



Pre-call sheet — client with 4 policies

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

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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 demonstration. **This sheet contains no commercial offer and no retention argument.** It contains what the file says — the adviser decides what to do with it, and is the only person authorised to.

The book

Policy	Taken out	Annual premium	Last endorsement
Home	14/09/2018	€1,480	2021
Motor	14/09/2018	€1,920	2024
Personal accident	03/02/2020	€840	—
Commercial combined	11/06/2021	€1,960	2023

History

Item	Data
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LINDBERGH FORMATION — a simplified joint-stock company with share capital of €250,000 · Registered office: 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114 · SIRET 817 946 114 00029 · VAT FR 60 817 946 114 · "Blue Lemon Agent" trade mark · Training-provider registration no. 119 108 635 91 (Île-de-France prefect — this registration does not amount to State approval) · Qualiopi certified, no. 03896, for the "training actions" category · contact@bluelemonagent.ai · dpo@bluelemonagent.ai · Hosted in France.

Length of relationship	8 years
Claims notified	2
Of which declined	1 — in 2024, home policy
Written complaints	None
Inbound calls never returned	3, between March and May 2026
No-claims certificates requested	2, on 09/07/2026

A claim declined in 2024 and no written complaint afterwards. The absence of a complaint is not a sign of satisfaction: it can be the sign of a client who stopped arguing. The fact is reported, not interpreted.

What the sheet does not contain, and why

Absent	Reason
A proposed price gesture	A commercial act reserved to an authorised person
A retention script	Depending on what is said, a retention call becomes an act of advice
A comparison with a competitor's offer	The agent does not hold competitors' offers and does not assume them

The most useful thing the agent did was not preparing the call: it was dating the real signal. Three unreturned calls, five months before the certificate request.

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.