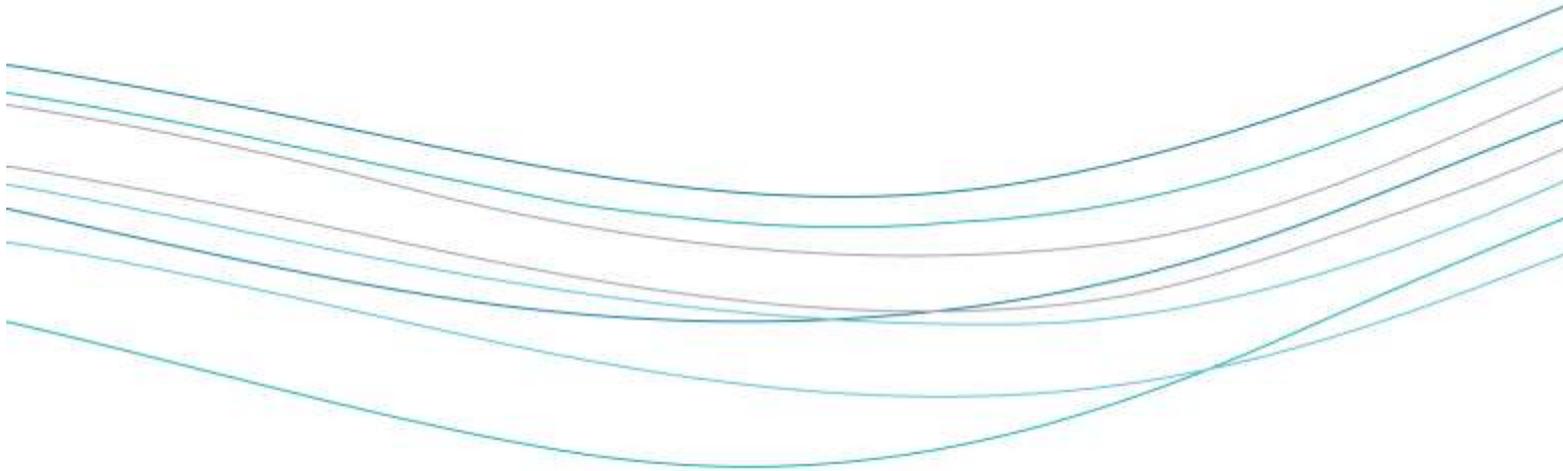# Operational Advisory Group (OAG)

18 May 2021 meeting

Minutes

Operational Advisory Group

Minutes of 18 May 2021 meeting

Attendees

OAG Members and Guests

- Ashley Connors (AC), Wholesaler
- David Buchan (DB), Retailer
- David Harris (DH), Wholesaler
- David Moss (DM), Retailer
- Deborah Morton (DMo), Wholesaler
- Frances Lickley (FL), Retailer
- Jenny Ansell (JA), Wholesaler
- Jon Fuller (JF), Wholesaler
- Laura Morgan (LM), Wholesaler
- Lewis Orr (LO), Retailer
- Madeleine Moores (MM), Retailer
- Matthew Garfield (MG), Wholesaler
- Michael Floyd (MF), Wholesaler
- Onkar Singh (OS), Wholesaler
- Patricia Quintana (PQ), Wholesaler
- Paul Baker (PB), Retailer
- Paul Treagust (PT), Wholesaler
- Sian Forward (SF), Wholesaler

MOSL

- Evan Joanette (EJ), Chair
- Chris Dawson (CD)
- Chris Chiorean (CC)
- Kevin Fearn (KF)
- Matthew Weaver (MW)
- Ivy Mandinyenya (IM)
- Mayuresh Tamboli (MT)
- Lisa-Ann Lott (LAL) - Secretariat

Agenda

- Customer/occupier change (mid-request)
- Process selection screens
- OPS performance monitoring
- AOB – Process re-prioritisation, TEPN collaboration on G2

Meeting notes

1. Customer/occupier change (mid-request)

EJ confirmed agenda and opened the meeting with the topic of dealing with service requests where the customer/occupier (not retailer) changes mid-request.

KF explained that an OAG subgroup discussed the matter and felt that no hub solution was required for this, namely because it was rare and that their own CRM systems would be used to identify where the customer had changed. MOSL still concerned that there are GDPR implications if we do not create a mechanism to purge or change customer details in the event a customer moves on.

EJ opened the discussion to the wider OAG. General consensus what that best practice approach would be to cancel the service request and then create a new one in the details of the new customer as opposed to retrospectively updating the request in process. This approach would provide a time stamp against the change. To change a customer mid-flight creates questions on whether SLAs would be met as a new customer was in situ.

Other proposals included using notes fields to denote where customers have changed. This would not create a new transaction

SF, OS noted that if the customer changed, the Wholesaler would expect a formal transaction with a time stamp to give them cover over SLAs.

Some members question whether GDPR would apply to businesses, rather than individuals. **KF** explained that the individual is the named contact on the service request.

JF reports that their organisation's experience is that very few live requests ever see a retailer change, customer even rarer.

> **Action: JF to provide MOSL with details of how often this occurs so MOSL can prioritise appropriately**
>
> **Action: MOSL (KF) to arrange a follow up session with sub-group to review rationale further (SF, JF, DB agreed to join sub-group)**

PB noted that there are some meter verification requests that could persist regardless of customer change.

2. Process selection screens (form submission)

KF shared different proposals balancing a system that proposes service requests for inexperienced users vs allowing an experienced user to immediately pick the form they want. Proposals included pop-ups, drop downs, suggested searches, popularity ranking, linking search terms to selected forms, etc... (see slidepack)

JF recommended a filter that determines if the user is a wholesaler or retailer and thus narrows the requests displayed. **KF** confirmed this would be possible. **JF** reminded MOSL of referencing 'form' within the documents, when it should be 'request'.

PB asked if this was an LVI or HVI facility. **KF** confirmed this works for LVI.

SF recommended a one line description of 'use this process for this task' to prevent retailers from submitting wrong process.

> **Action: MOSL (KF) to send a questionnaire to OAG members to ask which form selection method is preferred**

3. OPS performance monitoring

EJ presented slide pack and rationale for why there might be an OPS charging break transition period following the mandatory adoption of the processes via the hub. MOSL would use the period to work out any bugs that become apparent to prevent penalties incurring when not appropriate.

OS and **DH** noted that dual reporting for comparison purposes might be resource intensive on trading parties but their organisation would certainly continue to self-report.

JF queried if performance reporting will still be available during the transition period and CD confirmed this will be the case. Members generally agreed the necessity to retain reporting.

MG asked whether the removal of charges would materially affect any other works that those charges would fund. **EJ** confirmed this may affect the Market Improvement fund.

Outcome: While the rationale for testing the centralised reporting was understood and TPs were keen to compare central report to their own. Members were not supportive of a proposal to suspend charges. And even if charges were suspended, there'd still be a desire to view performance.

4. AOB:

Process re-prioritisation

EJ ran through updated prioritisation and rationale for revised phasing of development. EJ explained that some trading parties are asking for functionality over new processes. MOSL development also discovered that grouping similar processes is more efficient than initially assumed.

JF queried if high volume processes like E and F could be done sooner using the modules we've already developed in Phase 4.

DM suggested grouping all processes from same group together (e.g. all 17 B processes as opposed to a small number of them in each group). **CD** explained that the groupings tended to be by form. Members strongly supported the idea of tackling all processes for one form at a time. Many trading parties have entire teams working on one particular form.

PB recommended MOSL provide visibility of the full list of processes to be tackled and proposed timelines. Whilst it is understandable to focus on next phase a refreshed full pipeline should appear on the MOSL website.

> **Action: MOSL to publish re-prioritised functionality and processes**

Outcome: Members generally agreed to the re-prioritisation approach based on current form completion and did not require further discussion

OAG / Trade Effluent Practitioner's Network linkage on G2

JF updated members on G2 and how an OAG subgroup could work with TEPN.

Members generally agreed that G2 is unclear (especially if the customer wants a non-contracted retailer to managed TE) in the codes and should be subject to wider market review. DB and PQ volunteered to be involved in the review.

5. **Actions**

    1. JF to provide MOSL with details of how often this occurs so MOSL can prioritise appropriately
    2. MOSL (KF) to arrange a follow up session with sub-group to review rationale further (SF, JF, DB agreed to join sub-group)
    3. MOSL (KF) to send a questionnaire to OAG members to ask which form selection method is preferred
    4. MOSL to publish re-prioritised functionality and processes