



WORKFLOW AUTOMATION DELIVERY FRAMEWORK

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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Workflow Automation Delivery Framework

Quick Access Templates (Google Docs)

#	TEMPLATE	DIRECT LINK
01	Master Checklist	Open in Google Docs
02	Standard Operating Procedure	Open in Google Docs
03	Client Onboarding Template	Open in Google Docs
04	Security Audit Checklist	Open in Google Docs
05	API Key Setup Guide	Open in Google Docs
06	Maintenance Retainer Template	Open in Google Docs

Complete Professional Standards for n8n Automation Consultants

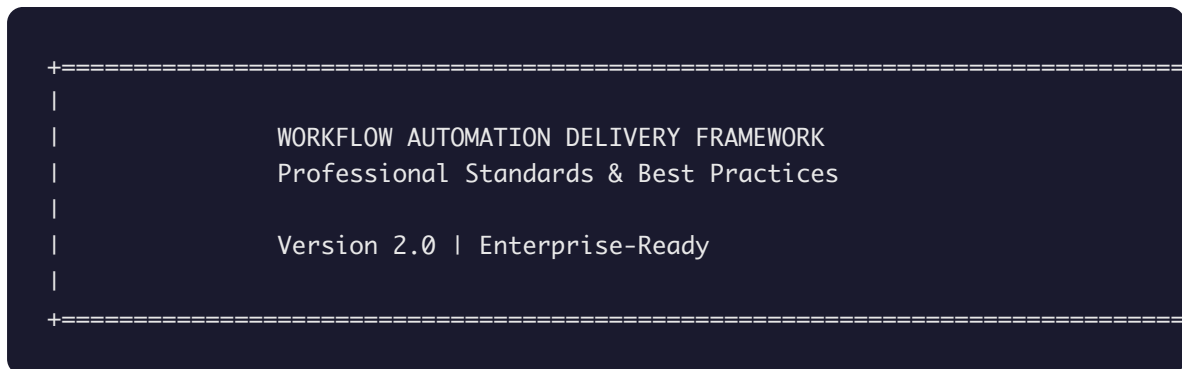


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Framework Overview

This comprehensive framework provides everything needed to professionally deliver workflow automations to clients using n8n. It covers the complete business lifecycle from lead generation through project completion, ongoing maintenance, and client offboarding.

Who This Framework Is For

ROLE	PRIMARY USE
Automation Consultants	End-to-end project delivery
Agency Owners	Scaling delivery operations
Freelance Developers	Professional client management
Technical Project Managers	Coordinating automation projects
Sales Teams	Proposals, contracts, client communication
Support Teams	Maintenance, troubleshooting, offboarding

What's Included

+-----+	
CATEGORY	CONTENTS
+-----+	
Diagrams	Architecture, flow, process maps
	(Mermaid format for easy rendering)
+-----+	
Checklists	Pre-flight, QA, handover, security
	(200+ checkpoint items)
+-----+	
Guides	Onboarding, security, testing, delivery
	(Step-by-step procedures)
+-----+	
Processes/SOPs	Role-based standard operating procedures
	(7 team roles covered)
+-----+	
Templates	Contracts, proposals, invoices, emails
	(MD + HTML formats for PDF export)
+-----+	

Framework Benefits

- **Consistency:** Standardized processes across all projects
- **Scalability:** Delegate confidently with documented procedures
- **Professionalism:** Client-ready templates and communication

- **Risk Reduction:** Security checklists and QA frameworks
- **Knowledge Retention:** Team members can onboard quickly

Getting Started

First-Time Setup

STEP 1: Read Core Documents

- +> README.md (this file)
- +> diagrams/01-master-architecture.md
- +> processes/00-sop-master-index.md

STEP 2: Customize Templates

- +> templates/00-template-index.md
- +> Replace all [PLACEHOLDERS] with your info
- +> Add your branding

STEP 3: Train Your Team

- +> Assign role-specific SOPs
- +> Review relevant checklists
- +> Practice with sample projects

Quick Start by Scenario

Starting a New Project

- | | |
|---|----------------------|
| 1. guides/01-client-onboarding-guide.md | [Onboarding process] |
| 2. diagrams/02-hosting-decision-tree.md | [Hosting decision] |
| 3. templates/01-scope-of-work-template.md | [Create SOW] |
| 4. templates/02-contract-template.md | [Contract] |
| 5. checklists/02-pre-project-checklist.md | [Pre-flight checks] |

Building & Testing

- | | |
|--|-------------------|
| 1. guides/02-security-implementation.md | [Security setup] |
| 2. guides/04-testing-qa-framework.md | [QA process] |
| 3. checklists/03-security-checklist.md | [Security audit] |
| 4. checklists/04-qa-testing-checklist.md | [QA verification] |

Delivering to Client

- | | |
|---|--------------------|
| 1. guides/05-handover-delivery.md | [Delivery process] |
| 2. checklists/05-handover-checklist.md | [Delivery items] |
| 3. templates/08-handover-document-template.md | [Handover doc] |
| 4. templates/05-email-templates.md | [Communication] |

Ongoing Support

- | | |
|--|--------------------|
| 1. guides/06-maintenance-retainer.md | [Retainer setup] |
| 2. templates/03-retainer-agreement-template.md | [Agreement] |
| 3. diagrams/06-maintenance-cycle.md | [Support workflow] |

Ending a Client Relationship

- | | |
|---|----------------|
| 1. guides/07-offboarding-guide.md | [Exit process] |
| 2. checklists/06-offboarding-checklist.md | [Exit items] |
-

Directory Structure

```

Workflow-Automation-Delivery-Framework/
|
+-- README.md                    # This file
|
+-- diagrams/                    # Visual process maps (Mermaid)
|   +-- 01-master-architecture.md # Complete system architecture
|   +-- 02-hosting-decision-tree.md # Hosting options flowchart
|   +-- 03-project-lifecycle.md    # End-to-end project flow
|   +-- 04-security-framework.md   # Security architecture
|   +-- 05-handover-process.md     # Delivery workflow
|   +-- 06-maintenance-cycle.md    # Ongoing support flow
|
+-- checklists/                  # Verification checklists
|   +-- 01-master-checklist.md     # Complete project checklist
|   +-- 02-pre-project-checklist.md # Before starting
|   +-- 03-security-checklist.md   # Security requirements
|   +-- 04-qa-testing-checklist.md # Quality assurance
|   +-- 05-handover-checklist.md   # Delivery items
|   +-- 06-offboarding-checklist.md # Project close-out
|
+-- guides/                      # Detailed how-to guides
|   +-- 01-client-onboarding-guide.md # Complete onboarding
|   +-- 02-security-implementation.md # Security best practices
|   +-- 03-api-key-management.md     # Credential handling
|   +-- 04-testing-qa-framework.md   # Testing methodology
|   +-- 05-handover-delivery.md      # Professional delivery
|   +-- 06-maintenance-retainer.md   # Ongoing support
|   +-- 07-offboarding-guide.md      # Graceful exit
|   +-- 08-pricing-estimation-guide.md # Project pricing & estimation
|   +-- 09-risk-management-guide.md  # Risk assessment & mitigation
|   +-- 10-workflow-standards-guide.md # Workflow development standards
|   +-- 11-troubleshooting-guide.md  # Common issues & solutions
|
+-- processes/                   # Role-based SOPs
|   +-- 00-sop-master-index.md      # Team structure overview
|   +-- 01-sop-lead-gen-va.md       # Lead generation VA
|   +-- 02-sop-sales-rep.md         # Sales representative
|   +-- 03-sop-closer.md            # Sales closer
|   +-- 04-sop-project-manager.md   # Project manager
|   +-- 05-sop-technical-lead.md    # Technical lead
|   +-- 06-sop-developer.md         # Developer
|   +-- 07-sop-client.md            # Client guide
|
+-- templates/                   # Business documents (Markdown)
|   +-- 00-template-index.md        # Template guide + conversion
|   +-- 01-scope-of-work-template.md # Project scope
|   +-- 02-contract-template.md     # Service agreement
|   +-- 03-retainer-agreement-template.md # Ongoing support
|   +-- 04-invoice-templates.md     # Billing documents
|   +-- 05-email-templates.md       # Communication scripts
|   +-- 06-proposal-template.md     # Sales proposals

```

```

|   +-- 07-project-brief-template.md      # Quick summary
|   +-- 08-handover-document-template.md  # Delivery package
|   +-- 09-change-order-template.md      # Scope change requests
|
+-- templates-html/                      # Print-ready HTML templates
    +-- scope-of-work.html                # SOW (print to PDF)
    +-- contract.html                    # Contract (print to PDF)
    +-- invoice.html                     # Invoice (print to PDF)
    +-- proposal.html                    # Proposal (print to PDF)
    +-- handover.html                     # Handover (print to PDF)

```

Core Principles

The 7 Pillars of Professional Delivery

```

+-----+
|
|  1. CLIENT HOSTS      Client owns their n8n instance
|  2. CLIENT PAYS       Client pays for all third-party services directly
|  3. SECURITY FIRST    Credentials encrypted, webhooks hardened
|  4. TEST THOROUGHLY  Use real data, plan for failure
|  5. DOCUMENT FULLY   Every workflow explained and labeled
|  6. CLEAN HANDOVER    Professional delivery with training
|  7. CLEAR SCOPE       Written agreements prevent scope creep
|
+-----+

```

Golden Rules

RULE	DESCRIPTION	WHY IT MATTERS
Transparency	Client sees all usage, all costs	Builds trust, avoids disputes
Ownership	Client owns their infrastructure	Clean separation, no lock-in
Documentation	Everything explained in writing	Enables handover, reduces support
Scope Protection	Clear definition of done	Prevents unpaid work
Professional Exit	Structured offboarding available	Shows confidence, builds trust

Credential Security Model

CLIENT OWNS AND PAYS FOR:

```
+-----+
| - n8n subscription/hosting      |
| - All third-party API accounts  |
| - All usage costs                |
+-----+
```

CONSULTANT PROVIDES:

```
+-----+
| - Expertise and development     |
| - Testing and quality assurance |
| - Documentation and training    |
| - Time-limited support          |
+-----+
```

CLEAN SEPARATION:

```
+-----+
| - No billing pass-through       |
| - No credential ownership       |
| - Full handover possible at any time |
+-----+
```

Document Index

Diagrams (Mermaid Format)

FILE	DESCRIPTION	WHEN TO USE
01-master-architecture.md	Complete system architecture	Project planning, client education
02-hosting-decision-tree.md	Hosting decision flowcharts	Initial client discussions
03-project-lifecycle.md	End-to-end project phases	Project planning, timeline setting
04-security-framework.md	Security layers and data protection	Security reviews, audits
05-handover-process.md	Delivery workflow	Preparing for handover
06-maintenance-cycle.md	Ongoing support cycle	Retainer discussions

Checklists

FILE	ITEMS	DESCRIPTION
01-master-checklist.md	200+	Complete project checklist (all phases)
02-pre-project-checklist.md	40+	Before-you-start requirements
03-security-checklist.md	50+	Security implementation
04-qa-testing-checklist.md	60+	Quality assurance and testing
05-handover-checklist.md	30+	Delivery and handover items
06-offboarding-checklist.md	25+	Project close-out

Guides

FILE	PAGES	DESCRIPTION
01-client-onboarding-guide.md	~15	Complete client onboarding process
02-security-implementation.md	~12	Security best practices
03-api-key-management.md	~14	Credential and API key handling
04-testing-qa-framework.md	~18	Testing methodology and QA
05-handover-delivery.md	~10	Professional delivery process
06-maintenance-retainer.md	~12	Ongoing support and retainer
07-offboarding-guide.md	~8	Graceful exit process
08-pricing-estimation-guide.md	~20	Project pricing and time estimation
09-risk-management-guide.md	~18	Risk assessment and mitigation strategies
10-workflow-standards-guide.md	~16	Workflow development best practices
11-troubleshooting-guide.md	~15	Common issues and solutions

Standard Operating Procedures

FILE	ROLE	RESPONSIBILITIES
00-sop-master-index.md	All	Team structure, handoff matrix
01-sop-lead-gen-va.md	Lead Gen VA	Lead sourcing, outreach, qualification
02-sop-sales-rep.md	Sales Rep	Discovery, relationship building
03-sop-closer.md	Closer	Proposals, negotiations, contracts
04-sop-project-manager.md	PM	Coordination, communication, billing
05-sop-technical-lead.md	Tech Lead	Architecture, QA oversight
06-sop-developer.md	Developer	Building, testing, documentation
07-sop-client.md	Client	Client-facing responsibilities guide

Templates

FILE	FORMAT	PURPOSE
00-template-index.md	MD	Template usage guide + conversion instructions
01-scope-of-work-template.md	MD	Project scope definition
02-contract-template.md	MD	Legal service agreement
03-retainer-agreement-template.md	MD	Ongoing maintenance contract
04-invoice-templates.md	MD	Deposit, final, retainer invoices
05-email-templates.md	MD	Communication for all project stages
06-proposal-template.md	MD	Sales proposal with pricing tiers
07-project-brief-template.md	MD	One-page project summary
08-handover-document-template.md	MD	Client delivery package
09-change-order-template.md	MD	Scope change requests and approvals

HTML Templates (Print-Ready)

FILE	PURPOSE	HOW TO USE
scope-of-work.html	Professional SOW	Open in browser, print to PDF
contract.html	Service agreement	Open in browser, print to PDF
invoice.html	Client invoice	Open in browser, print to PDF
proposal.html	Sales proposal	Open in browser, print to PDF
handover.html	Delivery document	Open in browser, print to PDF

Quick Reference Paths

By Project Phase

SALES PHASE

Lead In	-> processes/01-sop-lead-gen-va.md	
Discovery	-> guides/01-client-onboarding-guide.md (Phase 1)	
Proposal	-> templates/06-proposal-template.md	
Close	-> templates/02-contract-template.md	

DELIVERY PHASE

Kickoff	-> guides/01-client-onboarding-guide.md (Phase 2)	
Build	-> processes/06-sop-developer.md	
Test	-> guides/04-testing-qa-framework.md	
Security	-> checklists/03-security-checklist.md	
Deliver	-> guides/05-handover-delivery.md	

SUPPORT PHASE

Retainer	-> templates/03-retainer-agreement-template.md	
Maintain	-> guides/06-maintenance-retainer.md	
Exit	-> guides/07-offboarding-guide.md	

By Role

SALES TEAM

- +-- processes/01-sop-lead-gen-va.md
- +-- processes/02-sop-sales-rep.md
- +-- processes/03-sop-closer.md
- +-- templates/06-proposal-template.md
- +-- templates/05-email-templates.md

PROJECT MANAGEMENT

- +-- processes/04-sop-project-manager.md
- +-- checklists/01-master-checklist.md
- +-- templates/01-scope-of-work-template.md
- +-- templates/04-invoice-templates.md

TECHNICAL TEAM

- +-- processes/05-sop-technical-lead.md
- +-- processes/06-sop-developer.md
- +-- guides/02-security-implementation.md
- +-- guides/04-testing-qa-framework.md
- +-- checklists/03-security-checklist.md
- +-- checklists/04-qa-testing-checklist.md

CLIENT-FACING

- +-- processes/07-sop-client.md
- +-- templates/08-handover-document-template.md

By Task

"I need to..."	"Use this..."
Qualify a new lead	checklists/02-pre-project-checklist
Write a proposal	templates/06-proposal-template
Create a contract	templates/02-contract-template
Send an invoice	templates/04-invoice-templates
Estimate project pricing	guides/08-pricing-estimation-guide
Assess project risks	guides/09-risk-management-guide
Onboard a new client	guides/01-client-onboarding-guide
Set up credentials securely	guides/03-api-key-management
Follow workflow standards	guides/10-workflow-standards-guide
Test my workflow	guides/04-testing-qa-framework
Do a security audit	checklists/03-security-checklist
Troubleshoot an issue	guides/11-troubleshooting-guide
Handle scope change	templates/09-change-order-template
Deliver to client	guides/05-handover-delivery
Set up ongoing support	guides/06-maintenance-retainer
End a client relationship	guides/07-offboarding-guide

Customization Guide

Before Using This Framework

1. Replace All Placeholders

- [\[YOUR COMPANY\]](#) -> Your company name
- [\[YOUR NAME\]](#) -> Your name
- [\[YOUR EMAIL\]](#) -> Your email
- [\\$\[X,XXX\]](#) -> Your actual pricing

2. Add Your Branding

- Logo to HTML templates
- Brand colors
- Contact information

3. Review Legal Terms

- Have attorney review contracts
- Adjust for your jurisdiction
- Add required clauses

4. Set Your Processes

- Adjust timelines to your workflow
- Modify checklists as needed
- Update communication templates

Converting Templates

Markdown to Word/PDF:

```
# Install Pandoc
brew install pandoc

# Convert to Word
pandoc template.md -o template.docx

# Convert to PDF (requires LaTeX)
pandoc template.md -o template.pdf
```

HTML to PDF:

1. Open .html file in browser
2. Click "Print / Save as PDF" button
OR
3. Press Ctrl+P / Cmd+P
4. Select "Save as PDF"

Framework Changelog

VERSION	DATE	CHANGES
2.0.0	2025-01	Major update: Added HTML templates, expanded SOPs, enhanced security framework
1.0.0	2025-01	Initial framework release

Support & Contributions

This framework is designed for professional use by automation consultants and agencies. Customize and adapt as needed for your specific business context.

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Contact: mirza.iqbal@next8n.com

Website: next8n.com

Recommended Reading Order

For new users, we recommend reading in this order:

1. This README (overview)
2. [diagrams/01-master-architecture.md](#) (understand the system)
3. [processes/00-sop-master-index.md](#) (understand team structure)
4. Your role's specific SOP
5. Relevant guides as needed

```
+=====+
|
|  START HERE: diagrams/01-master-architecture.md
|
|  Questions? Refer to the relevant guide for your current project phase.
|
+=====+
```