

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 Venta

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| No | Task | Status | ROLES | | | | Analista de SAC de Onboarding | Analista de SAC Esp del Servicio | Gerente SAC | Name or Role | Ejecutivo Comercial | Administrativo de MKT y Redes Sociales | Director de MKT y CRM | Analista de Tesorería | Gerente de Tesorería | Name or Role | Portal Ventura SAC |
|----------------------------------|---|--------|----------------------|--------------|--------------|--------------|-------------------------------|----------------------------------|-------------|--------------|---------------------|--|-----------------------|-----------------------|----------------------|--------------|--------------------|
| | | | Comprador | Name or Role | Name or Role | Name or Role | | | | | | | | | | | |
| | | | Sponsor / Leadership | | | | SAC Team | | | | Other Resources | | | | | | |
| SP Atención a Compradores | | | | | | | | | | | | | | | | | |
| 1 | Identifica la necesidad de apoyo del SAC | | R | | | | | | | | | | | | | | |
| 2 | Contacta al personal de atención a compradores | | R | | | | | | | | | | | | | | |
| 3 | Ingres a red social | | R | | | | | | | | | | | | | | |
| 4 | Redacta y envía mensaje | | R | | | | | | | | | | | | | | |
| SP | GESTIÓN DE REDES SOCIALES | | | | | | | | | | R | A | | | | | |
| 5 | Redacta mensaje de texto | | R | | | | | | | | | | | | | | |
| 6 | Revisa y atiende mensaje | | | | | R | | A | | | | | | | | | |
| 7 | Ingres a al Portal SAC | | R | | | | | | | | | | | | | | D |
| 8 | Levanta ticket para atención | | R | | | | | | | | | | | | | | D |
| 9 | Atiende ticket de Portal SAC | | | | | | R | A | | C | | | | | | | D |
| 10 | Redacta mensaje de correo electrónico | | R | | | | | | | | | | | | | | |
| 11 | Atiende correo electrónico | | | | | | R | A | | | | | | | | | |
| 12 | Marca número telefónico | | R | | | | | | | | | | | | | | |
| 13 | Contesta llamada telefónica | | | | | R | | A | | | | | | | | | |
| 14 | Canaliza la llamada al analista correspondiente | | | | | R | | A | | | | | | | | | |
| 15 | Atiende llamada telefónica | | | | | | R | A | | | | | | | | | |
| 16 | Solicita u obtiene ticket en Portal SAC | | I | | | | R | A | | | | | | | | | |
| SP | SAC VENTA Y SOPORTE TÉCNICO A COMPRADOR | | | | | | R | A | | | | | | | | | |
| SP | GESTION DE PAGOS | | | | | | | | | | | | R | A | | | |
| 17 | Cierra ticket en Portal SAC | | I | | | | R | A | | | | | | | | | D |

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- I Informed

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| No | Task | Status | ROLES | | | | | Sponsor / Leadership | | | | | SAC Team | | | | | Other Resources | | | | |
|---|--|--------|-----------|--------------|--------------|--------------|--------------|----------------------|-------------|--------------|--------------|--------------|---------------------|-------------------|---------------------------|-----------------------------|---------------------------|-----------------|--|--|--|--|
| | | | Comprador | Name or Role | Name or Role | Name or Role | Name or Role | Analista de SAC de | Gerente SAC | Name or Role | Name or Role | Name or Role | Ejecutivo Comercial | Gerente Comercial | Coordinador de Mensajería | Gerente de Nuevos Proyectos | Portal Ventura Mensajería | | | | | |
| SP Envío de Expedientes de Venta | | | | | | | | | | | | | | | | | | | | | | |
| 1 | Solicita envío de expedientes de venta | | R | | | | | | | | | | | | | | | | | | | |
| 2 | Valida tipo de expediente | | | | | | R | A | | | | | | | | | | | | | | |
| 3 | Informa a Comprador y envía copia digital de su expediente | | I | | | | R | A | | | | | | | | | | | | | | |
| 4 | Descarga expediente digital | | R | | | | | | | | | | | | | | | | | | | |
| 5 | Consulta estatus de mensajería | | | | | | R | A | | | | | | | | | D | | | | | |
| 6 | Consulta estatus de pago | | | | | | R | A | | | | | | | | | D | | | | | |
| 7 | Informa sobre venta con documentos digitales | | I | | | | R | A | | | | | | | | | | | | | | |
| 8 | Revisa Ficha Técnica de unidad | | | | | | R | A | | | | | | | | | D | | | | | |
| 9 | Consulta estatus de guía de mensajería | | | | | | R | A | | | | | | | | | | | | | | |
| 10 | Revisa donde se encuentra el expediente de venta | | | | | | R | A | | | | | | | | | | | | | | |
| 11 | Solicita expediente de venta a área Comercial | | | | | | R | A | | | | C | A | | | | | | | | | |
| 12 | Solicita nombre y dirección de entrega | | C | | | | R | A | | | | | | | | | | | | | | |
| 13 | Registra datos de entrega en Reporte de Mensajería | | | | | | R | A | | | | | | | | | | | | | | |
| 14 | Solicita envío de expediente al Comprador | | | | | | R | A | | | | | | | | | | | | | | |
| 15 | Genera instrucción de entrega de expediente | | | | | | I | | | | | | R | A | | | | | | | | |
| SP ENTREGA DE MENSAJERIA | | | | | | | | | | | | | | | | | | | | | | |
| 16 | Informa a Comprador datos de entrega | | I | | | | R | A | | | | | | R | A | | | | | | | |

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RACI Matrix

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|---------------------------------------|--|--------|----------------------|--------------|--------------|--------------|--------------|--------------------------------|------------------------------------|----------------|-----------------|--------------|--------------|--------------|--------------|--------------|--------------------|
| | | | Comprador | Name or Role | Name or Role | Name or Role | Name or Role | | | | | | | | | | |
| | | | Sponsor / Leadership | | | | | SAC Team | | | Other Resources | | | | | | |
| SP | Emisión de Convenios de Compra-Venta | | | | | | | | | | | | | | | | |
| 1 | Solicita entrega de convenio de Compra-Venta | | R | | | | | | | | | | | | | | |
| 2 | Valida convenio de Compra-Venta | | | | | | R | | A | | | | | | | | D |
| 3 | Descarga convenio de Compra-Venta | | | | | | | | | | | | | | | | |
| 4 | Notifica carga y/o envío de convenio de Compra-Venta | | I | | | | R | | A | | | | | | | | |
| 5 | Descarga convenio de Compra-Venta | | R | | | | | | | | | | | | | | |
| 6 | Solicita corrección de convenio de Compra-Venta | | | | | | R | | A | | | | | | | | |
| 7 | Corrige carga de convenio de Compra-Venta | | | | | | | R | A | | | | | | | | D |
| 8 | Solicita emisión de convenio de Compra-Venta | | | | | | R | | A | | | | | | | | |
| 9 | Carga convenio de Compra-Venta | | | | | | | 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 Entrega de Facturas | | | | | | | | | | | | | | | | | |
| 1 | Solicita entrega de facturas | | R | | | | | | | | | | | | | | |
| 2 | Descarga y valida Reporte de Estatus de Facturas | | | | | | R | A | | | | | | | | D | |
| 3 | Solicita informes del expediente de venta | | | | | | R | A | | | | | | | | | |
| 4 | Valida estatus de facturas emitidas | | | | | | R | A | | | | | | | | | |
| 5 | Solicita Factura Cliente a área Comercial | | | | | | R | A | | | | | | S | | | |
| 6 | Solicita Factura Final a área de Finanzas | | | | | | R | A | | | | | | | | | |
| SP | EMISION DE FACTURAS A COMPRADORES | | | | | | | | | | | R | A | | | | |
| 7 | Valida estatus de Factura Intermedia | | | | | | R | A | | | | | | | | | |
| 8 | Solicita Factura Intermedia a área Comercial | | | | | | R | A | | | | | | S | | | |
| 9 | Valida carga en repositorio de red | | | | | | R | A | | | | | | | | | |
| 10 | Solicita carga de Factura Intermedia a Ejecutivo Comercial | | | | | | R | A | | | | | | S | | | |
| 11 | Solicita carga de Factura Intermedia a TI | | | | | | R | A | | | | | | | | | |
| 12 | Carga factura en SIS | | | | | | | | R | A | | | | | | D | |
| 13 | Notifica la carga y/o envío de factura al Comprador | | I | | | | R | A | | | | | | | | | |
| 14 | Descarga factura | | R | | | | | | | | | | | | | | |

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|--|---|--------|----------------------|--------------|--------------|--------------|--------------------------------|-------------|--------------|--------------|-----------------|--------------|--------------|--------------|--------------|----------------------------|--------------------|
| | | | Comprador | Name or Role | Name or Role | Name or Role | | | | | | | | | | | |
| | | | Sponsor / Leadership | | | | SAC Team | | | | Other Resources | | | | | | |
| SP Emisión de Cartas Validación de Comercialización | | | | | | | | | | | | | | | | | |
| 1 | Requiere una carta validación de comercialización | | R | | | | | | | | | | | | | | |
| 2 | Ingresa a Portal Ventura | | R | | | | | | | | | | | | | | |
| 3 | Genera carta validación de comercialización | | R | | | | | | | | | | | | | D | |
| 4 | Descarga carta validación de comercialización | | R | | | | | | | | | | | | | | |
| 5 | Solicita emisión manual de carta validacion de comercialización | | R | | | | | | | | | | | | | | |
| 6 | Recibe solicitud de Comprador | | | | | R | A | | | | | | | | | | |
| 7 | Valida ficha técnica de la unidad | | | | | R | A | | | | | | | | | | D |
| 8 | Genera carta validación de comercialización | | | | | R | A | | | | | | | | | | |
| 9 | Envía carta validación de comercialización a Comprador | | | | | R | A | | | | | | | | | | |
| 10 | Notifica a Comprador del rechazo de su solicitud | | I | | | R | A | | | | | | | | | | |
| <i>Insert new rows above this one</i> | | | | | | | | | | | | | | | | | |

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|----|--|--------|----------------------|--------------|--------------|--------------|--------------|--------------------------------|-------------|--------------|--------------|--------------|--------------------------|------------------------|-------------------------|--------------|
| | | | Comprador | Name or Role | Name or Role | Name or Role | Name or Role | Analista de SAC de Facturación | Gerente SAC | Name or Role | Name or Role | Name or Role | Ejecutivo de Salvamentos | Gerente de Salvamentos | Gerente de Contabilidad | Name or Role |
| | | | Sponsor / Leadership | | | | | SAC Team | | | | | Other Resources | | | |
| SP | Emisión de Fé de Erratas | | | | | | | | | | | | | | | |
| 1 | Solicita corrección de información en factura | | R | | | | | | | | | | | | | |
| 2 | Valida solicitud | | | | | | R | A | | | | | | | | |
| 3 | Revisa información de ficha técnica de unidad | | | | | | R | A | | | | | | | | D |
| 4 | Valida tipo de corrección | | | | | | R | A | | | | | | S | | |
| 5 | Solicita refacturación | | | | | | R | A | | | | | | | | |
| 6 | Elabora la fé de erratas | | | | | | R | A | | | | | | | | |
| 7 | Tramita firma de autorización | | | | | | R | A | | | | | | | | |
| 8 | Solicita autorización para corrección de ficha técnica | | | | | | R | A | | | | | | | | |
| SP | DOCUMENTACION DE EXPEDIENTES DE UNIDAD | | | | | | | | | | | | | | | |
| 9 | Valida el cliente | | | | | | R | A | | | | | | | | |
| 10 | Solicita emisión de fé de erratas | | | | | | R | A | | | | | | | | |
| 11 | Elabora la fé de erratas | | | | | | | | | | | R | A | | | |
| 12 | Tramita firma de autorización | | | | | | | | | | | R | A | | | |
| 13 | Envía fé de erratas al área de SAC (digital y físico) | | | | | | I | | | | | R | A | | | |
| 14 | Recibe y envía fé de erratas a Comprador | | I | | | | R | A | | | | | | | | |
| 15 | Descarga y recibe fé de erratas | | R | | | | | | | | | | | | | |

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