Quarterly review — 5,050 hours returned

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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The calculation redoable on one page · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **The three items do not add up on a single document:** checking a figure happens after dispatch, on the documents concerned. The total is computed volume by volume.

The three items measured

Item	Before	After	Volume / year	Hours returned
Compiling a report	**60 % — 57 min**	**8 % — 7 min 30 s**	**3,760 reports**	**3,096 h**
Carrying over the regulatory wording	30 % — 28 min 30 s	**4 % — 3 min 50 s**	3,760 reports	**1,548 h**
Checking a figure	25 % — 24 min	**3 % — 2 min 50 s**	1,180 requests	**411 h**
Total	—	—	—	**5,050 h a year**

What it is worth, and what it costs

Line	Calculation	Value
Capacity returned	**5,050 h × €55**	**€278,000 a year**
Subscription	€338 × 12	**€4,056 a year**
Compiling, per adviser	**5 h a week**	**24 minutes**

What the hours became

Destination	Observation	Source
Meetings with clients not seen for 24 months	**148 held**	Advisers' diaries
Additional assets entrusted afterwards	**€3.4m**	**Measured by the partners**
Twelve-month client retention	**91.8 % → 97.2 %**	51 relationships kept
Document opening on the portal	**31 % → 68 %**	Portal statistics

The two measures compliance will look at

Measure	Quarter
Reports carrying the wording block in force	**940 out of 940**
Figures tracing back to their record	**100 %**
Investment recommendations produced by the agent	**0**
Adviser signatures	**940 out of 940**

> **The same report exists by adviser, one side of a page each** — the view the partners lacked in order to allocate the books.

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For the partners to set

Scope of the report attached to activity reviews: _____

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> This document is a fictitious example. To see the agent work on your own documents, request a demo from its page.
>
> https://bluelemonagent.ai/en/entreprises/cas-usage/agent-de-gestion-de-patrimoine-reporting

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