Quarterly review — 21 staff-days a month

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

Document issued on 09/11/2026

Timesheets and approval log · fictional document

> **Fictional document — demonstration example**
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> **Fictional document**, produced for the demonstration. The measures come from the **firm's timesheets**, the **approval log** and the **successive versions of the answers sent** — not from a sector average.

The four items, and what they hand back

Item	Before	After	Handed back per month
Answering routine questions	**55 %** of enquiry handling time	**9 %**	**49 h — 7.0 days**
Finding an item inside a file	**35 %** of time spent in the file	**6 %**	**44 h — 6.3 days**
Chasing missing documents	**40 %** of close preparation time	**8 %**	**28 h — 4.0 days**
Building an advisory file	48 min per file	22 min	26 h — 3.7 days

Item	Before	After	Handed back per month
Total	—	—	**147 h — 21.0 staff-days, one full-time equivalent**

What those hours became

Measure	Previous quarter	This quarter
Hours booked to “advisory”	base 100	**138 — that is +38 %**
Annual review meetings held before 30 June	**4**	**9**
Files taken on at unchanged headcount	0	**11**

The number of annual review meetings is the only figure on this list that clients see — and it is the one they pay for. The rest is time handed back; this one is time handed back **visibly**.

The figure the agent publishes about itself

Measure	Value	Reading
Answers prepared over the quarter	741	247 a month
Answers sent after approval	684	57 escalated to a staff member
Answers corrected before sending	**61 — that is 8.9 %**	**Published by the agent, not discovered by the firm**
of which concentrated on 9 files	**44 of the 61**	**Customised chart of accounts, no written rule**
Correction rate on those 9 files	**14.2 %**	Against **2.8 %** on the other 205

The fix, already applied and measured

Action	Scope	Result

One hour with the account manager, writing down the customised accounts and what they cover	**3 files out of 9**	**14.2 % → 3.1 % in six weeks**
Proposal	The remaining 6 files	Same format, three hours in all

Three hours settled a third of the problem. An unfavourable figure published without an action is a confession; published with its measured cause and its quantified fix, it is what lets the firm know where it stands.

What never varied

Measure	Value
Answers sent without human approval	**0 out of 741 prepared**
File consultations logged	4,812
Access to a file outside remit	**0**
Advice sent without the certified accountant's signature	**0 out of 183**

For the firm to set

Order in which to take the remaining 6 files: _____

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