



# WORKFLOW AUTOMATION DELIVERY FRAMEWORK

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Workflow Automation Delivery Framework

ENTERPRISE EDITION

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# Workflow Automation Delivery Framework

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## Quick Access Templates (Google Docs)

| #  | TEMPLATE                      | DIRECT LINK                         |
|----|-------------------------------|-------------------------------------|
| 01 | Master Checklist              | <a href="#">Open in Google Docs</a> |
| 02 | Standard Operating Procedure  | <a href="#">Open in Google Docs</a> |
| 03 | Client Onboarding Template    | <a href="#">Open in Google Docs</a> |
| 04 | Security Audit Checklist      | <a href="#">Open in Google Docs</a> |
| 05 | API Key Setup Guide           | <a href="#">Open in Google Docs</a> |
| 06 | Maintenance Retainer Template | <a href="#">Open in Google Docs</a> |

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# Complete Professional Standards for n8n Automation Consultants

WORKFLOW AUTOMATION DELIVERY FRAMEWORK  
Professional Standards & Best Practices

Version 2.0 | Enterprise-Ready

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1. Framework Overview
2. Getting Started
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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                                |
|-----------------------------------|--|
| <b>Automation Consultants</b>     | End-to-end project delivery                |
| <b>Agency Owners</b>              | Scaling delivery operations                |
| <b>Freelance Developers</b>       | Professional client management             |
| <b>Technical Project Managers</b> | Coordinating automation projects           |
| <b>Sales Teams</b>                | Proposals, contracts, client communication |
| <b>Support Teams</b>              | Maintenance, troubleshooting, offboarding  |

## What's Included

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

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### 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/
|   |--- 01-master-architecture.md
|   |--- 02-hosting-decision-tree.md
|   |--- 03-project-lifecycle.md
|   |--- 04-security-framework.md
|   |--- 05-handover-process.md
|   |--- 06-maintenance-cycle.md
|
|--- checklists/
|   |--- 01-master-checklist.md
|   |--- 02-pre-project-checklist.md
|   |--- 03-security-checklist.md
|   |--- 04-qa-testing-checklist.md
|   |--- 05-handover-checklist.md
|   |--- 06-offboarding-checklist.md
|
|--- guides/
|   |--- 01-client-onboarding-guide.md
|   |--- 02-security-implementation.md
|   |--- 03-api-key-management.md
|   |--- 04-testing-qa-framework.md
|   |--- 05-handover-delivery.md
|   |--- 06-maintenance-retainer.md
|   |--- 07-offboarding-guide.md
|   |--- 08-pricing-estimation-guide.md
|   |--- 09-risk-management-guide.md
|   |--- 10-workflow-standards-guide.md
|   |--- 11-troubleshooting-guide.md
|
|--- processes/
|   |--- 00-sop-master-index.md
|   |--- 01-sop-lead-gen-va.md
|   |--- 02-sop-sales-rep.md
|   |--- 03-sop-closer.md
|   |--- 04-sop-project-manager.md
|   |--- 05-sop-technical-lead.md
|   |--- 06-sop-developer.md
|   |--- 07-sop-client.md
|
|--- templates/
|   |--- 00-template-index.md
|   |--- 01-scope-of-work-template.md
|   |--- 02-contract-template.md
|   |--- 03-retainer-agreement-template.md
|   |--- 04-invoice-templates.md
|   |--- 05-email-templates.md
|   |--- 06-proposal-template.md

```

# Visual process maps (Mermaid)  
# Complete system architecture  
# Hosting options flowchart  
# End-to-end project flow  
# Security architecture  
# Delivery workflow  
# Ongoing support flow

# Verification checklists  
# Complete project checklist  
# Before starting  
# Security requirements  
# Quality assurance  
# Delivery items  
# Project close-out

# Detailed how-to guides  
# Complete onboarding  
# Security best practices  
# Credential handling  
# Testing methodology  
# Professional delivery  
# Ongoing support  
# Graceful exit  
# Project pricing & estimation  
# Risk assessment & mitigation  
# Workflow development standards  
# Common issues & solutions

# Role-based SOPs  
# Team structure overview  
# Lead generation VA  
# Sales representative  
# Sales closer  
# Project manager  
# Technical lead  
# Developer  
# Client guide

# Business documents (Markdown)  
# Template guide + conversion  
# Project scope  
# Service agreement  
# Ongoing support  
# Billing documents  
# Communication scripts  
# 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/
    +-+ scope-of-work.html          # Print-ready HTML templates
    +-+ contract.html              # SOW (print to PDF)
    +-+ invoice.html                # Contract (print to PDF)
    +-+ proposal.html               # Invoice (print to PDF)
    +-+ handover.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                    |
|--------------------------|----------------------------------|-----------------------------------|
| <b>Transparency</b>      | Client sees all usage, all costs | Builds trust, avoids disputes     |
| <b>Ownership</b>         | Client owns their infrastructure | Clean separation, no lock-in      |
| <b>Documentation</b>     | Everything explained in writing  | Enables handover, reduces support |
| <b>Scope Protection</b>  | Clear definition of done         | Prevents unpaid work              |
| <b>Professional Exit</b> | 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

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## 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-salesrep.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-salesrep.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

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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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**Website:** [next8n.com](https://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.
|
=====
```