

package.md

01-universal-assets/testing-checklist.md

```
PS> npm test follow-up
```

```
status: practical, transparent, no hype
```

Testing Checklist

Do not trust the system until you test it with fake leads.

Basic end-to-end test

- ☐ Submit a fake lead through the form.
- ☐ Confirm the lead appears in the system of record.
- ☐ Confirm the lead has the correct status.
- ☐ Confirm the lead source is captured.
- ☐ Confirm the original message is saved.
- ☐ Confirm an instant response is sent or drafted.
- ☐ Confirm an internal notification is sent.
- ☐ Confirm a follow-up date is created.
- ☐ Confirm the follow-up reminder appears where expected.
- ☐ Confirm the owner knows what to do next.

Data quality test

- ☐ Submit a lead with missing phone number.
- ☐ Submit a lead with missing service request.
- ☐ Submit a lead with a typo in the email.
- ☐ Submit a duplicate lead.
- ☐ Submit a long message.
- ☐ Submit from mobile.

Follow-up timing test

- ☐ Confirm timezone is correct.
- ☐ Confirm next-day reminders land on the right date.
- ☐ Confirm weekends/closed days are handled if relevant.

- ☐ Confirm final follow-up does not send too early.

AI test

- ☐ Confirm AI summary does not invent details.
- ☐ Confirm AI draft asks for missing information.
- ☐ Confirm AI draft matches the business voice.
- ☐ Confirm a human reviews the draft before sending, unless the business intentionally approves auto-send.

Failure test

Temporarily break or disable one connection and confirm someone notices.

- ☐ Email send fails.
- ☐ CRM insert fails.
- ☐ Automation trigger fails.
- ☐ Notification fails.

The boring truth:

A workflow that fails silently is not a system. It is a trap.

> boring systems_

implementation package draft