

Workflow Safety Checklist

Prevent duplicate or runaway workflows.

Related week: Week 5 | Related SOP: Build a safe first workflow | Estimated use time: 30-45 min

Use this worksheet before building inside the CRM. Plan the path first, then build only what the plan supports.

Purpose

Use this checklist to plan and test a workflow before it goes live. A safe workflow has one purpose, one clear trigger, filters, stop conditions, and tested success and failure paths.

When to Use This Template

- ☐ Before building a new workflow
- ☐ Before turning on a workflow
- ☐ Before editing a live workflow
- ☐ When contacts receive duplicate messages
- ☐ When opportunities move unexpectedly

Workflow Plan

Decision	Answer
Workflow name	
Workflow purpose	
Trigger	
Required filters	
Who should enter	
Who should not enter	
Primary goal	
Stop condition	
Workflow owner	
Review date	

Action Sequence

Step	Action	Why it exists	Timing/wait	Risk or dependency

Duplicate Workflow Audit

- ☐ Searched workflows by form, tag, calendar, pipeline, and stage
- ☐ Checked same-trigger workflows
- ☐ Checked tag-added chain reactions
- ☐ Checked contact-created triggers
- ☐ Checked calendar reminder overlap
- ☐ Checked old test workflows
- ☐ Confirmed no duplicate opportunity will be created

Testing Checklist

- ☐ Tested using the real trigger
- ☐ Success path tested
- ☐ Failure path tested
- ☐ Existing contact tested
- ☐ Contact reply tested where relevant
- ☐ Unsubscribe, STOP, or do-not-contact behavior reviewed where relevant
- ☐ Workflow history log reviewed
- ☐ Internal notification tested
- ☐ No duplicate workflow fired

Related Training and SOPs

Related training: Week 5 - Workflows, Automations, and Triggers

Related SOPs: Build a safe first workflow; Prevent duplicate workflows; Move opportunities cleanly; Plan a 5-email nurture