



FREE CHECKLIST · SUMMARY

CRM automation failure checklist

25 checks in eight groups. Most automation failures are quiet.





GROUPS 1 - 3

Connections, copies and clocks.

01

Silent failures

Connections alive, webhook deliveries counted, rate limits handled, switched-off flows noticed.

02

Duplicates and loops

Match before create, a winner per synced field, a brake on self-triggering flows.

03

Time

Every tool's timezone written down, dates with an offset, clock changes tested.



GROUPS 4 - 6

Fields, alerts and test data.

04

Field-mapping drift

Mapped fields still exist, dropdown values match, missing values have a fallback.

05

Error alerts

Failures reach a person, alerts say what to do, silence is an alert too.

06

Test vs live data

Test records filtered, no live side effects, edits tried before they go live.



GROUPS 7 - 8

Proof, and a name on every flow.

07

Audit trails

Any field's last change traceable, your own code logs each event, history kept long enough.

08

Ownership

An owner per flow, connections off personal logins, someone who knows how to stop it.



WHEN SOMETHING BREAKS

Contain it, trace it, then fix it.

Pause without deleting, read the run history, check connections and data, read the audit trail, replay on a test record, then fix and add the alert. Every check, with why and how, is on the page.

[Read the full checklist →](#)

teqprotech.com/resources/crm-automation-failure-checklist

