

RACI Matrix

[Project Title]

Roles and Responsibilities

Responsible, Accountable, Consulted, Informed

		ROLES														
		Sponsor	Name or Role	Name or Role	Name or Role	Name or Role	Project Manager	Technical Lead	Name or Role	Name or Role	Name or Role	Consultant	Name or Role	Name or Role	Name or Role	
Deliverable or Task	Status	Sponsor / Leadership					Project Team					Other Resources				
Phase 1																
Deliverable/Task 1		A	R				I									
Deliverable/Task 2		A		R			I									
Phase 2																
Deliverable/Task 1		C	I				A	R								
Deliverable/Task 2			I				A		R							
Phase 3																
Deliverable/Task 1			I				A	I		R		C				
Deliverable/Task 2			I				A	I	R			C				
Phase 4																
Deliverable/Task 1				I			A	R					C			
Deliverable/Task 2				I			A		R							
<i>Insert new rows above this one</i>																

- D** Driver
- R** Responsible
- A** Accountable
- S** Support
- C** Consulted
- I** Informed

Driver Assists those who are responsible for a task.

Responsible Assigned to complete the task or deliverable.

Accountable Has final decision-making authority and accountability for completion. Only 1 per task.

Support Provides support during implementation.

Consulted An adviser, stakeholder, or subject matter expert who is consulted before a decision or action.

Informed Must be informed after a decision or action.



RACI Matrix

Proceso Pre Compra

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No	Task	Status	ROLES					SAC Team			Other Resources			Portal SAT	Portal Ventura SIS	
			Comprador	Name or Role	Name or Role	Name or Role	Name or Role	Analista de SAC de Onboarding	Analista de SAC de Reg y Renov	Gerente SAC	Name or Role	Name or Role	Analista de Tesorería			Gerente de Tesorería
SP Onboarding y Registro de Compradores																
1	Demuestra interés en membresía		R													
2	Envía información y requisitos						R		A							
3	Ingresa a Portal Ventura y genera pre registro		R					C								
4	Valida pre registro y documentos soporte							R	A							
5	Solicita correcciones a Comprador		I					R	A							
6	Revisa validez de RFC en SAT							R	A						D	
7	Contacta al Comprador y confirma RFC		I					R	A							
8	Actualiza RFC genérico en pre registro							R	A							
9	Libera ficha de pago al Comprador (referencia)							R	A							D
10	Realiza pago de membresía/garantía		R					I					R	A		
SP	CONCILIACIÓN DE PAGOS (registro)							C				R	A			
11	Recibe notificación de activación de membresía		I													R

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No	Task	Status	ROLES					Analista de SAC de Onboarding	Gerente SAC	Director de MKT y CRM	Director General	CEO	Analista de Tesorería	Gerente de Tesorería	Name or Role	Portal Ventura SIGUE	Portal Ventura SIS
			Comprador	Solicitante	Name or Role	Name or Role	Name or Role										
			Sponsor / Leadership					SAC Team					Other Resources				
SP Renovación de Membresías / Garantías																	
1	Solicita información para renovación		R														
2	Envía información solicitada						R	A									
3	Ingresa a Portal Ventura y genera ficha de pago		R														
4	Libera ficha de pago al Comprador (referencia)						R	A									D
5	Realiza pago de renovación		R				I										
SP	CONCILIACIÓN DE PAGOS (renovación)						C					R	A				
6	Recibe notificación de renovación de membresía		I														R
7	Recibe solicitud de reactivación			C				R	A								
8	Revisa historial de comprador y motivo de reactivación							R	A								
9	Informa a solicitante			I				R	A								
10	Solicita autorización para reactivación							R	A								
11	Recibe autorización para reactivación							R	A	A	A						
12	Procesa reactivación de membresía/garantía							R	A								D
13	Reactiva membresía/garantía								R	A						D	

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			Comprador	Name or Role	Name or Role	Name or Role	Name or Role										
			Sponsor / Leadership					SAC Team			Other Resources						
SP Mantenimiento a BD de Compradores																	
1	Extrae el reporte de compradores activos							R	A								D
2	Extrae el reporte de comercialización del ultimo trimestre							R	A								D
3	Obtiene listado de compradores con ventas generadas							R	A								
4	Obtiene BD de compradores activos con ventas							R	A								
5	Valida información, documentos sopore y fotografías							R	A								
6	Contacta al Comprador para actualización de datos		I					R	A								
7	Ingresa al portal Ventura a actualizar registro		R														
8	Envía documentación y/o fotografías actualizadas		R														
9	Realiza actualización de información del comprador		I					R	A								D
<i>Insert new rows above this one</i>																	

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SP Revisión de Baja Voluntaria de Compradores																
1	Ingresar al Portal Ventura y solicitar la BV de su membresía		R													
2	Recibe el depósito por transferencia bancaria		R									S				D
3	Extrae el reporte mensual de bajas voluntarias						R	A								D
4	Contacta al Comprador y solicita retroalimentación						R	A								
5	Elabora reporte de resultados y propone acciones correctivas						R	A								
6	Presenta resultados de cierre mensual						R	A								
<i>Insert new rows above this one</i>																

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