



Quarterly review — 5,050 hours returned

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The calculation redoable on one page · fictional document

Fictional document — demonstration example

This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

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	€653 × 12	€7,836 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.

For the partners to set

Scope of the report attached to activity reviews: _____

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.