

Retrospective Notes

Vortex Grid Systems Inc.

Retrospective Notes - First Meridian Record Exchange Pilot Cycle

Record ID: NOTE-005
Retrospective reference: MEE-26-RET-01
Date: 2026-07-17
Time: 15:00-16:30 UTC
Facilitator and author: Avery Lin, Service Readiness
Participants: Riley Okafor; Morgan Iqbal; Leila Grant; Noor Patel; Marta Alvarez; Theo Brooks
Notes by: Avery Lin (cleaned up 7/20)
Revision: 1.1, follow-up added 2026-07-20

Whiteboard + my laptop notes. Cleaned up Monday; left the awkward bits where they explain an action. - Avery

What this retro covered

First MEE-26 pilot cycle: Incident Chronicle, Regional Change Windows, Supplier Identity and Reconciliation, and Customer Narrative Discipline. Not a project closeout (Riley said this twice). One pilot down; several actions below still open.

Current name on the invite was Meridian Record Exchange. Older material in the folder still says Meridian Evidence Exchange. Same MEE-26 number. Nobody wants to rename all the old files by hand.

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Worked

The Regional Change Windows pilot recorded UTC, Pacific local time, expected recovery duration, rollback threshold, and named field recipient in one approved change record. Field SMS and ops chat were useful during the handoff. Leila still had to chase one calendar acceptance even though the person had replied "got it" in chat. Pilot result was filed with CHG-2026-204; the incident writeup stayed as-is.

Incident Chronicle: customer report, field notes, engineering view, correction, final review. Marta liked seeing the first customer status beside the correction ("painful, but you can see why we changed it"). Morgan was relieved the final review allowed more than one contributing condition.

Supplier work finally stopped the two Auroras getting mixed together. Noor: please do not turn that sentence into "vendor problem solved"; it was a records fix. Hardware triage used SUP-778 and the circuit-assembly part number afterward.

Still messy

Names were still messy. Project rename is manageable because MEE-26 stayed put. People were worse: Avery Lin and A. Lin in Product Finance got merged in a draft assignment list. Full employee IDs added after the meeting. Avery: "I am not approving invoices, promise."

Several summaries jammed unlike things into one sentence. Board draft after my edit: "the pilot ~~fixed the incident process~~ exercised the handoff fields." I left the wrong words visible because that was the tempting mistake. The incident review

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documented a past event; workstream actions are still open.

Two more of those went past me this week. A status line read "supplier issue resolved recorded", which Noor rewrote before it reached anyone; and a draft agenda said "metering export-fixed-reissued and on hold", which is Hana's correction and not mine. Same shape every time: a verb that closes something replacing a verb that merely describes it.

The metering incident is not ours

Riley asked whether the July Calder Mills export problem, IR-2026-023, belonged in this retrospective. It does not, and I want the reason written down rather than assumed.

Calder Mills is a different customer, a metering export is a different system, the owner is Hana Vogel in Metering Data Services, and nobody in this room contributed a finding to it. It shares no gateway, no change record, no supplier, and no conclusion with IR-2026-017.

What is worth noting is narrower and procedural: it is the first incident recorded with the chronology template this workstream produced. Hana's team used the observation and assessment labels from day one, and Bram's billing hold sits in the record as its own dated entry rather than as a sentence inside someone's summary. That tells us the template travelled to a team that was not in its design review. It tells us nothing at all about what happened at Calder Mills, and it must not be written up as though the template caused a good outcome there. The metering review is open and has its own owner.

Old snippets caused trouble too: "delete old notices," "merge Aurora entries," and

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"close when indicators are green." Nobody in the room owned the first two instructions. Riley rejected the green-only close rule; open actions still matter. Marta will keep the first phrase attached to the customer's original request.

Action checklist

- ☐ Riley Okafor - show each workstream status in program summaries.
- ☐ Morgan Iqbal - add "applies to" line to chronology conclusions.
- ☐ Leila Grant - keep calendar/change/SMS/chat attachments in pilot closeouts.
- ☐ Noor Patel - require legal supplier name + vendor ID in reconciliation.
- ☐ Marta Alvarez - keep first and corrected customer messages with approval times.
- ☒ Avery Lin - revise ambiguous participant abbreviations in the retrospective index.
- ☐ Theo Brooks - document when a configuration difference is expected rather than defective.

Revisions and follow-up

The first draft described Avery Lin as the "finance and readiness analyst." That was incorrect and likely arose from the repeated abbreviated name. Revision 1.1 preserves the mistake in this edit history and corrects the facilitator to Avery Lin, Service Readiness. Product Finance remains a separate participant role and did not facilitate this meeting.

Follow-up entered 2026-07-20: Program Delivery accepted the revised workstream-status sheet. No workstream was marked complete just because the retrospective occurred. Open checklist stays open. Riley will check dates with each owner next Monday.