CRM Field Ownership Checklist

Use before syncing warehouse-backed fields, scores, bands, or reason codes into CRM.

1. Field and workflow

- CRM field / object: ____
- Destination: Salesforce / HubSpot / other: ______________________
- Workflow changed by this field: __________________________________
- User action expected: route / prioritize / suppress / review / assign / personalize

2. Ownership matrix

- Business meaning owner: ____
- Source model owner: ____
- Destination field owner: ____
- Business outcome owner: ____
- QA / rollback owner: ____

3. Write and conflict rules

- Warehouse may overwrite CRM? yes / no / only when: ______________
- Manual override rule and expiry: __________________________________
- Null handling: leave unchanged / clear value / alert owner / other
- Freshness rule: field is valid for ______ hours / days after sync

4. Pre-launch sample review

- Review 10 records where the field writes a value.
- Review 10 records where the field should not write a value.
- Check duplicates, parent/child accounts, stale activity, and manual exceptions.
- Do not launch if destination owners cannot explain bad examples.

5. Workflow and AI risk

- Will this field trigger messaging, routing, score changes, or AI recommendations?
- Reason code visible? yes / no   Timestamp visible? yes / no
- Human review threshold: ____
- If AI or automation uses the field, confirm suggest / assist / route / act authority.

6. Rollback and first review

- Pause threshold: ____
- Who gets notified: ____
- What happens to existing CRM values: ____________________________
- First post-launch review date: ___________________________________