**Policies for the Management of Change**

This document outlines the change management policies to be adhered to for accepting or rejecting new proposals from customers or other external business entities.

This document seeks to establish the policies and procedures governing change management within our company. The steps to request, evaluate and support alterations to the EcoCaffe sales management system will be detailed, along with the definition of the responsibilities of the parties involved in each phase of the process.

The main aim of this document is to guarantee that alterations to the system are carried out in a structured and deliberate fashion, with the intention of reducing any detrimental effects on the system's quality and stability.

# Committee

The committee in charge of evaluating changes in the EcoCaffe project is made up of the following members:

* **President:** The President is the executive leader of the company, responsible for establishing the strategic vision and goals of the organization. He focuses on making key decisions, representing the company to external stakeholders and ensuring that business objectives are met.
* **Project Manager:** The Project Manager is responsible for planning, coordinating and supervising the execution of specific projects, including the online food sales platform. Leads the development team, ensuring milestones are met and product quality is maintained within established scope, time, and budget.
* **Human Resources Department:** The Human Resources Department is responsible for managing the company's human talent. This includes employee recruitment, selection, training, development and retention. It is also responsible for promoting a healthy work environment and encouraging teamwork and collaboration.
* **Finance Department:** The Finance Department is responsible for the company's financial management, including budget planning, expense tracking, financial reporting, and financial risk management. Works closely with other departments to ensure the economic viability of projects.
* **Technology Adviser:** The Technology Advisor provides strategic guidance in the use of technology to achieve business objectives. He stays abreast of the latest trends and technological advances, advising on the selection of the most appropriate tools, architectures and development approaches for the online food sales platform.

The objective of these decision-making policies is to clearly and effectively influence decisions regarding change requests that arise during the project's lifecycle. This will maintain order among the committee members for decision-making.

# Change Request Logging Policy:

Objective: Establish a process to formally log all change requests on the platform.

Procedure:

* All team members or the stakeholders (customers and users) can submit change requests using a standardized form.
* Requests must include a detailed description of the proposed change, its justification, and the expected impact.
* Requests are logged in an issue tracking system or collaborative work board for review and tracking purposes.
* The first status is new request.
* The second status is in review by project manager.
* The third status is reviewed.
* The four status is assessing.
* The five status is accepted.
* The six status is denied.
* The seven status is in process
* The last status is finish.

# Assessment and Prioritization Policy:

Objective: Evaluate and prioritize change requests based on their impact, urgency, and alignment with strategic objectives.

Procedure:

* An evaluation committee, including the Project Manager, the Technology Advisor, and representatives from other relevant areas, periodically reviews change requests (configuration items).
* Requests are evaluated based on criteria such as impact on user experience, technical complexity, and financial feasibility.
* A priority is assigned to each change request based on its relative importance to the business and its urgency.
* It’s necessary create the SWOT matrix for calculate risk and opportunity.
* The priority of changes requests are urgent or critical, regular or basic.
* It’s necessary calculate the impact and establish as high medium and low.

# Approval and Implementation Policy:

Objective: Establish a clear and transparent process for the approval and implementation of change requests.

Procedure:

* Change requests approved by the evaluation committee are assigned to a designated responsible party for implementation.
* Before implementing a change, an impact analysis is conducted to assess potential side effects on other areas of the system.
* Once the change is implemented, comprehensive testing is performed to verify its proper functioning and its impact on the platform.

# Communication and Notification Policy:

Objective: Keep all stakeholders informed about the status of change requests and any actions taken.

Procedure:

* A communication system is established to automatically notify requesters and other stakeholders about the progress of their change requests.
* Timely feedback is provided to requesters regarding the status of their requests, including reasons for approval or rejection.
* All decisions made and actions taken regarding change requests are documented and maintained in a record.

# Project Prioritization Policy:

Objective: Establish a process for prioritizing projects and features of the online food selling platform, considering their impact on the company's strategic objectives.

**Responsibilities:**

* The President leads the discussion on aligning projects with the company's strategic vision.
* The Project Manager provides feasibility analysis and estimates of time and resources.
* The Finance Department evaluates the financial feasibility of projects.

**Prioritization Criteria:**

* Impact on user experience.
* Technical feasibility and required resources.
* Potential return on investment.

Decision-Making Process: The committee evaluates and votes on project prioritization, considering the established criteria.

# Risk Management Policy:

Objective: Identify, assess, and mitigate risks associated with the company's projects and decisions.

**Responsibilities:**

* The President leads the discussion on strategic risks and risk tolerance.
* The Project Manager identifies specific risks in projects and proposes mitigation measures.
* The Technology Advisor advises on technical and security risks.

**Risk Management Process:**

* Identification of potential risks (The committee proposes a classification of risk levels as critical risk, high risk, moderate risk and low risk. They will be attended according to the risk of the most critical to the lowest).
* Evaluation of the probability and impact of each risk.
* Development of mitigation strategies and contingency plans.

Review and Update: The committee periodically reviews identified risks and updates mitigation strategies as necessary.

# Innovation and Technology Policy:

Objective: Foster innovation and the adoption of emerging technologies to enhance the platform and maintain competitiveness in the market.

**Responsibilities:**

* The President establishes the vision and strategic focus for technological innovation.
* The Technology Advisor monitors trends and proposes new technologies and approaches.
* The Human Resources Department ensures adequate resources and training for adopting new technologies.

**Technology Evaluation Process:**

* Research and analysis of emerging technologies.
* Proof of concept and viability assessment.
* Gradual implementation and monitoring of results.

Promotion of Innovation: An environment that encourages experimentation and continuous learning is promoted, incentivizing employees to propose new ideas and technological solutions.

# Logical order for decision making

1. Change Request: Any team member or key stakeholder can submit a modification request.
2. Change Acknowledgment: The Project Manager records the change request and distributes it among relevant team members. The committee reviews the request to understand its scope and potential impact.
3. Technical Analysis: The technical lead assesses the technical feasibility of the change and determines its potential impact on the current architecture and design. It is analyzed whether new tools or technologies are required to implement the proposed change.
4. Strategic Evaluation: The manager, HR representative, finance department, and stakeholders evaluate the strategic impact of the change in relation to business objectives, budget, required personnel, and timelines for execution.
5. Change Analysis Meeting: The committee convenes to discuss the results of technical, resource, and strategic evaluations. Risks associated with the change are analyzed, and the priority for addressing them is determined.
6. Decision Communication: The team structures the decision made on the change request and communicates it to the team. The following three scenarios may occur:
7. Approval: The change is approved, and its implementation is planned.
8. Rejection: The change request is denied, and the reasons for this decision are outlined.
9. Postponement: The decision is deferred for future review as it is not a priority in the current project stage.

# Decision-making criteria

In this part of the documents, we will standardize the way in which the development of the change request will be prioritized. We will create a table with scores to know the order of implementation of the change request depending on the criteria.

## Impact on changes in the system

Does the change meet a valid customer need or request?

Is it aligned with the agreed requirements in the contract or project specifications?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Very High** | **High** | **Medium** | **Low** | **Very Low** |
| For the change it is necessary to modify more than 30% of the current requirements and add new requirements | For the change it is necessary to modify less than 20% of the current requirements and add new requirements | For the change it is necessary to modify between 20 and 30% of the current requirements. | For the change it is necessary to modify between 10% and 20% of the current requirements. | For the change it is necessary to modify less than 10% of the current requirements. |

1. When the level is “Very High” the committee likely to be rejected this change
2. When the level is “High” the committee likely to be rejected this change
3. When the level is “Medium” the committee likely to be approved this change.
4. When the level is “Low” and “Very Low” the committee likely to be approved this change.

## Cost and Resources

Is the change cost effective and within the project budget?

Does it require a significant investment of time or resources?

**Level of Impact**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Very High** | **High** | **Medium** | **Low** | **Very Low** |
| The change request includes increasing the initial project budget by more than 15% of the project. | The change request includes increasing the initial project budget by 5 to 15% of the project. | The change request includes increasing the initial project budget by 5% or less of it. | The change request involves budget, but does not exceed the project budget. | The change request does not involve a budget increase. |

1. When the level is “Very High” the committee likely to be rejected this change
2. When the level is “High” the committee likely to be rejected this change
3. When the level is “Medium” the committee likely to be approved this change.
4. When the level is “Low” and “Very Low” the committee likely to be approved this change.

## Compatibility with existing architecture

Is the change consistent with the existing architecture and software design?

Does it introduce conflicts or integration problems?

**Level of Impact**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Very High** | **High** | **Medium** | **Low** | **Very Low** |
| It includes new technologies that the team does not master and more than 5 architectural changes. | It includes new technologies that the team does not master and between 1 and 5 architectural changes. | Includes new technologies that the team masters and between 1 and 5 changes. | The change request includes changes to technologies that the team masters and a change to the architecture. | There is no variation in the existing architecture. |

1. When the levels is Very High the committee likely to be reject this change
2. When the levels is High the committee likely to be reject this change
3. When the levels is Medium the committee likely to be reject or approved this change
4. When the levels is Low or Very Low the committee likely to be approved this change

## Impact on schedule:

Does the change affect the project schedule?

Can it be done without delaying the delivery of the product?

How long would the final product delivery go?

**Level of Impact**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Very High** | **High** | **Medium** | **Low** | **Very Low** |
| The change can be managed but it needs more than 30% of the time initially established. | The change can be managed but it takes between 15% and 30 % of the time initially established. | The change can be managed but it takes between 7% and 15 % of the time initially established. | The change can be managed but it takes between 1 and 7% of the time initially established. | The change can be managed within the initially defined schedule. |

1. When the levels is Very High the committee likely to be reject this change
2. When the levels is High the committee likely to be reject this change
3. When the levels is Medium the committee likely to be reject or approved this change
4. When the levels is Low or Very Low the committee likely to be approved this change

## Consistency with Business Strategy

Is the change aligned with the strategic objectives of the organization or the client?

Does it contribute to achieving the desired results?

**Level of Impact**

|  |  |  |  |
| --- | --- | --- | --- |
| **Very High** | **High** | **Medium** | **Low** |
| The change is a main functionality of the system | The change directly impacts the main functionalities of the system | The change creates attributes/elements that will be used by the main functionalities | The change does not impact the main functionalities of the system |

1. When the levels is Very High the committee likely to be rejected this change
2. When the levels is High the committee likely to be rejected this change
3. When the levels is Medium the committee likely to be reject or approved this change
4. When the levels is Low the committee likely to be approved this change

## Technical Feasibility

Is it feasible to implement the change from a technical point of view?

Are additional resources or specialized skills required to make the change effectively?

**Level of Impact**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Very High** | **High** | **Medium** | **Low** | **Very Low** |
| It is necessary to adopt new personal, technologies and tools where the team is not prepared | It is necessary to adopt new technologies and tools where the team is prepared | It is necessary to use new libraries or functionalities of the technologies used by the project | Only new implementations with codes are necessary. | No need to deploy with code, just configure the configuration. |

1. When the levels is Very High the committee likely to be rejected this change
2. When the levels is High the committee likely to be rejected this change
3. When the levels is Medium the committee likely to be reject or approved this change
4. When the levels is Low or Very Low the committee likely to be approved this change

## Effort

How much effort team members need to make to take on the change.

**Level of Impact**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Very High(Five Story Points)** | **High(Four Story Points)** | **Medium(Three Story Points)** | **Low(Tow Story Points)** | **Very Low(One Story Points)** |
| All team members must take on new knowledge coupled with real-time development. | Half of the team must take on new knowledge coupled with real-time development. | Less than 50% of the equipment will need to be trained in a new technology with an allotted time fund. | Only selected team members should train in a new technology with an allotted time fund. | For all team members it is enough with the knowledge and time currently allocated to take on the change. |

1. When the level is “Five Story Points” the committee likely to be approved this change
2. When the level is “Four Story Points” the committee likely to be approved this change
3. When the level is “Three Story Points” the committee likely to be approved this change.
4. When the level is “Tow Story Points” the committee likely to be approved this change.
5. When the level is “One Story Points” the committee likely to be rejected this change.

## Government Laws

How many company rules must be modified or altered to take on the change?

**Level of Impact**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Very High** | **High** | **Medium** | **Low** | **Very Low** |
| The change goes against more than 50% of the rules established in the company | The change goes against between 25% and 50% of the rules established in the company | The change goes against less than 25% of the rules set in the company | The change only needs the modification of some of the established rules | Change can be assumed without violating any of the established rules |

1. When the level is “Very High” the committee likely to be approved this change
2. When the level is “High” the committee likely to be approved this change
3. When the level is “Medium” the committee likely to be approved this change.
4. When the level is “Low” the committee likely to be approved this change.
5. When the level is “Very Low” the committee likely to be rejected this change.

## Human Resources

How many new human resources does change need to take place?

**Level of Impact**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Very High** | **High** | **Medium** | **Low** | **Very Low** |
| Need to recruit at least 10 new professionals | Less than 10 new professionals need to be recruited, but more than 5 | Fewer than 5 new recruits needed | The change can be assumed with the current staff, but evaluating the times | Change can be assumed with current staff. |

1. When the level is “Very High” the committee likely to be approved this change
2. When the level is “High” the committee likely to be approved this change
3. When the level is “Medium” the committee likely to be approved this change.
4. When the level is “Low” the committee likely to be approved this change.
5. When the level is “Very Low” the committee likely to be rejected this change.

## SWOT

**Tabla 1 SWOT table example**

|  |  |
| --- | --- |
| *STRENGTHS*  • Direct Benefits for the Customer  • Alignment with Project Objectives  • Ease of Implementation  • Positive Impact on Brand Image  • Potential to Generate Competitive Advantages | *OPPORTUNITIES*  • Improvement of Customer Experience  • Innovation and Differentiation  • Market Expansion  • Process Optimization  • Strategic Collaborations |
| *WEAKNESSES*  • Implementation Risks  • Required Costs and Resources  • Potential Negative Side Effects  • Alignment with Long-Term Strategy  • Dependency on Third Parties | *THREATS*  • Market Competition and Response  • Regulatory Environment Changes  • Security and Privacy Risks  • Market Trends  • Technological Limitations |

An assessment of the impact of each previously described criterion will be conducted to decide the impact generated by each change request.

A table with the 6 criteria and the impact assessment will be created, and the overall impact will be the assessment that repeats the most. In the example in table 2 the general impact is low since it is repeated 3 times.

**Tabla 2 Example to define impact of a given criterion**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Criteria** | **Very High** | **High** | **Medium** | **Low** | **Very low** |
| **Impact on interested clients** |  |  |  | ✔ |  |
| **Cost and Resources** |  |  |  | ✔ |  |
| **Compatibility with existing architecture** |  |  |  | ✔ |  |
| **Impact on schedule** |  |  | ✔ |  |  |
| **Consistency with Business Strategy** |  | ✔ |  |  |  |
| **Technical Feasibility** |  |  |  |  | ✔ |
| **Effort** |  | ✔ |  |  |  |
| **Government Laws** |  |  |  | ✔ |  |
| **Human Resources** |  |  | ✔ |  |  |

The SWOT matrix will be able to gather the strengths, weaknesses, opportunities, and threats of each change request.

For decision-making, the following aspects will be prioritized:

* First: Change request with the closest overall impact to very low (In the event that two impact levels have the same number of evaluations, the chosen one is decided with the following steps). After the change request with the closest overall impact to low. After the change request with the closest overall impact to medium. After the change request with the closest overall impact to high.
* Second: Change requests with more strengths.
* Third: Change requests with more opportunities.
* Fourth: Change requests without threats or opportunities.
* Fifth: Change requests with fewer weaknesses.
* Sixth: Change requests with fewer threats.

## Matriz SWOT for first chanche request

This SWOT matrix provides an overview of the strengths, weaknesses, opportunities, and threats associated with the request to change the café's system by partnering with food delivery platforms like Rappi and Uber Eats.

|  |  |
| --- | --- |
| *STRENGTHS*   1. **Increased reach and visibility:** By partnering with platforms like Rappi and Uber Eats, the café can reach a broader audience of potential customers who use these apps to place food orders. 2. **Sales growth:** By being present on these popular food delivery platforms, the café can experience an increase in sales by attracting customers who prefer to order food online and receive home deliveries. 3. **Sales growth:** By being present on these popular food delivery platforms, the café can experience an increase in sales by attracting customers who prefer to order food online and receive home deliveries. | *OPPORTUNITIES*   1. **Market expansion:** By partnering with food delivery platforms, the café can expand its market beyond its physical location, reaching customers in broader geographic areas and potentially increasing its customer base. 2. **Attraction of new customers:** Presence on food delivery platforms can help the café attract new customers who may not be familiar with its physical location but discover the business through delivery apps. |
| *WEAKNESSES*   1. **Sales commission:** Platforms like Rappi and Uber Eats typically charge commissions for sales made through their platforms, which can reduce the café's profit margins. 2. **Dependency on third parties:** By using third-party platforms for order management and delivery, the café becomes reliant on the reliability and effectiveness of these platforms, which can pose risks if there are issues with the service. | *THREATS*   1. **Increased competition:** By joining food delivery platforms, the café may face greater competition as it will be competing with other businesses that are also present on these platforms. 2. **Logistical challenges:** Food delivery can present additional logistical hurdles such as delivery timing, inventory control, and coordination with delivery drivers, all of which can impact service quality and customer satisfaction if not effectively managed. |