Call and LinkedIn steps

What happens when a sequence reaches a step the rep must do by hand: the task it creates, the reminder, how the sequence moves on, and what happens if the task is deleted.

Not every touch can be automated. A call, a LinkedIn connection request or comment, and a general to-do are steps the rep does personally. The sequence turns each into a task, waits for the rep, and carries on when it is done.

When the step comes due

- A task is created on the contact, assigned to the rep who owns the contact in that tribe. A call step makes a call task; LinkedIn and to-do steps make to-do tasks.
- The task's title is the step's subject, and its notes are the step's message, personalised for the contact. For a LinkedIn step that means the message to paste is right there in the task.
- The task is dated today with a reminder at 9am in the tribe's time, or straight away if it is already past nine. Reminders go out the same way as for any other CRM task.
- The sequence shows as **Waiting** on the contact, and nothing further is sent until the task is done.

Doing the task

1. Open the task from the Tasks list, the contact's Tasks card, or the reminder.
2. Make the call, or paste the LinkedIn message and send it.
3. Mark the task **Completed**.

Within a minute the sequence marks the step done and schedules the next one, counting the next delay from the moment you completed the task rather than from when it was created.

> **AN UNDONE TASK HOLDS THE SEQUENCE INDEFINITELY**
> There is no timeout. If the task is never completed the contact hears nothing more from that sequence. Keep an eye on **Waiting** sequences on the contact and on your open tasks. If the call is not going to happen, either stop the sequence, or delete the task and resume the sequence as described below.

If the step is not going to happen

Sometimes the call or the LinkedIn message is no longer worth making, but the rest of the sequence still is. To skip the step and keep the sequence, delete its task:

1. Open the task and select **Delete**. Because the task belongs to a sequence, the confirmation names the sequence and tells you that deleting the task skips that step and pauses the sequence. A deleted task cannot be restored.
2. Within a minute the step shows as **Skipped**, the sequence on the contact reads **Paused — its task was deleted**, and the rep who started the sequence receives a notification saying so.
3. Open the contact and select **Resume** on the sequence strip to carry on with the next step, or **Stop** to end the sequence there.

The sequence pauses rather than carrying on by itself because it cannot tell why the task was deleted. You might have decided against the call, or you might only have been tidying your task list, so the sequence does not send the next email on a guess. Nothing is sent until you select Resume. When you do, the delay on the next step counts from the moment the step was skipped, so if that time has already passed the next step is due straight away.

A sequence you had paused for a set number of days does not resume on its own once its task has been deleted. Its status changes to **Paused — its task was deleted** and it waits for you, for the same reason.

When the sequence ends first

If you stop the sequence, a task it was still waiting on is removed from your task list at the same moment, because completing it would no longer do anything; the Stop confirmation tells you this first. If the sequence ends on its own instead, because an opportunity was created, a meeting was booked or the contact unsubscribed, the task stays on your list with any notes you added, but it is no longer part of the sequence. Close or delete it yourself when you are done. A task you had already marked **Completed** is always kept as a record of the work.

If the sequence is paused

Completing a task while the sequence is paused - because the contact replied, for example - does not restart it. The step is marked done, and the sequence stays paused until the rep resumes it.