

CASE STUDY STRUCTURE

Agentic SA — BEE Compliance & Tender Agents

Template for documenting a client engagement: challenge, intervention, verification outcome, and commercial impact. Designed for board packs, tender annexures, and sales enablement.

Document type	Case study structure / template
Audience	Compliance · CFO · Tender leads · Partners
Length target	4–6 pages finished case; this file = structure + prompts
Classification	Replace bracketed fields with client-approved facts only

How to use: copy each section into your finished case study. Keep claims evidence-backed (agent logs, certificate dates, tender outcomes). Obtain client permission before naming the organisation or publishing levels.

1. Document architecture (recommended order)

A finished Agentic SA case study works best as a tight narrative with one proof table and one quote. Avoid feature lists — focus on the verification or tender problem and what changed after the agents ran on-premise.

#	Section	Purpose	Target length
1	Title block & snapshot	Client sector, scorecard, plan, one-line outcome	½ page
2	Context & challenge	Why overtime / risk / failed findings existed	¾ page
3	Approach	Which agents, on-prem setup, rule packs, timeline	¾ page
4	Results	Metrics table + qualitative outcomes	1 page
5	Verification / tender moment	SANAS cycle or RFP outcome — the proof scene	½ page
6	Quote & next steps	Named role quote + what they run now	■ page

2. Section-by-section prompts

2.1 Title block & snapshot

Place at the top of page 1. No marketing adjectives — facts only.

- **Title:** [Outcome in plain language] — [Sector] | [Generic / Sector code]
- **Client:** [Name or anonymised “mid-size construction group, Gauteng”]
- **Plan:** Starter / Growth / Enterprise · **Agents:** Verification · Tender · Monitor · Dashboard

-
- **Runtime:** On-premise / private cloud · **Go-live:** [Month Year]
 - **Snapshot metric:** e.g. “Pre-audit findings closed before SANAS booking”

2.2 Context & challenge

Describe the operational pain without blaming people. Tie to Codes language where accurate (priority elements, discounting, look-through, TMPS).

- What triggered the search? (failed verification, tender loss, consultant cost, certificate expiry)
- Scorecard type and complexity (trusts, multi-entity, sector code)
- Volume: checks per quarter, tenders per month, entities in scope
- Constraints: POPIA, data residency, IT change window, verification calendar

2.3 Approach

- Discovery: scorecard mapping workshop outcomes (1–2 bullets)
- Install: where runtime sits; watchers (folders / SharePoint); who receives alerts
- Rule packs: Generic and/or sector; pack version noted on first report
- Agents in production vs pilot; human sign-off path for affidavits and bids
- Timeline: Week 0 scope → install → first live run (use real dates if allowed)

2.4 Results (metrics table)

Use only numbers the client will stand behind. Prefer before/after pairs.

Metric	Before	After	Notes
Time per BEE pre-check pack	[e.g. 3–5 days]	[e.g. < 2 hours agent + review]	Human review retained
Priority-element surprises at verification	[count / narrative]	[reduced / none]	Ownership / Skills / ESD
Tender preferential draft cycle	[days]	[hours + legal edit]	PPPFA claims consistent with cert
Consultant overtime / rework cost	[R / quarter]	[R / quarter]	Optional — finance-approved only
Estimated level stability	[drift events]	[monitor alerts acted on]	Certificate still issued by SANAS agency

Narrative under the table: 3–5 sentences on what the team stopped doing (weekend pack rebuilds, inconsistent preferential wording) and what they still own (strategy, agency relationship, final sign-off).

2.5 Verification or tender moment

One concrete scene. Examples: “findings list three weeks before SANAS onsite,” “ownership change alert before discounting risk,” “preferential section aligned to Level X certificate in RFP Y.” Name the agency only with permission; otherwise say “accredited verification agency.”

2.6 Quote & next steps

- Quote from Compliance Officer, CFO, or Tender Lead (role + company if allowed)
- What runs today: agents in use, alert owner, verification month
- Expansion path: more entities, sector pack, API — only if real

3. Claims hygiene (non-negotiable)

Agentic SA does not issue B-BBEE certificates. Case studies must never imply replacement of SANAS-accredited verification or independent advice.

- No fabricated levels, points, or tender win rates
- Distinguish agent estimate vs agency-issued certificate
- POPIA: no personal data in public PDFs; redact share registers in screenshots
- Logo and name use only with written client approval
- Rule-pack version and date of run noted if methodology is questioned

4. Optional appendices

Appendix	When to include
A. Anonymised findings sample (cover page only)	Technical buyers who want to see output shape
B. Implementation timeline (Week 0–2)	IT / change-control stakeholders
C. Scorecard elements in scope	Sector-code or multi-entity deals
D. Security one-pager (on-prem, audit log)	InfoSec review

5. Production checklist

- Client approval on name, metrics, quote, and any logo
- Legal review if comparative claims vs consultants or SaaS appear
- Design: cover + 4–6 pages, Agentic SA logo, page numbers, confidential footer
- Export PDF; filename: AgenticSA-Case-[Sector]-[Year].pdf
- Website: summary blurb + “request full case study” gate if metrics are sensitive

Agentic SA · Johannesburg · info@agentic-sa.co.za · On-premise BEE & tender agents