



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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