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AUTOMATION PREP

Checklist

1. DESIGN

- ☐ Define the goal
- ☐ Identify who is involved
- ☐ Map the workflow steps: trigger > actions > outcome
- ☐ Confirm you have the right permissions

2. BUILD

- ☐ Use clear, descriptive workflow names and form titles
- ☐ Customize messages to reflect your desired tone and voice
- ☐ Have one clear action per step
- ☐ Choose the right channel visibility

3. TEST

- ☐ Make sure every step works as expected
- ☐ Check variable fields to make sure they populate correctly
- ☐ Confirm that notifications go to the right people
- ☐ Ask your co-workers to test it and give you feedback

4. LAUNCH!

- ☐ Announce your new workflow to the team
- ☐ Communicate what it does and how to trigger it
- ☐ Create a quick demo video or GIF and pin it to the channel
- ☐ Gather feedback from users and iterate