

Workflow Ownership Decision Tree

Domain Methods

Use this worksheet before choosing reverse ETL, iPaaS, native CRM automation, or custom APIs.

1. Name the workflow

- When this condition happens: _____
- The business action should be: _____
- The destination tool is: _____
- The owner who acts on it is: _____

2. Locate the trusted logic

- Warehouse/dbt/governed source: reverse ETL is a candidate.
- CRM or lifecycle tool only: native automation may be enough.
- Nowhere reliable: pause and fix definitions first.

3. Choose the workflow owner

- Data owner for source model and field quality: _____
- RevOps/lifecycle owner for destination action: _____
- Exception owner for failures or bad records: _____

4. Pick the likely category

- Reverse ETL / Data Activation: trusted fields or audiences need delivery.
- iPaaS / workflow automation: multi-step actions, alerts, approvals, retries.
- Native CRM automation: local Salesforce or HubSpot action with local data.
- Custom APIs/scripts: product-grade control is worth the maintenance burden.
- Pause: definitions, precedence, or ownership are still unstable.

5. Launch gate

- One owner? _____ One rollback path? _____ One quality threshold? _____
- What happens if the workflow is wrong? _____

Next step: use Data Activation when the workflow is ready, Translate the Ask when the operating contract is unclear, and Data Foundation when the definitions are not trusted yet.