Real margin — 780 maintenance contracts

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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Contract by contract, over the closed financial year · fictional document

Fictional document — demonstration example
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Fictional document, produced for the demonstration. **The overall margin of 12.4% is an average of two businesses that are in no way comparable.** This document separates them and goes down to contract level, because that is the only level at which a decision is possible.

The two businesses, separated

Activity	Revenue	Margin	Stability over 3 years
New equipment sales	€54.6M	**17.1%**	Stable — maximum spread of 0.4 points
Maintenance contracts	€23.4M	**4.8% on average**	**The average hides the essential**
Together	€78M	12.4%	The figure shown to the board

The 780 contracts, by margin band

Band	Contracts	Average margin	Annual result
Above 12%	188	15.4%	+€1.9M
From 4% to 12%	378	7.6%	+€1.4M
From 0% to 4%	0	—	—
Negative	**214**	**−9.8%**	**−€1.1M**

What separates the 214 from the other 566

Characteristic	The 214 loss-making	The other 566	Reading
Distance to the nearest branch	**More than 90 km in 197 cases**	Less than 90 km in 511 cases	**The main cause, and it is mechanical**
Travel allowance applied	**The 2019 one, never revised**	Revised in 2023 for 402 contracts	The allowance no longer covers the journey
Call-outs per year	3.4 on average	3.6 on average	**Call-out volume explains nothing**
Customer seniority	9.2 years	6.1 years	The oldest are the worst indexed

Renegotiation is not a breach of the bargain: it is written into the contract. All 214 contracts carry an indexation clause that has not been applied since 2019. **Applying what the contract already provides for is worth €1.1M of margin, that is 1.4 points on group result.**

Why terminating would be the wrong calculation

Population	Contracts	Maintenance margin	Equipment revenue over 2 years	Overall result

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Loss-making customers who bought new equipment	**96**	−€0.5M	**+€3.8M at 17.1% margin**	**Clearly positive**
Loss-making with no purchase for 2 years	118	−€0.6M	0	Negative — this is where renegotiation counts

The 15 contracts up for renewal this quarter

Renegotiation option	Effect on margin	Contracts at risk of leaving	What it requires
Indexation alone, as provided for in the contract	+€0.6M	**2 out of 15**	A letter, no new agreement
Indexation plus travel zone	+€1.0M	5 out of 15	An amendment
Full redesign of the allowance	+€1.1M	**7 out of 15**	A customer-by-customer renegotiation

This document stops where another discipline begins. It explains where a margin comes from; it does not look for anomalies in financial flows — duplicate payments, atypical receipts, breaks in an audit trail. **That search belongs to a dedicated financial analysis agent, which connects to the same consolidated foundation.**

Renegotiation option chosen by the board, on ______ : ______

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