CRM in sync — channel, timestamp, reason

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Document issued on 09/11/2026

3,400 interactions recorded every month · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **A timestamp is the exact date and time, to the second, of every message and every reply.** With the channel and the reason, it makes a customer service measurable — and a reason you can see is a reason you can fix at source.

What is written on every interaction

Field	Content	Use
Channel	Email, chat or phone	Reading the journey
Timestamp	**To the second, message by message**	**Measuring reply times**
Reason	The company's own classification	**Filled in on 100 % of interactions against 46 % before**
Order concerned	From the ERP	Cross-reference with product and warehouse

Field	Content	Use
Summary	Three lines	A colleague picks up without reading everything
Commitment made	**With its due date**	**Shown at the top of the thread and recalled the day before**
Who handled it	Agent or named adviser	Continuity of the relationship

What complete entry brought to light

Finding	Volume	Share of customer service	Follow-up
Reason “leg or fixings missing on delivery”	**214 a month**	**6.3 %**	**Cross-referenced with references and warehouse**
Three sofa references	**61 % of those 214**	—	**Passed to the logistics manager with the detail**
Reasons previously filed under “other”	54 % of interactions	—	**Reclassified under your own scheme**

The time shifted

Task	Before	After	What remains
CRM entry	**30 %** of adviser time	**4 %**	**Reading over the summary on cases the adviser held**

Proposed monthly statement: the top ten reasons, their volume, their handling cost and their automatic cross-reference with the product reference and the warehouse. **A reason fixed at source costs once, instead of 214 times a month.**

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https://bluelemonagent.ai/en/entreprises/cas-usage/agent-de-relation-client-omnicanal

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