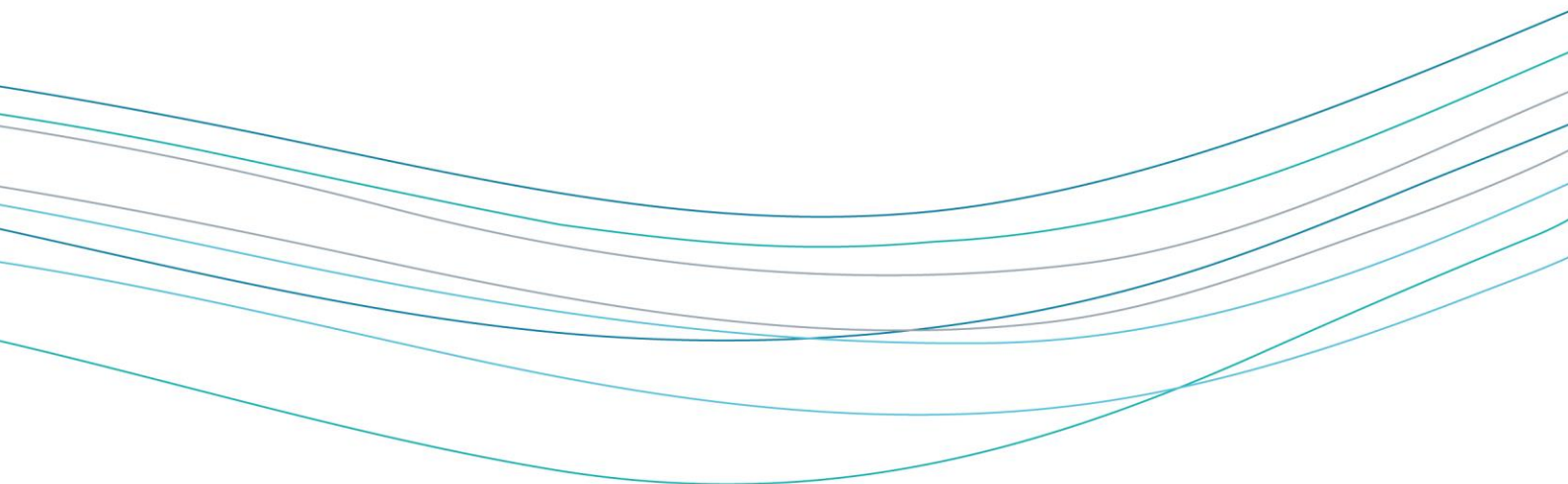


Operational Advisory Group (OAG)

Minutes from 30 July 2020 meeting



Operational Advisory Group

Minutes from 30 July 2020 meeting

Attendees

OAG Members and Guests

- ◆ Ashley Connors (AC) (WHL)
- ◆ David Moss (DMo) (RTL)
- ◆ Deborah Morton (DM) (WHL)
- ◆ Frances Lickley (FL) (RTL)
- ◆ Matt Garfield (MG) (WHL)
- ◆ Patricia Quintana (PQ) (WHL)
- ◆ Sam Dawson (SD) (WHL)
- ◆ Sian Forward (SF) (WHL)
- ◆ Steve Turnbull (ST) (RTL)

MOSL

- ◆ Chris Chiorean (CC)
- ◆ Evan Joannette (EJ)
- ◆ Chris Dawson (CD)
- ◆ George Monea (GM)
- ◆ Mayuresh Tamboli (MT)

Notes

1. Review C1 Process Flow

- F to I - Is "happy path" rather than unhappy path
 - All OAG members in agreement
- ◆ AG to Z as a cancellation route?

- EJ: Re-submission might not be desirable, might a retailer or customer just simply cancel?
- OAG: Yes, hypothetically possible. Particularly if customer switching to a new retailer.

◆ Path O to AE (proposed correction plan)

- What will happen if the correction plan was not agreed?
 - AF set is route for site visit rescheduling which is the OAG's obvious route where corrections not been possible
 - Rebooking sometimes needed if need access to neighbouring property.
 - SD: Her company would defer until such time that proper visit could take place.
 - So C1 correction plan correct as is and in line with OAG member thinking already.

◆ OAG noting that re-submission not always a preferred route

- EJ: Re-submission in bilaterals should be near instant

◆ DM: What happens with a live service request if the customer service?

- When a transfer happens could be discussed at future OAG
- MG: The bilateral request whether cancelled or not, their organisation would still fix any bad data.

◆ EJ: When customer's transfer, no plans to change the code, incoming retailer to get notification.

◆ DMO: AG to AE. Isn't that the flow? Why re-submit?

- CD: The resubmit steps are practically instantaneous
- MOSL to take away and work through.

◆ DMO: Whose resubmission is it? Retailer's or Wholesaler's. Potential consistency issue about who owns it, as charges payable if retailer-requested.

◆ Result

- OAG approving of the Process C1 flow as it currently stands, barring considering of additional question on AG to AE flow proposed by DMO

2. Review Proposed Rejection Codes

- ◆ CC reviewed the proposed new rejection codes shared in meeting slides.
- ◆ OAG invited to
 - Use case examples of when rejections happen to be used as a guide for new entrants/employees;
 - Missing codes
 - Misinterpretation
- ◆ DM: Wrong wholesaler. Would the system recognise that the wrong SPID has been introduced? For example, G2. Would hub recognise the water vs wholesale SPID.
 - Not sure of what solution is right now, but hub would need to be clever enough to know about service components and who is responsible for what.
 - AC: H forms could allow you to pick either SPID. So could easily pick the water instead of sewerage.
 - SF: Often getting water meter requests when they're sewerage requests.
 - MOSL to take away: Something to keep in mind when reviewing the Service Components.
 - SD: Her water-only company still gets trade effluent queries.
- ◆ ST: Duplicates. Not all requests on the same SPID are duplicates. For example, F5 are legit complaints. even if it appears the end outcome is the same as a service request that's come out of a B or C process. SD: Concur, some F5 processes cannot be resolved until a site visit takes place after the SLA. Don't want excuse to close F5 for illegitimate reasons.
- ◆ MT: In due course, we'll share validation codes
- ◆ DMO: Past chronology of the same SPID. Needs to be easy to see if request has come in previously. Maybe wholesaler has raised a request for same SPID. EJ strongly supportive of this.
- ◆ DM: Unable to contact customer may also sometime be inability to contact retailer.
- ◆ PQ: Material completion may still not be actionable without required info. So, still needs rejection.
 - Suggestion for a 5th code
 - DMO: Isn't this a deferral? CC sure, but what if you don't get an answer.

- SF: Form may be complete, but the CMOS meter reading history doesn't match what's provided on the form.
- EJ: Better help and context sensitive tooltips will minimise problems.

◆ SD: Preferable to have the codes built right into the bilateral hub. Particularly useful for reporting. MOSL could use to flag trading party pairing with high numbers of rejections.

◆ Result:

- OAG says generally thinking so far is reasonable

3. AOB

◆ Do OAG members want to see Bilateral system with basic caseload management (e.g. assign service requests to individual users, teams, queues)

- Generally, yes. OAG members agree is important feature.
 - Particularly important where service requests are escalated to a team leader
 - AC: Past ownership of an issue tends to make it useful to flag for the attention of the individual who dealt with it before.
 - DM: Case ownership beginning to end tends to increase customer satisfaction
- Caveats:
 - Mandatory, might not work where the team fully shares work.
 - System links to workflow/CRM could be costly.
 - Suggested to have the option available but have the choice of implementing it or not like other elements of bilateral integration.

◆ Temperature check for OAG

- Is the OAG and material what members expected?
 - AC: Going as expected
 - DMO: Great to see the what/when. How will be interesting. Input/output. EJ, in due course, yes, OAG members will be first to see. DMO has some views on the how, will email them to us.

◆ DM: Code change for B3. Wise to submit as standalone or wait for bilateral.

- CD: Propose early, but accept that it might be built into the bilateral solution path.

- ◆ SD: The lunch time slot makes attendance difficult due to having to provide colleague cover. Please consider shifting to AM or PM.

4. **Next steps**

- ◆ Update C1 process flow.
 - Consider David Moss' feedback on alternate plan approval path
 - Get OAG approval
- ◆ Share rejection code slides with the OAG members for feedback
- ◆ Re-submission codes to be completed and discussed at future meeting
- ◆ Building landing pages/wireframes. Want OAG feedback on fields, etc...
- ◆ When C1 is sufficient for development build, will move on to B5