AI Workflow Delivery Master Checklist

Complete Guide for Delivering n8n Automation Projects to Clients

PHASE 1: Pre-Build Planning

1.1 Hosting Decision

- ☐ Determine hosting model: Client-hosted (recommended), Agency-hosted, or Commercial license
- ☐ If client-hosted: Client purchases n8n Cloud OR sets up self-hosted instance
- ☐ Client invites you as team member to their n8n instance
- ☐ Verify n8n license compliance (cannot mark up hosting or turn n8n into your product)
- ☐ Document hosting arrangement in contract/scope of work

1.2 Client Onboarding Call

- ☐ Review client expectations document from contract
- ☐ Walk client through API key setup for required services
- ☐ Help client sign up for n8n account (if not already done)
- ☐ Show client how to invite you to their n8n instance
- ☐ Connect initial integrations: CRM, calendar, email, data sources
- ☐ Request sample data that reflects real usage
- ☐ Define success criteria and unacceptable outputs

1.3 Scope Documentation

- ☐ Document all workflows to be built
- ☐ List all systems/tools to be connected
- ☐ Define 'definition of done' for each deliverable
- ☐ Establish payment milestones
- ☐ Create backlog for future features (out of scope for v1)

PHASE 2: Security & Data Protection Setup

2.1 Credential Management

- ☐ Verify all credentials are encrypted at rest in n8n
- ☐ Confirm proper workspace permissions (credentials only accessible to authorized users)
- ☐ No sensitive data stored in plain text within nodes
- ☐ Use credential references by name (not raw values in nodes)

2.2 Webhook Security

- ☐ All webhooks use HTTPS for encrypted data in transit
- ☐ Implement signing secrets/verification tokens for services that support it
- ☐ Verify signatures before trusting webhook payloads
- ☐ No sensitive data in webhook URLs
- ☐ Consider rate limits and authentication checks for abuse prevention

2.3 Data Privacy Compliance

- ☐ Apply data minimization (only collect/process necessary fields)
- ☐ Limit access to workflow execution logs
- ☐ Confirm client has legal basis for data collection
- ☐ Data Processing Agreement in place (if acting as data processor)
- ☐ Workflows support data deletion/correction requests (GDPR compliance)
- ☐ Configure execution pruning and log trimming
- ☐ Document data flow for audit purposes

2.4 AI-Specific Security

- ☐ Implement prompt injection guardrails
- ☐ Protect against jailbreak attempts in AI agents
- ☐ Consider self-hosted AI models for privacy-sensitive clients

PHASE 3: API Key Management

3.1 Client API Key Setup

- ☐ Client signs up for each required service themselves
- ☐ Client enters their own billing information
- ☐ Client generates API keys directly
- ☐ Client pastes keys into n8n credentials
- ☐ Provide Loom walkthrough video for each API setup

3.2 Secure Key Transfer (if client provides keys)

- ☐ Use secure vault (1Password, encrypted secret sharing tool)
- ☐ Generate one-time expiring links for key transfer
- ☐ Never transfer keys via email, Slack, or unencrypted channels

3.3 Billing Transparency

- ☐ Client has visibility into their own API usage
- ☐ Client sees charges directly (not through your invoices)
- ☐ Consider offering dashboard showing all API keys and billing in one spot

PHASE 4: Testing & Quality Assurance

4.1 Test Data Planning

- ☐ Collect sample data from client (emails, tickets, transcripts, CRM records)
- ☐ Anonymize data if needed
- ☐ Define success criteria and unacceptable outputs
- ☐ Document edge cases to test

4.2 Failure Mode Testing

- ☐ Test with bad data, no data, duplicate data
- ☐ Test unexpected input scenarios
- ☐ Implement graceful timeout handling
- ☐ Set up error workflow for team alerts
- ☐ Log all failures to Google Sheet or tracking system
- ☐ Verify system breaks safely and quietly

4.3 Black Box Testing

- ☐ Run dozens/hundreds of sample inputs through workflow
- ☐ Log inputs, processing steps, and outputs for each test
- ☐ Compare outputs to defined success criteria
- ☐ Flag failures, edge cases, and borderline results

4.4 AI Quality Checks

- ☐ Relevance: Does the AI answer the actual request?
- ☐ Correctness: Is the information accurate?
- ☐ Tone: Is it on-brand and non-toxic?
- ☐ Safety: No leaking of system prompts or private info?
- ☐ Consistency: Same inputs produce similar outputs?
- ☐ Run A/B tests on prompts and models
- ☐ Use n8n's built-in evaluation feature

4.5 Internal QA Period

- ☐ Run internal QA for minimum 3-5 days before client testing
- ☐ Fix all identified issues before client access

4.6 Client-Facing QA

- ☐ Provide simple testing interface (chatbox, form, or UI)
- ☐ Do NOT require client to navigate n8n directly
- ☐ Collect feedback on outputs, tone, and formatting
- ☐ Iterate on prompts and model tuning based on feedback

PHASE 5: Workflow Handover

5.1 Environment Setup

- ☐ Duplicate workflow: keep backup/test version separate from production
- ☐ Push clean version to production
- ☐ Document test vs. production environment separation

5.2 Credential Transfer

- ☐ If built in client environment: credentials already in place
- ☐ If built in your environment: swap your test credentials for client's
- ☐ Verify no sensitive keys remain in workflow nodes

5.3 Workflow Hygiene

- ☐ Clear naming on each node/step
- ☐ Labels on all nodes
- ☐ Sticky notes explaining workflow logic and decisions
- ☐ Remove any debug/test nodes
- ☐ Workflow is readable by anyone on client's team

5.4 Backup System

- ☐ Export workflow JSON to GitHub, Google Drive, or backup system
- ☐ Consider automated backup workflow in n8n
- ☐ Document version history and revert process

5.5 Documentation Package

- ☐ Loom walkthrough video (1-2 minutes)
- ☐ Show how system works
- ☐ Explain configuration options
- ☐ Cover what to do when updates are needed
- ☐ PDF or image of workflow with annotations
- ☐ Written documentation of your design decisions

PHASE 6: Legal & Billing Close-Out

6.1 Project Completion

- ☐ Review original scope of work
- ☐ Walk through each deliverable with client
- ☐ Get written confirmation that project is complete
- ☐ Send final invoice

6.2 Maintenance Retainer (Optional)

- ☐ Define retainer scope: bug fixes, tweaks, updates, monitoring, security checks
- ☐ Clarify what is NOT covered: new features, new workflows, major scope changes
- ☐ Set service levels: response time for critical issues vs. minor requests
- ☐ Document retainer pricing and billing cycle

6.3 Ownership & IP

- ☐ Client owns work product once paid
- ☐ You retain right to reuse generic patterns, tools, and templates
- ☐ Document IP terms in agreement

6.4 Exit Terms

- ☐ Define what happens if client wants to move providers
- ☐ Handover includes: exported workflows, documentation, handover call
- ☐ Clarify what is included vs. billable in exit process

PHASE 7: What's Missing (Additional Best Practices)

The following items were not covered in the source material but are essential for a complete workflow delivery process:

7.1 Version Control

- ☐ Implement Git-based version control for workflow JSON files
- ☐ Track changes with meaningful commit messages
- ☐ Use branching strategy for different workflow versions

7.2 Monitoring & Alerting

- ☐ Set up uptime monitoring for webhooks
- ☐ Configure error rate alerting
- ☐ Monitor API rate limits and quota usage
- ☐ Set up Slack/email notifications for critical failures

7.3 Performance Optimization

- ☐ Optimize workflow execution time
- ☐ Implement caching where appropriate
- ☐ Batch API calls to reduce rate limit issues
- ☐ Monitor and optimize token usage for AI workflows

7.4 Disaster Recovery

- ☐ Document recovery procedures
- ☐ Test backup restoration process
- ☐ Define RTO (Recovery Time Objective) and RPO (Recovery Point Objective)

7.5 Client Training

- ☐ Create training materials for client team
- ☐ Conduct training session (live or recorded)
- ☐ Provide FAQ document for common questions
- ☐ Create troubleshooting guide for common issues

7.6 Compliance Documentation

- ☐ Create data flow diagrams
- ☐ Document all third-party services and their data handling
- ☐ Prepare audit trail documentation
- ☐ Document data retention policies

7.7 Scaling Considerations

- ☐ Document expected volume and growth projections
- ☐ Plan for scaling n8n infrastructure
- ☐ Consider queue-based processing for high-volume workflows

7.8 Communication Plan

- ☐ Define communication channels (Slack, email, project management tool)
- ☐ Set expectations for response times
- ☐ Schedule regular check-in meetings during build phase
- ☐ Create status update cadence