



Enquiry sorting — 228 prepared, 19 escalated

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The five escalation grounds · 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 sorting covers **one month's 247 routine questions**. The 61 advisory enquiries do not appear here: they are never handled by this route.

The split, and what it costs in review

Handling	Volume	Average review time
Answer prepared, sourced, ready to send	228	1 min 40 per answer
Escalated by name to a staff member	19	Full human handling
Total routine questions for the month	247	—

The five escalation grounds, and why each matters

Ground	Volume	Why a prepared answer will not do
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File under tax audit	6	Anything leaving the file goes through the quality partner, without exception
Client behind on fees	4	A friendly answer during an invoice chase is a message the firm writes itself
Question that turns advisory mid-sentence	5	“Where does my VAT stand, and can I defer it?” — the second half changes everything
Client in insolvency proceedings	3	The recipient of the information is no longer only the director
Complaint about a mistake by the firm	1	An automated reply to a well-founded grievance does more damage than silence

The quality of sorting is read in what comes back, not in what goes through. An agent answering all 247 without exception would win two more hours and expose the firm on the six files where it must not speak alone.

What every prepared answer carries

Element	Always present
A pointer to the document or entry for every figure	Yes — an item without a source is not written
Missing documents flagged and quantified	Yes, whenever there are any
The file's next deadline	Yes
Firm-assistant disclosure and the option to ask for a human	Yes, from the first message, in the recipient's language
Name of the account manager in charge	Proposed — for the firm to approve

The gain on this item, as measured

Measure	Today	With the agent
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Share of enquiry handling time	55 %	9 %
Hours per month, across the firm	49 h	≈ 8 h
Staff-days handed back per month	—	7.0
First-reply turnaround	D+1.8	11 minutes

What is not automated, and will not be: the month's 61 advisory enquiries. They are 18 % of the volume and most of what a firm bills above bookkeeping. **The agent prepares them; it does not sign them.**

For the firm to set

Escalation grounds to add: _____

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