Domain Methods

# CRM AI Workflow Readiness Checklist

Use this before shipping an AI workflow that depends on CRM data.

1. Workflow definition
- Name the exact workflow and decision it changes.
- Name the owner, destination system, and action path.

2. Identity quality
- Duplicate contacts under control?
- Duplicate accounts under control?
- Canonical account/contact IDs stable across CRM and warehouse?

3. Lead-to-opportunity linkage
- Lead conversion keeps source context?
- Contact roles and account matching trustworthy?
- Revenue outcomes reconcile back to the workflow records?

4. Lifecycle stability
- Stage definitions documented in plain English?
- CRM and warehouse use the same logic?
- Historical backfills handled consistently?

5. Field trust
- Receiving team understands what the output means?
- Caveats are explicit?
- Field owner is named?

6. Workflow safety
- Human review before action?
- Downstream action reversible if output is wrong?
- Missing or stale data has a fallback path?

Decision:
- Stop and fix first
- Directional only with caveats
- Safe to ship into workflow

If two or more checks fail on identity, linkage, or lifecycle trust,
do not automate the workflow yet. Fix the trust layer first.