



CRM log — 7 fields and their source

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Document issued on 24/09/2026

What is written, what is never overwritten · 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 the demonstration. **A CRM is a shared memory: what goes into it ends up in front of the customer the day they ask what the company holds about them.** That is the very practical reason why the agent writes only dated, sourced facts.

The seven fields the agent writes

Field	Content	Source
Sequence step	D+0, D+3, D+8, D+15 or exit	Sending platform
Last contact	Date, time and channel	Sending platform and short-message gateway
Next message	Date scheduled	Sequence cadence
Score and its detail	Out of 100, block by block	Every point carries the line that produced it

Field	Content	Source
Original sentence	The prospect's enquiry, quoted word for word	Form, email or show record
Exit status and grounds	Reply, opt-out, quotation opened, existing customer	Stop rules
Link to the message sent	The exact text the prospect read	So the salesperson reads what their prospect read before picking up the phone

What makes the record readable in front of the customer, and what protects the salesperson's note

Rule	Example	Reason
Dated facts, never a judgement about a person	« difficult customer », « understands nothing »	A record is read in front of the customer concerned — on that day it defends you or it costs you
An intention is recorded only if the prospect stated it, quoted word for word	« does not want to buy »	An unsourced supposition distorts the score of every later lead
The agent's note goes beside the human's, dated	« call back after the holidays », noted by a salesperson	The salesperson's stands: what they understood of their customer is never lost

The first month's unflattering figure, its cause and its fix

Measurement	First month	After the fix	What changed
Opt-outs, « purchasing » segment	3.1 %	0.7 %	Message rewritten for the purchasing role: total cost of ownership, contract term, trade-in conditions

Measurement	First month	After the fix	What changed
Opt-outs, all other segments	0.6 %	0.6 %	Unchanged — so it was not the message in general
Reply rate on the « purchasing » segment	4.8 %	11.2 %	The segment that troubled us became the one that improved most

The cause was not the message, it was the targeting: a text about parts availability sent to purchasing managers whose job is price. **Publishing that figure before anyone asks is what allows it to be fixed in a fortnight rather than a quarter.**

Additional fields the sales director wants populated: _____

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