ANNEXURE E - CRM Demonstration requirements

Bidders will be required to demonstrate how their proposed solution meets the following requirements

1. Query Intake / Logging

- The query is received through a channel (email, portal, call, walk-in, ticketing system).
- It is logged into the query management system.
- A unique reference number is generated.
- Initial information is captured (requestor name, category, urgency, description).

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2. Categorisation & Prioritisation

- Query is classified (e.g., technical, billing, HR, procurement, operations).
- Priority is assigned (P1 critical, P2 high, P3 normal, P4 low).
- Service Level Agreement (SLA) response and resolution times are determined.

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3. Assignment / Routing

- Query is routed to the correct department or subject matter expert (SME).
- If needed, escalations or handovers are performed.
- Ownership is clearly defined.

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4. Investigation & Resolution

- Assigned team analyses root cause, gathers info, consults systems or stakeholders.
- A resolution is developed (fix, answer, workaround, clarification).

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5. Response to Requestor

- A formal response is provided.
- Additional clarification is obtained if needed.
- The requestor confirms whether the response resolves the issue (optional depending on policy).

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6. Closure

- Query is marked as resolved/closed in the system.
- All notes, actions, timestamps, and documents are finalised for audit trail.
- Closure within SLA is recorded.

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7. Reporting & Continuous Improvement

- Reports generated for:
  - SLA compliance
  - Volume of queries
  - Recurring issues
  - Department performance
  - Customer satisfaction
- Trends are analysed to improve processes, training, or systems.