Morning watch — 4 flags

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

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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

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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.

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