

# n8n Workflow Handoff Pack

B2B Lead Intake Triage

**6/20**  
HANDOFF READINESS

**NOT READY**  
Independent ownership is blocked

## Can another person safely own it tomorrow?

The workflow may run, but transfer is not complete. The original builder remains the implied technical owner; dependency owners, safe settings, failure recovery, acceptance tests, and an accepted rollback baseline are missing.

**Decision: complete the P0 transfer items, run all six acceptance tests with the receiving owner, and sign the transfer receipt before declaring handoff complete.**

### What this pack covers

- Purpose, ownership, system map, and dependency transfer.
- Safe-to-edit settings versus structural changes.
- Failure detection, recovery actions, and escalation owners.
- Scenario-based tests, baseline export, change log, and rollback.
- A concrete transfer receipt for the receiving owner.

### Boundary

This is a fictional example. It contains no customer data, credentials, tokens, account details, real webhook addresses, or exported execution data.

# 1. Readiness score

Area	Score	Finding
Purpose and impact	1/2	Purpose is clear; failure impact and business owner are not accepted.
Named ownership	0/2	Technical, incident, change, and credential owners are not assigned.
System map	2/2	Main nodes and external tools are identifiable.
Safe configuration	0/2	No dedicated client-settings surface exists.
Access and credentials	1/2	Credential types are inferable; owners and transfer steps are missing.
Failure and recovery	0/2	No documented retries, error workflow, manual queue, or escalation.
Acceptance tests	0/2	No scenario-based health or deliberate failure test.
Version and rollback	1/2	A sample JSON exists; no accepted baseline or rollback receipt.
Data and support safety	1/2	Sensitive fields are known; redaction and retention rules are incomplete.
Receiving-owner acceptance	0/2	No receiving owner has run the tests or signed transfer.

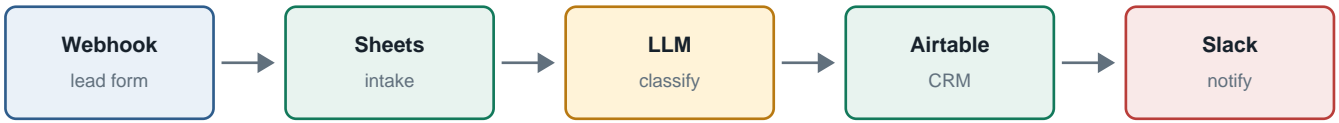
## Score bands

Score	Meaning
0-7	Transfer blocked
8-14	Supervised ownership only
15-17	Handoff-ready with minor gaps
18-20	Independently operable and accepted

# 2. Workflow contract

Field	Accepted behavior
Purpose	Turn a web lead into a structured sales record and route it to the correct sales channel.
Trigger	Public webhook called by a lead form.
Inputs	Name, email, company, request text, consent state, and source page.
Outputs	One intake row, one classification, one deduplicated CRM record, and one redacted notification or manual-review item.
Failure impact	Missed or duplicate lead, wrong classification, private data in the wrong channel, or silent failure.
Target	Valid lead reaches Airtable and the correct Slack channel within two minutes. Business owner must confirm.

### 3. System and ownership



Event-driven path. No explicit validation, dedupe, manual-review, or error branch is shown in the sample.

#### Structural findings

- Raw lead data is stored before validation and minimization are confirmed.
- CRM creation and notification appear coupled to the main path.
- No manual-review route is visible for low-confidence classifications.
- No deduplication step or assigned error workflow is visible.

Role	Current state	Required decision
Business owner	Unassigned	Accept purpose, failure impact, and service target.
Technical owner	Original builder implied	Name post-handoff maintainer and backup.
Daily operator	Assumed	Name tester and manual-queue reviewer.
Incident owner	Unassigned	Name first responder and escalation backup.
Change approver	Unconfirmed	Approve structural and data-handling changes.
Dependency owners	Unknown	Name owner and revocation path for every account.

**Blocker: every operational dependency needs a named owner and backup. Secret values remain in n8n or an approved secret store, never in this pack.**

### 4. Safe-to-edit boundary

Receiving operator may edit	Technical review required
Notification channel; recipient list; labels; confidence threshold; business hours; permitted fields; response messages; service target; escalation contact.	Webhook auth; field schema; expressions or code; model or prompt; credentials; retries; dedupe; node order; retention; error workflow.

Recommendation: centralize operator values in a clearly labeled CLIENT SETTINGS node or approved configuration table, with type, allowed values, owner, and last-tested date.

## 5. Dependency and access register

Dependency	Purpose	Owner	Handoff action
Web form / webhook	Receive lead	Unknown	Confirm source owner, endpoint access, and rotation path.
Google Sheets	Intake record	Unknown	Connect client-owned credential and confirm sheet ownership.
Model provider	Classification	Unknown	Confirm account, limits, fallback, and data policy.
Airtable	System of record	Unknown	Confirm base/table, permissions, owner, and revocation.
Slack	Sales notice	Unknown	Confirm workspace, channel, app owner, and redaction.
n8n instance	Execution	Unknown	Confirm instance owner, project membership, version, backup, and logs.

**Export check: inspect credential names and IDs, and check HTTP Request nodes for imported authentication headers. Share only a sanitized copy.**

## 6. Failure and recovery runbook

Scenario	Detection	Automatic behavior	Operator action
Missing email	Validation	Reject visibly; no CRM record.	Check form and payload.
Duplicate delivery	Duplicate key	Keep one record; log duplicate.	Confirm existing record.
Model timeout	Node error / confidence	Route to manual review.	Classify manually.
Airtable outage	Failed execution	Retry, then failed-write queue.	Retry after recovery.
Slack outage	Node error	Keep lead capture successful.	Use fallback channel.
Expired credential	Auth error	Trigger error workflow with owner.	Owner reconnects in n8n.

### Required before transfer

- Assign a reusable error workflow and named incident owner.
- Retain enough failed execution data for debugging under the approved retention rule.
- Create manual-review and failed-write queues with owners and timestamps.
- Confirm retries cannot create duplicate records.

## 7. Acceptance test pack

Test	Input	Expected result
T1 Happy path	Valid sample lead	One sheet row, one CRM record, correct redacted notice within two minutes.
T2 Required field	Lead without email	Visible rejection or manual queue; no CRM record.
T3 Duplicate	Same lead twice	One CRM record; duplicate event recorded.
T4 Model failure	Timeout / low confidence	Intake retained and routed to manual review.
T5 CRM failure	Simulated Airtable error	Retry, then failed-write queue with owner and timestamp.
T6 Notice failure	Simulated Slack error	Core capture succeeds; fallback alert or visible notice failure.

**Acceptance rule: all six tests pass, or the business owner accepts a documented exception with an owner and due date.**

## 8. Change and rollback protocol

Control	Required record
Accepted baseline	Sanitized JSON, workflow reference, n8n version, hosting owner, settings snapshot, and checksum.
Test evidence	Tester, timestamp, evidence reference, result, and accepted exceptions.
Ownership	Business, technical, incident, change, and dependency owners plus backups.
Change log	Date, modified by, type, change, reason, risk, tests rerun, result, and new baseline.
Rollback	Export current state, restore last accepted baseline, reconnect approved credentials, rerun tests, record receipt.

### Rollback sequence

1. Pause changes. 2. Preserve the current sanitized export. 3. Restore the last accepted baseline. 4. Reconnect approved credentials in n8n. 5. Run affected tests. 6. Reactivate after owner acceptance. 7. Record the rollback and new baseline.

## 9. Completion plan

Priority	Timing	Work
P0	Before transfer	Assign owners; create safe settings; add validation and dedupe; add queues and error workflow; sanitize baseline; run tests; sign receipt.
P1	First week	Review failure queue; confirm client-owned credentials and revocation; confirm retention; enforce change log; rerun affected tests.
P2	After stable ownership	Add compact health summary; standardize across workflows; consider a portfolio view only after repeated demand.

## 10. Transfer receipt

Workflow	
Accepted baseline	
Receiving business owner	
Receiving technical owner	
Incident owner and backup	
Tests passed / exceptions	
Credential owners confirmed	Yes / No
Rollback demonstrated	Yes / No
Acceptance date	
Receiving owner sign-off	
Builder / reviewer sign-off	

### Reference standard

Based on current n8n documentation for export/import, sharing, workflow history, error handling, execution debugging, and security audit, plus the public n8n Workflow Builder repository. Full links are in the source Markdown pack.

**Paid audit outcome: answer one question clearly - can the receiving owner operate, change, test, and recover this workflow without depending on the original builder?**