Excluded accounts — 264 lines and their grounds

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 the demonstration. **Exclusions are set by the sales director; the agent only applies them** — without exception and without arbitration. Every removed line carries its grounds and its date, so that an exclusion can be challenged and lifted.

The four grounds for removal

Grounds	Lines	How the line is identified	Reach
Already a customer	**212**	**Company registration number in the ERP, never the name** — « Transports Vallier » and « SAS Vallier Logistique » are the same account	Whole account
Live negotiation	34	Quotation above €20,000 open in the CRM	**Whole account, head office and subsidiaries**

Grounds	Lines	How the line is identified	Reach
Opt-out request	18	Opt-out register, **some dating from 2023**	**The person, permanently — an opt-out does not expire**
Competitors and suppliers	File supplied	File handed over by the sales director	Whole account

What matching on company number prevented

Campaign	Exclusion method	Customer accounts hit in error	Consequence
2025 manual campaigns (3 of them)	Export and sorting by name	**47**	**2 customers raised it with their salesperson**
Sequence in progress	Matching on company registration number	**0**	Across 402 leads in sequence

> **An exclusion is not a door closed for life.** If an excluded contact fills in the website form again, **they are put back on the list with the date and the page on record**, and the sales administrator is told. Someone who comes back of their own accord has changed their mind: it is theirs to say, and the agent's to hear.

A costed proposal awaiting a decision: lower the automatic removal threshold from €20,000 to €8,000 of open quotation. **It would cover 61 more deals a year and would cost 61 unsent follow-ups.** The ratio between those two numbers is the only argument that matters here, and it is given so that the decision takes one minute.

Quotation threshold triggering account removal (default: €20,000): _____

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