



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

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. **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

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: _____

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.