Morning watch — 4 flags

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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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> https://bluelemonagent.ai/en/entreprises/cas-usage/agent-ia-commercial-crm

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