



RUNNING EXAMPLE

Lendari formalizes the card for "Margaux", customer support & returns agent: identity, data, tools and maturity. Owner: **Camille Roussel** (DDAO — Delegated Decision Agent Officer).

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OBJECTIVE

Precisely describe an agent in order to set its **role, scope, data, tools, rules and maturity**. The agent card turns the constitution (ACF-03) into a concrete, enforceable and supervisable agent.

1 AGENT IDENTITY

AGENT NAME

Margaux

ROLE

Customer support & returns agent — tier 1

PRIMARY MISSION

Handle tier 1 customer support and returns for Lendari customers.

SCOPE OF ACTION

Returns, refunds < €100, goodwill gestures requiring approval.

ASSOCIATED SYSTEMS / SERVICES

Zendesk, Lendari OMS, customer support database (EU instance).

OWNER (RESPONSIBLE HUMAN)

Camille Roussel — Director of Digital Transformation (DDAO).

CREATION / VERSION

06/03/2026 — v1.0

STATUS

In testing · Active · Suspended · Archived

2 MISSION & OBJECTIVES

MEASURABLE OBJECTIVES

- 1 Handle 70% of tier 1 requests without human intervention within 6 months.
- 2 Maintain a CSAT $\geq 4.2 / 5$ on managed conversations.
- 3 Bring the first-response time below 2 minutes.

SUCCESS INDICATORS (KPIs)

- Autonomous resolution rate (no escalation).
- CSAT & ticket reopen rate.
- Amount refunded / day & error rate.

3 AGENT MATURITY

The agent's overall **governance framework** (ACF-01 scale), distinct from the **autonomy delegated decision by decision** (set in ACF-01 / ACF-02).

- ☐ **N0 · Classic automation** — fixed rules, no judgment ☐ **N1 · Assisted agents** — proposes, the human decides
- ☒ **N2 · Governed agents** — acts within a defined framework, supervised
- ☐ **N3 · Supervised autonomy** — decides alone, control after the fact

Delegated autonomy (per decision): Margaux is at maturity **N2**. The latitude varies by decision (ACF-01) — *supervised autonomous* on tier 1 customer support and refunds < €100, *co-decision* on goodwill gestures.



4 AUTHORIZED DATA

- ☒ Internal data (FAQ, support procedures)
- ☒ Customer data (orders, returns)
- ☒ Operational data (logistics, inventory)
- ☐ Financial data
- ☐ Partner data

SENSITIVITY & RESTRICTIONS

High sensitivity (personal data). No data outside the EU; no payment access; anonymized exports.

6 RULES & GUARDRAILS

MANDATORY RULES

- Comply with GDPR and the AI Act; never any data outside the EU.
- Never issue a refund > €100 without human approval.
- Log every decision: reason, amount, order.

WHAT THE AGENT MUST NEVER DO

- Modify a price, a promotion or the terms and conditions.
- Disclose personal data to a third party.
- Expand its scope or bypass the cap.

8 REVIEW & IMPROVEMENT

REVIEW FREQUENCY

- ☒ Weekly (daily in the 1st week)
- ☐ Monthly · Quarterly

REVIEW CRITERIA

Errors, escalations, CSAT, amount refunded / day.

9 TRACEABILITY & APPROVAL

DATE	ACTION / CHANGE	AUTHOR (HUMAN)	VERSION
06/03/2026	Creation (aligned with ACF-03)	Camille Roussel (DDAO)	1.0

APPROVED BY Camille Roussel — DDAO DATE 06/03/2026 SIGNATURE

Next step: supervise Margaux (ACF-05), then prepare the emergency stop — ACF-06 · Kill Switch.

5 TOOLS & INTEGRATIONS

AUTHORIZED TOOLS / APIS

- Zendesk — tickets & conversations.
- Lendari OMS — tracking, return labels.
- Refund engine — capped at €100.
- Customer support knowledge base — read only.

USAGE RESTRICTIONS

Read-only catalog; no admin access; refund cap enforced by a technical guardrail.

7 HUMAN INTERACTION

THE AGENT MUST ALERT A HUMAN IF...

- ☒ Decision is out of scope
- ☒ Confidence < defined threshold
- ☒ Error or anomaly detected
- ☒ Financial impact > threshold (≥ €100)

ESCALATION

Support supervisor, then Camille Roussel. Response < 4 business hours. Forwards: order, customer, reason, amount, recommendation.

PLANNED IMPROVEMENTS

- Enrich the customer support knowledge base.
- Refine escalation and confidence thresholds.
- Extend to proactive delivery tracking.