

Workflow Design and QA

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A workflow brief, test plan, and launch decision.

Name / team: _____ Date: _____

Choose one automation. Document the intended behavior before building it. Use a safe test environment or approved test records, and prevent unintended customer messages or production changes during testing.

Key idea

Enrollment determines who enters. Re-enrollment determines whether someone can enter again. Branches and delays change the path. Exit and suppression rules prevent inappropriate actions. Inspect related automations for conflicts.

Example: Route a consultation request only when the request is valid and an owner can be assigned. Missing territory follows an exception route to an operations owner. A repeat submission follows an explicit duplicate-handling rule.

What event starts this workflow, and what result should it produce?

Which records are eligible, excluded, or allowed to re-enter?

Who owns approval, ongoing monitoring, and incident response?

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BUILD YOUR WORKING PLAN

Write expected outcomes before testing

Add one case for every branch and external action. Include timing, time zone, owner availability, and failure handling. Verify final record values and notifications, not just whether the workflow ran.

Test scenario	Input / starting state	Expected action / exit	Actual result / evidence
Eligible record			
Ineligible record			
Missing required value			
Each branch / delay			
Repeat entry / update			
Suppressed record			

What other workflows or integrations write to these same fields?

What happens if an action fails, an owner is unavailable, or a record changes during a delay?

How will we pause the process and repair affected records if behavior is wrong?

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VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Enrollment, re-entry, exclusions, and exits are written clearly.
- ☐ Every branch and external action has passed an approved test.
- ☐ Test sends and changes cannot reach unintended recipients.
- ☐ Circular updates and conflicting automations have been checked.
- ☐ Evidence, unresolved defects, approval, and launch time are recorded.
- ☐ A monitoring owner and a practical recovery plan are assigned.

Measure what changes

Track exceptions and incorrect actions / eligible executions during the pilot. Review actual affected records. Pausing automation does not undo actions already completed.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Before launch: resolve critical defects and record the approver.

At launch: use a limited approved cohort and inspect results.

After launch: review the first cycle and schedule recurring checks.

First action / accountable owner / due date:

Open issue / decision needed / approver:
