Action Plan

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
- Removing tags
- Changing stages
- Creating notes
- Assigning other Action Plans

Once assigned, the Action Plan automatically executes each step according to the configured schedule.

Action Plans can be assigned to:

- Individual leads
- Tags
- Stages
- Sources

This helps automate lead nurturing and follow-up processes at scale.

Access Action Plans

1. Navigate to **Automation > Action Plans**.

The Action Plans page displays all available Action Plans.

From this page, you can view:

- Action Plan Name
- Number of Steps
- Active Leads
- Paused Leads
- Stopped Leads
- Completed Leads

- Available Actions

View an Action Plan

1. Navigate to **Automation > Action Plans**.
2. Locate the desired Action Plan.
3. Click **View**.

The configured Action Plan steps will be displayed.

Create an Action Plan

1. Navigate to **Automation > Action Plans**.
2. Click **Add Action Plan**.
3. Enter the Action Plan Name.
4. Click **Add Action**.
5. Configure one or more actions.
6. Click **Save**.

The Action Plan will be created successfully.

Available Action Types

Send Email

- Select **Send Email**.
- Select an Email Template.
- Configure the execution timing.
- Save the action.

Send SMS

- Select **Send SMS**.
- Select an SMS Template.
- Configure the execution timing.
- Save the action.

Add Tags

- Select **Add Tags**.
- Select one or more tags.
- Configure the execution timing.
- Save the action.

Remove Tags

- Select **Remove Tags**.
- Select one or more tags.
- Configure the execution timing.
- Save the action.

Change Stage

- Select **Change Stage**.
- Select the desired stage.
- Configure the execution timing.
- Save the action.

Note: Only one stage can be selected at a time.

Add Note

- Select **Add Note**.
- Enter the note content.
- Configure the execution timing.
- Save the action.

Assign Action Plan

- Select **Assign Action Plan**.
- Select the desired Action Plan.
- Configure the execution timing.
- Save the action.

Additional Action Types

You can also configure:

- Pause Specific Action Plan
- Pause All Action Plans
- Repeat Action Plan

Automatically Pause When a Lead Replies

While creating or editing an Action Plan, you can enable:

Pause the action plan when the lead replies to an email.

When enabled, future Action Plan steps automatically stop executing once the lead replies.

Edit an Action Plan

1. Navigate to **Automation > Action Plans**.

2. Locate the Action Plan.
3. Click **Edit**.
4. Modify the required settings.
5. Click **Update**.

The Action Plan will be updated successfully.

> **Note:** Changes made to an Action Plan apply immediately to all future executions. For leads that are already progressing through the Action Plan, previously completed steps will remain unchanged, while any upcoming steps that have not yet been executed will follow the updated configuration. Newly assigned leads will follow the updated Action Plan from the beginning.

Assign an Action Plan

Action Plans can be assigned from multiple locations within AgentRoof CRM.

From the Action Plans Page

1. Select the desired Action Plan.

You can assign it to:

Leads

1. Click **Leads**.
2. Select one or more leads.
3. Click **Submit**.

Tags

1. Click **Tags**.
2. Select one or more tags.
3. Click **Apply**.

Stages

1. Click **Stages**.
2. Select a stage.
3. Click **Apply**.

Sources

1. Click **Sources**.

2. Select one or more sources.
3. Click **Apply**.

The Action Plan will be assigned successfully.

From the CRM Page

1. Navigate to **CRM**.
2. Select one or more leads.
3. Click **Action Plan**.
4. Select the desired Action Plan.
5. Click **Submit**.

The Action Plan will be assigned successfully.

From the Lead Profile Page

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Scroll down to the **Action Plans** section.
5. Click the **+** icon.
6. Select the Action Plan you want to assign.
7. Confirm the assignment.

The selected Action Plan will be assigned successfully.

Manage Assigned Leads

Each Action Plan displays lead counts under:

- Active
- Paused
- Stopped
- Completed

Click the number displayed in any column to view the corresponding leads.

Active Leads

Available actions:

- Pause
- Stop
- Remove

Paused Leads

Available actions:

- Resume
- Remove

Stopped Leads

Available actions:

- Restart
- Remove

Completed Leads

Available actions:

- Restart

Change Action Plan Status from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **Action Plans** section.

Available actions depend on the Action Plan status.

If Active

- Pause
- Stop
- Delete

If Paused

- Resume
- Delete

If Stopped

- Restart
- Delete

Delete an Action Plan

1. Navigate to **Automation > Action Plans**.

2. Select the Action Plan.
3. Click **Delete**.
4. Confirm the deletion.

> **Note:** Action Plans assigned to one or more leads cannot be deleted. You must first remove the Action Plan from all associated leads before deleting it.

Understanding Action Plan Statuses

Status	Description
Active	The Action Plan is currently executing.
Paused	The Action Plan is temporarily suspended and can later resume.
Stopped	The Action Plan was terminated before completion and can be restarted.
Completed	All configured steps have executed successfully.

Conclusion

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

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