

Action Plans Overview

Action Plans are very valuable and productive tools inside WorkCenter. You can find the Action Plans under the “Action Plan Tab” at the top of the WorkCenter screen view. WorkCenter comes with 7 pre-programmed action plans for your use. As a user of WorkCenter, you can create and design an unlimited number of these Action Plans for your client and prospect marketing and communication campaigns.

Action Plans are designed to send emails, print letters or schedule calendar appointments and tasks automatically. Consider this your drip marketing or communications processes and procedure plans. Unlike other contact management software programs that will give you a pop-up reminder to perform your desired task, WorkCenter will automatically perform the task for you.

Any processed step in your action plans will automatically be logged in your contact record under the Journal Tab.

The Action Plan tab is divided into two sections:

#1: Management: This is where you will edit or design new Action Plans

#2: Processing: This area is set for calculating items due, selecting items to be processed and processing the action plans.

These Action Plans are driven by associating the Action Plan with a Contact List Manager List. The Action Plan must also be checked as “Active” for the plan to be operational. If you do not want to delete an old Action Plan but simply retire it for a period of time, uncheck the “Active” status box on the plan.

Watch the other flash videos on Action Plans and also refer to your WorkCenter Quick Start User Guide for additional tips and information on Action Plans.