Action Plan Sharing

What Is an Action Plan?

An Action Plan is an automated workflow that performs predefined actions for assigned leads over a specified period of time.

Action Plans help automate follow-up activities such as sending emails, sending SMS messages, adding tags, changing stages, creating notes, assigning other action plans, and more.

What Is a Brokerage?

A brokerage account allows brokers to manage realtors and share resources such as Action Plans with connected realtors.

Sharing Action Plans helps ensure that realtors can use brokerage-approved automation workflows without needing to recreate them manually.

Share an Action Plan

1. Log in to your Brokerage account.
2. From the left-hand menu, click **Automation**.
3. Select **Action Plans**.
4. Select the Action Plan you want to share.
5. Click **Share** from the top menu.
6. Select one or more realtors.
7. Click **Submit**.

The Action Plan will be shared successfully.

Important Notes

- Action Plans created by the Super Admin cannot be shared with realtors.
- Only brokerage-created Action Plans can be shared.
- Multiple realtors can be selected during the sharing process.

Shared Templates

When an Action Plan is shared, any templates associated with the Action Plan are automatically transferred to the realtor account.

This includes:

- Email Templates
- SMS Templates

The transferred templates will appear in the realtor's Templates section.

Templates shared from a brokerage are identified with the label:

Created by Brokerage

This allows realtors to distinguish brokerage-provided templates from their own templates.

You have successfully learned how to share Action Plans in AgentRoof CRM.

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