next8n

MASTER CHECKLIST

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Emergency Quick Reference

If Workflow Breaks

If Client Wants Changes

Master Checklist

Complete Project Delivery Checklist

Quick Reference Status Legend

SYMBOL	MEANING
	Not started
@	In progress
[x]	Completed
	Needs attention
[REQUIRED]	Required/Critical
	Optional/Recommended

Phase 1: Pre-Project & Discovery

1.1 Lead Qualification

```
[REQUIRED] Lead source identified
[REQUIRED] Initial inquiry reviewed
[REQUIRED] Budget range discussed
[REQUIRED] Timeline expectations set
 Portfolio/case studies shared
[REQUIRED] Discovery call scheduled
```

1.2 Discovery Call

```
[REQUIRED] Business context understood
[REQUIRED] Pain points identified
[REQUIRED] Current tech stack documented
[REQUIRED] Integration requirements listed
[REQUIRED] Data sensitivity discussed
[REQUIRED] Success criteria defined
 Budget confirmed
 Decision makers identified
```

1.3 Proposal & Scoping

```
[REQUIRED] Scope of Work drafted
    Specific workflows listed
    Integrations specified
    Deliverables defined
    What's NOT included stated
    Success criteria measurable
[REQUIRED] Pricing prepared
[REQUIRED] Timeline outlined (phases only)
[REQUIRED] Payment terms specified
 Maintenance options included
```

1.4 Contract & Close

```
[REQUIRED] Contract/agreement signed
[REQUIRED] Deposit/first payment received
[REQUIRED] Project kickoff date set
[REQUIRED] Communication channels established
 Project management tool set up
```

Phase 2: Kickoff & Environment Setup

2.1 Kickoff Call Preparation

```
[REQUIRED] Kickoff agenda prepared
[REQUIRED] Pre-call requirements sent to client
    Sample data/examples needed
    Account credentials needed
    Access requirements listed
[REQUIRED] Kickoff call scheduled
 Recording permission confirmed
```

2.2 Kickoff Call Execution

```
[REQUIRED] Scope reviewed and confirmed
[REQUIRED] Success criteria reconfirmed
[REQUIRED] Client expectations aligned
[REQUIRED] Sample data received
[REQUIRED] Communication protocol established
[REQUIRED] n8n setup process explained
 Next steps confirmed
```

2.3 n8n Environment Setup

```
[REQUIRED] Hosting decision made
    n8n Cloud
    Self-hosted VPS
    Local/On-prem
[REQUIRED] Client creates/owns n8n instance
[REQUIRED] Client enters billing information
[REQUIRED] Consultant invited as team member
[REQUIRED] Consultant access verified
 Test environment created (if separate)
```

2.4 Credential & Integration Setup

```
[REQUIRED] Required integrations listed
[REQUIRED] Credential setup guide sent (Loom)
[REQUIRED] Client creates API accounts
[REQUIRED] Client generates API keys
[REQUIRED] Credentials entered in n8n
[REQUIRED] All integrations tested working
 Credential documentation created
```

Phase 3: Development

3.1 Architecture & Planning

```
[REQUIRED] Workflow architecture designed
[REQUIRED] Data flow mapped
[REQUIRED] Node structure planned
 Sub-workflows identified
 Reusable components noted
```

3.2 Core Build

```
[REQUIRED] Trigger nodes configured
[REQUIRED] Core logic implemented
[REQUIRED] AI components built
    Prompts written
    Model selected
    Response parsing configured
[REQUIRED] Actions/outputs configured
[REQUIRED] Workflow tested with sample data
```

3.3 Hardening

```
[REQUIRED] Error handling added
    Try/catch patterns
    Fallback logic
    Graceful degradation
[REQUIRED] Timeout protection configured
[REQUIRED] Input validation implemented
[REQUIRED] Rate limit handling (if applicable)
 Retry logic added
```

3.4 Observability

```
[REQUIRED] Execution logging enabled
[REQUIRED] Error logging configured
    Google Sheet log (recommended)
    Or other logging destination
[REQUIRED] Error notifications set up
    Email alerts
    Slack notifications
 AI response logging (for quality)
 Usage/token tracking
```

3.5 Workflow Hygiene

```
[REQUIRED] All nodes properly named
[REQUIRED] Sticky notes added for logic
[REQUIRED] No hardcoded secrets
[REQUIRED] No test data in production
 Color coding used (if applicable)
 Workflow description added
```

Phase 4: Testing & QA

4.1 Internal QA

```
[REQUIRED] Test with sample data (10+ examples)
[REQUIRED] Edge cases tested
    Empty inputs
    Invalid data
    Duplicate data
    Large payloads
[REQUIRED] Error handling verified
[REQUIRED] Timeout behavior tested
[REQUIRED] All outputs validated
```

4.2 AI-Specific Testing

```
[REQUIRED] AI responses checked for:
    Relevance & correctness
    Tone & safety
    Consistency across runs
[REQUIRED] Prompt injection tested
[REQUIRED] Jailbreak attempts tested
 Multiple prompts/models evaluated
 Evaluation data documented
```

4.3 Scale Testing

```
[REQUIRED] Run 50+ sample inputs
[REQUIRED] Check consistency
[REQUIRED] Monitor execution time
[REQUIRED] Verify rate limits not hit
 Cost projection calculated
```

4.4 Client QA

```
[REQUIRED] Testing interface provided
[REQUIRED] Testing instructions given
[REQUIRED] Client testing period allowed
[REQUIRED] Feedback collected
[REQUIRED] Issues documented
[REQUIRED] Fixes implemented
[REQUIRED] Re-testing completed
```

Phase 5: Security Review

5.1 Credential Security

```
[REQUIRED] No credentials in workflow JSON
[REQUIRED] No secrets in sticky notes
[REQUIRED] Credentials reference by name only
[REQUIRED] Client owns all API keys
[REQUIRED] Secure transfer method used
```

5.2 Webhook Security

```
[REQUIRED] HTTPS only
[REQUIRED] Signature verification (if available)
[REQUIRED] Token authentication (if needed)
 Rate limiting considered
 IP whitelisting (if applicable)
```

5.3 Data Protection

```
[REQUIRED] Data minimization practiced
[REQUIRED] PII handling documented
[REQUIRED] Execution logs auto-prune enabled
[REQUIRED] No sensitive data in URLs
 GDPR considerations addressed
```

5.4 Access Control

```
[REQUIRED] Role-based access configured
[REQUIRED] Only necessary permissions granted
[REQUIRED] Credential sharing restricted
 Audit logging enabled
```

Phase 6: Handover & Delivery

6.1 Documentation

```
[REQUIRED] Workflow overview document
[REQUIRED] Loom walkthrough video (5-10 min)
[REQUIRED] Credential setup guide
[REQUIRED] Troubleshooting FAQ
 Architecture diagram
 Data flow diagram
```

6.2 Pre-Handover Preparation

```
[REQUIRED]  Production workflow created
[REQUIRED]  Test data removed
[REQUIRED]  All nodes labeled
[REQUIRED]  Backup exported
[REQUIRED]  Handover call scheduled
```

6.3 Handover Call

```
[REQUIRED]  Scope reviewed
[REQUIRED]  Live demo conducted
[REQUIRED]  Monitoring explained
[REQUIRED]  Maintenance discussed
[REQUIRED]  Questions answered
[REQUIRED]  Credentials swapped (test  prod)
[REQUIRED]  Workflow enabled
```

6.4 Post-Handover

```
[REQUIRED]  Call recording shared
[REQUIRED]  Documentation sent
[REQUIRED]  First executions verified
[REQUIRED]  Client acceptance received
[REQUIRED]  Final invoice sent
```

Phase 7: Project Close & Support

7.1 Project Closure

```
[REQUIRED] All deliverables verified against scope
[REQUIRED] Client sign-off received
[REQUIRED] Final payment received
 Testimonial/case study requested
 Referral opportunity discussed
```

7.2 Post-Launch Support

```
[REQUIRED] Support period defined (7-14 days)
[REQUIRED] Monitoring active
[REQUIRED] Quick response to issues
[REQUIRED] Bug fixes applied
[REQUIRED] Support period closed
```

7.3 Retainer Decision

```
[REQUIRED] Retainer options presented
[REQUIRED] Scope defined (if proceeding)
    What's included
    What's excluded
    SLA terms
    Pricing
[REQUIRED] Retainer agreement signed (if proceeding)
 Or clean exit documented
```

7.4 Archive

```
[REQUIRED] Project files organized
[REQUIRED] Backups stored securely
[REQUIRED] Lessons learned documented
 Templates updated for future
```

Quick Checklists by Role

For Consultants/Developers

```
    Environment access verified
    All integrations tested
    Workflow built and tested
    Error handling complete
    Documentation ready
    Handover prepared
```

For Project Managers

```
    Contract signed
    Kickoff completed
    Milestones tracked
    Client communication managed
    Scope protected
    Invoice sent
```

For Clients

```
    n8n account created
    API keys generated
    Team access configured
    Testing completed
    Acceptance confirmed
    Support understood
```

Emergency Quick Reference

If Workflow Breaks

```
1.  Check execution logs
2.  Identify error point
3.  Disable workflow if needed
4.  Notify client (if critical)
5.  Diagnose and fix
6.  Test thoroughly
7.  Re-enable
8.  Monitor closely
```

If Client Wants Changes

```
1.  Document the request
2.  Compare against scope
3.  If in scope  implement
4.  If out of scope  quote new work
5.  Get approval before proceeding
```

Next: See individual phase checklists for more detail.

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