RMTTF MEETING NOTES

Thursday, November 4thth, 2021

9:30 AM

WEBEX ONLY

Debbie 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
* Carolyn Reed Centerpoint
* Diana Rehfeldt TNMP
* Eric Lotter Grid Monitor
* Lysette Ballance CNP
* Eric Broach Frontier

Meeting Minutes from September 2nd will be reviewed at the December 2nd meeting.

**LEARNING MANAGEMENT SYSTEM STATISTICS**

LMS STATS WERE PROVIDED BY ART WHICH INCLUDED:

|  |  |  |  |
| --- | --- | --- | --- |
| **LMS WBT Stats** | In Progress | Complete | Total |
| MT YTD | 73 | 83 | 156 |
| MT All Time | 439 | 903 | 1342 |
| Retail 101 YTD | 239 | 121 | 360 |
| Retail 101 All Time | 1001 | 484 | 1485 |
| Mass Tran YTD | 25 | 35 | 60 |
| Mass Tran All Time | 25 | 35 | 60 |

Commented that the on-line modules continue to see traffic.

**MARKETRAK TRAINING PLAN – PARTS 1 AND 2**

Given the limits of the ERCOT LMS (cannot enroll in two classes with the same name), it was concluded to retitle the two parts and keep the registration/surveys separate going forward.

The task force will need to review the Jeopardy game, creating two games with relevant Q&A for each day. This will be taken up at a later meeting.

Discussion also took place regarding future training offered if MarkeTrak will be undergoing a tech refresh and enhancements around Q3 of 2022. It was decided to proceed with the two-day ILT WB Training for Q1 of 2022, then determine the remaining training plan for 2022 based on current COVID policies of ERCOT and market participants.

For the **MarkeTrak upgrade** (tech refresh with look and feel of FlighTrak), all materials (current on-line modules, current MT training decks) will need to be revised once development is further along. It was suggested a few ½ day training sessions – ILT – be conducted prior to launch. The material will cover SCR 815 and the tech refresh. Sheri will continue to provide RMTTF with an update from TDTMS on MarkeTrak Upgrade status.

A separate training and materials review will occur with NPRR 1045, RMGRR169, and SCR817 aligning with TXSET 5.0.

**SURVEY RESULTS**

MarkeTrak – Parts I and II

26 Day 1, 25 Day 2, 13 respondents to survey

TDSP/LSE/Other

All comments were positive indicating the class was “clear and organized”. One respondent felt the intros were unnecessary. TF felt this was still valuable to learn expectations of each participant and it serves as an “ice breaker”.

Retail 101: 9/30 class (Art and Bill)

16 respondents, 46 attended, 9 no-shows

QSE/CRRAH/LSE/TDSP/Other

Art commented the class really was “too big” making it challenging to manage the noise when participants are taken off mute to engage in the class. Nine comments and all are positive. Only suggestion was to mute everyone (which Art and Bill attempt to do).

**2022 RMTTF Meeting Dates**

The following meeting dates were reviewed. ACTION: Debbie will forward request to Suzy to be placed on the ERCOT calendar for 2022:

2022 REQUESTED RMTTF MEETING DATES WITH START TIMES

|  |  |  |
| --- | --- | --- |
| THURSDAY, 01-06-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 02-03-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 03-03-2022 | 1:30 PM | RMTTF MEETING |
| THURSDAY, 04-07-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 05-05-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 06-02-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 07-13-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 08-04-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 09-01-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 10-06-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 11-03-2022 | 9:30 AM | RMTTF MEETING |
| THURSDAY, 12-01-2022 | 9:30 AM | RMTTF MEETING |

MarkeTrak Training will be scheduled for Wednesday, March 3rd.

IAG/Switch Hold MarkeTrak Training will be scheduled for Thursday, March 4th.

If necessary, RMTTF will meet following Thursday’s training @ 1:30 PM.

ACTION: Art will confirm a date for Retail 101 ILT, Web-based in Q1 and prepare marke

**GOALS & ACCOMPLISHMENTS**

|  |  |
| --- | --- |
|  | **2021 Goals** |
| **1.** | **Facilitate the following Instructor-led Courses:**   * + **Retail 101**     - **January 19th , WebEx only**     - **March 30th , WebEx only**   + **MarkeTrak/Inadvertent Gain Training**     - **January 26th, WebEx only**     - **March 31st, WebEx only**   + **TXSET 101**      - **TBD, WebEx only** |
| **2.** | **~~Remain flexible and continue to monitor ERCOT and market participant COVID-19 guidelines to determine when in person classed may resume~~** |

|  |  |  |
| --- | --- | --- |
| 3. | ~~Update~~ Continue developing TXSET 101 training materials for WebEx training only ~~while maintaining a high level of engagement of participants~~ |  |
| 4. | Support ERCOT market notifications and communications for training efforts COMPLETE |  |
|  |  |  |
| 5. | Verified content and m~~M~~odif~~y~~ied MarkeTrak on-line training modules to align with market revisions as needed – (list subtypes revised) |  |
| 6. | Conduct Instructor-led retail market training, WebEx only and in person if permitted COMPLETE |  |
| 7. | Modify training materials based on feedback as warranted COMPLETE |  |
| 8. | Modify training materials to maintain consistency with Retail market changes – Emergency Conditions List directing Mass Transition Training updates |  |
| 9. | Collaborate with RMS working groups by providing input when updating market documentation (i.e. user guides, process flows) TDTMS supporting training |  |
| 10. | Support enhancements for ERCOT’s Learning Management System DELETE – no enhancements this year |  |

**GOALS FOR 2022**

Same as above with the following proposed revisions:

1. Breaking up #1 into Facilitate Retail 101 training by providing SME support and a second category on Conducting MarkeTrak and IAG/Switch Hold training
2. Same with clarifying planning for Q2 forward will be based on ERCOT and market participant COVID policies
3. Keep with a goal of completion and launch
4. Keep
5. Same and clarify addition of SCR815 & MarkeTrak Technical Refresh training development
6. Same
7. Add ‘survey results’
8. Merge #5 and #8 into one
9. Keep
10. Keep

ACTION: Sheri will develop new list of goals for 2022 and accomplishments for 2021 for review in December /January timeframe.

**TXSET WBT**

Art reported the “first cut” of the WBT will be available at next month’s meeting

**MASS TRANSITION MODULE REVISIONS**

ACTION: Art was checking with Matt Tschetter on the status of the revisions that were reviewed during the September 2nd meeting. Matt had performed revisions to the script during the meeting and was planning updates to the visuals and re-recording sections of the module.

DRAFT AGENDA for 12/2/21

* LMS Stats
* Review 2022 Training Plan
* Review MarkeTrak Training Materials – revise as needed
* TXSET WBT Review of “first cut”
* Mass Transition Module modifications – status
* Review of Goals & Accomplishments