NYISO Salesforce - Member Community

Kasia Shunk & Steve Cleary

Stakeholder Services Representative

NYISO Stakeholder Services

October 2, 2020

Agenda

- **Value of the NYISO Salesforce Member Community?**
  - Background /Value, why use it?
- **Overview of the NYISO Member Community Features**

- **NYISO Member Community Registration**
  - How to sign up?
- **Q&A**

What is the VALUE of the NYISO Member Community?

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Value of the NYISO Member Community

- **Background**
  - Process began in 2017 with the Salesforce implementation
  - NYISO Market Participants expressed a need for greater visibility and control with registration and interactions with the NYISO
  - Currently 31% of Market Participants are utilizing the Member Community
  - PJM, CAISO, ISONE also using this CRM platform to enhance customer service
- **Process – Creating process efficiencies for Market Participants**
  - Automation of manual processes and improved customer service experiences
- **Tools – Providing a Suite of Customer Service Tools**
  - Communications, contact and case management, annual affiliate list submission, automated registration and coming soon a knowledge article library
- **Available to all registered Market Participants**

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NYISO Salesforce Member Community Features

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Benefits of the NYISO Salesforce Member Community

- **Contact Management**
  - Maintain updated Contact information (phone, email, etc.)
  - Account contact role designations
- **Notification List Registration and Management**
  - Subscribe /NYISO communications
- **Case Management -Inquiries**
  - View all individual / org. tickets
  - Communicate / Inquiry updates
- **Knowledge Articles**
  - Coming soon (by end of 2020)
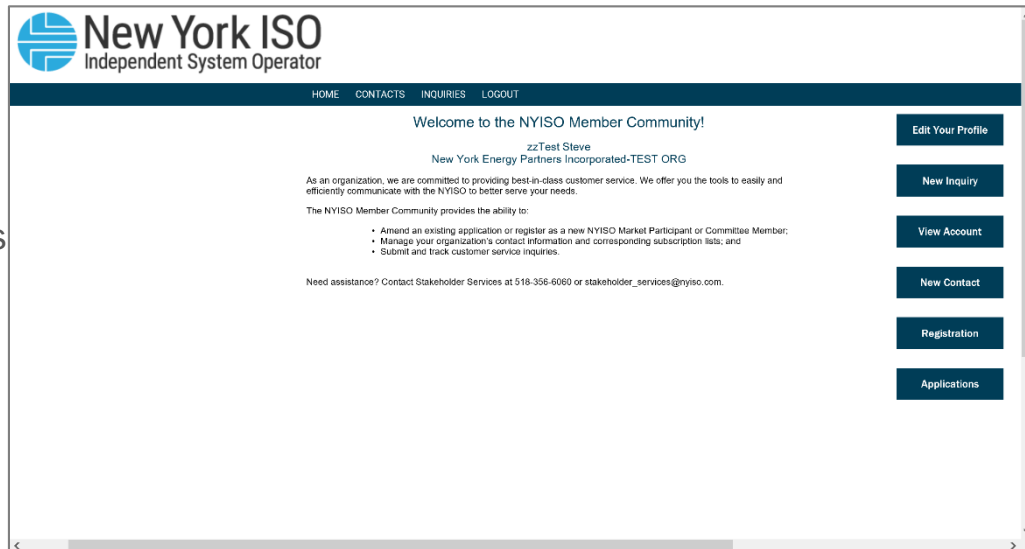
Contact Management

- **View active contacts associated with your organization**

- **Register and update your organizations contacts for various email notification lists**
  - Outage notification
  - Governance mailing lists
  - Billing

- **Activate/deactivate contacts**

- **Update contact information**
  - Phone, email, address, etc.

- **Account Contact Role Management**
  - Main Contact, MIS Admin, Credit Contact etc.

Case Management - Inquiries

- **Submit inquiries directly into the NYISO Stakeholder Services case management system**

- **Inquiry sent directly to Stakeholder Services Representatives**

- **Transparent status updates, and Inquiry Tracking**

- **Admin can view submitted cases for their designated organization**

New Inquiry

Inquiry Details

Subject

Inquiry Category

Markets and Programs

Description

File Upload

Attachment

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Contact Information

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Knowledge Articles

- Database of Industry related Frequently Asked Questions and Educational Articles

- Ability to provide direct feedback on articles / recommendations for future articles

- Offers insight into existing and new NYISO products / services
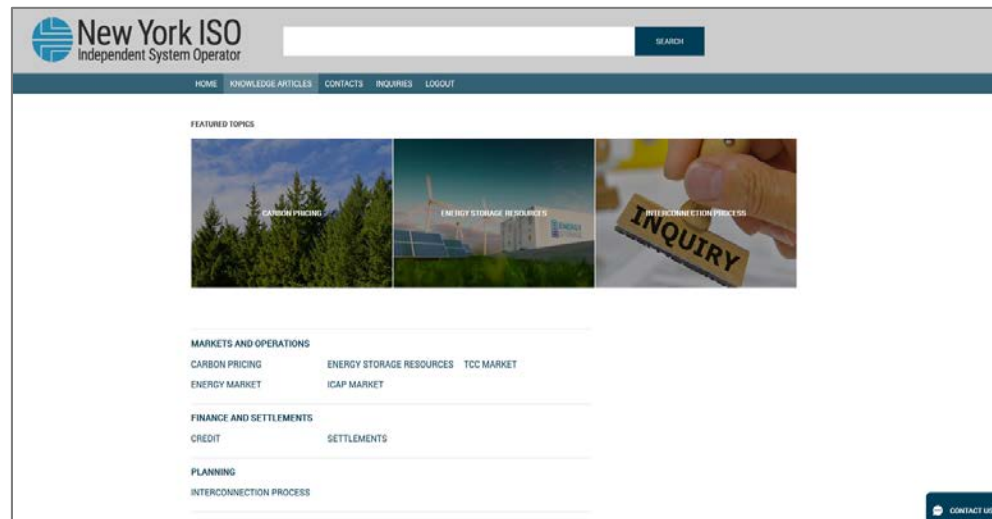
NYISO Member Community Registration

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NYISO Member Community Registration

- Contact NYISO Stakeholder Services at stakeholder_services@nyiso.com expressing your interest in registering for the NYISO Member Community
- Complete a NYISO Member Community Agreement
  - Agreement must be completed and signed by an authorized signatory from your organization
- Designate a NYISO Member Community Administrator
  - Administrators create and manage user Member Community access and accounts
- NYISO Stakeholder Services representatives will work directly with you to complete registration
- Informational Webex sessions scheduled
  - Tuesday, October 6th 10:00 AM
  - Thursday, October 8th 1:30 PM

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Questions?

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Our mission, in collaboration with our stakeholders, is to serve the public interest and provide benefit to consumers by:

- Maintaining and enhancing regional reliability

- Operating open, fair and competitive wholesale electricity markets

- Planning the power system for the future

- Providing factual information to policymakers, stakeholders and investors in the power system

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