# Enquiry sorting — 228 prepared, 19 escalated

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

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The five escalation grounds · fictional document

**Fictional document — demonstration example**

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**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 |
|---|---|---|

| | | |
|---|---|---|
| **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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