



RUNNING EXAMPLE

Lendari documents the dossier for its first agent, "Margaux" (Level 1 customer support), prior to deployment. Lead: **Camille Roussel** (DDAO — Delegated Decision Agent Officer).

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OBJECTIVE

Gather in a single document everything that frames an agent before launch: **identity, purpose, scope, data, risks, validation**. A well-scoped agent is a governable agent.

1 IDENTITY OF THE AGENTIC PROJECT

AGENT NAME

Margaux

ASSOCIATED PROJECT / SERVICE

Customer support & returns — fashion e-commerce

PROJECT LEAD

Camille Roussel — DDAO

TEAM INVOLVED

L. Fontaine (Customer Support), IT/Ops, K. Belkacem (DPO)

DOSSIER CREATION DATE

05/26/2026

DOSSIER VERSION

v1.0

2 PURPOSE & OBJECTIVES OF THE AGENT

PRIMARY PURPOSE

What is the fundamental goal of this agent?

Automate Level 1 customer support to respond quickly to simple requests (tracking, returns, refunds < €100) and free up advisors for complex cases.

OPERATIONAL OBJECTIVES

What must the agent concretely accomplish?

1. Resolve ≥ 70% of Level 1 requests without human intervention
2. First-response time < 2 min
3. Process refunds / credits < €100 (supervised)
4. Maintain CSAT ≥ 4.2 / 5
5. Cleanly escalate any out-of-scope case

EXAMPLES OF AGENTS

- Intelligent customer support agent
- Commercial analytics agent
- Report generation agent
- Competitive intelligence agent

WATCH POINTS

- ! Objectives too broad or vague
- ! Uncontrolled scope
- ! Sensitive data not identified
- ! Lack of stakeholder buy-in



3 👤 USERS & STAKEHOLDERS

END USERS

Who will interact with the agent?

- Lendari customers (website + app)
- Customer support advisors (supervision & handover)

KEY STAKEHOLDERS

Who must be involved or informed?

- Camille Roussel — DDAO (lead)
- Étienne Mercier — CEO (sponsor)
- Karim Belkacem — DPO (compliance)
- Léa Fontaine — Head of Customer Support (business)

4 📖 SCOPE & FEATURES

INCLUDED FEATURES

What the agent will do.

- Order & delivery tracking
- Return management & labels
- Refund / credit < €100
- Product & policy FAQ responses

EXCLUDED FEATURES

What the agent will not do.

- Disputes & refunds > €100
- Fraud detection, legal claims
- Exceptional goodwill gestures
- Modification of an already paid order

SCOPE LIMITS

Refund cap €100 / decision · no access to payment data · EU scope only · mandatory escalation in case of doubt.

✓ BEST PRACTICES

- ✓ Start small, with a minimum viable scope.
- ✓ Document every decision and every limit.
- ✓ Test early and often, with users.

⚠️ WATCH POINTS

- ! Scope too broad at the outset.
- ! Blurred boundary between included and excluded.
- ! Edge cases not settled in advance.



5 DATA & RESOURCES

REQUIRED DATA

- Order history
- Delivery status (carrier)
- Product catalog & returns policy

DATA CONSTRAINTS

GDPR — EU customers, EU instance · minimization · no payment data · logging of accesses & decisions.

SOURCES & ACCESS

- Order ERP (read API)
- Carrier API (tracking)
- Customer CRM (read) · FAQ database

6 PLANNED ARCHITECTURE & TOOLS

MAIN COMPONENTS

- Governed LLM + rules engine (caps)
- ERP / CRM / carrier connectors
- Escalation module to human support

TOOLS & TECHNOLOGIES

- Lendari customer support platform (EU instance)
- Sovereign model hosted in the EU
- Internal APIs + kill switch (ACF-06)

INTEGRATIONS & INTERFACES

ERP (orders) · CRM (customers) · Carrier API (tracking) · Slack #sav-incident · supervision dashboard.

EXPECTED DELIVERABLES

- Functional specification of the agent
- Technical documentation
- Test & deployment plan
- Supervision plan + user guide

BEST PRACTICES

- ✓ Prefer a sovereign model & hosting.
- ✓ Give the agent the minimum useful data.
- ✓ Plan the kill switch from the architecture stage.



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DEPLOYMENT PLAN

STAGE	DESCRIPTION	OWNER	STATUS
Preparation	Scoping & first agent dossier	C. Roussel	Completed
Development	Connectors, rules, safeguards	IT / Ops	Completed
Tests & validation	Scenarios + user tests (UAT)	L. Fontaine	In progress
Pilot deployment	10% of Level 1 customer support traffic	C. Roussel	To do
Full deployment	100% of Level 1 (if KPIs OK)	C. Roussel	To do
Monitoring & optimization	Weekly KPI review	L. Fontaine	To do

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RISKS & MITIGATIONS

IDENTIFIED RISK	IMPACT	PROB.	MITIGATION PLAN	OWNER
Hallucination in a response	High	3	Sourced responses + escalation in case of doubt	C. Roussel
Erroneous refund	Critical	2	€100 cap + kill switch	C. Roussel
Customer data leak	Critical	2	EU instance + minimization + RLS	K. Belkacem
Behavioral drift	High	2	Daily supervision during week 1 + alerts	C. Roussel

Impact: Low / Moderate / High / Critical · Probability: 1 (low) to 5 (high)



9 TESTS & VALIDATION

PLANNED TEST TYPES

- ✓ Functional & integration
- ✓ Security & performance
- ✓ User acceptance tests (UAT)

ACCEPTANCE CRITERIA

1. $\geq 70\%$ autonomous resolution
2. 0 refunds > €100 without validation
3. First-response time < 2 min (p95)
4. Error rate < 2% · escalation 100% out-of-scope

10 SUPERVISION & IMPROVEMENT PLAN

SUPERVISION

- Real-time dashboard
- Daily during week 1, then weekly

TRACKING METRICS

- Resolution, CSAT, time
- Error, escalation, € refunded

CONTINUOUS IMPROVEMENT

- Weekly review + rule tuning
- FAQ enrichment

✓ BEST PRACTICES

- ✓ Test in real conditions before the pilot.
- ✓ One acceptance criterion = one measurable threshold.
- ✓ Supervise closely during the first week.

WATCH POINTS

- ! Deploying without a representative test set.
- ! Metrics not instrumented from the outset.
- ! Supervision that fades after launch.



LEVELProject

DURATION60-90 min

USEScoping / deployment

TRACKToolkit

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VALIDATION & APPROVAL

ROLE	NAME	DATE	SIGN-OFF
Project / AI lead	Camille Roussel — DDAO	06/03/2026	✓
Compliance lead	Karim Belkacem — DPO	06/03/2026	✓
Sponsor / decision-maker	Étienne Mercier — CEO	06/03/2026	✓

DEPLOYMENT DECISION

● Approved with reservations — 10% pilot deployment first; full deployment conditional on pilot KPIs.

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NEXT STEPS

ACTION	OWNER	DEADLINE	STATUS
Launch the 10% pilot	C. Roussel	06/09/2026	● To do
Pilot KPI review (D+7)	L. Fontaine	06/16/2026	● To do
Go / No-go full deployment	É. Mercier	06/20/2026	● To do

- ✓ FINAL CHECKLIST BEFORE DEPLOYMENT
- ✓ Objectives & scope clear · users & stakeholders identified
 - ✓ Data & risks assessed · tests planned · acceptance criteria defined
 - ✓ Supervision in place · approval obtained · decision tracked

What's next: supervise continuously with **ACF-05**, keep **ACF-06 — Kill Switch** within reach, and log every decision in **ACF-08 — Decision Register**.