Customer Relationship Management (CRM) Guide for Customers

science, technology & innovation
Department:
Science, Technology and Innovation
REPUBLIC OF SOUTH AFRICA

technology innovation AGENCY
Innovating Tomorrow Together

1. Introduction & Purpose

The CRM (Customer Relationship Management) system is TIA's formal channel for logging, tracking, and resolving all stakeholder enquiries, complaints, requests, and compliments. Its aims are:

- To ensure transparency, accountability, and consistency in handling issues
- To give you (the Applicant) a clear, visible way to follow your case from start to finish
- To standardise response times and escalation routes, so no enquiry is forgotten
- This guides you (step by step) through how to register, submit, follow up, escalate, and understand the roles and timelines in our CRM process.

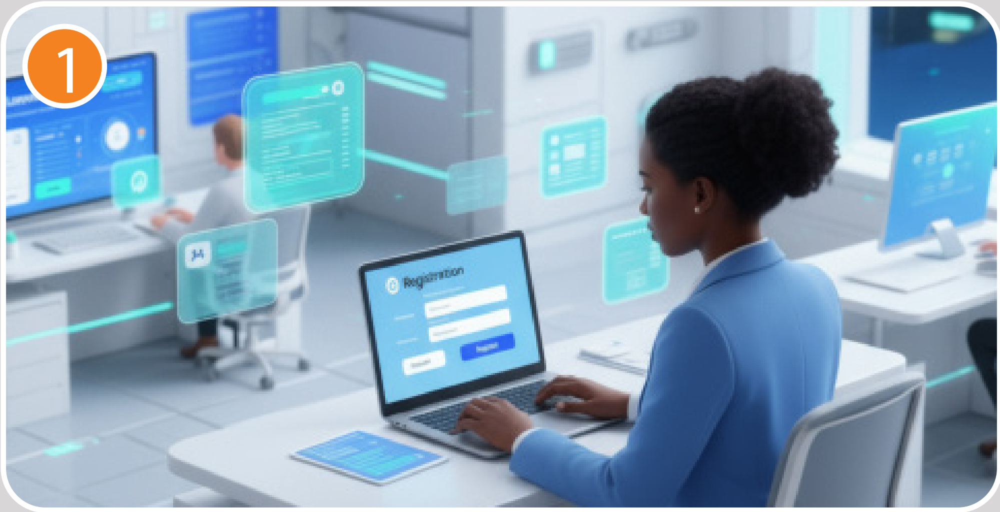
CONCEPTS TO REMEMBER

Term / Role	What it Means	Why It Matters for You
Reference Number	A unique identifier for your case once registered	You'll use this in all follow-ups — "no reference, no case"
Case Type	Categories such as enquiry, complaint, funding request, compliment	Helps TIA route your issue correctly and quickly
Severity Level	The priority assigned to your case (Low / Medium / High)	Determines how fast TIA must respond
CSC (Customer Service Centre)	The central team that receives and assesses all CRM cases	They validate your case, assign severity, and forward to the correct Business Unit
Business Unit (BU)	The specific internal team responsible for handling your case	They are accountable for resolving the issue
Escalation	Automatic forwarding up the chain if your case isn't handled timely	Ensures accountability if there's no action at lower levels

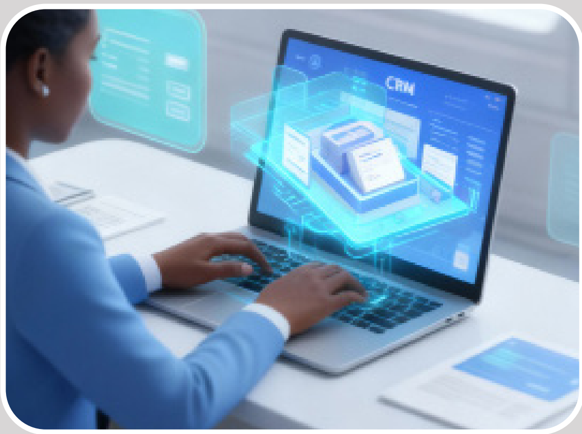
1.

STEP-BY-STEP PROCESS

Below is the end-to-end flow of how your enquiry or case will be handled in the CRM system:



1. **Register on the CRM Portal**
   - Fill in all required fields.
   - You will immediately receive an email with a one-time pin for authentication and verification.
   - Profile registered



2. **Log Your Case**
   - Choose the correct case type (e.g., enquiry, complaint, funding support, compliment).
   - Provide a clear description and attach supporting documents if needed.
   - The CRM system auto-acknowledges receipt and sends you reference number for confirmation.
   - If no reference number is generated, your case is not registered. This might be due to incompleteness of compulsory fields.

3. Customer Service Centre (CSC) Review

- The CSC reviews your case.
- They validate that all mandatory fields are filled correctly.
- They assign a severity level (Low / Medium / High).
- They forward your case to the appropriate Business Unit (BU) according to the sector chosen/relevant sector.

4. Response & Feedback

- The BU is responsible will investigate and respond within the allowed time frames as per severity levels below.
- You will receive status updates on the portal.
- If more information is required, the BU or CSC will contact you.

TIMELINES

Severity Level	Impact / Description	Maximum Response Time
High	Critical issues or high risk (e.g. major system failure, loss of funding, compliance breach)	3 working days
Medium	Important but less urgent (e.g. delays, moderate issues)	5 working days
Low	Minor enquiries, clarifications, non-urgent feedback	7 working days

5. Tracking Your Case

- You may log into the CRM portal at any time to view the current status, updates, and any actions.

6. Escalation

- If your case is not acknowledged or resolved within the designated timeframe, the system automatically escalates it to the next management level for attention.
- Escalation ensures management oversight when a case is not attended to timeously.

7. Case Status

- Once resolved, the respective BU will update the status of the case accordingly.

8. Response Timelines & Severity Levels

The speed at which your case is handled depends on the severity level assigned by CSC.

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- The automated acknowledgement is instantaneous (upon submission of a case).
- The response provided will indicate process to be followed and timelines.
- If no response or acknowledgement is given in these timeframes, escalation kicks in automatically.

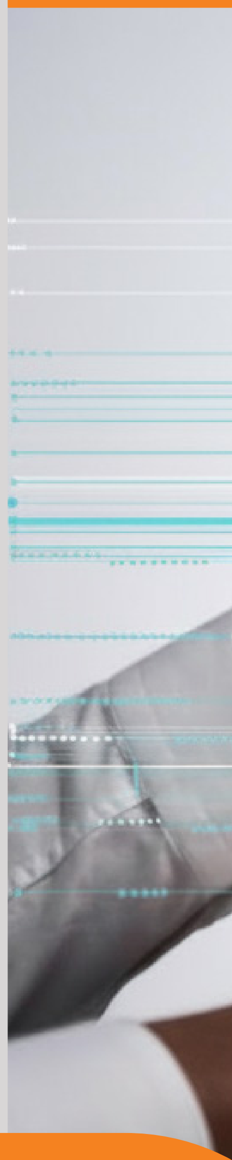
9. What Applicants Need to Do

- Always keep your reference number for tracking purposes.
- Always check the status of your case on the portal to see any updates.
- Respond promptly to requests for information.
- Use the portal for all correspondence related to your case.

10. Complaints and Investment Appeals

Complaints: If you believe your case was mishandled, submit a written complaint with your reference number and details to **customercomplaints@tia.org.za.** Your complaint will be investigated and feedback provided on the portal within the acceptable timelines given the merits of the case.

Investment Appeals: You may appeal an investment decision by explaining why you believe it was incorrect. The appeals process (attach link) will be followed for handling the case.



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