Single customer thread — 214,000 interactions attached

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

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18 months of exchanges, 62,000 customers · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **A single thread is everything a customer has written or said to you, in order, whatever the channel.** This attachment states what the take-on of the last 18 months attached, and what the thread gives back to the adviser and to the customer.

What the take-on gathered

Source	Interactions	Period	Attachment key
Shared inbox (email)	119,000	18 months	By address and order number
Website chat module	58,000	18 months	By signed-in account and order number
Telephony	37,000	18 months	**By calling number and CRM record**
Total	**214,000**	—	**62,000 customers**

Channel switching, measured

Finding	Value	What it was costing
Customers who switched channel mid-enquiry	**1 in 3, i.e. 21,000**	**Story told 2.1 times on average**
Enquiries this month from a customer already seen within 30 days	**1,130 out of 3,400**	As many rebuilds done again
Share of an adviser's time spent rebuilding	**55 %**	**Brought down to 6 %**
Equivalent across 9 advisers	—	**Close to 4 posts given back to handling**

What the thread shows, and where

Element	Content	What it is for
Timeline	Every channel, newest first	The exchange resumes where it stopped
Commitments made	**At the top of the thread, with their due date**	**1,340 complaints in 18 months were about a commitment lost from view**
Attached orders	From the ERP, live	The tracking number without changing window
Who handled it	Agent or named adviser	Continuity of the relationship
Location	**Inside the CRM, exactly where advisers already look**	**No extra tool to open**

Proposed go-live: the customer service manager reads ten rebuilt threads of their own choosing, the ones they know by heart. **The single thread opens to the 9 advisers as soon as they approve it, with no migration and no change of tool.**

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