body { font-family: 'ArialUnicode'; font-size: 11pt; line-height: 1.35; } h1 { color: #0B3558; font-size: 20pt; margin-bottom: 6pt; } h2 { color: #0B3558; font-size: 14pt; margin-top: 12pt; } h3 { color: #0B3558; font-size: 12pt; margin-top: 10pt; } p { margin: 4pt 0; } ul { margin: 0 0 6pt 18pt; } ol { margin: 0 0 6pt 20pt; } table { width: 100%; border-collapse: collapse; margin-bottom: 8pt; } th { background: #F0F4F8; font-weight: bold; } th, td { border: 0.5pt solid #D3DADF; padding: 4pt; } blockquote { border-left: 3pt solid #0B3558; padding-left: 6pt; color: #333; }

Workflow Playbook – Framing Change

Goal: Express a requested change as a precise delta (functional, design, technical) ready for estimation, without rewriting the entire product documentation.

1. Quick Reference

- Trigger: Change request submitted for an existing product.
- Exit: Locked Change Specification, updated docs/design (delta only), routed to estimation.
- Owner: Project / Product Lead (States 0,1,3), Tech Lead (State 2).
- SLA: 5 business days.

2. Intake Checklist

- [ ] Change Specification received with requester, priority, rationale.
- [ ] Access to current product docs, design, technical notes confirmed.
- [ ] Impacted stakeholders identified.

3. Stage Instructions

State 0 – Change Qualification & Lock (Owner: PPL, SLA 0.5 day)

Checklist - [ ] Log request in Change Register (ID, date, source, urgency). - [ ] Validate it fits maintenance/change scope (not net-new product). - [ ] Decide outcome: Accepted, Rejected, or Redirected; communicate decision.

Artifacts: Qualification note + Change Register entry.

State 1 – Change Scope Definition (Owner: PPL, SLA 2 days)

Steps 1. Functional delta – describe adds/mods/removals referencing Product Doc sections. 2. Non-impacted scope – explicitly state unaffected modules to avoid creep. 3. Design decision – mark whether UI/UX updates needed. 4. Update Product Doc (delta only) – use annotations or addenda, never rewrite whole doc.

Exit: Updated Change Specification + annotated Product Doc.

State 2 – Technical Decision Gate (Owner: Tech Lead, SLA 1 day)

Checklist - [ ] Technical impact documented (components, services, tests, data migrations). - [ ] Infra impact classified: None / Potential / Confirmed. - [ ] If design required, ensure updated screens/prototype attached before proceeding. - [ ] Risks + dependencies logged.

Outcome: Tech note + infra classification. If infra confirmed → simultaneously trigger Infrastructure Change workflow.

State 3 – Change Lock & Handover (Owner: PPL, SLA 1.5 days)

Steps 1. Validation review – PPL + Tech Lead verify all deltas captured and versioned. 2. Lock specification – mark doc read-only; changes require restart. 3. Route to estimation – send to Development Estimation (change path) or Development + Infrastructure (if infra flagged). 4. Communicate – notify Delivery Owner, Sales/client of next steps + ETA.

Exit: Locked change pack + estimation ticket ID.

4. Controls & KPIs

- Turnaround time: ≤5 business days per change.
- Rework rate: ≤10% of changes re-opened after lock.
- Documentation hygiene: 100% of changes linked to Product Doc sections via anchors.

5. Templates & Tools

- Change Register (Notion/Airtable) template.
- Change Specification form.
- Delta annotation guideline.
- Technical impact note template.
- Routing email template for estimation handover.

6. Escalations

- If change scope disputes arise → involve Delivery Owner + Client sponsor within 24h.
- If infra impact uncertain → pause handover and convene Tech Design review.