



Morning watch — 4 flags

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

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Fictional document — demonstration example

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Fictional document, produced for demonstration. **None of the four flags concerns a salesperson**: three concern the CRM's structure, one a portfolio forecast.

#	Flag	What triggered it	At stake	Recipient	Chase
1	340 records with overdue follow-up	Next-action date	The portfolio shown	Their salesperson, never their manager	Monthly
2	1 field filled 900 times the same	List order	Every origin statistic	Whoever designs the form	7 d
3	61 likely duplicates	Record comparison	A merge cannot be undone	Whoever administers, one at a time	7 d
4	14 values changed after closing	Log	The forecast gap	Sales management, as a volume	Monthly

The first flag never goes to line management. Three hundred and forty overdue actions describe a workload; naming them would turn a help into a control.

Six acts kept by your sales team — the morning's 4 flags, meanwhile, are already worked up

The act, kept by the rep	Why it is theirs
Modify data entered by a human	It becomes indistinguishable from an entry
Merge two records without validation	No CRM can separate what has been joined
Invent a missing value	It would be indistinguishable from a real one
Send a message without validation, outside the four open families (CRM-ENV-001 to 004)	It carries the salesperson's name
Move an opportunity forward a stage without validation	It is a commercial assertion
Count overdue actions per salesperson	They would delete rather than catch up

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