Situation review — 214 files, 340 enquiries a month

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

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What 73 % of requests have in common · fictional document

Fictional document — demonstration example

This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

Fictional document, produced for the demonstration. The classification covers **340 enquiries received in one month** by a 26-person firm looking after **214 client files** . Each enquiry was attached to the file concerned: **no analysis crosses two client files.**

The split that decides the gain

Enquiry family	Monthly volume	Share	What it calls for
Routine questions	**247**	**73 %**	**Opening the file and reading** — no professional judgement
Enquiries touching on advice	61	18 %	**The certified accountant's signature**

Enquiry family	Monthly volume	Share	What it calls for
Administrative requests	32	9 %	Certificates, contact details, duplicate copies
Total	**340**	**100 %**	—

That split, and nothing else, is what makes the gain. The 247 routine questions are answered from the client's file, quoting the document or the entry. The 61 advisory enquiries are not automated: they are **prepared**, which is not the same thing, and they gain the time no longer spent elsewhere.

The 247 routine questions, by frequency

Question, as the client writes it	Volume	Source of the answer	Turnaround before / after
“Where does my VAT return stand this month?”	**96**	Sales and purchase journals, status of documents received	**D+1.8 → 11 minutes**
“Did you receive the document I sent you?”	58	Portal deposit log	D+1.2 → 4 minutes
“What is my interim result?”	41	File trial balance to date, with reservations flagged	D+2.4 → 14 minutes
“When is my next deadline?”	33	File deadline schedule	D+1.1 → 3 minutes
“Can you send me that document again?”	19	The file's document store	D+2.0 → 6 minutes

What was read to establish this classification

Source	Volume	What it brings

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The firm's document store, 9 years	**1,040,000 documents**	The documentary history of each file
Documents with an unusable file name	**84,000**	**Indexed by their content, not by their file name**
Production accounting software	214 files	Entries, trial balances, deadline schedules
Client document portal	177 files connected	Deposit dates, expected documents
The firm's shared mailbox	340 messages this month	The enquiries themselves

The gain, item by item, as measured

Item	Today	With the agent	Hours handed back per month
Answering routine questions	**55 %** of enquiry handling time	**9 %**	**49 h — 7.0 staff-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 minutes per file	22 minutes	26 h — 3.7 days

> **These benchmarks describe a fictional firm.** They are given as orders of magnitude, not as a result measured at a client: the size of the gain depends on the number of files looked after and is confirmed by a pilot.

For the firm to set

Question family to open first: _____

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Number of files in the pilot, and in which month: _____

Request a demo with your own documents

This document is a fictitious example. To see the agent work on your own documents, request a demo from its page.

https://bluelemonagent.ai/en/entreprises/cas-usage/agent-de-support-comptable-client-cabinet

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