Who decides what — 3 automatic actions, everything else on a decision

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Matrix approved by the sales director · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **Only three actions go ahead without asking**, and all three protect the relationship rather than the numbers. **All three are reversible.**

The three automatic actions

Action	Trigger	Reversibility
Applying an opt-out	Click on the opt-out link, or a written request	**If the person fills in the website form again, they go back on the list, with the date and the page on record**
Taking a lead out of the sequence the moment they reply	Any reply, in whatever sense	**An automatic out-of-office is read as such: postponed, not exited**

Action	Trigger	Reversibility
Taking an account out as soon as a quotation opens	Quotation above €20,000 in the CRM	**The account returns on its own when the deal closes, won or lost**

Everything else waits for a decision, and here is who takes it

Action	What the agent brings	Who decides
Launching a campaign	Sourced file, written sequence, drafted mandate	Sales director
Changing a score threshold	**Effect recalculated across three years of history before it applies**	Sales director
Adding a channel	Volumes, applicable framework, cost	Sales director
Writing to a private individual	**Consent form prepared and followed up**	**The person themselves**
Quoting a firm price or a discount	Full quotation, resulting margin displayed	The area salesperson
Committing to a delivery date	Actual availability read from the ERP	The logistics manager

The three neighbouring agents — the chain does not end here

Agent	Position	What it brings to the chain
CRM enrichment	Upstream	Completes records and prioritises before qualification — **of 1,240 trade-show lines, 412 had neither a role nor a phone number**
Commercial proposals	Downstream of the meeting	Takes over the visit report, the fleet surveyed and the service history

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Agent	Position	What it brings to the chain
Sales reporting	Alongside	Tracks results by area, range, salesperson and channel — **it reads the logs, it does not rewrite them**

Proposed way in: an eight-week pilot on the largest segment, with the same three measurements as today — sequence tracking, writing, CRM updates. **If the figures do not move, the company will have found out in eight weeks and for the price of two months.**

Segment chosen for the eight-week pilot: _____

Job title authorised to withdraw the sending mandate: _____

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https://bluelemonagent.ai/en/entreprises/cas-usage/agent-qualification-scoring-relance-multicanal

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