

## CRM Workflow Reliability Scorecard

### Domain Methods

### USE THIS SCORECARD ON ONE LIVE CRM-DRIVEN WORKFLOW

Examples: inbound routing, lifecycle progression, SDR follow-up, renewals handoff, owner assignment, or alerting.

### WORKFLOW DEFINITION

- Workflow being scored
- System where the action lands
- Primary owner
- Fallback owner
- Decision or handoff this workflow supports

### SCORE EACH DIMENSION FROM 1 TO 3

- Lifecycle stability: do stages and status logic stay consistent long enough to trust?
- Owner coverage: does every important handoff have a named owner and escalation path?
- Duplicate control: would duplicate records materially change the workflow path?
- Field trust: does the receiving team trust the key fields enough to act on them?
- Exception handling: is there a rule for edge cases, or do people fix them from memory?
- Sync reliability: does the destination system receive the update in time to use it?

### TOTAL SCORE AND BAND

- 6 to 8 = Safe to automate
- 9 to 13 = Usable with caveats
- 14 to 18 = Cleanup first

### FAILURE MODE NOTES

- Which dimension scored worst?
- What real workflow failure has that weakness already caused?
- What workaround is keeping the workflow alive today?

#### GUARDRAIL DECISION

- Can the workflow run only with human review for now?
- What fallback rule applies if the workflow output looks wrong or arrives late?
- Who is allowed to override the workflow in the current state?

#### NEXT MOVE

- Tighten definitions
- Clarify ownership
- Fix duplicate handling
- Repair sync reliability
- Write the exception rule
- Narrow the workflow scope before expanding automation

#### WHAT THIS SCORE DOES NOT PROVE

- It does not prove the whole CRM is healthy
- It does not prove the workflow is ready for AI just because it is usable
- It does not replace judgment about source-of-truth or executive reporting quality