MTTF MEETING

April 1, 2021

9:30 AM

TOMAS FERNANDEZ, RMTTF CO-CHAIR OPENED THE MEETING AND READ THE ANTITRUST STATEMENT.

INTRODUCTIONS FOR THOSE ATTENDING:

* TOMAS FERNANDEZ NRG
* SHERI WIEGAND TXU
* DIANA REHFELDT TNMP
* ART DELLER ERCOT
* JORDAN TROUBLEFIELD ERCOT
* JIM LEE AEP
* DEBBIE MCKEEVER ONCOR

REVIEW AGENDA

* TOMAS REVIEWED THE AGENDA. NO COMMENTS WERE MADE.

REVIEW MEETING NOTES FROM LAST MEETING

* MEETING NOTES FROM LAST MEETING WERE CORRECTED WHICH INCLUDED ONE CHANGE – DATE WAS INCORRECT.

ART PRESENTED THE LMS STATS

**LMS Stats (4/1/2021)**

|  |  |  |  |
| --- | --- | --- | --- |
| **LMS WBT Stats** | In Progress | Complete | Total |
| MT YTD | 30 | 21 | 51 |
| MT All Time | 370 | 822 | 1192 |
| Retail 101 YTD | 77 | 32 | 109 |
| Retail 101 All Time | 839 | 395 | 1234 |
| Mass Tran YTD | 17 | 23 | 40 |
| Mass Tran All Time | 17 | 23 | 40 |

REGISTERED FOR JUNE TRAINING:

* RETAIL 101 = 14
* MARKETRAK – IAG = 6

MARKET NOTICES FOR JUNE TRAINING

* ART SAID ERCOT WILL SEND OUT THE REMINDER LATE APRIL OR EARLY MAY.
* SHERI WILL SEND THE RMTTF REMINDER AFTER ART SENDS THE ERCOT TRAINING ANNOUNCEMENT AND AGAIN JUNE 1ST.

JUNE TRAINING DISCUSSION:

* REVISE THE MARKETRAK IAG CLASS INTO TWO HALF DAY SESSIONS OR MINIMIZE THE COMMENTARY OR MINIMIZE THE SLIDES AND EMPHASIZE THAT MODULES ARE CURRENT AND AVAILBLE IN THE ERCOT LMS.
* DECISION WAS TO MODIFY THE PPT TO MINIMIZE SLIDES AND MINIMIZE AS MUCH AS POSSIBLE WITHOUT CHANGING THE CONTENT.
* CHANGE AND PUT IAG AFTER LUNCH AND END WITH SWITCH HOLD BEFORE LUNCH
* TF WILL REVIEW AGAIN AFTER THE JUNE TRAINING TO DETERMINE IF CLASS SHOULD BE DIVIDED INTO TWO CLASSES ESPECIALLY SINCE REMOTE LEARNING

SURVEY RESULTS FROM RETAIL 101 AND MARKETRAK/IAG:

ART PROVIDED THE FOLLOWING SURVEY RESULTS FROM THE RETAIL 101 AND MARKETRAK IAG TRAINING.

ART SAID SURVEY RESULTS LOOK GREAT AND ALL WERE POSITIVE EXCEPT ONE.

**MARKETRAK IAG TRAINING – MARCH 31**

* 21 ATTENDEES
* 14 SURVEY RESPONSES RECEIVED

SURVEY QUESTIONS AND RESPONSES:

WHAT IS THEIR PARTICIPANT TYPE?

* QSE 0
* LSE/REP 8
* TDSP 2
* ERCOT 1
* OTHER 3

WHAT DID WE DO WELL?

* Clear/concise and very knowledgeable presenters. Great job!
* Topic coverage was clear and well explained when questions were asked.
* You guys are great! Very knowledgeable with a great attitude and the whole time tried to keep participants engaged.
* Explanation and delivery of the material was great as the panel certainly demonstrated their expertise.
* Discussing examples and coming up with situations helped drive home the material presented and passed along the knowledge.
* You guys always do well very knowledgeable of the content
* Very clear and deep analysis
* Each presenter was very good with their presentation. This was very helpful. Thank you.
* I think the IAG/IAL part was very informative and helped to understand how it works and the reasons for it.
* Great Presentation
* Covered best practices
* Lots of info provided

HOW CAN WE IMPROVE?

* Example are always good for us visual/"hands on" learners.
* Please consider adding URLs to areas such as reports and bulk insert templates to make it easier for the user that occasionally needs this information, especially helpful when web site/pages are updated. Consider putting all login information into a single email to make it easier for individuals to log in. It was my experience that the email sent yesterday took me to the presenter's login page with a small note/link to get to student's link to access the online presentation. Including the link to the student's login and password in the email would greatly simplify the process, especially for those dealing with normal workday issues and running behind to get connected to the class. Otherwise it was a pleasurable and informative session.
* A great deal of theory. Perhaps adding a few real time examples, showing in practice how to submit most important requests while asking for group participation, could help increase theory retention.
* Organizing the IAG slides together, I felt we continued to revisit parts of the process. Which wasn't a bad thing, I just expected it to be grouped in back to back slides.
* I would like to see more how to steps on creating. I know there are modules but would like to see examples
* Lots of raw info to take in. Just the nature of the course
* For those that are new to ERCOT's portal, it would be helpful to have links on the presentation to give a clear picture of where to go for Reports etc.
* The reporting section and latter half of the afternoon wasn’t as engaging but I think that is just because it’s things that we won’t use as often and won’t apply as much as IAG.
* Use examples or visuals rather than reading off the presentation. This could have been an overview and not an all-day training.
* Length of training.

**RETAIL 101, MARCH 30:**

* 44 ATTENDEES
* 25 SURVEY RESPONSES RECEIVED

SURVEY QUESTIONS AND RESPONSES:

MARKET PARTICIPANT TYPE:

* 3 QSE
* 9 LSE/REP
* 5 TDSP
* 2 ERCOT
* 6 OTHER

HOW DID THEY LEARN ABOUT THE COURSE?

* ERCOT.com 2
* ERCOT Learning Management System (LMS) 5
* Market Notice 4
* Referral 3
* Social Media 0

WOULD RECOMMEND THE COURSE TO OTHERS?

* 1 DISAGREED
* MAJORITY AGREED

WHAT DID WE DO WELL?

* Kept a good pace.
* Class was right mix of information and banter to keep the presentation interesting.
* Had a good deal of information and presented it well
* Engaging participation
* Awesome presentation
* I loved the dry humor.
* Thought the course was informative and as collaborative as it could be virtually with strangers.
* Great presentation
* Very informative
* Had a good deal of information and presented it well
* The class was very entertaining Easy to engage
* Really good and knowledgeable presenters and panel
* Everything needed
* Very well organized
* Very clear and deep course. No stone left unturned.

HOW CAN WE IMPROVE?

* Nothing comes to mind at this point. Job well done.
* Information was not relevant to me (an analyst at a REP). The information was not really informative about the retail industry specifically, more just about ERCOT mechanics around the industry
* Nothing comes to mind at this point. Job well done
* Too much background noise, mute everyone unless they are speaking
* Provide more details in the Retail Market Responsibilities and Market Rules sections. Also have a Jeopardy after each section!
* N/A
* n/a
* Maybe a little slower pace for newbies to electricity
* Information was not relevant to me (an analyst at a REP).
* Ya’ll did very well.
* Could be a bit more engaging and interactive. I know it is limited due to the format.

FUTURE TX SET MODULE

* EVERYONE ATTENDING IS IN FAVOR OF THE APPROACH ART/ERCOT IS PROPOSING. EVEN IF EVERYONE RETURNS TO FACE TO FACE TRAINING, THE MARKET NEEDS A TX SET MODULE.
* APPROACH WILL BE VERY EFFICIENT FOR THOSE TAKING THE MODULE SINCE THE BUSINESS PROCESSES WILL BE INDIVIDUAL/SEPARATE.

MT/IAG TRAINING MODULE

SLIDES WERE REVIEWED, MODIFICATIONS AGREED, SLIDES MODIFIED

SLIDE 4 – COOKBOOK & USE MODULE

SLIDE 5 – HIGHLIGHT USAGE & BILLING, SWITCH HOLDS

SLIDE 11 – HOW TOS, STEP UP REPORTING

SLIDE 15 – HELP FEATURE

SLIDE 16 – SET URLS

SLIDE 18 – REPORTS

SLIDE 19 & 20 – GO OVER HOW TO

SLIDE 22 – EVERYONE HAS A ROLODEX AND NEEDS TO BE MAINTAINED

SLIDE 24 – EMAIL AUTOGENERATED – CAN GET INDIVIDUAL MTS

SLIDE 26/27 – ADD SPECIFIC LISTSERVES: RMS, RMTTF, TXSET, TDTMS, WEATHER MORATORIUMS – ADD TOMBSTONE

SLIDE 33 – MAKE TOMBSTONE LARGER- AT LEAST 3-5 DAYS

USAGE & BILLING

SLIDE 61 – EXPAND QUESTION- CLARIFY TRANSACTION #S, MONTHLY USAGE

ACTION ITEMS

TOMAS WILL REARRANGE DOCUMENT AND POST TO NEXT MEETING

DEBBIE WILL CHECK ON ADMIN FUNCTION FOLLOW UP WITH MARTY ALLEN

OTHER BUSINESS

RMTTF NEWSLETTER

AT A FUTURE RMTTF MEETING, INVITE ERIC TO FURTHER EXPLAIN THE FORMAT, LOOK AND FEEL OF HIS VISION OF THE NEWLETTER.

AGENDA ITEMS FOR NEXT RMTTF MEETING:

* FEEDBACK FROM MODULES
* LMS STATS
* MARKETRAK IAG PPT
* MODIFICATIONS
* SLIDES PER PRESENTER
* TIMINGS

MEETING ADJOURNED