Pre-call sheet — client with 4 policies

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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

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.

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