

Detailed Template to Define Your Workflow Goal

Use this template to help you think through each part of your workflow before you start building it in n8n. It covers everything from choosing a goal to defining triggers, actions, and expected results.

Step 1: Define the Workflow Goal

- **Describe the Task You Want to Automate**

Think about something you do repeatedly that could save you time if it were automated. Write it down clearly.

- Example: "Automatically save new email attachments from clients to Google Drive."

- **Why Do You Want to Automate This Task?**

Think about the benefits of automating this task. Will it save you time, reduce errors, or make it easier to manage information?

- Example: "This will save time on manually downloading each attachment and ensures all files are saved in one place for easy access."
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Step 2: Identify the Workflow Trigger

- **What Event Will Start This Workflow?**

The trigger is what sets the workflow in motion. Think about the specific action or event that needs to happen for the workflow to begin.

- Example: "When I receive a new email with an attachment."

- **Type of Trigger**

Choose one of these types, depending on your workflow needs:

- Time-Based Trigger (e.g., every hour, every day)
 - Event-Based Trigger (e.g., new email, new row added in a spreadsheet)
 - Manual Trigger (you start the workflow yourself)
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Step 3: Outline the Workflow Steps (Nodes)

Break down each action in your workflow. Each step should be one specific action that happens in a certain order. Think of it as writing a recipe; each action needs to follow the one before it to complete the workflow smoothly.

- **Step 1 (First Node)**

Action Description:

- Example: "Fetch new emails from my inbox." *Node Name:*
- Example: "Gmail - New Email"

- **Step 2 (Second Node)**

Action Description:

- Example: "Check if the email has an attachment." *Node Name:*
- Example: "Filter Node - Check for Attachment"

- **Step 3 (Third Node)**

Action Description:

- Example: "Save the attachment to Google Drive." *Node Name:*
- Example: "Google Drive - Upload File"

Write down each action in order so you know what nodes you'll need when you start building the workflow in n8n.

Step 4: Define Data Passing Between Nodes

Data passing refers to how information flows from one action to the next. It's important to make sure that each node gets the data it needs from the previous one.

- **Identify Data from Each Node**

For each action, write down the data it needs and where that data is coming from.

- Example: "Google Drive node needs the attachment from the Gmail node."

- **List Any Variables or Dynamic Fields**

Variables allow you to use dynamic content, like using an email subject as the file name.

Define any variables you'll need.

- Example: "Set the file name to be the email subject (e.g., `{{ $json["subject"] }}`) so each file is easily identifiable."
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Step 5: Expected Outcome

- **What Should Happen When the Workflow Runs Successfully?**

Describe the final result you expect once all actions in the workflow are completed.

- Example: "The attachment from each new email is saved in a specific Google Drive folder, with the email subject as the file name."

- **How Will You Know if the Workflow Worked?**

Describe how you'll check to confirm the workflow ran as expected. This could be a simple test run or checking the saved files in Google Drive.

- Example: "I'll check Google Drive to make sure the attachment was saved and named correctly."
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Step 6: Testing Plan

- **Test Each Node Individually**

To catch errors early, plan to test each node one at a time.

- Example: "First, I'll test the Gmail node to make sure it's fetching emails correctly. Then I'll test the Google Drive node to check that it can save files."

- **Run the Full Workflow for Final Testing**

Once each step works on its own, run the entire workflow to make sure everything works together.

- Example: "I'll send a test email with an attachment to see if it gets saved in Google Drive automatically."
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Fill-in-the-Blank Workflow Goal Template

Now that you have a detailed guide, here's a fill-in-the-blank version to help your learners organize their thoughts:

1. **Task to Automate:**

- "I want to automate _____."

2. **Benefits of Automating This Task:**

- "Automating this task will _____."

3. **Trigger for This Workflow:**

- "The workflow should start when _____ happens."

4. **Workflow Steps (Nodes):**

- **Step 1:** Action - _____ | Node Name - _____
- **Step 2:** Action - _____ | Node Name - _____
- **Step 3:** Action - _____ | Node Name - _____

(Add more steps as needed)

5. **Data Passing Between Nodes:**

- "To pass data from **Step X** to **Step Y**, I will use _____."
- "I will need the following variables or dynamic fields: _____."

6. **Expected Outcome:**

- "When the workflow runs successfully, _____ should happen."

7. **Verification:**

- "I will confirm the workflow worked by checking _____."

8. **Testing Plan:**

- **Node Testing:** "I will test each node by _____."
- **Full Workflow Test:** "For final testing, I will _____."