n8n marketing automation build checklist

Workflow name: _____ Date: _____

Before you build

☐ One trigger written down (form, schedule, email)

☐ The data fields I need (name, email, consent, budget)

☐ Credentials connected once in n8n (Google Sheets, Slack, Gmail or SMTP)

Build

☐ Webhook trigger added, Test URL pasted into the form

☐ Listen for Test Event run, sample data pinned

☐ Edit Fields node gives clean field names

☐ IF node blocks duplicates and leads without consent

☐ Google Sheets append, Slack alert and welcome email added

☐ Error Workflow created and set under Options, Settings

Before you publish

☐ Every Test URL swapped for the Production URL

☐ Every node uses a saved credential, no pasted keys

☐ Duplicate test lead blocked

☐ Time zone matches my audience (Schedule Trigger)

☐ Workflow published

After you publish

☐ Executions tab checked after the first live leads

☐ Executions counted against my plan limit (webhook: one per request; schedule: one per run)

☐ Review date set: _____