



Morning watch — 4 flags

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07/08/2026 · 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. **The first flag is not the most urgent: it is the latest.** The real signal was five months old, and it is recalled at the foot of the table because it is the one that should have triggered something.

#	Flag	What triggered it	Deadline	At stake	Recipient
1	Client about to leave	2 no-claims certificates requested in July	Window in 8 d	4 policies · €6,200/yr	Adviser + branch manager
2	14 claims past time	Time limit stated in the policy wording	Up to 23 d	Complaints, ombudsman	Handlers
3	Address declared, policy not adjusted	Declaration of 12/06, zone rating table	56 d	Pricing	Underwriting

#	Flag	What triggered it	Deadline	At stake	Recipient
4	9 expired identity documents	Validity dates	3 transactions since	Client due diligence	Compliance only

The fourth flag goes to compliance and nowhere else. A list of clients whose identity document has expired has no reason to circulate in a branch: it serves one function, and widening it only increases the number of people holding it.

Flag 1 — the chronology of a departure

Date	Event	What followed
11/03/2026	Inbound call from the client	No call back
04/04/2026	Inbound call from the client	No call back
22/05/2026	Inbound call from the client	No call back
09/07/2026	No-claims certificates requested (2 policies)	Certificates sent
15/08/2026	Cancellation window opens	—

Requesting a certificate is what somebody does once they have decided. Three unreturned calls are what somebody does while still hesitating. A watch that only fires at the certificate request arrives after the decision — which is why the third unreturned call is also a trigger.

Proposed chases

Flag	Without action	Then
2	Reminder at 24 h	Branch manager at 48 h
1, 3	Reminder at 48 h	Branch manager at 96 h

Flag	Without action	Then
4	Reminder at 48 h	Compliance only
All	—	Weekly summary, by subject

The summary is sorted by subject and not by handler. On claim delays, a list by name turns a management tool into an instrument of individual control, and it stops being opened.

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.