



EBS Change Request Handling Process

Version Control

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1. Purpose: Managing Change Effectively

Change is inevitable in any dynamic business environment—whether it’s adjusting project timelines, refining deliverables, or adapting to new compliance requirements. However, without a structured approach, changes can lead to confusion, inefficiencies, or unintended risks.

That is why we have established this Change Request Handling Process. It is designed to ensure that every proposed change—no matter how big or small—is carefully evaluated, approved, and documented before implementation. This way, we maintain control, minimize disruptions, and keep our projects and operations aligned with EBS Limited’s strategic goals.

Why This Matters

This process isn’t just about following rules—it’s about making informed, collaborative decisions that support our success. By standardizing how we handle changes, we:

- Protect project integrity—ensure changes don’t derail timelines, budgets, or quality without proper review.
- Reduce risks—assess potential impacts before making adjustments to avoid costly surprises.
- Stay aligned with business objectives—every change should support EBS Limited’s broader goals, not just immediate needs.
- Promote transparency and accountability—clear documentation ensures that everyone understands why a change was made and who approved it.

Built on Best Practices

Our approach isn’t created in isolation—it’s based on globally recognized frameworks, including:

- **PMBOK® Guide (Project Management Institute)**—Following the Perform Integrated Change Control process to ensure changes are managed systematically.
- **ISO 21502:2020**—Aligning with international project management standards for structured change control.
- **ITIL® Change Enablement (ITIL v4)**—Applying IT service management best practices to assess and mitigate risks in technical changes.

**Who Needs to Follow This Process?**

This applies to all EBS Limited employees, contractors, and stakeholders involved in projects or operational changes. Consistency is key—whether you are in IT, finance, or project management, adhering to this process helps us work smarter and avoid unnecessary disruptions.

Confidentiality Note:

This document is for internal use only and must not be shared outside EBS Limited without explicit authorization.

2. Scope: Where and How This Process Applies

This change request handling process ensures that every meaningful adjustment—whether in projects, daily operations, or IT systems—follows a structured, thoughtful approach.

Who Does This Apply To?

This isn't just for project managers or IT teams—it's for anyone at EBS Limited involved in

- Planning or executing projects (from small team initiatives to enterprise-wide rollouts).
- Managing business operations (HR, finance, marketing, etc.).
- Supporting or modifying IT systems (software updates, security changes, infrastructure upgrades).
- Responding to compliance or strategic shifts (new regulations, market trends, risk management).

If your work could be impacted by a change—or if you're proposing one—this process applies to you.

What Kinds of Changes Are Covered?

We categorize changes into four key areas to ensure nothing slips through the cracks:

1. Project-Based Changes
 - a. Adjusting timelines, budgets, or deliverables in active or upcoming projects.
 - b. Example: A client requests additional features mid-project—how do we assess the impact on deadlines and costs?
2. Operational & Functional Changes
 - a. Updates to workflows, team structures, or performance metrics.
 - b. Example: HR introduces a new onboarding process—what approvals are needed before rollout?
3. Technical & System Changes
 - a. Software updates, security patches, cloud migrations, or data pipeline modifications.
 - b. Example: IT needs to upgrade a critical database—how do we ensure minimal downtime?

4. Strategic & Compliance-Driven Changes

- a. Responses to new regulations, shifts in business strategy, or risk assessments.
- b. Example: New data privacy laws require process adjustments—who signs off on these changes?

Why This Structure Matters

This process isn't about red tape—it's about clarity, risk management, and alignment. It ensures:

- ✓ No surprises—stakeholders understand the "why" and "how" behind each change.
- ✓ Accountability—Every change has a clear owner and approval path.
- ✓ Consistency—Whether it's a 100K project or an IT tweak, the same rigor applies.
- ✓ Auditability—A documented trail for compliance and future reference.

Where Does This Process Apply?

- Enterprise initiatives (e.g., company-wide ERP implementations).
- Departmental projects (e.g., marketing's new automation tool).
- Day-to-day operations (e.g., finance streamlining, reporting workflows).

What's Not Covered?

- Routine maintenance (e.g., replacing a printer toner).
- External requests (e.g., a client's ad hoc ask—unless it impacts our internal work).

Note: This is a living document. As EBS Limited grows, we will revisit this process to stay agile and effective.

3. Definitions

To ensure clarity and consistency across teams, the following key terms are defined as they apply to the Change Request Handling Process at **EBS Limited**:

S/N	Term	Definition
1	Change Request (CR)	A formal proposal to modify any existing aspect of a project, system, or business process. This could include changes to project scope, timelines, features, deliverables, costs, or even internal operations.
2	Change Management	The structured process of reviewing, evaluating, approving, and implementing changes in a controlled manner.
3	Change Control Board (CCB)	A designated group of cross-functional stakeholders—including project leads, department heads, and quality assurance—is responsible for reviewing major or high-impact change requests. The CCB ensures that every significant change aligns with business goals, resource capacity, and risk tolerance.
4	Requester	The individual or department that identifies the need for a change and formally initiates the request. Requesters can be team leads, business analysts, technical staff, or any employee authorized to propose adjustments within their project or functional area.
5	Project Lead	The person responsible for coordinating project activities, evaluating the feasibility of the change, and determining its impact on ongoing plans. They serve as the first level of review for most change requests.
6	Head of Department (HOD)	The executive or managerial lead of the relevant department is responsible for approving changes with strategic or resource implications. The HOD holds the final decision-making authority for most medium- to high-impact change requests.
7	Project Coordinator	A central figure in the change process who ensures that

		change requests are properly logged, reviewed, tracked, and documented. The project coordinator at EBS Limited is also responsible for facilitating communication between stakeholders and maintaining up-to-date change records.
8	Impact Assessment	A structured evaluation of how the proposed change will affect various aspects of the business or project, such as budget, timeline, quality, compliance, or customer experience. This assessment helps stakeholders make informed decisions.
9	Change Decision	The formal outcome of a reviewed change request. It may be approved, rejected, deferred, or sent back for more information. Each decision is logged and justified to maintain transparency.
10	Emergency Change	An unplanned, high-priority change that must be implemented immediately to avoid significant disruption to business operations, systems, or customer services. While speed is key, documentation and post-review are still required.
11	Change Register	A centralized log or record of all submitted change requests, including their status, decision history, implementation notes, and lessons learned. It serves as both an audit trail and a knowledge base for future initiatives.

4. Change Requests

Change is inevitable in projects and operations, but without a standard process, it can quickly lead to confusion, delays, or risk. That's why every proposed change—no matter how minor—is formally captured, evaluated, and documented through this system.

Whether it's tweaking a feature, fixing an error, or rolling out a strategic shift, every change request allows the organization to stay aligned, reduce risk, and deliver better outcomes.

What is a change request?

A **change request** is a documented proposal to alter a component of an existing project, product, system, or business process. These requests can originate from team members, managers, technical personnel, or stakeholders who recognize a need to adapt something that has already been planned or implemented.

Each request is evaluated for:

- Feasibility
- Business value
- Cost and time implications
- Potential risks and dependencies

The goal is to ensure that all changes are **intentional, approved, and beneficial** to the organization.

4.1 Types of Change Requests

Changes can come in many forms depending on the situation and objective. Below are the standardized **change types** recognized at **EBS Limited**, categorized to support consistent analysis and decision-making:


S/N	Change Type	Definition
1	Adaptive Change	Adjustments made to keep up with evolving internal or external environments, such as regulatory changes or new market conditions.
2	Corrective Change	Changes made to fix a defect, error, or problem discovered after implementation. These ensure performance and functionality remain on track.
3	Emergency Change	Unplanned changes that must be implemented immediately due to system failure, security breaches, or business-critical disruptions.
4	Enhancement Change	Requests to add or improve features, functionality, or performance of an existing process, service, or product.
5	Major Change	High-impact, high-risk changes that require rigorous analysis and formal approval due to significant implications on scope, cost, time, or strategic direction.
6	Minor Change	Low-risk and low-impact changes that are simple, non-disruptive, and typically easy to implement.
7	Preventive Change	Actions taken to avoid future issues or risks, such as upgrading a system before it becomes obsolete or implementing controls to reduce future errors.
8	Routine Change	Regular, pre-approved changes that are part of daily operational management—e.g., scheduled system maintenance.

9	Standard Change	Predefined and low-risk changes that follow a repeatable process. These are often fast-tracked and do not require full change board review.
10	Strategic Change	Long-term, vision-driven changes that impact the organization's direction, structure, or key capabilities. These usually require leadership-level engagement.
11	Temporary Change	Short-term modifications are intended to address immediate needs, which are later reversed or re-evaluated.
12	Urgent Change	Important changes that must be fast-tracked but may not meet all the conditions of an emergency change. These are typically expedited but still reviewed.

Each change request must indicate the relevant change type to help stakeholders understand the nature of the request and assess it accordingly.

4.2 Level of Urgency

Understanding how urgent a change is helps prioritize efficiently and allocate resources smartly. The urgency rating is assigned by the requester and validated by the project lead during review.

Urgency Level	Response Time	Business Impact	Typical Action	Approval Needed
 Critical	Immediate (0–4 hours)	Severe impact, business at risk, compliance threat	Execute change ASAP, even during off-hours	Project Lead + HOD

● Very High	Within 1 day	Major disruption or financial loss is imminent	Fast-tracked evaluation and implementation	Project Lead + HOD
● High	1–2 days	High-priority project or operational impact	Prioritize in the queue; expedite if possible	Project Lead
● Medium	3–5 days	Moderate impact on deliverables or timelines	Include in the next change review cycle	Project Lead
● Low	1–2 weeks	Minimal risk or urgency does not block work	Schedule for routine planning window	Project Coordinator
○ Very Low	Next available slot	No real impact, mostly suggestion-based	Log for future consideration or bundling	Project Coordinator

5. Change Control Board

The Change Control Board (CCB) is a critical part of maintaining governance, transparency, and accountability in how changes are assessed and approved. Think of the CCB as the decision-making team that helps the organization say "yes" to the right changes and "no" to those that could hurt project goals, team productivity, or overall strategy.

The board doesn't just gatekeep change—they bring context, cross-functional insight, and risk awareness to help ensure that any proposed modification is in the best interest of the business and the people involved.

The CCB is activated especially for major, high-impact, strategic, or high-risk changes that require deeper evaluation and collaborative decision-making. It ensures that:

- Decisions are based on data, not assumptions.
- Risks and downstream effects are anticipated.
- Approvals are not bottlenecked by individuals but guided by collective wisdom.

5.1 CCB Composition

The Change Control Board is not a static group. Membership may adjust depending on the nature of the change, but it typically includes the following:

Role	Responsibility
Project Lead	Presents the case for change, outlines implications, and facilitates discussion.
Head of Department	Final decision-maker for departmental alignment, resource impact, and strategy.
Project Coordinator	Manages change documentation, logs outcomes, and ensures procedural compliance.

QA Lead/Analyst	Evaluates how the change affects quality, testing needs, and operational integrity.
Technical Lead	Assesses technical feasibility, integration complexity, and risk exposure.
Finance/Budget Rep	(Optional) Weighs in on budget impact and cost-benefit concerns.
End-User/Stakeholder Rep	(Optional) Provides practical insight on the real-world impact of the change.

5.2 Responsibilities of the Control Board

Activity	What It Means
Reviewing Change Requests	Evaluating each request on merit, urgency, impact, and alignment with business priorities.
Conducting Impact Assessments	Facilitating deeper analysis of risks, dependencies, timelines, resources, and compliance requirements.
Approving or Rejecting Changes	Making an informed decision on whether to implement the change, defer it, or reject it altogether.
Recommending Mitigations or Conditions	Suggesting controls, timelines, or phased approaches to reduce risk while implementing change.
Ensuring Documentation and Communication	Ensuring that decisions are logged and communicated to the right teams and that next steps are clear.

6. Tools & Systems Used

The successful handling of change requests at **EBS Limited** relies not only on process clarity but also on the efficient use of technology. To ensure traceability, speed, collaboration, and documentation accuracy, we leverage several internal platforms and systems at different stages of the change lifecycle.

Below is an overview of the core systems and how they support our change request operations:

◆ EBS PMO Platform (*Internal Task Management & Scheduling Tool*)

Our proprietary **EBS PMO Platform** serves as the digital backbone for project execution and change tracking. It allows project teams to plan, assign, monitor, and update tasks related to a change request in real-time. Key features include

- **Task breakdowns and dependencies** tied to approved change requests.
- **Timeline visibility** for scheduling implementation efforts.
- **User accountability** through assignee tracking and progress updates.
- **Integrated document storage** ensures assessments, approval memos, and implementation notes are stored centrally.

The PMO platform ensures that every approved change is not only executed efficiently but also **visible to all relevant stakeholders** through shared dashboards and team notifications.

◆ ERP (Frappe-Based Platform) (*Form Submission & Workflow Engine*)

The ERP system is the **official entry point** for initiating change requests. As a Frappe-based framework, it allows employees to

- **Submit formal Change Request Forms.**



- **Track the request status** from submission to approval or closure.
- **Attach supporting documents** (e.g., impact assessments, business cases, or screenshots).
- **Route requests through predefined approval flows**, ensuring compliance with the Change Management Policy.

The ERP platform provides **audit trails** for every request, making it easy to review who did what, when, and why—an essential aspect of governance and process accountability.

7. Change Request Submission Process

The change submission process is initiated through a digital form on our **ERP platform (Frappe-based)**. This form captures the essential information required to **evaluate, prioritize, and route** the change to the appropriate decision-makers.

A well-filled form sets the tone for effective implementation, helps the approvers understand the **business value and urgency**, and supports faster turnaround.

Change Request Form Template

Below is the complete breakdown of the fields available on the **Change Request Form**, along with sample values and input guidance.

◆ Section 1: General Info

Field	Input Type	Required?	Sample Answer / Description
Series	Dropdown	<input checked="" type="checkbox"/> Yes	CR-2025-XXX (Auto-generated or selected by pattern)
Date	Date Picker	<input checked="" type="checkbox"/> Yes	19-06-2025 (Auto-filled or selected)
Company	Text/Dropdown	<input checked="" type="checkbox"/> Yes	Estuary Business Solution
Required By	Date Picker	Optional	26-06-2025 (Set deadline for implementation if needed.)
Status	Static Field	<input checked="" type="checkbox"/> Yes	New CR (Auto-assigned initially)
Project Title	Dropdown	<input checked="" type="checkbox"/> Yes	CRM – ERPNext, Jollof.com, Activation on the Go.

◆ Section 2: Requester Details

Field	Input Type	Required?	Sample Answer / Description
Requester	Text	<input checked="" type="checkbox"/> Yes	Emmanuel Agbedejobi
Email	Email Field	<input checked="" type="checkbox"/> Yes	emmasa@ebsafr.com
Department	Dropdown	<input checked="" type="checkbox"/> Yes	Administration, IT, Operations, Finance

◆ Section 3: Change Details

Field	Input Type	Required?	Sample Answer / Description
Change Type	Dropdown	<input checked="" type="checkbox"/> Yes	Corrective, Enhancement, Strategic, Urgent (See full list below.)
Level of Urgency	Dropdown	<input checked="" type="checkbox"/> Yes	High, Medium, Critical, Very Low (See urgency matrix)
Change Description	Rich Text	<input checked="" type="checkbox"/> Yes	<i>"Update email notification logic to include CC to the billing department."</i>
Business Impact	Rich Text	<input checked="" type="checkbox"/> Yes	<i>"Current logic misses key recipients, causing delays in invoice processing and approvals."</i>

Accepted Change Types

The following change types are selectable from the form dropdown:

1. Adaptive Change
2. Corrective Change
3. Emergency Change
4. Enhancement Change
5. Major Change
6. Minor Change
7. Preventive Change
8. Routine Change
9. Standard Change
10. Strategic Change
11. Temporary Change
12. Urgent Change

Level of Urgency (Reference Matrix)

Urgency	Definition
Critical	Must be implemented immediately; severe business or technical impact
Very High	Extremely important, needs action within 24-48 hours
High	Affects important users/functions, needs prioritization
Medium	Moderate issue, implement within project cycle
Low	Not urgent, schedule in next maintenance window
Very Low	Cosmetic or long-term value improvement, no time pressure

Where It Goes

Once submitted, the request enters the **Change Request Workflow**, where the **Project Coordinator**, **QA Lead**, and **Department Head** will evaluate it. The process becomes traceable in:

- The **ERP system** (where it was submitted)
- The **EBS PMO Platform** (where it may be assigned, tracked, and referenced)

The Change Request Journey (Step-by-Step)

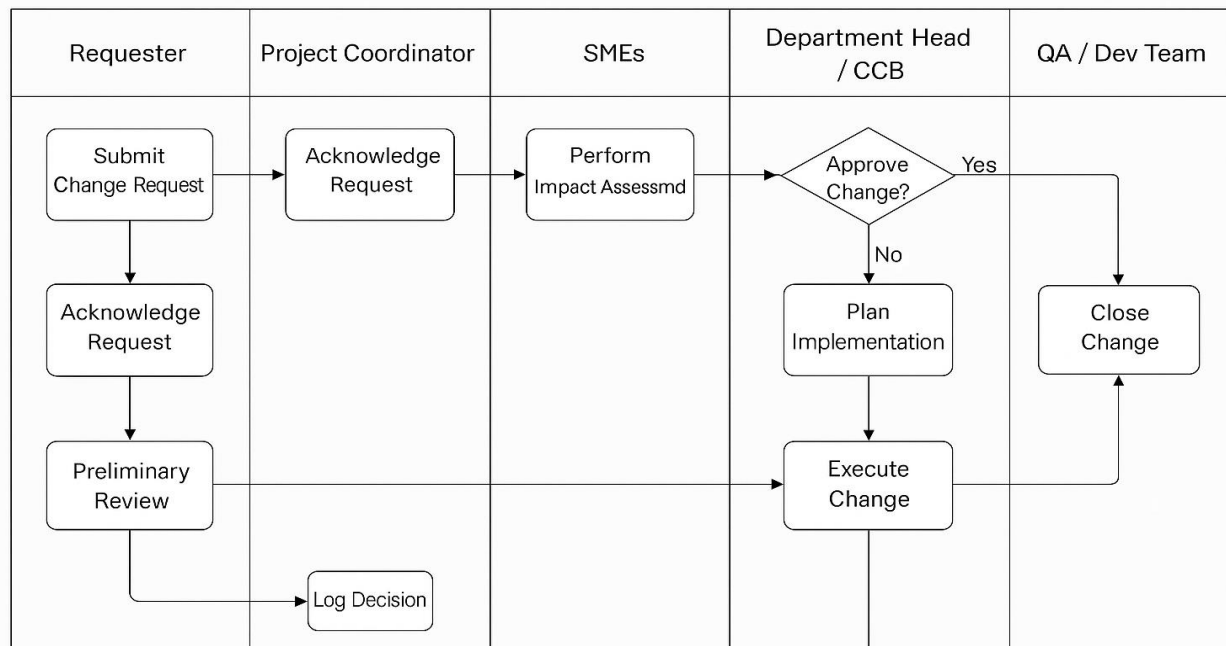
S/N	Step	What happens	Tools Used	Responsible Party	Deliverable
1	Identification	A team member or stakeholder spots an opportunity for improvement, a problem needing resolution, or a required adaptation.	N/A	Any employee or stakeholder	Recognized need

2	Documentation	The requester gathers: <ul style="list-style-type: none"> • Clear description • Business justification • Impact assessment • Supporting evidence 	Email, Notes, Word	Requester	Complete request draft
3	Formal Submission	The requester submits via our ERP (Frappe) system, including: <ul style="list-style-type: none"> • Project details • Change type/urgency • Full description • Attachments 	ERP	Requester	Officially logged request
4	System Acknowledgement	Automatic generation of: <ul style="list-style-type: none"> • Unique tracking ID • Receipt confirmation • Notifications to the PMO Team and Other Stakeholders. 	ERP	System	Request ID + notifications
5	Initial Review	The PM lead verifies: <ul style="list-style-type: none"> • Completeness of information • Alignment with project scope • Proper categorization 	ERP + PMO Platform	PM Lead	Validated or returned request
6	Approval	Approved requests are: <ul style="list-style-type: none"> • Added to the change log • Scheduled for CCB review • Approved by the HOD 	ERP	HOD	Approval

8. Change Request Workflow

The change request workflow is designed to be both **rigorous and flexible**, balancing governance with agility. It ensures that any proposed change—whether a small fix or a strategic shift—follows a transparent and accountable path before implementation. This promotes alignment across teams and protects the integrity of project scope, timelines, and outcomes.

The process begins when a change need is identified and continues through several review and approval stages, ending only when the change is fully implemented and reviewed.



Stage	Description	Owner(s)	System Used
1. Submission	A user logs in to the ERP platform and submits a new Change Request Form, detailing the nature of the change, its urgency level, and the associated business impact.	Requester	ERP (Frappe Framework)
2. Acknowledgment	The system automatically assigns a unique request ID , timestamps the submission, and notifies the project team and other stakeholders.	ERP System	ERP
3. Preliminary Review	The project coordinator conducts an initial review to ensure clarity, completeness, and alignment with business and project objectives.	Project Coordinator	ERP / EBS PMO Platform
4. Impact Assessment	The project lead collaborates with relevant teams (e.g., QA, engineering, operations) to assess potential impacts on scope, schedule, budget, and risk.	Project Lead + SMEs	EBS PMO Platform
5. Approval Routing	The fully reviewed request is forwarded to the department head for formal approval. In complex cases, input may be sought from the Change Control Board (CCB) .	Department Head, Optional: CCB	ERP + PMO Tracker

6. Decision Logging	Approval, rejection, or deferral decisions are logged in the ERP system, and notifications are sent. If rejected, feedback is included for transparency.	Department Head, Coordinator	ERP
7. Implementation Planning	Once approved, the change is broken down into tasks within the EBS PMO Platform and assigned to appropriate team members with timelines and deliverables.	Project Coordinator, Task Owners	EBS PMO Platform
8. Execution & Monitoring	The change is implemented. QA and cross-functional teams validate, test, and ensure the change delivers expected outcomes.	QA, Dev Team, Project Coordinator	EBS PMO Platform
9. Closure & Documentation	Post-implementation, the change is reviewed. Lessons learned and performance reports are documented and archived.	Project Coordinator	PMO Platform, Shared Folder

Key Principles Embedded in This Workflow

- **Transparency:** All changes are traceable by ID, owner, and status.
- **Accountability:** Every stage has a responsible person and documented decisions.
- **Collaboration:** Impact assessments are cross-functional and inclusive.
- **Governance:** No change is implemented without proper approval and validation.
- **Learning:** Every change ends with a documented review for future reference.

9. Change Evaluation and Impact Assessment

The **Change Evaluation & Impact Assessment** step ensures that **every stakeholder understands the implications**—both short and long-term—before a decision is made. This prevents project derailments, budget overruns, or user dissatisfaction.

The Assessment Process: A Human-Centered Journey

When a change request is accepted for review, the **project coordinator** initiates a collaborative impact assessment involving relevant subject matter experts, team leads, and operational stakeholders. This process is **question-driven**, focused on understanding the **breadth, depth, and urgency** of the change.

The assessment is recorded using a standardized internal **Impact Assessment Form**, either within the **EBS PMO Platform** or as part of the request log in the **ERP system**.

Standard Change Impact Assessment Form (with Guiding Questions)

S/N	Assessment Area	Questions to Ask	Input/Owner
1	Scope	<ul style="list-style-type: none"> What part of the system or project is affected Does the change alter core deliverables or functionalities? 	Business Analyst
2	Schedule	<ul style="list-style-type: none"> Will this impact project timelines or milestones? Is there a dependency on other initiatives? 	Project Coordinator
3	Resources	<ul style="list-style-type: none"> Do we need additional personnel, tools, or third-party support to execute this change? 	Technical Lead, HR if needed

4	Budget & Cost	<ul style="list-style-type: none"> Will this require extra funding? If so, what are the estimated direct/indirect costs? 	Finance Team, PMO
5	Quality & Compliance	Could this change affect product/service quality or compliance standards?	QA Lead, Compliance Officer
6	Risk	<ul style="list-style-type: none"> What are the risks if we implement this change? What are the risks if we don't? 	Risk Manager, PMO
7	Stakeholder Impact	<ul style="list-style-type: none"> Who will be directly or indirectly impacted? Do we need to communicate with external stakeholders or clients? 	Project Lead, Account Manager
8	Technology Impact	Will this require software upgrades, infrastructure changes, or integrations?	Engineering Lead
9	Training & Support	Will the change require training, new documentation, or user support planning?	Support Team
10	Urgency & Timing	<ul style="list-style-type: none"> Is the timing for this change optimal? Can this change be deferred? What level of urgency has been declared, and is it accurate? 	Project Coordinator, Sponsor

Outcome of the Assessment





At the end of the impact assessment process:

- A **composite impact score** or **narrative summary** is created.
- The change is categorized (e.g., minor, major, urgent).
- The assessment is attached to the change request record.
- If needed, a presentation is prepared for the **department head** or the **change control board**.




10. Change Impact Matrix








The Change Impact Matrix offers a **structured visual reference** to assess how significantly a change will affect various domains of the business and the project. Each area is rated based on **impact severity**, and this guides approval, escalation, and resource planning.

◆ Matrix Legend

Impact Level	Meaning
 Low	Minimal impact, easily absorbed
 Moderate	Noticeable impact, some resource adjustment
 High	Major shift requires planning/realignment
 Critical	Business-critical impact may halt other work

✖ Change Impact Matrix Table

Impact Domain	Description	Impact Level	Notes/Justification
Project Scope	Change in deliverables, milestones, or features	 High	Adds two modules, shifts project boundaries
Timeline/Schedule	Effect on delivery dates, sprints, dependencies	 Moderate	Causes 1-week delay in testing phase
Budget/Cost	Additional or reduced expenditure	 Low	No major cost implications

Resources/Staffing	Additional staffing, overtime, and role changes	 Moderate	Needs one extra QA analyst
Risk Profile	Introduction or mitigation of project risks	 High	New vendor introduces integration uncertainty
Stakeholder Impact	Influence on users, clients, sponsors, or leadership	 Low	Internal change only
Compliance/Quality	Affecting regulatory standards, QA benchmarks, or documentation	 Moderate	Requires updated SOPs
Technology/ Systems	System upgrades, new infrastructure, or platform interdependencies	 Low	Compatible with current infrastructure
Operations/ Processes	Workflow disruption, handover delays, or procedural changes	 Moderate	Adjustment needed in inventory process
Training/Adoption	Need for new documentation, training, or onboarding	 Moderate	Refresher session required for ops team

Summary Interpretation

Based on the matrix above:

- This change is considered **medium to high impact overall**, particularly due to its scope and risk implications.
- It will require a **targeted communication and change enablement plan**, plus involvement from the **QA and operations teams**.
- Approval should be escalated to the **department head**, and project schedules must be **realigned and rebaselined**.

11. Measuring Change Impact

Measuring impact allows us to **evaluate feasibility, forecast risk, manage expectations**, and ensure that any adjustments we make are grounded in **value, necessity, and business relevance**.

Why Do We Measure Impact?

We measure the impact of a change request to:

- Determine **how significant** the proposed change is.
- Understand its **strategic alignment** with business goals.
- Evaluate its **cost-benefit ratio**.
- Ensure proper **resource and risk management**.
- Avoid **scope creep, duplication of effort, or unintended consequences**.

Dimensions of Impact

We assess change impact across **multiple dimensions** because even a small change in one area could cause substantial effects elsewhere. The following table breaks down the **core impact categories** we consider during evaluations:

Impact Area	Description	Measurement Indicators
Project Scope	Will the change add or remove deliverables? Will it shift the boundaries of the project?	Change in WBS, deliverables list, or objective statements

Time/Schedule	Will the change affect project timelines, sprints, or milestones?	Adjusted Gantt chart, milestone shifts, delay projections
Cost/Budget	Will the change introduce new costs or reduce existing allocations?	Additional funding required, revised cost estimates
Resources	Are more team members, tools, or external support required?	Resource reallocation, staffing needs, workload adjustments
Risk Profile	Will this increase or mitigate existing risks? Introduce new risks?	Updated risk register, new mitigation plans
Stakeholder Impact	Will the change affect internal or external stakeholders, clients, or partners?	Stakeholder feedback, engagement plans
User Experience	Will the change affect how end-users interact with the system or service?	Usability metrics, user feedback, and support request forecasts
Compliance & Quality	Does the change pose compliance risks or opportunities to improve standards?	QA adjustments, compliance checks, and audit requirements
Organizational Impact	Does the change align with the company strategy or disrupt other business units or priorities?	Strategic alignment matrix, leadership feedback
Operational Impact	Will the change affect ongoing operations, system uptime, or interdepartmental dependencies?	Downtime forecasts, maintenance schedules, process adjustments

Tools We Use to Measure

We don't rely on guesswork—we apply structured tools to support our evaluations:

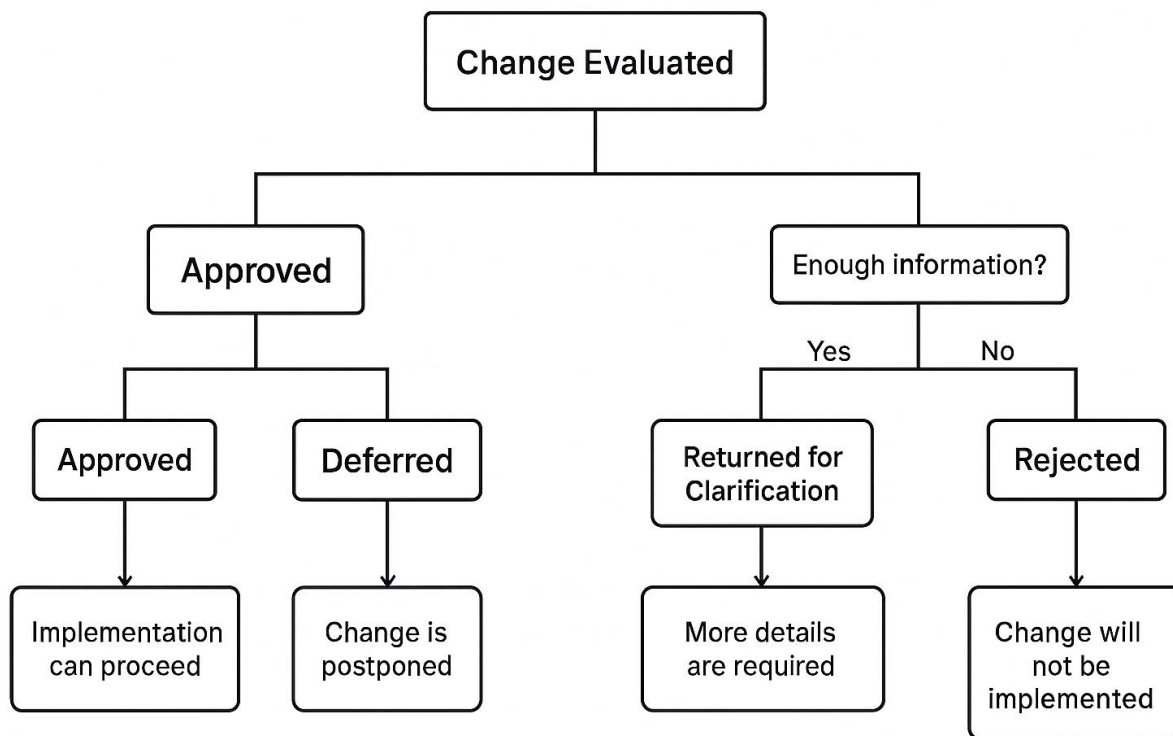
- Impact Assessment Forms
- Change Impact Matrix

Outcome of Impact Measurement

At the end of this stage:

- A **Change Impact Summary** is generated (as a narrative or dashboard).
- The change is classified by **magnitude** (e.g., minor, moderate, major, critical).
- The impact report informs **approval decisions** by the department head or the change control board.

12. Change Decisions



Change Decisions are more than approvals—they are strategic calls made with intention, insight, and accountability. Once a change has been assessed and its impact thoroughly evaluated, a decision must be made. This decision determines whether the proposed change should be approved, deferred, escalated, or rejected—each path guided by purpose, process, and the people involved.

We understand that change is often requested in the heat of problem-solving or innovation. But the decision to proceed is made with a wider lens, looking not only at what the change can fix but also at what it can disrupt, enable, or delay.

🕒 Who Makes the Decision?




Role	Responsibility in Decision Making
Requester	Initiates the change request, justifies the business case
Project Coordinator	Reviews the completeness of the request
QA/BA Leads	Provide assessment input on feasibility and risk
Department Head	Final approver of change requests after impact review
Change Control Board (when applicable)	Handles critical or cross-functional changes requiring executive alignment

⚠️ *All decisions are documented and stored in the ERP, complete with digital signatures, comments, and timestamps, ensuring audit readiness.*

📁 Types of Change Decisions

Change decisions fall into four primary categories:

Decision Type	Definition	When It's Used
✅ Approved	The change is accepted, and implementation can begin.	All impact concerns are addressed; risk is manageable.

 Deferred	The change is valid but postponed due to timing, resources, or dependencies.	Change is needed but cannot proceed immediately.
 Returned for Clarification	More information is required before a decision can be made.	Key assessments or business justifications are missing or unclear.
 Rejected	The change will not be implemented.	The change poses too high a risk, lacks value, duplicates effort, or is out of scope.

Communicating Change Decisions

Every decision—whether approval or rejection—must be communicated to the original requester and affected stakeholders. Communication includes

- The decision outcome (Approved, Deferred, etc.)
- The reasoning behind the decision
- Any actions or expectations for next steps
- Links to relevant documentation (assessment forms, notes, comments)

This is typically done via the ERP and email notifications

13. Approval Workflow

The Change Approval Workflow is designed to balance **speed**, **transparency**, and **rigor**. We recognize that the success of any change—whether large or small—depends not only on technical feasibility but also on buy-in from the right stakeholders at the right time.

We’ve crafted an approval flow that doesn’t just **tick boxes** but fosters **collaboration and clear decision-making**. Everyone involved knows where the request is, what’s expected of them, and how to move things forward.

How Our Approval Journey Works

Here’s how we journey from request to decision, making sure every stakeholder has a voice and every change has context:

1. **Change Request Submission**

The process begins when a team member or stakeholder identifies a need for change and fills out the **Change Request Form** via the **ERP platform (Frappe-based)**.

2. **Initial Review by Project Coordinator**

The project coordinator ensures that the request is **complete, well-defined**, and includes all necessary documentation (business impact, urgency, attachments, etc.).

3. **Assessment Phase**

The request is forwarded to relevant technical or functional leads (QA Lead, BA, Engineering, etc.) for **impact analysis, feasibility, and risk assessment**.

4. **Department Head Review**

The responsible department head serves as the **final approver**. They evaluate:

- Alignment with business goals
- Budgetary or strategic implications
- Risks and urgency
- Dependencies or resource constraints

5. Decision Logging & Notification

The final decision (Approve, Reject, Defer, Return for Clarification) is **recorded in the ERP**, and automated notifications are sent to the requester and relevant stakeholders.

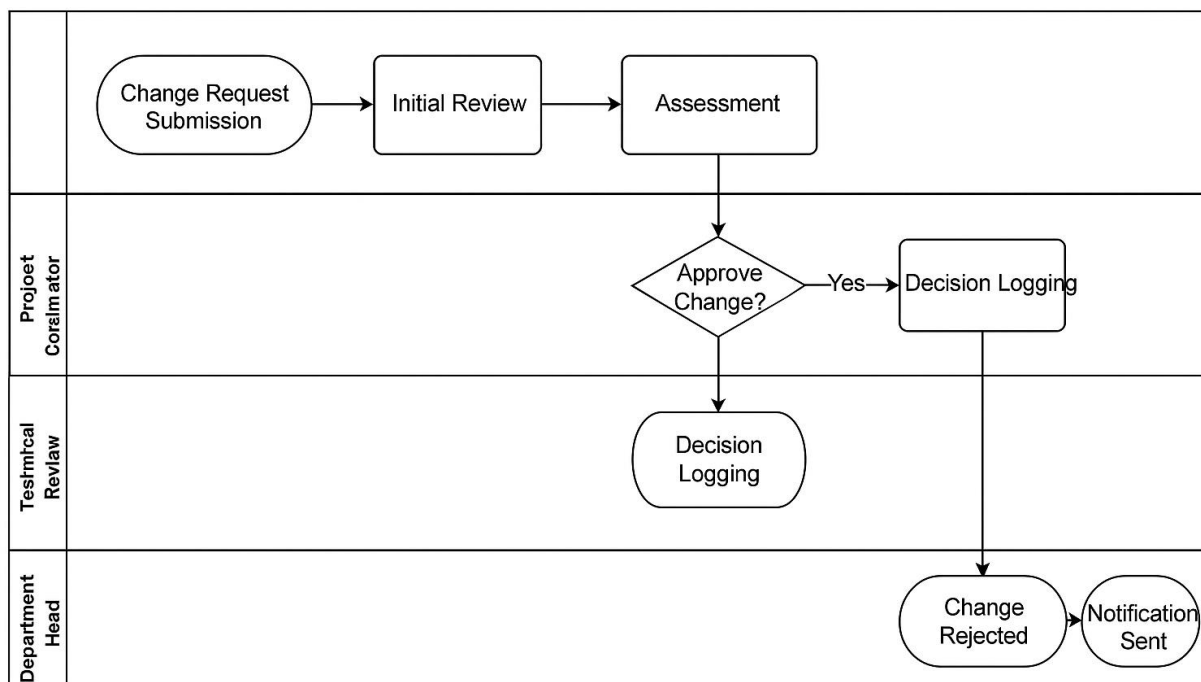
6. Storage & Audit Readiness

All decisions, supporting assessments, and comments are archived for future audits, reporting, and lessons learned.

Visual Workflow (Swimlane Diagram)

Here's a **visual swimlane-style workflow diagram** showing the journey of a change request across roles:

Approval Workflow



✓ Roles in the Workflow

Role	Responsibility
Requester	Initiates the request, provides justification, and completes the form
Project Coordinator	Screens the request, coordinates stakeholders, and facilitates communication
QA/BA/Tech Lead	Analyzes technical, business, and user impacts; prepares assessment documentation
Department Head	Final approver: makes informed decisions based on impact and strategic value

14. Implementation Process



The **implementation phase** is where approved change requests are transformed from planning to tangible results. This is a **critical step** in the change lifecycle, where strategy meets execution and decisions are put into delivery.

The implementation is not a single action but a **coordinated effort** involving technical execution, communication, testing, and documentation—all designed to ensure that changes are deployed **smoothly, safely, and with minimal disruption**.

🔗 Objective of the Implementation Process

- Ensure approved changes are executed according to plan.
- Maintain operational continuity throughout.
- Document actions and results for traceability and knowledge sharing.
- Minimize risk, downtime, and user impact.

🔧 Key Implementation Stages

Stage	What Happens	Owner(s)
Implementation Planning	Create a detailed execution plan, timeline, checklist, rollback strategy, and communication plan.	Project Coordinator, Tech Lead
Stakeholder Notification	Inform relevant users and departments about the change schedule, impact window, and points of contact.	PMO, Change Manager
Pre-Implementation Testing	Test changes in a staging or QA environment to validate expected outcomes and ensure zero regressions.	QA Team, Technical Lead
Execution	Roll out the change according to the implementation plan—either manually or through automation.	Engineering, DevOps, or Operations

Monitoring & Validation	Observe live systems or services after implementation to ensure their behavior matches expectations.	QA, Support Team
User Acceptance Confirmation	In some cases, gather feedback from affected users to validate usability and satisfaction.	Product/BA Team
Documentation & Handover	Update system records, SOPs, and documentation, and store all evidence in the ERP .	PMO, Project Coordinator

More Than Just Deployment

A “successful deployment” isn’t only about code running or documents uploading. It’s also about:

- Keeping users **informed, not confused**
- Making sure people know **how to use what’s changed**
- Ensuring that **if something goes wrong**, we have a **rollback** or recovery plan in place
- Creating a feedback loop that gives the team **confidence** in the outcome

Every implementation has a **human dimension**—whether it's a new screen someone has to navigate or a process someone has to relearn. We work to make that experience clear, supportive, and stress-free.

Risk Management & Rollback

If issues arise during or after implementation:

- A **rollback plan** (defined during planning) is activated
- The team coordinates recovery through the **Task Management module** in the EBS PMO platform
- A **post-incident review** is conducted, and lessons are recorded

Standards Alignment

The implementation process at EBS is modeled after:

- **PMBOK® – Direct and Manage Project Work**
- **ITIL® v4 – Change Enablement Execution**
- **ISO 21502 – Execution Management in Portfolio/Program Contexts**

Supporting Tools

- **EBS PMO Platform:** For task tracking, checklists, and communication logs
- **ERP System (Frappe-based):** For status changes, audit trails, and final documentation
- **Staging Environment:** For testing prior to live implementation
- **Version Control/Deployment Tools:** Git, CI/CD pipelines (where applicable)

15. Governance & Audit

We view governance not as bureaucracy, but as a **system of accountability that protects our teams, our projects, and our purpose**. Change without structure can lead to confusion, duplication, or risk. That's why every change request—whether small or strategic—follows a defined governance and audit framework.

This ensures that decisions are **visible**, changes are **traceable**, and our practices are **continually improved**.

What Governance Looks Like at EBS

Our governance approach is structured around three pillars:



1. **Transparency**—Every change is documented, approved, and accessible in our ERP and PMO systems.
2. **Accountability**—Clear roles are defined; no action happens without a responsible person or sign-off.
3. **Consistency**—All requests, assessments, approvals, and outcomes follow a repeatable, measurable process.

Audit Trail and Recordkeeping

Every change at EBS must have a **digital audit trail** that includes:







- Unique Change Request ID
- Date and time of submission and approvals
- Names and roles of reviewers and approvers
- Assessment documentation and decision rationale
- Links to implementation reports and closure comments
- Any rollback actions or incident logs, if applicable

These records are automatically captured and stored in:

-  The **ERP system (Frappe-based)** — for primary change request logs
-  The **EBS PMO Platform** — for tasks, timelines, and attachments

Key Performance Indicators (KPIs)

We track specific KPIs to evaluate the health and maturity of our change management process:

KPI	Why It Matters
 Change Request Cycle Time	Measures how long it takes from submission to resolution. Reflects efficiency.
 % of Emergency vs. Planned CRs	Helps monitor whether the process is being followed proactively or reactively.
  % of Successful vs. Failed Changes	Indicates quality of planning, risk assessment, and stakeholder coordination.
 Audit Compliance Rate	Ensures all required documentation and approvals are consistently captured.
 Stakeholder Satisfaction Score	Captures user feedback to improve the change experience and communication.

15. Appendix

This section contains supplemental materials that support the Change Request Handling Process at **EBS Limited**. It includes definitions, process visuals, templates, and tools that are essential for users involved in requesting, assessing, approving, implementing, or auditing changes.

A1. Glossary of Terms

Term	Definition
Change Request (CR)	A formal proposal to alter a product, process, system, or service
Requester	The individual or team member submitting the change request
Change Type	The classification of a change based on its nature, impact, or urgency
Change Control Board	A group of stakeholders who review and authorize changes that are strategic or high-impact
Business Impact	The expected consequences of the change on operations, customers, users, or systems
Change Decision	The outcome of the evaluation process—approval, rejection, deferral, or clarification request
Implementation Plan	A coordinated set of tasks, timelines, and responsibilities for executing an approved change
Audit Trail	A recorded history of who did what, when, and why—used for traceability and accountability

A2. Change Types

1. Adaptive Change
2. Corrective Change
3. Emergency Change

4. Enhancement Change
5. Major Change
6. Minor Change
7. Preventive Change
8. Routine Change
9. Standard Change
10. Strategic Change
11. Temporary Change
12. Urgent Change

A3. Level of Urgency (Reference Table)

Urgency Level	Definition
Critical	Immediate action required; threatens operations or customer delivery
Very High	Needs response within 24 hours
High	Time-sensitive and disruptive if delayed
Medium	Can be handled in regular sprint/project cycle
Low	No immediate consequence
Very Low	Cosmetic or long-term process enhancement

A4. Change Request Form Fields (As Used in ERP System)

- Series (CR Code)
- Date

- Company
- Required By
- Project Title
- Requester Name
- Requester Email
- Department
- Change Type
- Level of Urgency
- Change Description
- Business Impact
- File Attachment (optional)

A5. Tools & Platforms

Platform	Purpose
ERP (Frappe-based)	Primary platform for submitting and tracking change requests
EBS PMO Platform	Task coordination, implementation logging, document versioning
Staging Environment	Used for pre-implementation testing and validation
Version Control Tools	For code-based change rollouts and rollbacks (e.g., Git, CI/CD pipelines)

A6. Roles & Responsibilities Summary

Role	Responsibility
Requester	Submits the CR and provides impact context
Project Coordinator	Validates, routes, tracks, and facilitates stakeholder conversations
QA / BA / Tech Leads	Analyze feasibility, dependencies, and risks
Department Head	Final approval authority for most change types
Change Control Board	Reviews and approves strategic/high-impact or cross-functional changes
Implementation Team	Executes the change and ensures testing, documentation, and communication
Audit / PMO Team	Ensures traceability, compliance, and process adherence

A7. International Standards Referenced

- **PMBOK®—Project Management Body of Knowledge** (Integrated Change Control, Risk Mgmt., Stakeholder Engagement)
- **ITIL® v4 – Change Enablement & Release Management**
- **ISO 21502:2020 – Project, Programme, and Portfolio Governance**
- **COBIT®—Governance and Risk Controls (where applicable)**

A8. Contacts for Change Management Support

Function	Contact Person/Email
PMO Lead	demmyd@ebsafr.com
QA & Testing	damil@ebsafr.com
ERP System Support	support@ebsafr.com