



SOP Prep Worksheet

Write an SOP your n8n outline will actually love.

Fill the five blocks in plain English, top to bottom. Each one maps to a part of your n8n workflow, so a clear answer here means a cleaner outline when you paste it into the tool. **Name real apps, spell out your conditions, one action per step.**

1 Trigger

SCHEDULE / WEBHOOK

What starts this workflow, and when?

e.g. **Every weekday at 8am** (time based) or **When a new row is added to Airtable** (event based).

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2 Data source and input

APP NODE

Where does the data come from, and which records do you need?

e.g. **Pull rows from my Airtable Leads base where status equals new.** Name the app and the exact filter.

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3 Decision logic

IF (ONE LEVEL)

Any if / then branching? Keep it to one level so the chart stays readable.

e.g. **If there are no new leads, stop. Otherwise, keep going.**

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4 Actions, in order

ACTION / AI NODES

What happens to each item? One verb per step, name the app.

e.g. **For each lead: draft a 2-line email with AI, then save it as a Gmail draft.**

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5 Output and done

RESULT

What is the end result, and how will you know it worked?

e.g. **A Gmail draft exists for every new lead, and nothing runs when there are none.**

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Before you paste, check each one

- | | |
|--|--|
| ☐ Named the exact apps, not "my database" | ☐ Exactly one trigger, stated plainly |
| ☐ Conditions spelled out (where status = new) | ☐ Steps in order, one action each |
| ☐ Branching kept to one if / then | ☐ Read it back: could a stranger follow it? |

The tool won't do this part. The outline tells you which nodes to use and in what order. You still wire up credentials and auth, field mapping between apps, and error handling or retries yourself. Jot those on the back so you don't forget them when you build.