Sample Silent Workflow Failure Audit

Client/demo: **Synthetic B2B lead workflow**
Workflow: **Webflow form → Zapier → Airtable + HubSpot → Slack/email alert**
Audit type: No-credentials review from screenshots, exports, and history logs
Status: synthetic demo report, not a real customer audit

Executive summary

We reviewed a synthetic but realistic inbound lead workflow where Webflow form submissions should create records in Airtable and HubSpot, then notify the owner in Slack/email.

The source system shows **47 lead submissions** for the review window. The destination system shows **39 matching CRM/Airtable records**. Eight source records are missing from the destination export.

The biggest issue is not a single visible "failed Zap." It is a chain of silent-failure conditions:

1. A filter silently excluded leads after a field value changed.
2. The destination schema changed from `Company Size` to `Company_Size`, causing partial field loss.
3. Owner alerts were configured to notify only on hard Zap errors, not missing-record mismatches.
4. Task/run usage is close enough to plan limits that throttling/held tasks could create another invisible backlog.
5. There is no replay SOP for reconstructing missing records from source submissions.

Data reviewed

Evidence item	Provided?	Notes
Webflow form export	Yes	47 source submissions in CSV
Zapier run history screenshots	Yes	Mixed success/skipped-path runs
Airtable destination export	Yes	39 records
HubSpot destination export	Partial	Screenshots only
Slack alert screenshots	Yes	Alerts exist for errors, not count mismatches
Known failure examples	Yes	Two leads reported "never contacted"
Workflow owner named	Yes	RevOps owner listed, backup owner missing

Workflow map

```
Webflow Lead Form
  ↓ trigger: New Form Submission
Zapier Step 1: Normalize fields
  ↓
Zapier Step 2: Filter: only route if lead_type = qualified
  ↓
Zapier Step 3: Create Airtable record
  ↓
Zapier Step 4: Create/Update HubSpot contact
  ↓
Zapier Step 5: Slack channel alert
  ↓
Zapier Step 6: Email owner summary
```

Reconciliation finding

Metric	Count
Source submissions	47
Destination records matched	39
Missing destination records	8
Extra destination records	0
Duplicate destination IDs	0

Missing source IDs

- `LEAD-0040`
- `LEAD-0041`
- `LEAD-0042`
- `LEAD-0043`
- `LEAD-0044`
- `LEAD-0045`
- `LEAD-0046`
- `LEAD-0047`

Why this matters

If each inbound qualified lead is worth even $125 in expected pipeline value, the eight missing records represent a plausible **$1,000 pipeline-risk event** before counting trust damage, sales follow-up delay, or manual recovery time.

This is an estimate for prioritization, not a guaranteed loss calculation.

Findings table

#	Severity	Finding	Evidence	Recommended fix
1	Critical	Source and destination counts do not reconcile.	47 source submissions vs 39 destination records.	Add weekly source-vs-destination reconciliation with ID-level missing-record report.
2	High	Filter can silently drop records when field values drift.	`lead_type = qualified` filter; recent submissions used `Qualified` and `sales-ready`.	Replace exact-value-only filter with controlled mapping or explicit “else” alert path.

#	Severity	Finding	Evidence	Recommended fix
3	High	Schema/field rename caused partial data loss.	Destination field changed from `Company Size` to `Company_Size`; some CRM records lack company-size data.	Lock a field mapping checklist and add field-presence validation after schema edits.
4	High	Alerts only fire on hard task errors, not skipped/missing records.	Slack alert exists for errored Zap run; no alert for skipped filter path or count mismatch.	Add count-mismatch alert and skipped-path review. Notify owner + backup.
5	Medium	Workflow owner has no backup.	Intake names one owner; no escalation path if owner misses alert.	Add backup owner and escalation rule after 24h unresolved mismatch.
6	Medium	Task/run usage creates held-task/backlog risk.	Usage screenshots show high task volume near plan limit.	Weekly task usage review and pre-limit alert.
7	Medium	No replay SOP exists.	Team manually recreates records ad hoc from source exports.	Use the replay SOP below: freeze exports, identify missing IDs, replay/create records, mark recovered.
8	Low	No change log for workflow edits.	Zap changes are visible in history but not summarized for business owner.	Keep a simple workflow-change log with date, editor, reason, expected impact, and retest result.

Top 5 fixes

1. **Add a reconciliation check**: weekly source export vs destination export comparison by lead ID.
2. **Add a skipped-path alert**: when records are filtered out, send count and sample IDs to the owner.
3. **Harden field mappings**: maintain a field map and retest when source/destination schema names change.
4. **Create a replay SOP**: documented process to recover missing records from the source export.
5. **Assign backup ownership**: primary owner, backup owner, and escalation rule.

Replay / recovery SOP

When missing records are suspected:

1. Export the source submissions for the affected window.
2. Export destination records for the same window.
3. Run the reconciliation checker by stable ID or email.
4. Save the missing-ID list.
5. Verify whether each missing source record should have passed the business rules.
6. Recreate or replay missing destination records through the approved path.
7. Mark each record as recovered, skipped by rule, duplicate, or unresolved.
8. Notify the workflow owner with before/after counts.
9. Add a change-log entry with root cause and prevention step.

Monitoring blueprint

Daily quick check

- Source count vs destination count for the previous day.
- Hard error count in Zapier/Make/Airtable automation history.
- Held/stopped/errored automations.
- Owner alert received and acknowledged.

Weekly reliability check

- ID-level reconciliation for the highest-value workflow.
- Review skipped/filtered records.
- Check task/run usage and plan-limit exposure.
- Review field/schema changes in source and destination tools.
- Confirm replay SOP still works with current exports.

Before workflow edits

- Screenshot current workflow map.
- Export or document current field mappings.
- Test with one known-good record and one known-edge-case record.
- Confirm destination record appears.
- Confirm owner alert appears.
- Record the change in the workflow-change log.

Buyer-facing conclusion

This workflow is valuable enough to monitor but currently depends on silent assumptions: field names stay stable, filter values do not drift, owners see alerts, and missing records are noticed manually.

The immediate priority is not building new automation. It is proving that every source record reaches the expected destination — and that someone gets notified when it does not.