TaskoMatic Builder Worksheet

TaskoMatic Name: (New Sequence)	Purpose: (Description)

TaskoMatic Action No. _____   Sequence Name: _____

Description: _____

Action Name: _____Name the step ex. Send Email, Call Prospect)

Description: _____ Describe the action ex. Send email to request next step, Call to engage client and ask the following questions…1.) 2.) etc.)

Type: ☐ Manual   ☐ Printed   ☐ Email

Select Document (printed/email only):_____

Subject: (email use only) _____

Discovery Guide: ☐ Not Used ☐ _____

Days to Complete Task: _____

Days to Next Task: _____

Assign Task to: ☒ Initiator ☐ _____(Initiator is default and the one to launch)

TaskoMatic Action No. _____   Sequence Name: _____

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