839 | 1231 |
| RETAIL 101 YEAR TO DATE | 68 | 30 | 98 |
| RETAIL 101 ALL TIME | 830 | 393 | 1223 |
| Mass Tran YTD | 16 | 20 | 36 |
| Mass Tran All Time | 16 | 20 | 36 |

UPCOMING RETAIL MARKET TRAINING CLASSES REGISTERED ATTENDEES

ALL VIA WEB-EX

RETAIL 101 60 REGISTERED FOR MARCH 30

MARKETRAK-INADVERTENT GAIN 32 REGISTERED FOR MARCH 31

ACTION ITEM: Sheri will send out reminder notices on Retail and MT training on 3/23.

RETAIL 101 3 REGISTERED FOR June 8

MARKETRAK-INADVERTENT GAIN 1 REGISTERED FOR June 15

MARKETRAK MODULES REVIEW

Debbie to check with Marty if Admin module changes are needed.

All other changes discussed at February meeting where changed and confirmed by Art.

**MarkeTrak/IAG Training**

* Reviewed presenters, timing, and break schedule for training
* Introductions after first break *(name, company, responsibility, what they expect to learn from the training)*
* Class will be told they will have a break mid-morning, lunch around noon, and two afternoon breaks to set expectations. *(updated housekeeping slide to include)*
* Housekeeping slide updated to reflect instruction to ‘re-opening’ chat after change in presenters
* Reviewed reporting slides 160-162 that were update by Sheri. (no changes needed)
* ACTION ITEMS:
	+ Sheri will update trend analysis on subtypes and reporting slides based on year end data through 2020
	+ Slide 8 – will remove black box and use that information as talking points. Expand the chart to make bigger. Chart will reflect July – 2018 through December - 2020
	+ Slide 9 – will update through December 2020.
	+ Slide 209 – Add QR Code to slide *(will send link through chat during training)*

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 swim lanes 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’.

* Aiming for EOY as timeline for development

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.

* Create template to follow if we implement

Mass Transition Module

Discussed possible changes to the module to highlight or list possible unhappy scenarios and where to familiarize themselves with it. (Link to section in RMG)

Will wait for TDTMS and/or TXSet discussion.

DRAFT AGENDA for 4/1/21

* LMS Stats
* Enrollment for ILT WebEx training
* Review survey results and feedback from March Training (Retail 101 and MarkeTrak/IAS)
	+ Make any changes based on feedback or survey
* Retail Training Newsletter discussion – goal/scope, suggestions
* Continue discussion on TXSET WBT development
* MARKETRAK MODULES REVIEW
	+ Admin
	+ Siebel Change
	+ Overview