**Use case: Execute a plan**

1. This use case begins when a plan has been created for a client.
2. System posts the next action to implement to the to-do list.
3. Insurance agent initiates **Use case: Implement an action**
4. If **Use case: Implement an action** returns completion, and this is not the last action, resumes at step 2, otherwise resume at step 5.
5. System prompts the Insurance Agent to do **use case: Assess a plan**.
6. If **use case: Assess a plan** returns success, System prompts the Insurance Agent to do **use case: Record a sale**, followed by **use case: Do sales analysis**; otherwise resume at Alternative: **plan fails**.

**Alternative: plan fails**

At step 4, **Use case: Implement an action** returns failure:
4.1 System makes record of the action failed.
4.2 System makes record of the plan failed.
4.3 System prompts the Insurance Agent if to redo client sales analysis.
Use case: Implement an action

1. This use case begins when Insurance agent requests implementing an action.
2. Insurance agent initiates the **use case**: Make contact.
3. If make contact successful, Insurance agent carries out the planned action.
4. Insurance Agent indicates to the system the action has been implemented.
5. System prompts agent to make record of the implementation. (0418-2002 real time or batched record processing? Or both? Now, Later, No)
6. Insurance agent indicates the action is completed.

**Alternative:** contact retries
At step 3, make contact returns retry, redo the use case later.

**Alternative:** contact fails
At step 3, make contact returns failure, resume to **Alternative:** action fails.

**Alternative:** action fails
At step 6, action fails, return.

**Alternative:** action needs repetition
At step 6, action needs additional implementation. System records and displays the times the action is repeated. Insurance agent indicates retry later or abandon. If retry, System reposts the action to the to-do list. If abandon, use case resumes at **Alternative:** action fails.
Use case: make contact

1. This use case begins when Insurance Agent requests making contact with a client.
2. System shows contact information (phone numbers and email) for the client.
3. If not activated, System activates Calendar.
4. In addition to displaying existing schedules for the Insurance Agent, Calendar also displays the selected Client’s suitable time slots for visit.
5. Agent calls Client.
6. Client contacted, Agent makes solicitation.
7. Client agrees to meet. Agent consults Client and check Calendar for arranging meeting time and place.
8. System records the assigned time slot.

Alternative: Client not contacted
At step 5, client is not contacted. System records and displays the number of tries so far. Insurance agent indicates retry later or abandon. If abandon, action (and the plan it belongs to) fails.

Alternative: Client unable to decide
At step 6, Client unable to decide whether to meet, contact later.

Alternative: Client refuses to meet
At step 6, Client refuses to meet, System records and display of number of refusals so far. Insurance agent indicates retry later or abandon. If abandon, action (and the plan it belongs to) fails.

Alternative: Disagree on Meeting time or place
At step 7, Agent and Client cannot agree on meeting time or place. Agent will rearrange his/her own schedule to satisfy Client by initiating the use case: relocate an appointment.

6.1 If use case: relocate an appointment returns UnableToCancel, execution resumes at Step 7.
Use case: relocate an appointment

1. This use case begins when Agent requests to relocate an appointment to another time slot.
2. Agent invokes Calendar if not already invoked.
3. Agent selects the appointment to relocate.
4. System displays information of the appointment
5. If the appointment can be cancelled, cancel the appointment. System posts to the cancelled appointment to the todo-list.

Alternative: appointment cannot be cancelled

At step 5, appointment cannot be cancelled. Return UnableToCancel.