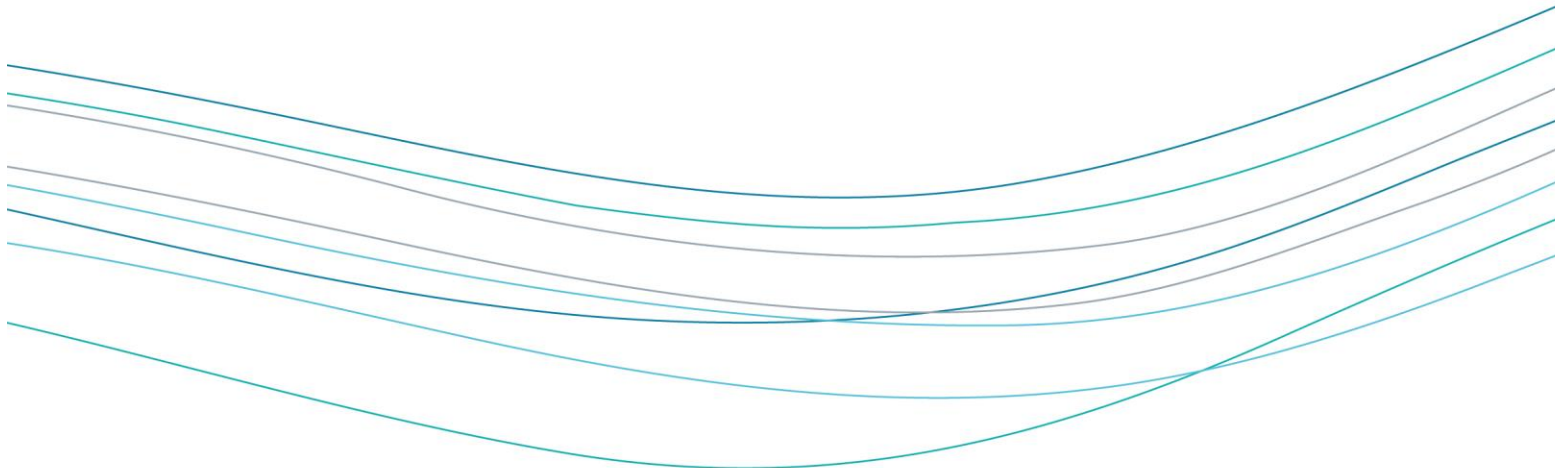


Operational Advisory Group (OAG)

Minutes from 8 October 2020 meeting



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Attendees

OAG members and guests

- ◆ David Moss (DM) Retailer
- ◆ Deborah Morton (DeM) Wholesaler
- ◆ Matt Garfield (MG) Wholesaler
- ◆ Sian Forward (SF) Wholesaler
- ◆ Frances Lickley (FL) Retailer
- ◆ Patti Quintana (PQ) Wholesaler
- ◆ David Seymour (DS) Wholesaler
- ◆ Paul Baker (PB) Retailer
- ◆ Jenny Ansell (JA) Wholesaler

MOSL

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

Agenda

- ◆ C1 user requirements – Testing assumptions about Transfers in Progress
- ◆ Notification templates
- ◆ Walkthrough new wire-frames
- ◆ AOB

Meeting Notes

1. C1 User Requirements – Transfer in Progress

- MT; presented assumptions on raising/actioning/visibility of service requests firstly, for where a Transfer is in progress and what an *outgoing* Retailer can do.
 - --> can outgoing retailer submit C1 when transfer is in progress or restrict initiation of new request by Outgoing Retailer during transfer in progress?
 - PB; second option is more sensible. Nothing sensitive with other Retailers having a view of this
 - EJ; need consistency across all processes - don't want to just focus on C1 - other processes this may affect?
 - PB; allowances which were mentioned last time
 - PQ; any trade effluent request (G1) would be included here
 - FL; agree with PB points raised. want to make sure we get right results for customer when they were with us, and get them the best results moving forward with the new Retailer - visibility for the outgoing retailer is desired
 - DeM; customers expect old retailer to know what is being undertaken - from a customer service point of view, visibility is essential, but the option to contribute as the outgoing retailer may be useful?
 - FL; outgoing retailer may have more detail/information.
 - SL; under the impression that the outgoing retailer doesn't reliably get the message once an allowance was pushed through, historically?
 - DS; doesn't particularly work well where trading parties are supposed to know to refund a customer
 - SF; if there is a transfer 'in flight', the messages are passed out to all parties. however, once the transfer is gone, only the retailer at that point who gets visibility of this new adjustment
 - PQ; this is a CMOS wide issue
 - DM; in terms of how the new platform will work, once the transfer has been done, does the process/transaction transfer over, or is it re-raised?
 - EJ; expect these to persist through transfers between Retailers.
 - MT; any argument for giving no visibility to outgoing retailer of new request?
 - DM; disagree - historical information may be required. perhaps a 'cooling off' period may be required? cannot see more visibility hurting the situation
 - PQ; anti-competitive to see what other retailers are doing?
 - SF; not the visibility of the bilaterals, more about a solution of tackling .M to T corrs which span two periods
 - PB; outgoing retailer shouldn't get visibility of new service requests raised AFTER the transfer

OUTCOME; more visibility for all involved (outgoing Retailer) is preferred. Might be a good idea to allow outgoing retailer to also add comments/additions/free text notes/additional information to transactions during transfers?

- MT; presented assumptions on raising/actioning/visibility of service requests firstly, for where a Transfer is in progress and what an *incoming* Retailer can do.
- Considerations presented for how this would work under HVI

OUTCOME; OAG content with MOSL assumptions.

- MT; presented assumptions on charges and where/who the charge is applicable to. made assumptions; charge is to be sent to outgoing retailer if applicable (that retailer who owns the SPID when request was made).
- OAG asked for thoughts on presented assumptions;
 - PB; Retailer can only get charges for things they raised, not charges for things other retailers have raised.
 - **CD; need to clarify in the codes - (ACTION).**
 - MG; tricky one - both outgoing/incoming retailer could benefit from the C1 process. the Scottish market states the incoming retailer would take on the charge when they take on the new customer. The incoming retailer would decide to close the process or not and be on the hook for the outcome of this. Personal thought is that whoever sees the service request through (incoming retailer) is responsible for the charge.
 - EJ; would there not be as many 'losers' as there is 'winners'?
 - MG; Agreed. In addition, charges are not huge either
 - PB; this could be sensitive to sabotage by outgoing retailer who raises nonsensical requests?
 - DM; in the same logic, the incoming retailer could just cancel all requests potentially raised before the customer is transferred (no option for outgoing retailer to cancel, but incoming retailer can).
 - EJ; in absence of evidence, must consider this uncommon.
 - EJ; all things being equal, what's the easier option for billing retailers for visits?
 - SF; easier to bill retailer who was the retailer at the time? this may need a code change though.
 - FL; tend to agree with SF - not what the current terms state though
 - PQ; not always possible for incoming retailer to cancel something though?
 - FL; need to be smart enough to consider Wholesaler-initiated processes

OUTCOME: OAG member views split - revisit later? seems less a bilaterals issue, and more code change issue? (ACTION)

2. Notification templates

- EJ; notifications where other parties need to be involved - assumption of notifications in the hub and via email format which will be sent to contracting Wholesalers/Retailers? Also emails to other Retailers are seen to come from bilateral hub.
- OAG comments;
 - PQ; do we want to go down email route? pushback as part of process we sent out emails, but we cannot turn them off after this has been requested by other parties. is there a better way of doing this rather than email? Summary report? Open portal where all parties can access and see notifications?
 - DeM; users to have ability to choose to see emails or just log into the hub to see?
 - EJ; can do, but this needs to be worked into wireframes - risk that a global box turned off might result in missing out on notifications.
 - FL; should be something where we need to acknowledge outstanding tasks in the hub
 - Yes, this is being built by design into the LVI

OUTCOME; emails are fine, but we want an opt out for some processes - desire for some type of preference of notification (e.g. opt out of LVI but not HVI). -- add to backlog (ACTION)

1. EJ; third party transactions - want to include some form of interface from some 3rd party and corrections plan steps toward the end? Presented mock-up of email notification.
2. OAG comments;
 - PQ; customer name/SPID might be useful?
 - EJ; would people use emails for HVI integration, or would they use LVI?
 - PQ; depends on the process which will differ - no sight of this yet. maybe have different headers for emails going to Retailers and Wholesalers?
 - EJ; in text body - link directing you back to the hub?
 - PQ; unless the link is directly to the case, it would not be that useful
 - FL; improves customer journey - reduces delays
 - SF; not too worried about greeting and personalisation?
 - DeM; contact details should not encourage contact outside hub viewed'

OUTCOME; this is uncontroversial - incorporate presented information on how emails are to be sent out as correct (see slide deck)

💧 **3. Wire-frame walkthrough**

CD; presented on a reminder of what landing page looks like, as well as a process flow update with regards to feedback from OAG.

💧 **4. AOB**

Meeting date/time: Meeting time to shift to morning, 11am. EJ may move meeting to alternative day of week due to availability of one of the OAG members

💧 **5. Actions**

1. Clarify in the codes whether any restrictions on how wholesaler charges for aborted visits needs to be levied (outgoing or incoming retailer) - MOSL
2. OAG views split with respect to charges and whether to levy on outgoing or incoming retailer - revisit at future OAG, - MOSL
3. Propose opt in/out of email notifications for some processes. Add to development backlog - MOSL