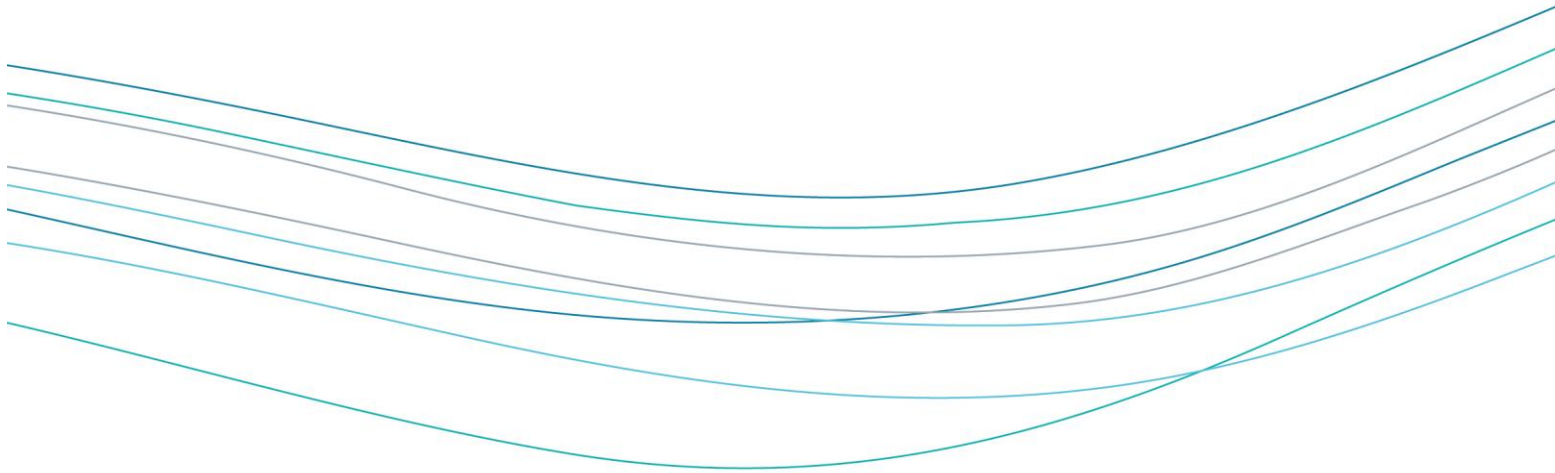


Operational Advisory Group (OAG)

Minutes from 22 October 2020 meeting



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Attendees

OAG Members and Guests

- ◆ Deborah Morton (DeM) Wholesaler
- ◆ Madeleine Moores (MM) Retailer
- ◆ Matt Garfield (MG) Wholesaler
- ◆ Frances Lickley (FL) Retailer
- ◆ David Seymour (DS) Wholesaler
- ◆ Paul Baker (PB) Retailer
- ◆ Jenny Ansell (JA) Wholesaler
- ◆ Jon Fuller (JF) Wholesaler
- ◆ Quentin Gallagher (QG) Wholesaler
- ◆ Sarah Harrison (SH) Retailer
- ◆ Ashley Connors (AC) Wholesaler
- ◆ Sian Forward (SF) Wholesaler

MOSL

- ◆ Evan Joannette (EJ)
- ◆ Chris Dawson (CD)
- ◆ George Kelly (GK)
- ◆ Lisa Connell (LC)
- ◆ Mayuresh Tamboli (MT)
- ◆ Val Rose (VR)
- ◆ Chris Chiorean (CC)

Agenda

- ◆ Export functions
- ◆ Wholesaler-initiated C1 process flow
- ◆ AOB

Meeting Notes

1. Export function

💧 **LC; presented on proposed export options from the bilateral portal landing page (PDF format) and history tab and contact details (Excel format).**

- Export of entire C1.R request is not in scope yet but can be revisited at a later date if needs be. OAG member advice on version of Excel in use would be useful.
- OAG feedback;
 - DM; Export useful, but currently all done via link to Swimpool. Automation takes copy of form as 'letter' so form can be viewed (but not altered).
 - EJ; equivalent to flat PDF page? Wouldn't manipulatable data provide more flexibility? Like work order creation?
 - DM; Potentially yes. Depending on the form
 - QG; Portsmouth create a service work order manually
 - MG; we take flat form (PDF), which can be created into a work order to schedule jobs etc. at the moment, we envisage that this data out of the bilats system would be copied and pasted into own form to create service request form in own systems
 - LC; as it stands, only be able to export screen, not whole form. we need to know how this will be used
 - MG; want automation between all systems - build efficiencies into own service desks (don't want to copy and paste all info from system to system).
 - AC; ability to export when needed would be helpful. Maybe send out to industry full survey with all requirements etc in it?
 - LC; if Trading Parties will export into own hub, perhaps exporting of full form is not required? Exporting will be out of own systems.
 - PB; Where we use Swimpool for export functions, we filter down service requests before exporting
 - DM; Yes, this is good for if a retailer wants quick information, or to check who has done what in the service desk team
 - MM; don't export from portals used at the moment - do need to speak to IT team though regarding requirements for export. data is gathered from processes then put into an email. Useful to have exports for business intelligence like 'most popular form/how many cancellations' etc would be useful.
 - FL; we would export is for producing own training information
 - CD; currently history tab is being exported in excel format, but from the conversation, excel exports can be manipulated (PDFs are not) - what is OAG opinion on what's preferable?
 - PB; times where excel is useful?
 - FL; both on each page might be useful for whatever is required in different scenarios.
 - EJ; sounds like export function isn't a launch day crucial requirement.

💧 **OUTCOME; Propose Trading Parties' own tech teams know exactly what would be needed in export function ('usage cases')/what excel version is used/CSV requirements. LC stated this could be TAG questions? -ACTION 1**

2. Wholesaler initiated C1 Wireframes

- ◆ CD; presented process flow for Wholesalers process
 - CD; wireframes and actions for C1 process for Retailer and Wholesaler are similar. But we are creating process where it's easier for Wholesalers and Retailers to communicate, and for Retailer to become engaged throughout process.
 - EJ; is there a need and sufficient process capability for Wholesalers to approach Retailers for more information on C1 wholesaler process?
 - PB; photos for meter reads are requested sometimes (Retailer to pass on photos to Wholesaler).
 - DM; customers approach technician while they are out, Wholesalers request the meter read/billing information from Retailers to rule out 'bill shock' due to billing corrections before doing work on site.
 - JF; common example is where the meter is not able to be found in the location - sometimes the C1 is initiated but the Wholesaler requests from the Retailer to ensure with the customer details regarding this dialogue example. At end of month reviews for C1b, there are occasions where requester goes to Retailer at the outset - not always a site visit request. JF will confirm with use case example(s) **ACTION 2**
 - JA; is T207 transaction available in this wireframe?
 - CD; don't need deferrals in this process - not same OPS requirements, but there still needs to be a route to start the process again or ask for more info.
 - DM; not a reportable OPS, but for Wholesalers to report how many cases are on hold, we wouldn't necessarily drop the case, but we want to report on how long and why things are being on hold
 - CD; proposing any hand off is reportable
 - JF; when we started with portal, we desired more adhoc comms (go to Retailer at various points through process) - e.g. ask for more info at any time, but also categorise WHY more information is being requested. Reason codes.
 - PB; most of the time, the reason Wholesalers get in contact is to ask for help in scheduling a site visit

3. Next steps

- EJ; propose next meeting mostly covers deferrals?
 - OAG agreement
- LC; tentatively starting B5 process
 - CD; starting with B1 form

4. AOB

◆ Demo Feedback/Questions

- EJ; did anyone not receive the demo?
- DS asked for a link --**ACTION 3**

◆ Meeting day

- Need to send out poll for different meeting day (member cannot make Thursday anymore) --**ACTION 4**

5. Actions:

1. To send out questions and Trading Parties to enquire with own tech teams to know exactly what would be needed in export function ('usage cases')/what excel version is used/CSV requirements. Proposed to explore via TAG route.
2. JF to go away and confirm with use case example(s) of where Wholesaler needs to request more info from Retailer which may require step between d and f on process flow.
3. EJ to send Demo link to DS
4. MOSL to poll members at next meeting for new OAG meeting day