RMTTF MEETING

05-23-2022

9:30 AM

WEBEX ONLY

MEETING NOTES

Tomas Fernandez Chaired the meeting and welcomed everyone.

Antitrust statement

Antitrust statement was read

Agenda Review

Agenda was reviewed, no comments were made and no changes were requested.

Introductions

Those attending the meeting that were listed on the web-ex included:

* ART DELLER ERCOT
* TOMAS FERNANDEZ NRG
* DEBBIE MCKEEVER ONCOR
* SHERI WIEGAND VISTRA
* JORDAN TROUBLEFIELD ERCOT
* KATHY SCOTT CENTERPOINT
* BILL SNYDER AEP
* CAROLYN REED CENTERPOINT
* ERIC LOTTER GRIDMONITOR
* LYNETTE BALLANCE CENTERPOINT
* MELINDA EARNEST AEP
* CALL IN #4 – NO NAME OR COMPANY PROVIDED

APRIL 7 Meeting Notes

Meeting notes from the April 7 RMTTF meeting were discussed. No questions were asked. No changes were made. Notes are considered final.

ERCOT Learning Management System (LMS) Statistics

Art provided the following LMS Stats for the online modules as of 5-23-2022

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| --- | --- | --- | --- |
| **LMS WBT Stats** | In Progress | Complete | Total |
| MT YTD | 22 | 32 | 54 |
| MT All Time | 470 | 944 | 1414 |
| Retail 101 YTD | 83 | 43 | 126 |
| Retail 101 All Time | 1103 | 545 | 1648 |
| Mass Tran YTD | 2 | 11 | 13 |
| Mass Tran All Time | 32 | 55 | 87 |

Art said that the TX SET online module included the following:

10 started the training module

09 in progress

08 completed the module

TX SET online module training

It was mentioned that ERCOT has not sent the quarterly notification that includes dates and additional info for upcoming training.

That may help increase the numbers.

Many are not aware that the training is available.

Suggestion was made for Sheri to possibly send out an email from RMTTF indicating the TX SET training is now available online.

Marketrak Instructor led virtual training classes

Classes are currently scheduled for June 1, 2

Lengthy discussion regarding whether or not to move the training such that the new screens could be included in the training. Concern was noted about confusing those attending by possibly presenting with the old/current screens.

This is based on the Marketrak Technical Refresh that will result in changes of the screens that will be implemented on June 4, 5 weekend and in effect on Monday, June 6.

It was stated that once you get passed the new screens and into the updated Marketrak, that the screens look the same so not every slide that has a screen shot needs to be updated.

It was determined the best way to address the concern is to review each slide.

Those in attendance today reviewed each slide to determine which slides could be classified as one of the following:

* Slide is correct and will be retained
* Slide needs updating with the new screen
* Slide should be deleted due to no longer relevant

Many of the slides are accurate but should be replaced in future training due to the color in the screen will change. For the June training, the presenter should just state that following the June 4 implementation, the colors may change for some of the slides.

Marketrak Part 1 and Part 2 presentations were reviewed and Tomas made changes as each slide was discussed and changes agreed.

Presentations are now current and these will be presented for the June training. Tomas emailed the presentations to all the presenters.

Presenters for Marketrak Part 1 (Overview) and Part 2 (IAG and Switch Hold) include:

Tomas, Sheri, Debbie, Kathy Carolyn, Melinda

The Fall session for Marketrak part 1 and 2 are currently scheduled for early October. That training presentation will be modified at the next RMTTF meeting to include the new screens.

Art noted that it is possible the Marketrak Technical refresh could be completed prior to June 4 weekend and that ERCOT is working to get it to the Market sooner.

MarkeTrak User Guide revisions are nearly complete and should be ready next week.

The modules will be updated with new screens, most likely from those in the User Guide.

Retail 101 Training

Training was held on May 4.

Art said there were 28 attendees. It was mentioned that the number attending was much lower than the number for those that registered because possibly many of those that registered were unable to attend because that was in the middle of a Mass Transition and they had other responsibilities.

Art said the Retail 101 class went very well.

RETAIL 101 SURVEY

Art provided the survey results to RMTTF leadership.

There were 15 that completed the survey. All ratings were very positive, either “agree” or “strongly agree”.

Some completed the 2 fill in the blank questions on the survey including “What We Did Well” and “How Can We Improve. Comments are listed below for each question.

Comments received are below.

9 RESPONSES WITH DATE AND TIME FOR SURVEY QUESTION; “WHAT WE DID WELL”

* 1 Power point presentation was nice and very informative. 5/4/2022 2:40 PM
* 2 They were funny and made sure everyone understood the material. 5/4/2022 2:37 PM
* 3 giving different scenario 5/4/2022 2:19 PM
* 4 Explaining the process. 5/4/2022 2:18 PM
* 5 Everything 5/4/2022 2:18 PM
* 6 Well timed and engaging. The examples were good. 5/4/2022 2:17 PM
* 7 Kept the course engaged, and funny jokes 5/4/2022 2:16 PM
* 8 Explaining the information 5/4/2022 2:15 PM
* 9 Very well. 5/4/2022 2:15 PM

4 RESPONSES WITH DATE AND TIME FOR SURVEY QUESTION: “HOW CAN WE IMPROVE?”

* 1 I like the jeopardy game at the end.
  + More games after each section would be fine. 5/4/2022 2:40
* 2 Giving more information about each transaction 5/4/2022 2:19 PM
* 3 N/A 5/4/2022 2:18 PM
* 4 Tell better jokes 5/4/2022 2:15 PM

OTHER BUSINESS, COMMENTS FROM TODAY’S MEETING

Since the June meeting is schedule for the same date as Marketrak training, the June RMTTF meeting should be cancelled.

The next RMTTF meeting will take place in July.

Tomas will email market support services at ERCOT and let them know we are cancelling the June meeting.

Those in attendance today discussed whether or not the July meeting and future meetings and training will be in person or virtual.

It was agreed the July RMTTF meeting will be held virtually and at the July meeting the group can decide if in person meetings can resume in August or another date. Everyone was flexible but agreed that there needs to be sufficient reason for resuming in person, such as make sure there will be some attending in person.

Agenda Items for discussion at the July Meeting will include:

* Verify and revise the Marketrak training
* Add in new screens to sections where relevant
  + This is probably needed for the 4 screens on the 4 slides that were changed today.
  + Change out screens that will have the new colors.
  + Possibly updating the slide with the updated numbers of MarkeTrak issues
* Survey feedback from the June Marketrak training
* Determine if August will be an in person or virtual meeting

Tomas asked if anyone had any additional comments. No comments were made so the meeting adjourned.

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| Meeting adjourned at 10:54 AM. |
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