



CRM Workflow Automation Checklist

Workflow Definition & Planning

Initial planning and design of the automated workflows.

Workflow Purpose Description

Write something...

Workflow Type

- ☐ Lead Routing
- ☐ Task Assignment
- ☐ Email Automation
- ☐ Data Update
- ☐ Other

Estimated Completion Time (minutes)

Enter a number...

Workflow Start Date (Planned)

Enter date...