

# Welcome to the 2024 AEP Texas Competitive Retailer Relations Workshop August 29, 2024





# DIFFICULT LOCATIONS

Jeff Edgemon

Service Crew Leader – Aransas Pass

**What do Line  
Workers actually  
do to get the  
power restored?**





**A difficult location is a  
work location that we  
are unable to access  
with our normal  
equipment**

# What is considered Normal Equipment?









**If we are lucky enough we can  
gain access to a customers  
backyard with the use of  
BACKYARD EQUIPMENT**















**In unlucky situations  
we do still climb to get  
the lights back on**







QUESTIONS?

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# MOBILE GENERATION

- Robert De Leon, Director Distribution Region Operation
- Jesse Macias, Manager CRR and Billing & Account Operations

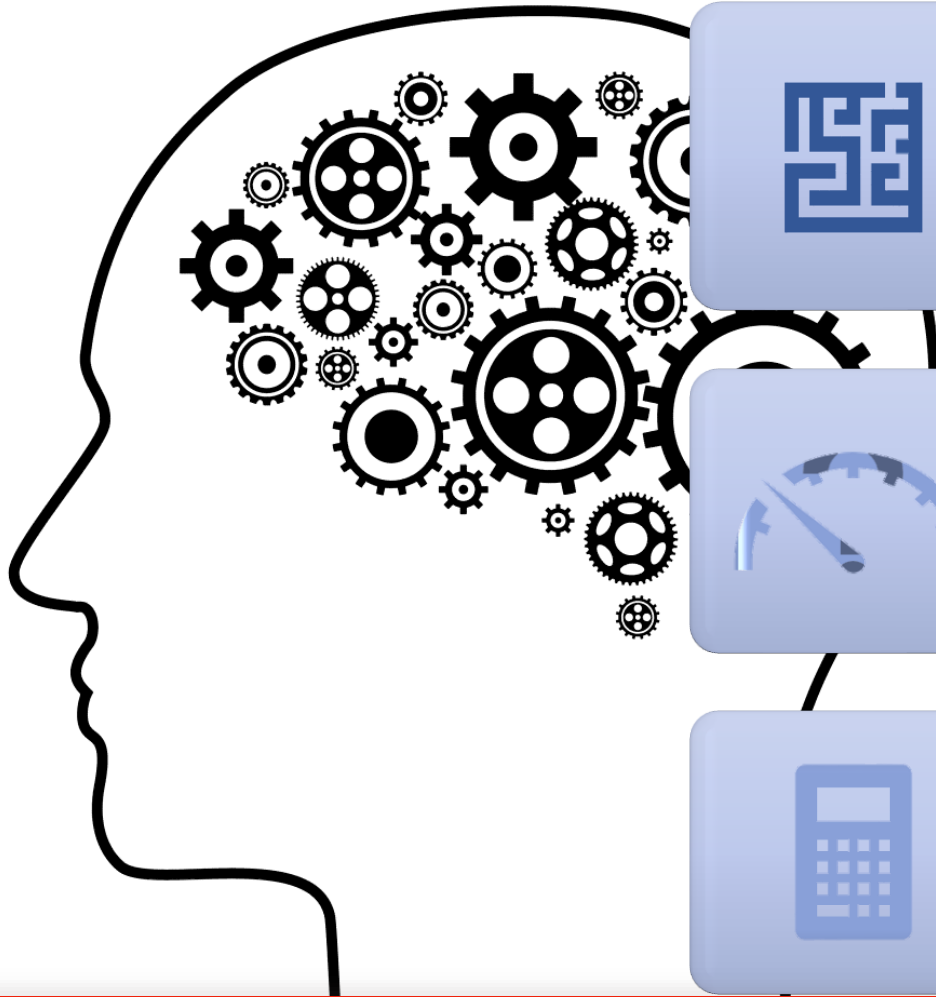
# Mobile Generation HB 2483

- e) A transmission and distribution utility that leases and operates facilities under Subsection (b)
- (1) shall ensure, to the extent reasonably practicable, that retail customer usage during operation of those facilities is adjusted out of the usage reported for billing purposes by the customer's retail electric provider.

*September 2021*



# The Challenge...



This created a major challenge for I.T. groups. All TDU's system capabilities aren't the same.



Meters will be energized during a Mobile Gen event and are still registering usage.



How do we adjust out the metered kwh consumption?

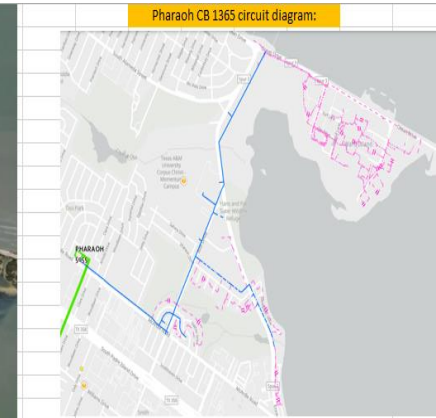
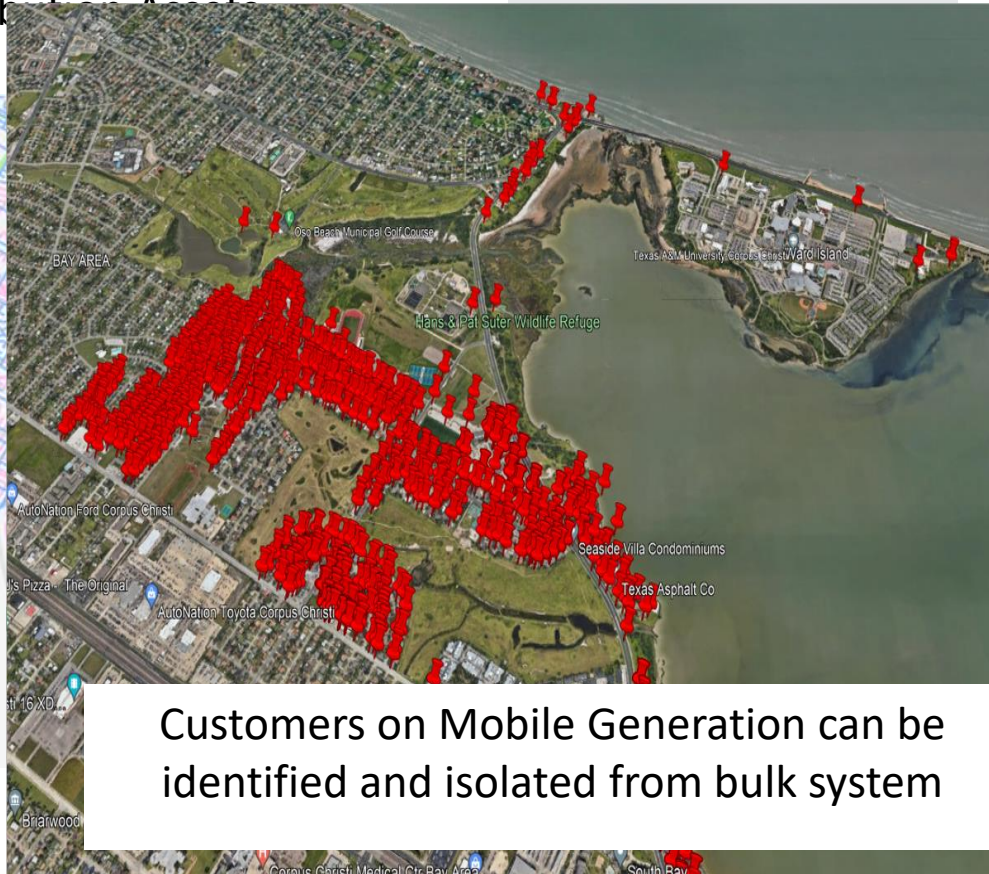
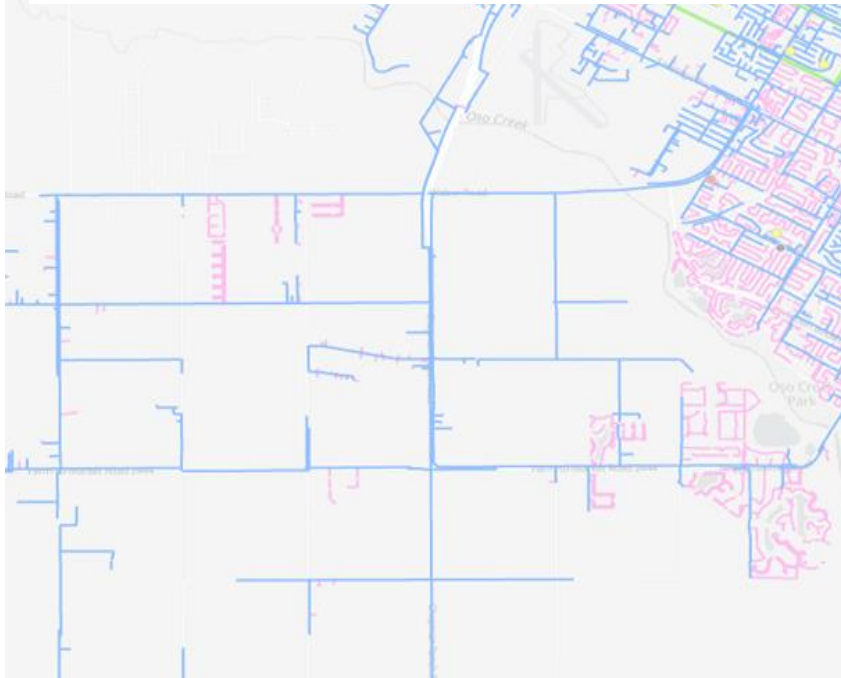
What will be our plan?



**AEP TEXAS  
MOBILE  
GENERATION  
PLAN**

# Identifying Customers

Distribution Dispatch Center (DDC) uses data mapping applications to identify Distribution Assets



Customers on Mobile Generation can be identified and isolated from bulk system

# The Customer Lists

## Customer List Created

ESI ID#	Meter Number
Pending Orders	REP of Record
KW Demand	other data points

Customer list is reviewed for

- Pending Meter Change Outs (cancel)
- Opt-Out customers (manual adjustment)

# Billing Adjustments

## Interval Data

- Customer List –with impacted Meter #'s - sent to MDM Team (Meter Data Management).
- MDM Team uses the Mobile Gen event Start Date & Start Time and sends **0 kwh Actual** interval readings to ERCOT and SMT until the Mobile Gen event End Date & End Time.

## Monthly Billing

The MDM kwh's that were zeroed out are used to calculate adjustments to the 867\_03.

**Readings** - Sent as normal, however with 0 kwh consumption during the MG event period

**Billing Cycles** – If an impacted account bills on the day of Mobile Gen event or 4 days later, billing hold will be placed to allow for manual adjustments, reducing cancel/rebills.

Accounts with cycles billing 5 days after event + will not be held and go out normally.

**Cancel/Rebills** that go out on impacted accounts will keep the TEEEF adjustments.

**Unmetered accounts** will not be included in this plan.

**Opt-out** customers in Mobile Gen event will be manually adjusted.

**KW Peak Demands** set during Mobile Gen event will not be used.

# Billing Adjustments

## Billing Transactions

3 different scenarios:

Scenario #1. Only **DG** meter present (*No **Mobile Gen** event*)

Scenario #2. Only **Mobile Gen** event (*No **DG Meter***)

Scenario #3. Customer has **DG** meter **AND** in a **Mobile Gen** event

# Billing Adjustments

## Scenario #1. Only **DG** meter present (No *Mobile Gen* event)

This is the **existing process** where we send the **DG customer surplus generation** in the ignore loop REF~JH~I.  
(ERCOT is looking at the customer's Load Profile if customer has Distributive Generation at their premise)

Billing Cycle dates: 08/15/2024 – 09/14/2024

Beginning Read **18500**

Ending Read **18700** = **200 kwh of Surplus Generation back onto the Grid**

Only the 1<sup>st</sup> Ignore Loop is utilized.

REF|JH|I

REF|MT|KHMON

QTY|QD|**200**

MEA|AA|PRQ|**200**|KH|**18500**|**18700**

# Billing Adjustments

## Scenario #2. Only **Mobile Gen** event (No **DG Meter**)

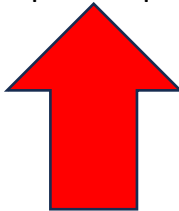
Customer **Billing Cycle** Dates from 08/15/2023 to 09/14/2023

Mobile Generation kwh consumption “to be adjusted out of usage reported for billing purposes”.

MDM reports to the MACSS Billing Team that **Mobile Gen Event Start Reading 01500 End Reading of 01600 = 100 kwh consumed during Mobile Gen Event**

Billing Cycle Start Read	<b>01000</b>	Billing Cycle End Read	<b>02000</b>	= <b>1000</b> kwh
<b>Mobile Gen Event Start Reading</b>	<b>01500</b>	<b>Event End Reading</b>	<b>01600</b>	= - <b>100 kwh TEEEF Adjustment in ignore loop</b>
				= <b>900</b> kwh Total Billable Usage reflected in the 867 & 810

REF|JH|I  
REF|MT|KHMON  
QTY|QD|**100**  
MEA|AA|PRQ|**100**|KH|**00000**|**00100**



Start Reading will be set to **0**, and the end reading will be the quantity to be adjusted.  
In this case, **Mobile Gen Event End Reading in the Ignore Loop is 00100**



# Billing Adjustments

## Scenario #3. Customer has DG meter **AND** in a **Mobile Gen** event

Customer Billing Cycle Dates from 08/15/2023 to 09/14/2023

1<sup>st</sup> ignore loop for **DG surplus generation**.

If Surplus Generation was registered during the Mobile Gen Event, it must be adjusted out per Proposal for Publication Project 53404 – Deployment of TEEEF (7) B states: *Energy generated in an area isolated from the bulk power system during operation of the TEEEF, including any energy generated by an affected generator, is excluded from the generation reported to the independent organization certified under PURA for ERCOT settlement purposes.*

Cycle Billing Start Read **18500**

Cycle Billing End Read **18700** = **200 kwh of Surplus Generation back onto the Grid**


*BUT ... the customer Generated **50 kwh of that** during the **Mobile Gen Event!***

**Surplus Generation** Meter Readings during **The Mobile Gen Event**

Reading on the DG Meter = **18600**      Reading on the DG Meter = **18650**

= **50 kwh of Surplus Generation During Mobile Gen Event that must be adjusted**

REF|JH|I  
REF|MT|KHM  
QTY|QD|**150**  
MEA|AA|PRQ|**150**|KH|**18500**|**18700**





# Mobile Gen Communication



A Market Notice will be sent advising of the Mobile Generation Event, and a Market Call will be set up to answer any questions REPs may have.

AEP Texas Account Managers will reach out to REPs who have impacted customers and will provide them with a list of those impacted customers so they can prepare for the 867\_03 adjusted usage

# CONTINUOUS IMPROVEMENT

AEP Texas will continue to work with Market Participants to develop an ERCOT-wide process for addressing the requirements.

Proposed Texas SET 5.0 item to allow modification of 867\_03 REF~JH~I ignore loop segment - to REF~JH~M to help differentiate ignore loops for **Mobile Generation** vs. **Surplus Generation**

Adhering to future PUC Rule making on Mobile Generation for any potential changes to our current process

# Deployment Examples

The word "DEPLOYMENTS" is rendered in large, white, serif capital letters with a purple outline. Each letter is filled with a different aerial photograph of a substation or utility site, showing various pieces of equipment, power lines, and vehicles. The background of the entire slide is a light gray gradient with a thin purple border.

DEPLOYMENTS

MG units will be connected to AEP Texas's distribution system, either inside or outside of a substation.

# Substation Deployment

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## La Grulla Substation

11 – 2 MW units

# Substation Deployment

## Escondido Substation

12 – 2 MW Units



# Feeder Deployment

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San Benito  
Feeder

3 – 2 MW Units

QUESTIONS?  
DEMO TIME!  
LET'S MEET  
DOWNSTAIRS



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# AEP TEXAS GROWTH

Chad Burnett

VP Regulatory &  
Finance

# AEP Texas Service Territory

- AEP Texas is the fastest growing utility<sup>1</sup> in the fastest growing state<sup>2</sup> in the nation.
- Size of Service Territory: 97,000 square miles (slightly bigger than the state of Michigan)
- Laredo, TX now the top port city in the US<sup>3</sup>.
- Port of Corpus Christi is the fastest growing major port over the last decade<sup>3</sup>.
- AEP Texas serves portions of the Permian and Eagle Ford shale plays.

- Total Customers

Residential	1,115,000
Commercial	940,000
Data Centers	55,000
Industrial	18
Other Retail	12,000
	8,000

- Major Industries Served
  - Petroleum Products
  - Chemical Manufacturing
  - Oil & Gas Extraction
  - Pipeline Transportation
  - Primary Metal Manufacturing
  - Data Centers



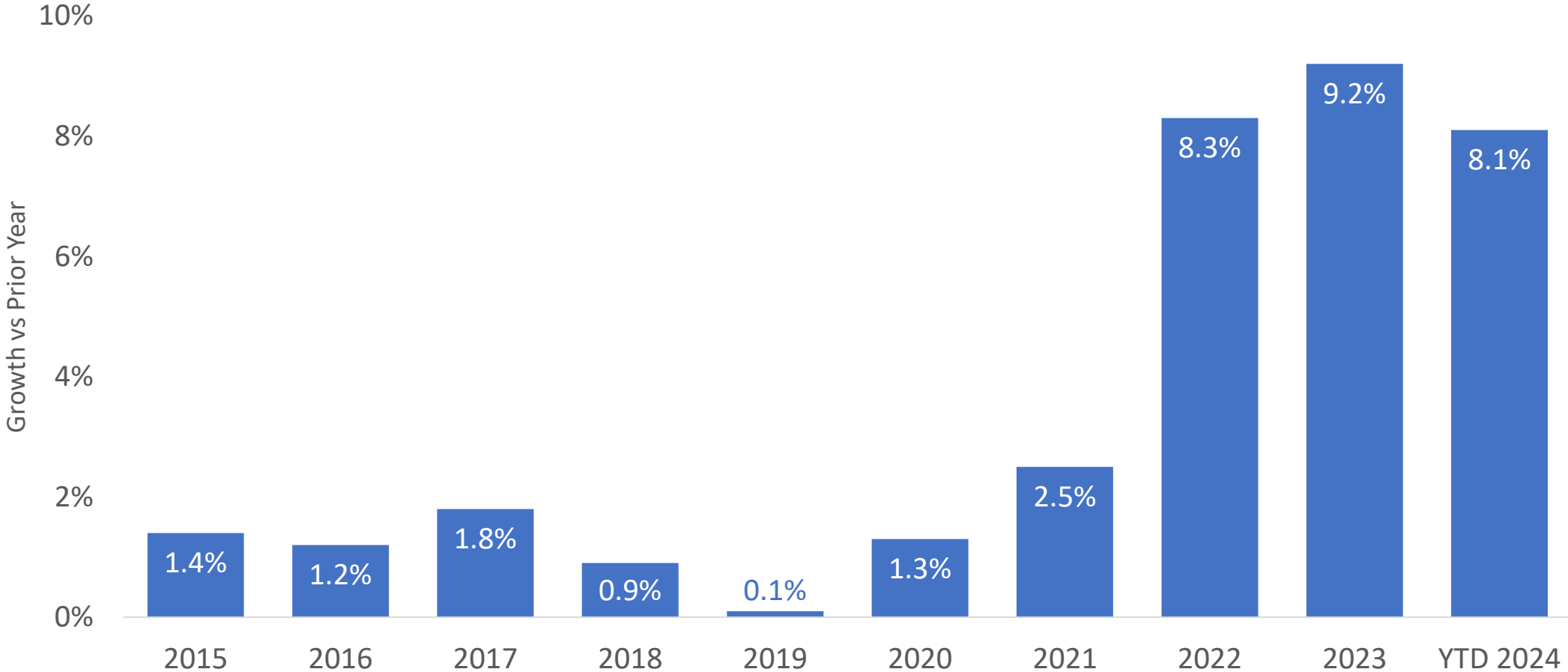
<sup>1</sup> Based on reported GWh sales from utilities Annual 10-K filing with SEC.

<sup>2</sup> Texas leads the nation in number of jobs added and population increase since before the pandemic.

<sup>3</sup> Forbes, Dec 30, 2023 "Top 10 Fastest Growing Ports in United States Over the Last Decade" Ken Roberts.

# AEP Texas Growth Acceleration

AEP Texas Normalized GWh Growth



# Fun With Numbers (Part 1)

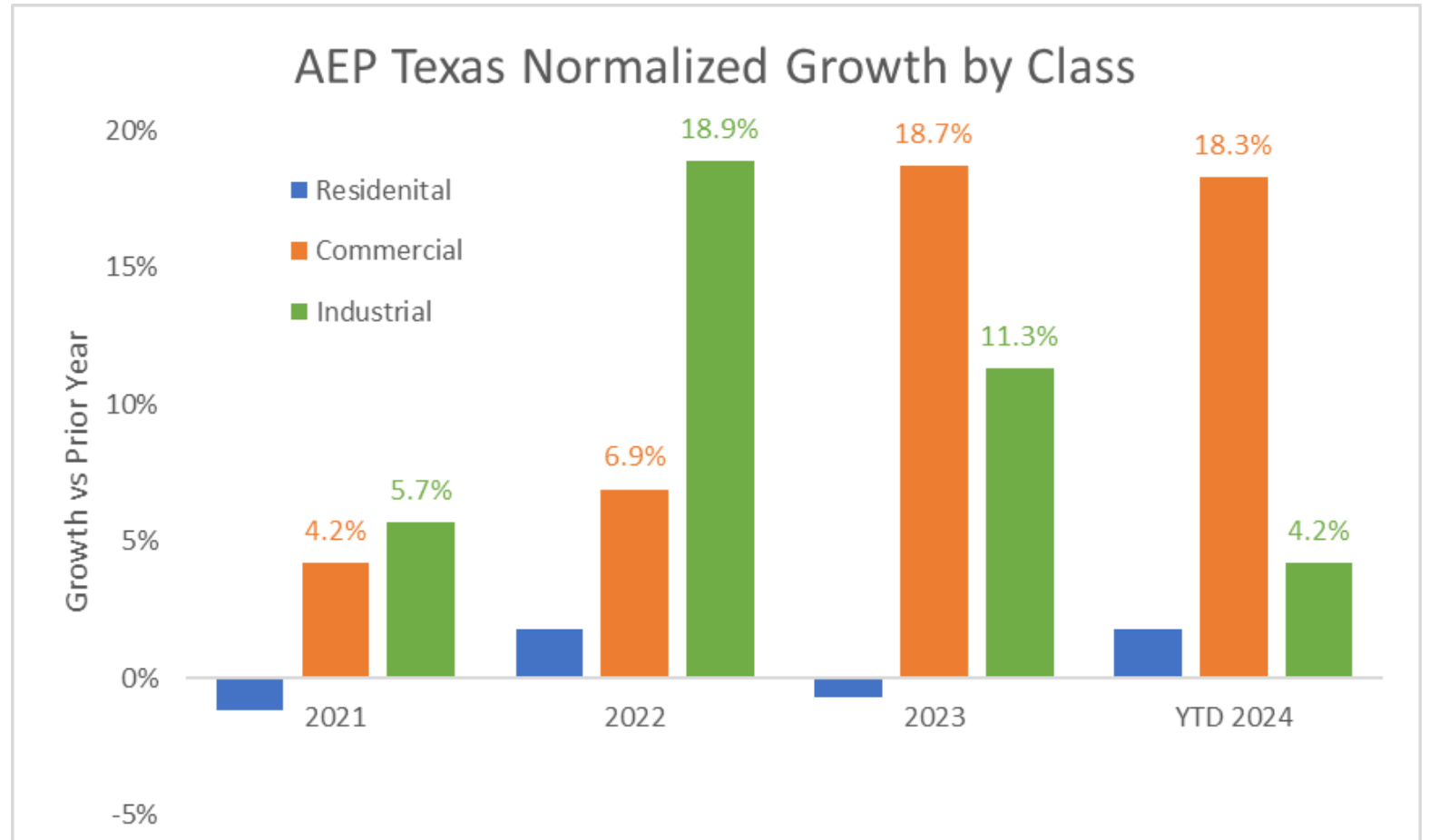
Average Growth (2011-2021) ~ **50 MW / Year**

Average Growth (2022-2023) ~ **550 MW / Year**

- AEP Texas has just experienced 20 years of load growth over the past two summers.

# ...Primarily Commercial & Industrial Classes

- Accelerated growth is largely in the Commercial and Industrial classes, as a result of prior Economic Development activities.
- Much of the Commercial growth is from data centers and crypto mining facilities located in West Texas.
- Industrial growth is spread across many industries including Oil & Gas, Chemicals, and Primary Metals facilities located across the footprint.



# Fun With Numbers (Part 2)

**All-time Peak Demand (2023) ~ 7,550 MW**

**+ Signed LOAs w/ Customers (2023) ~ 9,000 MW**

**+ Customers Requesting LOAs (2023) ~ 12,000 MW**

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**Potential Load by 2030 ~ 28,000 MW**

# Who Are These New Loads? Why AEP Texas?

## WHO?

- There are approximately 30 customers that have signed or requested LOAs from AEP Texas (12 of those are > 1 GW).
- These customers represent various industries including Hydrogen, Data Centers, Crypto Miners, Oil & Gas (LNG), Chemicals, Battery Manufacturing, etc.
- Many of these loads are bringing their own renewable generating resources to satisfy ESG commitments to investors. (BYOG)

## WHY?

- Favorable demographics (e.g. population growth, labor force, etc.)
- Favorable business environment (e.g. lower taxes, targeted incentives)
- Favorable locations (e.g. Permian/Eagle Ford shale regions, Coastal area, Laredo now busiest US port city, Rio Grande Valley)
- Emerging industries (Hydrogen Hub, EV manufacturing, Renewables, etc.)
- The AEP Texas service territory is well-positioned for future economic growth.



# Storm Response

## Hurricane Beryl

- Made landfall as Category 1 hurricane near Matagorda, Texas on July 8 at 4am.
- Areas most impacted within AEP footprint were El Campo, Bay City, and Palacios area.
- Just over 35,000 customer outages as a result of the storm.
- 95% of customers restored by Thursday July 11.

Current PUCT Rulemaking require REPs to provide customer contact information to TDUs for storm restoration notifications.



# System Resiliency

## HB 2555

- Allows Texas utilities to file Resiliency Plan at PUCT to improve system resiliency.
- Starting in 2014, AEP Texas updated its standards to be more resilient. (Currently, approximately 19% of distribution structures are from the new design standards).
- HB 2555 will allow AEP Texas to accelerate its Resiliency efforts to improve customer experience after a major storm event.
- AEP Texas plans to file its Resiliency Plan later this year.





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# REGULATORY UPDATE

Gricelda Calzada

Reg Pricing & Analysis MGR

# Rate Case

## Project 56165

# Settlement Agreement



Rate case filed February 29, 2024  
Settlement was filed July 25, 2024



Base Rate Revenue requirement to be \$70Million. \$45.5M related to distribution cost of service and \$24.5M related to transmission cost of service.



New Rate Case Expense Rider SAC04 code MSC049



# Rate case cont. New Rate Schedules

Wholesale Distribution Rate

Substation and Primary Line Rate  
subject to change in future proceedings  
(54224-*Cost Recovery for Service to  
Distributed Energy Resources*).

**AEP Texas agreed to not collect the  
interim rates authorized in Docket No.  
53267 and moved to dismiss.**





# Rate case cont.

## New Rate Schedules/Fees

Primary Substation Rate

New **Miscellaneous Fee** to be billed directly to end use customer OR Retail Electric Provider

**Miscellaneous Fee SAC04 code  
SER109**

# Rate case cont.

Good cause exception allowing Distribution voltage facilities rental offering through the effective date of new rates approved in next base rate case.

Rates to be effective Bills Rendered on or After October 1, 2024.



# Upcoming Rulemakings

Project No. 56897

This rule change requires electric utilities to create and maintain online outage trackers on their website and develop a process to receive information from governmental entities regarding hazardous conditions.

Comments must be filed by Sep 20, 2024.



# Upcoming Rulemakings

Project No. 56898

This rule change requires Retail Electric Providers to provide the TDU with customer contact information for each retail customer. The information must include the retail customer's name, service address, telephone number, mobile phone number, and email address.

Comments must be filed by Sep 19, 2024.



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# TEXAS SET UPDATE

Bill Snyder

Business Standards Consultant

Last updated: August 15, 2024

- Business Unit Activities – Focus on new processes and documentation
  - MIMO Rules (remove some, adds TDSP authority on some rules)
  - Specific Reject Codes (limiting use of A13 reject code)
  - Inadvertent Gains/Cust. Recissions (New IA and CR indicators)
  - Disconnects/Reconnects (due to safety, weather or emergency conditions)

We have also assisted other departments like Field Communications, Call Center and Regulatory in documenting how these changes will affect their work

- User Acceptance Testing - AEP Texas' Business IT group set up test environment and have had users testing Texas SET 5.0 changes for the last 3 months.
- Test Flight 0924 – Currently in connectivity testing. On September 16th, AEP Texas (and all TDSP's) will upload Test Bed information in FlighTrak. September 23rd will be Day 1 of transaction flow with the Flight scheduled to conclude on October 4th. Contingency Period to conclude the flight will end October 18th.



- Market Implementation Plan – AEP Texas is ready to execute its plan. The first Market Conference Call is on November 5<sup>th</sup> at 2pm.

November 1<sup>st</sup> 5pm - “ready to receive” deadline for IAG’s

November 6<sup>th</sup> 12pm - suspend 650\_01 DNP transactions

November 8<sup>th</sup> 12pm - suspend 814\_PC transactions

- begin using Safety Net process for MVI’s on 11/8 & 11/9

- suspend all 650\_01 transactions

- 1pm - suspend 824 transactions

November 9<sup>th</sup> 8am - ERCOT shuts down outbound and inbound processing and MarkeTrak

- Market Implementation – All systems go on the evening of November 10<sup>th</sup>.
- Contingency Implementation date is November 17<sup>th</sup>.



QUESTIONS?

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# UAS (DRONES)

Eric Elizondo

Last updated: June 26, 2024

# Drone Evolution

- Over 200 pilots currently active in AEP
- TCOM Drone program started in 2017 with DJI Inspire 2 drones
- Due to strict security, DJI no longer a viable option so we started to look for American made drones
- Skyfish M6 – 6 rotor drone with a Sony 61MP camera
- Skydio (S2+, X2E, X10) – Now the main source of our drone imagery and photogrammetry



# Telecom Tower Inspections

- Whole tower site inspections
- Antenna inspections (Microwave and Bogner)
- Shelter roof inspections
- Lighting inspections (Beacon and sidelights)
- Cost and time savings on unnecessary tower crew mobilizations
- Crews already know the parts needed for repair eliminating the wait time between inspection and repairs



# Distribution and Transmission

- Inspection of lines and equipment especially in areas with overgrown vegetation
- Flying over waterways that are inaccessible by other vehicles for line, equipment, and ROW inspections
- Helps to reduce costs due to quicker and more importantly safer ways of inspecting our assets



# Storm Assessment



- Hurricane Beryl
- We utilized 20 pilots (Texas, Louisiana, Oklahoma, and West Virginia) making up 10 teams to fly assessment
- Helped to inspect and identify trouble on hard-to-reach circuits due to overgrown vegetation and water.
- Took minutes instead of hours or even days to assess
- Was crucial in enabling restoration crews to know where to focus their efforts along long hard to reach circuits



# Drone Demonstration



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# ENERGY EFFICIENCY CONSUMER PROGRAMS

Robert Cavazos

Manager



# Energy Efficiency & Consumer Programs



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What is the  
difference between

Efficiency  
&  
Conservation?



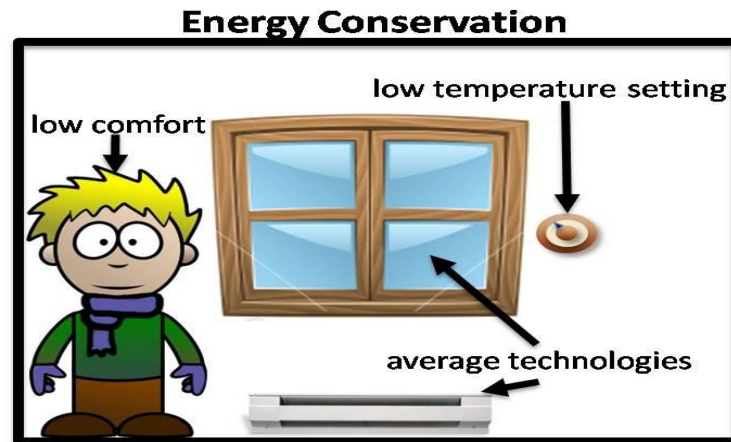
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## Energy Conservation

*Doing with less of a service to save energy*

Using less energy and probably getting less of a result

Example: Turning down the thermostat to get less heating

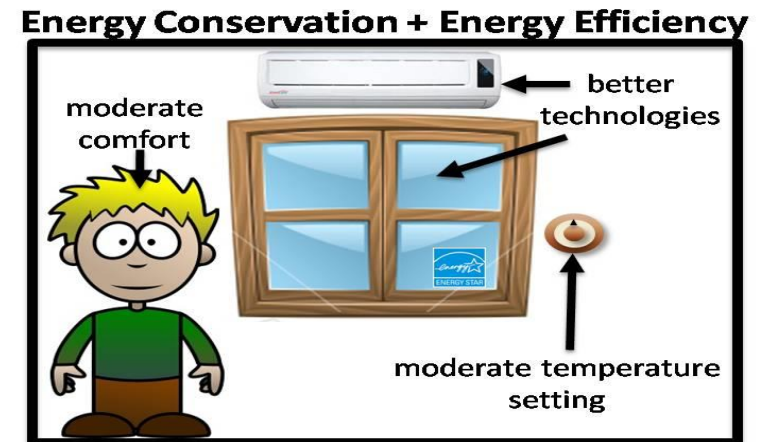


## Energy Efficiency

*The use of less energy to provide the same or an improved level of service*

Using less energy to perform the same (or better) function

Example: A more efficient HVAC





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# Why Energy Efficiency?

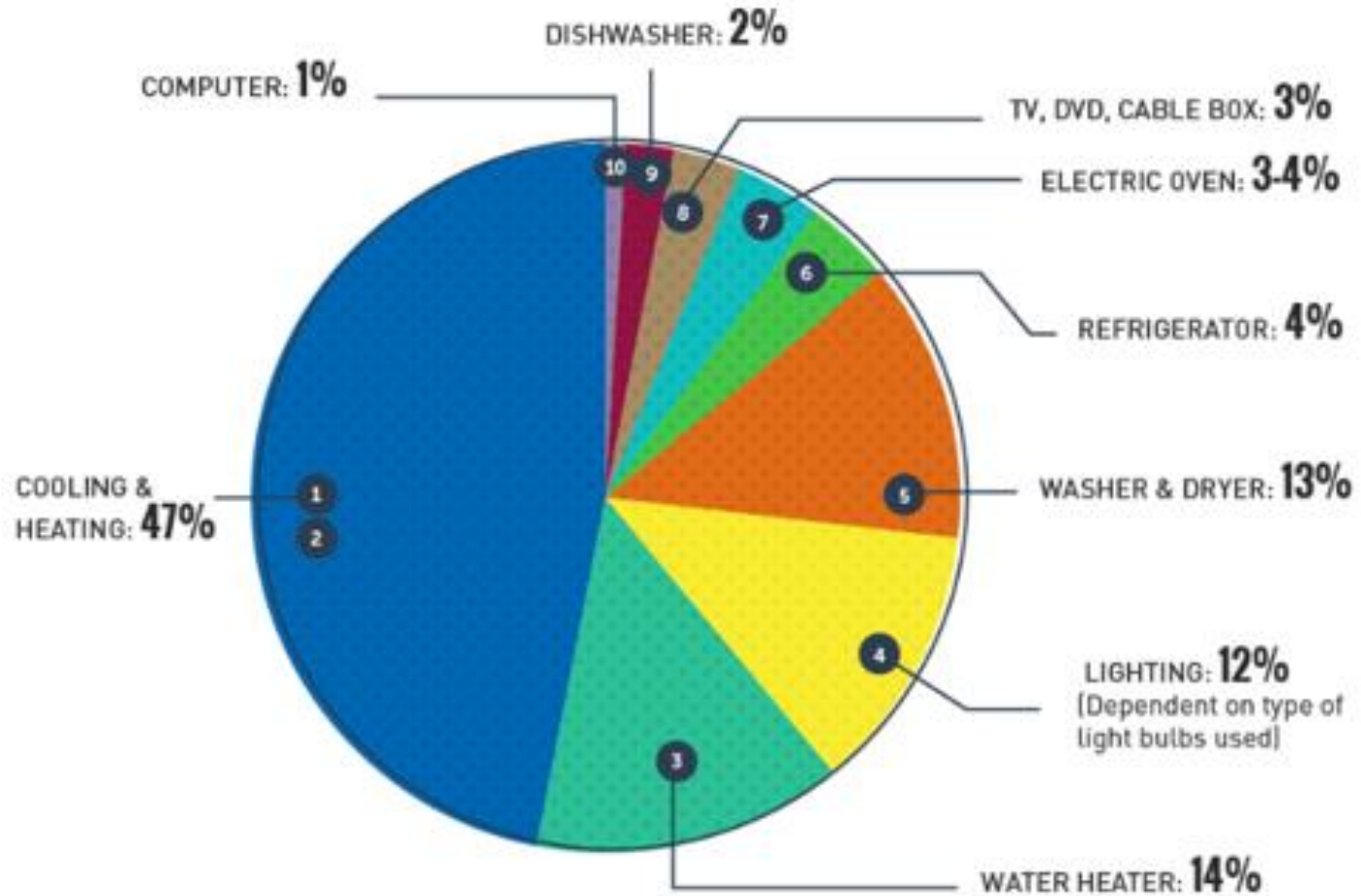
- The State of Texas requires investor-owned utilities such as AEP Texas to achieve annual goals for energy efficiency
- The Public Utility Commission of Texas (PUCT) has rules guiding the utility programs for consistency
- AEP Texas believes energy efficiency programs help customer save energy and reduce energy costs





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# Energy Use in a Typical Home





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# Commercial Programs

- Commercial Solutions MTP (Market Transformation Program)
  - Targets commercial customers
  - Provides energy usage consultation at no charge to customers
  - Incentives paid directly to customers
- Commercial SOP (Standard Offer Program)
  - Targets commercial customers or energy efficiency service providers (EESPs) who install eligible energy efficiency measures
- CoolSavers MTP
  - Program offers incentives for A/C tune-ups
  - Incentives paid to contractors
- Load Management SOP (Winter / Summer)
  - Targets commercial customers with a peak demand of 500 kW or more
  - Incentive payments are based on the demand reduction during the Summer Peak Period



# Commercial Programs

- Open MTP
  - Targets small commercial customers with a maximum peak demand of  $\leq 150$  kW at any one facility
  - Incentives paid to contractors and reduces the cost to the customer
- SCORE / CitySmart MTP
  - Targets educational and governmental entities
  - Provides energy usage consultation at no charge to customers
  - Incentives paid directly to customers
- Smart Source Solar MTP
  - Helping customers meet their energy needs with solar electric systems
- Food Service Pilot MTP
  - Point-of-sale rebate for equipment dealers and market actors



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# Residential Programs

- CoolSaver MTP
  - Program offers incentives for A/C tune-ups and A/C replacements
  - Incentives paid to contractors
- High Performance (HP) New Homes MTP
  - Consult and incentivize builders to build homes more energy efficient than building code
- Multi-Family Smart Thermostat Pilot MTP
  - Incentives paid for the installation of Energy Star Thermostats



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# Residential Programs

- Residential SOP
  - Participating contractors offer EE weatherization services and/or install EE products in eligible residential customer homes
- Smart Source Solar MTP
  - Helping customers meet their energy needs with solar electric systems



# Low Income Programs

- Hard to Reach (HTR) SOP
  - Targets residential customers at or below 200% of the federal poverty guidelines
- Targeted Low Income Energy Efficiency Program (TLIEEP)
  - Not-for-profit community agencies identify eligible customers, conduct home assessments and arrange for weatherization and energy efficiency product installations



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Thank You

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A close-up, slightly blurred photograph of a person's hand holding a blue pen over a laptop screen. The background is warm and out of focus. A solid red horizontal bar is positioned above the main title text.

# CUSTOMER SOLUTIONS CENTER

Julie Walker, Customer Operations Supervisor

# OUR CORPUS CHRISTI CUSTOMER SOLUTIONS CENTER

We are one of 6 Call Centers

Other Centers:

- Shreveport, LA
- Tulsa, OK
- Fort Wayne, Indiana
- Gahanna, OH
- Hurricane, WV



# OUR CORPUS CHRISTI CUSTOMER SOLUTIONS CENTER

## Hours of Operation:

- 8am – 7pm Monday – Friday
- 8:30 am – 5pm Saturdays
- Closed Sundays

## Most common calls:

- Processing Open and Close orders
- Billing Questions
- Service Orders requests or inquiries
- Payment Arrangements

# OUR CORPUS CHRISTI CUSTOMER SOLUTIONS CENTER

- Corpus Christi center is the Bilingual Center for all of AEP
- 15 agents / 2 Leads / 1 Supervisor
- Employees in the center have stringent requirements to meet such as Productivity (AHT, Wrap, Hold, off the phone time), Quality, Attendance, No Tardies, and many others.
- Corpus and Shreveport call centers are the only centers that handle Customer Service for Texas Dereg.
- All centers handle Outage calls.
- We are in the process of hiring 10 more agents - We lost a few due to retirement.
- We are all Spanish speaking agents and handle calls from all the 11 states we serve:

Texas	Kentucky	Arkansas
Virginia	Tennessee	Oklahoma
West Virginia	Ohio	Michigan
Indiana	Louisiana	

# OUR CORPUS CHRISTI CUSTOMER SOLUTIONS CENTER

Most of our States are Regulated. Every State has different Policies, Regulations and available Programs.

- For example:

Ohio has a **Percentage of Income Plan (PIP)**. This programs helps customers who's household income is at or below 175% of the federal poverty guidelines.

This plan is an extended payment agreement based on a percentage of your household income. And every month, they only have to pay that very small amount.

This plan is funded by the State of Ohio as part of the Universal Service Fund program and the Ohio Development Service Agency.

Customer has to apply for this program with the State of Ohio.

# OUR CORPUS CHRISTI CUSTOMER SOLUTIONS CENTER

## Medallia Survey

We measure the agents Overall Customer Satisfaction via Surveys. If we have an email on file, customers are randomly sent Surveys in regard to their call to us.

A bad survey will create an alert to the Lead and Supervisor. We review the call and coach the agent.

What are our recent scores? Osat with Agent is at 72.4% Our goal is 74 % for the year.

Customers also have the option to leave a Video Message responding to the Survey.

# OUR CORPUS CHRISTI CUSTOMER SOLUTIONS CENTER

Most of our days have been busy lately, but queue times can vary anywhere from 2 to 35 minutes at times.

We have a lot of automation in place and customers can self-serve. The calls our agents are handling are far more difficult and are lengthy than automated options.

Questions from our AEP Customer Solutions Center agents:

ESID- Look ups - Can REP agents obtain these online without generating calls?

TDSP – Charges – Are REP agents able to explain TDSP charges to the customers when they have a bill inquiry? Customers are directed to call us to explain billing, however it can be difficult since our AEP agents can only see the TDSP Charges.



# QUESTIONS?



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ASSET CONTROLLERS

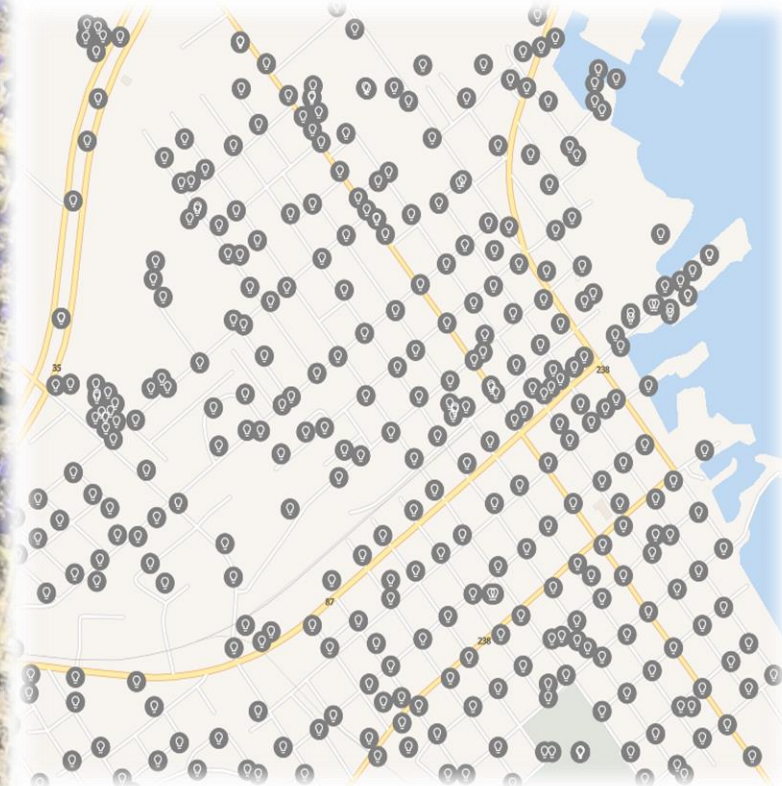
Naomi Serrata & Natalie Montano

# Updates

1.5 years into a  
5-year project

Automation

Billing Cleanup



# Deployment

- San Angelo
- Eagle Pass
- Aransas Pass
- Rockport
- Beeville
- El Campo
- Bay City
- Port Lavaca
- Uvalde
- Del Rio
- Pleasanton



- Total of 28,438 asset controllers installed
- Rio Grande valley is currently in deployment
- By the end of 2024, total installed will be 44,009

# Workload and Results

- Work open/close orders and disconnect/reconnect orders from the REP on outdoor light accounts if there is an asset controller on the light.
- Saved 105 truck rolls working orders internally
- Quicker response time
- Visiting service centers in the surrounding areas to discuss processes



QUESTIONS?

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# 2024 CR SURVEY RESULTS

**Melinda Earnest & Toney Gutierrez**  
**CRR Account Executives**

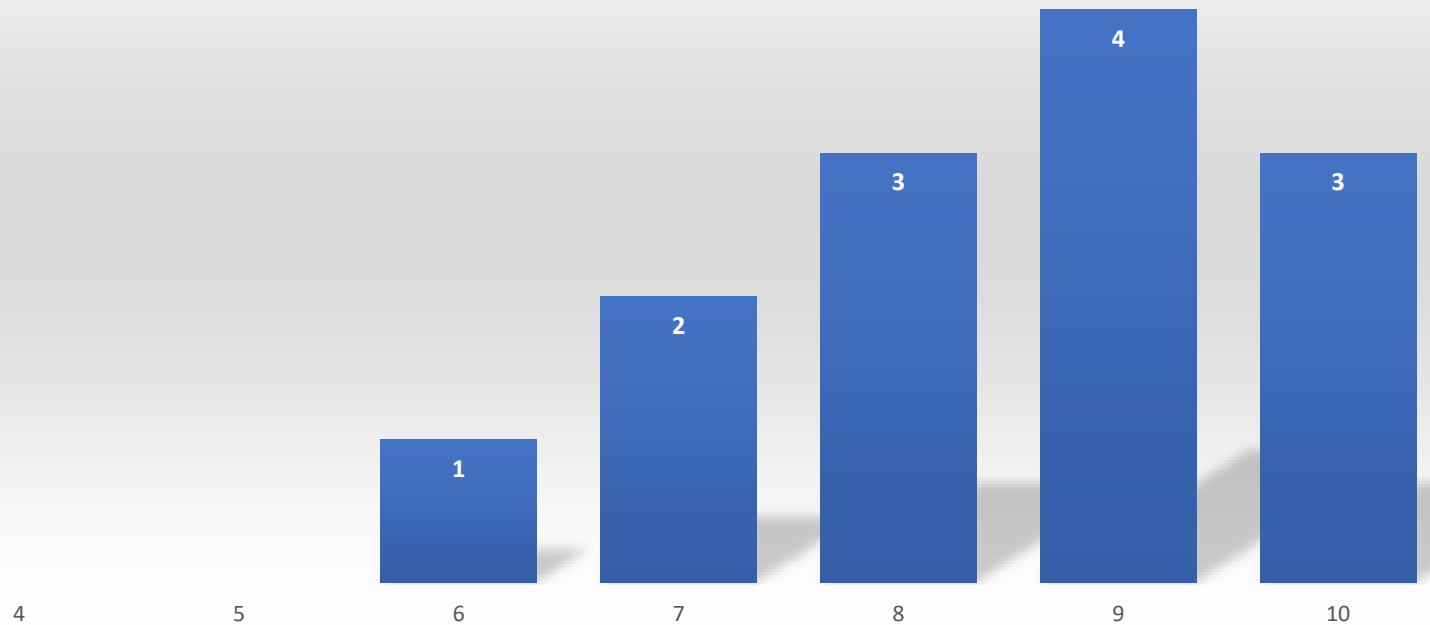


# 2024 Competitive Retailer Survey Results

- ❖ **Surveying CRs for over 20 years**
- ❖ **Data collection began on July 22nd and concluded August 16th**
- ❖ **Encouraged Comments and Honest Feedback**
- ❖ **Participation – 2024 Survey - 13 Respondents**
  - **2023 Survey – 13 Respondents**
  - **2022 Survey – 20 Respondents**
  - **2021 Survey – 13 Respondents**

# 2024 Competitive Retailer Survey Results

Overall, how would you rate the general performance of AEP Texas? - Average = 8.46



# 2024 Competitive Retailer Survey Results

The 2024 Survey Results, in all honesty, were.....



# 2024 Competitive Retailer Survey Results

Is there anything AEP Texas could do to better to meet your needs?

Be more visible. At a time AEP was proactive and now it seems as if they are content just reacting.

Sending 867/810 transactions for large load customers as soon as possible (ideally next business day) after meter read dates.

REP Desk issues needing fixing:

1. Often we get an error message that, "REP Desk is not Available,
2. NOT finding an esi-id when it is at ERCOT and has been active for months if not years and
3. Not finding an esi-id when we are needing to do a Disconnect For Non-Payment connect.

I would like to see AEP be more proactive and visible. We don't see them enough.

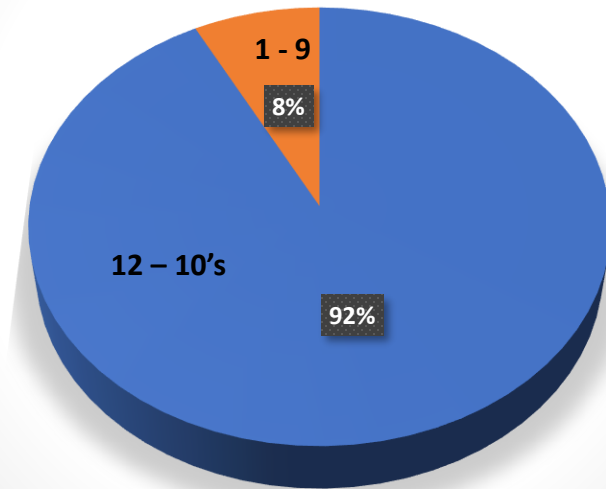
The REP Desk, as some of the more seasoned staff has retired, does not always have the "above and beyond" that it used to. When I use the chat, I find myself hoping that I get one particular person because I know my issue will be thoroughly researched and resolved, otherwise, there is a good chance I am going to need to follow up with my Account Manager. There have been some examples of what I suspected were mistakes in responses that I've needed to "double check" with my account manager. I've also been told I can only ask about 3 ESI IDs at one time, otherwise I need to end the chat and start again (that does not seem to make sense, especially if all the ESI IDs have the suspected same issue).

Clear and concise communications

Ensure clarity of information contained in Market Notices.

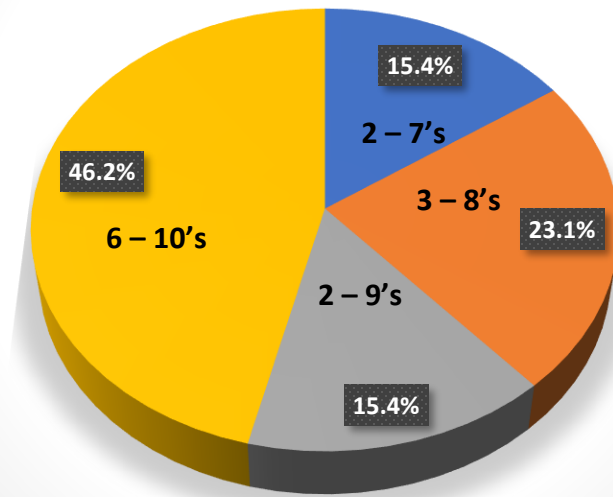
# 2024 Competitive Retailer Survey Results

Overall, how would you rate your Account Manager's general performance? - Average = 9.9



# 2024 Competitive Retailer Survey Results

Overall, how would you rate the general performance of the AEP Texas Market Specialists? Average – 8.92



# 2024 Competitive Retailer Survey Results

Is there anything the AEP Texas Market Specialists could do to provide better service?

Ensure the Market Specialists include the reasoning for specific requests. Example: When an email request is sent for a MVI / MVO, please include the reason / context for the request.

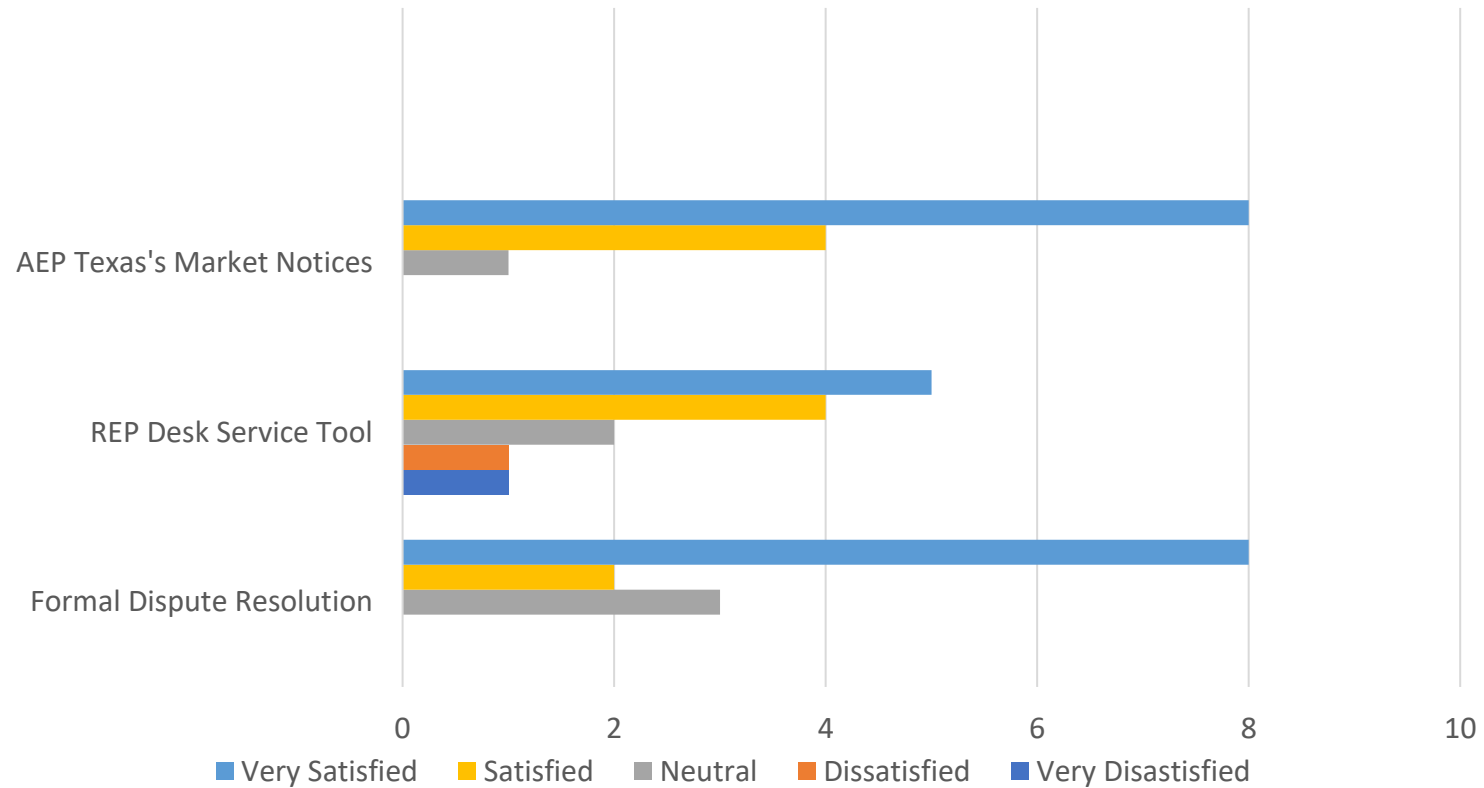
Sometimes we get conflicting information between chat reps

Market specialists have been good this year. Just make sure they have the information they need to represent so they can be prepared to answer or be accountable for follow ups. I am not saying they haven't been accountable, but just recall a few times where they were dependent on others and were needing information to fulfill requests from market.

I would also like to recognize "Cesar" on the REP Desk, he continually goes above and beyond to resolve whatever issue might be presented on the chat. Most recently (last week, late on a Friday afternoon) I had a particularly urgent issues that was brought to my attention by our Sales team. Cesar was on the REP DESK and figured out what was going on (not what I had thought) and took it upon himself to get the resolution process in motion. My Sales team could not have been happier and was very impressed they (Sales) did not have to play "back and forth" because Cesar took the initiative to resolve. Excellent customer service (as usual)!!!!

# 2024 Competitive Retailer Survey Results

The effectiveness of the processes utilized by the Market & AEP Texas.  
Indicate how AEP Texas is performing in each area.







QUESTIONS?

**THANK YOU** for attending the 2024 AEP Texas  
Competitive Retailer Relations Workshop

August 29, 2024

**SAFE TRAVELS**

