680 enquiries worked up for an adviser

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What the adviser gets on one page · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **An enquiry taken over by an adviser arrives worked up:** the thread, the reason, the history, what the company granted in comparable cases, and a costed proposal. **They decide, they don't search.**

The month's 680 enquiries

Nature	Volume	What the agent prepared
Goodwill gestures	**310**	**Amount proposed, cost, customer history**
Delivery commitments	180	Real order status and a date that holds
Particular situations	**110**	**A one-line note saying why the handover happened**
Technical questions outside the documentation	80	**Draft written, for the right person to approve**

What the page contains

Element	Content	What it is for
Full thread	Every channel	The customer repeats nothing
Customer value over 24 months	**Amount and number of orders**	**Sizing the gesture**
Past incidents	Deliveries, returns, complaints	Understanding the request
House precedents	**What was granted over 6 months in the same case**	**Treating two similar customers the same way**
Costed proposal	Gesture, amount, cost	Deciding in seconds

The time shifted, and what it becomes

Measure	Before	After	Effect
Handling an enquiry taken over	**19 minutes**	**7 minutes**	**The 12 minutes saved are search time**
Across 680 enquiries	—	—	**136 hours a month given back to the 9 advisers**
Proposed use of those hours	—	—	**Assisted selling on 90 monthly quotes above €1,500**

The principle: the agent works it up, the adviser decides. **Handover criteria are written down, and any adviser can add one in a sentence — it takes effect the same day.**

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

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