



n8n Lab

Automation Scoping Assessment

Prepared for: Tomorrow's Leaders

Completed by: n8n Lab

How to Describe n8n Automation Workflow

Think of every automation as a data flow. Something triggers it, data comes in from one or more systems, something happens to that data, and results go out to one or more destinations.

EXAMPLE: Post-Call Intelligence Workflow

Trigger: Sales call completed in Gong

Data In: Sales call transcript (Gong) + Enriched lead information (Apollo) + CRM deal record (HubSpot)

Processing: AI extracts key insights, scores engagement, generates recommended next steps

Data Out: Slack notification with prospect summary + insights + next steps | HubSpot deal updated with call notes | Follow-up task created for AE

Estimated Time

15–25 minutes per automation, depending on how many workflows you identify.

Departments in Scope

Which departments should we assess for automation opportunities? Check all that apply and fill in a section for each.

Department	In Scope?	Does department has lead	Headcount
Sales	Yes / No	Yes / No	
Marketing	Yes / No	Yes / No	
Customer Success / Support	Yes / No	Yes / No	
Operations / Admin	Yes / No	Yes / No	
Product / Engineering	Yes / No	Yes / No	
Finance / Accounting	Yes / No	Yes / No	
HR / People	Yes / No	Yes / No	
[Other]	Yes / No		
[Other]	Yes / No		

Departments information

This completed example shows how to fill out a department section. Use this as your reference when completing the blank templates that follow.

Department: Sales

Total department headcount: 10

A. Team Structure

Role / Job Title	Headcount	Core Responsibilities	Reports To
VP of Sales	1		CEO
RevOps	4		VP of Sales
BDR	3		RevOps
SDR	1		RevOps
Hiring manager			
Role			

B. Tools & Systems Used by This Department

Tool / System	Category	Used For	Used By (Roles)	Has API?
HubSpot CRM	CRM	Pipeline management, contact records, deal tracking	AEs, SDRs, Sales Ops	Yes
Apollo	Sales Engagement	Prospecting, email sequences, lead enrichment	SDRs	Yes
Gong	Call Intelligence	Call recording, transcript analysis, coaching	AEs, VP Sales	Yes
Google Sheets	Reporting	Manual pipeline reports, commission tracking	Sales Ops	Yes
Slack	Communication	Internal deal updates, win/loss alerts, handoffs	All	Yes

Automation Workflow 1: Post-Call Intelligence & Notification

Description	After every sales call, automatically extract key insights from the transcript, enrich the prospect record, and notify the team with a structured summary and recommended next steps.
Trigger	New call recording completed in Gong
Data In	• Sales call transcript (from Gong) • Enriched lead information (from Apollo — company size, industry, tech stack, funding) • CRM deal record (from HubSpot — deal stage, owner, history)
Processing	AI extracts: pain points, objections, budget signals, decision timeline, competitor mentions Cross-reference enriched data with transcript insights Generate recommended next steps based on deal stage + call outcome Score lead engagement level (hot / warm / cold)
Data Out	• Slack notification to #sales-deals with: prospect summary, key call insights, engagement score, recommended next steps • HubSpot deal update with call notes, extracted objections, updated deal properties • Follow-up task created for assigned AE with deadline and action items
Systems Involved	Gong, Apollo, HubSpot, Slack, AI (Claude)
Who Benefits	AEs (faster follow-up), VP Sales (pipeline visibility), SDRs (lead context)
Current Process	AE manually reviews recording, writes notes in HubSpot, pings Slack. Takes 20–30 min per call. Often skipped when busy.
Volume / Frequency	~15–20 calls/day across team = 75–100/week
Priority	High — immediate time savings + data quality improvement

Department Assessment Templates

Complete one section per department marked “In Scope” above. Copy the entire department block if you need additional departments beyond what’s provided.

Department 1: [Department Name]

A. Team Structure

Role / Job Title	Headcount	Core Responsibilities	Reports To
<i>e.g., Department Head</i>		<i>Primary responsibilities</i>	

Total department headcount:

B. Tools & Systems Used by This Department

Tool / System	Category	Used For	Used By (Roles)	Has API?
				<i>Yes / No / Unsure</i>

C. Anticipated Automation Workflows

For each workflow this department needs, copy the template below. Add as many workflows as needed.

Workflow 1: [Name this workflow]

Description	<i>What should this automation do? Describe in 1–2 sentences.</i>
Trigger	<i>What event starts this workflow? (e.g., form submitted, deal stage changed, new row in sheet)</i>
Data In	• [Data source 1] — what information? from which system? • [Data source 2] — what information? from which system? • [Data source 3] — ...
Processing	<i>What should happen to the data? (enrich, transform, validate, score, generate, classify, route...)</i>
Data Out	• [Output 1] — where does this data go? what format? • [Output 2] — where does this data go? what format? • [Output 3] — ...
Systems Involved	<i>List all tools/systems this workflow touches</i>
Who Benefits	<i>Which roles or teams benefit from this automation?</i>
Current Process	<i>How is this done today? How long does it take? What breaks?</i>
Volume / Frequency	<i>How often does this happen? (e.g., 50 leads/week, 200 orders/day)</i>
Priority	<i>Low / Medium / High / Critical</i>

Workflow 2: [Name this workflow]

Description	<i>What should this automation do? Describe in 1–2 sentences.</i>
Trigger	<i>What event starts this workflow? (e.g., form submitted, deal stage changed, new row in sheet)</i>
Data In	• [Data source 1] — what information? from which system? • [Data source 2] — what information? from which system? • [Data source 3] — ...
Processing	<i>What should happen to the data? (enrich, transform, validate, score, generate, classify, route...)</i>
Data Out	• [Output 1] — where does this data go? what format? • [Output 2] — where does this data go? what format? • [Output 3] — ...
Systems Involved	<i>List all tools/systems this workflow touches</i>

Who Benefits	<i>Which roles or teams benefit from this automation?</i>
Current Process	<i>How is this done today? How long does it take? What breaks?</i>
Volume / Frequency	<i>How often does this happen? (e.g., 50 leads/week, 200 orders/day)</i>
Priority	<i>Low / Medium / High / Critical</i>

Workflow 3: *[Name this workflow]*

Description	<i>What should this automation do? Describe in 1–2 sentences.</i>
Trigger	<i>What event starts this workflow? (e.g., form submitted, deal stage changed, new row in sheet)</i>
Data In	• <i>[Data source 1] — what information? from which system?</i> • <i>[Data source 2] — what information? from which system?</i> • <i>[Data source 3] — ...</i>
Processing	<i>What should happen to the data? (enrich, transform, validate, score, generate, classify, route...)</i>
Data Out	• <i>[Output 1] — where does this data go? what format?</i> • <i>[Output 2] — where does this data go? what format?</i> • <i>[Output 3] — ...</i>
Systems Involved	<i>List all tools/systems this workflow touches</i>
Who Benefits	<i>Which roles or teams benefit from this automation?</i>
Current Process	<i>How is this done today? How long does it take? What breaks?</i>
Volume / Frequency	<i>How often does this happen? (e.g., 50 leads/week, 200 orders/day)</i>
Priority	<i>Low / Medium / High / Critical</i>

Need more workflows? Copy any workflow table above and paste below. There is no limit to the number of workflows per department.

Assessment Summary

Once you've completed all department sections, fill in this summary. This helps us prepare for the strategy session.

Summary Item	Your Answer
Total departments assessed	
Total headcount across departments	
Total unique tools/systems identified	
Total workflows identified	
Top 3 highest-priority workflows	1. 2. 3.
Biggest pain point across all departments	
Estimated hours/week spent on manual processes	
Timeline expectation for first automations	<i>Immediate / 1–3 months / This quarter</i>
Anything else we should know?	

What Happens Next

Once you return this completed assessment to the n8n Lab team:

- We review your responses and pre-map automation opportunities
- We schedule a 2–3 hour strategy session to validate findings, explore additional workflows, and assess technical feasibility
- Within 2 weeks of the strategy session, you receive your complete Automation Roadmap with workflow inventory, tier classifications, ROI projections, and phased implementation plan