

2. Actions: Use Cases

Use Case #1: “Call” Logging and Outcomes Tracking

When a sales rep completes a prospecting call, they log a **Call** action with subtype “Cold Call” or “Follow-up.” They record the outcome (e.g., “Left voicemail,” “Spoke with decision-maker”), assign the next action automatically based on the result, and set due dates—ensuring no opportunity slips through the cracks.

Use Case #2: “Meeting” Scheduling and Attendance

An account manager needs to organize a quarterly business review. They create a **Meeting** action, pick date/time, attach the calendar invite, assign it to themselves or a team, and track RSVP status. Reminders fire before the meeting, and post-meeting notes are captured directly in the action record.

Use Case #3: “Task” Management for Support Tickets

A support engineer is assigned a critical bug report. They create a **Task** action with subtype “Bug Investigation,” set an SLA date, and update status from **Open** → **In Progress** → **Resolved** as they work. All steps are timestamped and visible to stakeholders, improving transparency and accountability.

Use Case #4: Automated “Email” Follow-ups

After a webinar, marketing seeds a **Email** action subtype “Webinar Follow-up” for each attendee one week later. Automation rules generate these actions en masse, and the team monitors open rates and click-throughs directly from the action dashboard—driving timely, personalized outreach.

Use Case #5: Cross-Team Reporting on Actions

The sales director needs a weekly summary of all client interactions. They filter **Actions** by type, subtype, owner, and date range—exporting counts of completed vs. overdue tasks. This report highlights high-performing reps, reveals process bottlenecks, and informs coaching priorities.

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