

Workflow Health Audit

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81%

Overall Health Score



Issue Summary

- 14 warnings
- 21 info items

Object Coverage



16 items require attention. Address critical issues first, then warnings.

- 1. Change ticket status when a customer replies to an email** **WARNING**
Not updated in 10 months Stale Workflows
- 2. Change ticket status when a customer replies to an email** **WARNING**
Isolated workflow with no connections — This active workflow doesn't connect to any other workflows. Orphan Workflows
- 3. Change ticket status when an email is sent to a customer** **WARNING**
Not updated in 10 months Stale Workflows
- 4. Pipeline is "Support Pipeline", Ticket status is "Closed"** **WARNING**
Not updated in 10 months Stale Workflows
- 5. Pipeline is "Support Pipeline", Ticket status is "Closed"** **WARNING**
Isolated workflow with no connections — This active workflow doesn't connect to any other workflows. Orphan Workflows
- 6. Become New Lead** **WARNING**
Not updated in 9 months Stale Workflows
- 7. Welcome New Lead** **WARNING**
Not updated in 9 months Stale Workflows
- 8. MQL to SQL** **WARNING**
Not updated in 9 months Stale Workflows
- 9. SQL to Opportunity** **WARNING**
Not updated in 9 months Stale Workflows
- 10. Opportunity to Customer** **WARNING**
Not updated in 9 months Stale Workflows
- 11. Convert to MQL** **WARNING**
Not updated in 9 months Stale Workflows

12. **Add Engaged to List**

Not updated in 9 months

WARNING

Stale Workflows

WARNINGS

Change ticket status when a customer replies to an email Not updated in 10 months	Stale Workflows
Change ticket status when a customer replies to an email Isolated workflow with no connections — This active workflow doesn't connect to any other workflows.	Orphan Workflows
Change ticket status when an email is sent to a customer Not updated in 10 months	Stale Workflows
Pipeline is "Support Pipeline", Ticket status is "Closed" Not updated in 10 months	Stale Workflows
Pipeline is "Support Pipeline", Ticket status is "Closed" Isolated workflow with no connections — This active workflow doesn't connect to any other workflows.	Orphan Workflows
Become New Lead Not updated in 9 months	Stale Workflows
Welcome New Lead Not updated in 9 months	Stale Workflows
MQL to SQL Not updated in 9 months	Stale Workflows
SQL to Opportunity Not updated in 9 months	Stale Workflows
Opportunity to Customer Not updated in 9 months	Stale Workflows
Convert to MQL Not updated in 9 months	Stale Workflows
Add Engaged to List Not updated in 9 months	Stale Workflows
Send Special Offer Not updated in 9 months	Stale Workflows
Assign to SDR Not updated in 9 months	Stale Workflows
Send an email series when a form is submitted Not updated in 7 months	Stale Workflows
Unnamed workflow - 2025-11-27 06:53:27 GMT+0000 No actions configured — This workflow has no actions and won't do anything when triggered.	Empty Workflows

INFO

Change ticket status when a customer replies to an email Similar to: Change ticket status when an email is sent to a customer — Consider consolidating these workflows if they serve similar purposes.	Possible Duplicates
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Pipeline is "Support Pipeline", Ticket status is "New"

Possible Duplicates

Similar to: Pipeline is "Support Pipeline", Ticket status is "Closed" — Consider consolidating these workflows if they serve similar purposes.

Become New Lead

Inactive Workflows

Currently turned off

Welcome New Lead

Inactive Workflows

Currently turned off

MQL to SQL

Inactive Workflows

Currently turned off

SQL to Opportunity

Inactive Workflows

Currently turned off

SQL to Opportunity

Possible Duplicates

Similar to: Opportunity to Customer, Opportunity Workflow Test — Consider consolidating these workflows if they serve similar purposes.

Opportunity to Customer

Inactive Workflows

Currently turned off

Convert to MQL

Inactive Workflows

Currently turned off

Engaged List Nurture

Inactive Workflows

Currently turned off

Engaged List Nurture

Possible Duplicates

Similar to: Add Engaged to List — Consider consolidating these workflows if they serve similar purposes.

Add Engaged to List

Inactive Workflows

Currently turned off

New Deal Created

Inactive Workflows

Currently turned off

New Deal Created

Possible Duplicates

Similar to: Create and assign tasks when a new deal is created — Consider consolidating these workflows if they serve similar purposes.

Assign to SDR

Inactive Workflows

Currently turned off

Open Deal Test

Inactive Workflows

Currently turned off

Send an email series when a form is submitted

Inactive Workflows

Currently turned off

Send an email series when a form is submitted

Possible Duplicates

Similar to: Send an email series when a form is submitted — Consider consolidating these workflows if they serve similar purposes.

Create and assign tasks when a new deal is created

Inactive Workflows

Currently turned off

Send re-engagement email to cold leads

Inactive Workflows

Currently turned off

Send an email series when a form is submitted Currently turned off	Inactive Workflows
Opportunity Workflow Test Currently turned off	Inactive Workflows
List Test Currently turned off	Inactive Workflows
Unnamed workflow - 2025-11-27 06:53:27 GMT+0000 Currently turned off	Inactive Workflows
Custom object test Currently turned off	Inactive Workflows

Properties used across the most workflows. Changes to these fields carry the highest automation risk.

Property	Workflows	As Trigger	As Condition	As Action
Lifecycle Stage	10	4	—	6
Pipeline Stage	4	2	—	2
Lead Status	3	1	—	2
Last email activity	2	2	—	—
Pipeline	2	2	—	—
Last email date	2	2	—	—
Source	2	2	—	—
List Membership	2	2	—	—
Number of Form Submissions	2	2	—	—
Original Traffic Source	2	2	—	—
Date of last meeting booked in meetings tool	1	1	—	—
Is Closed Won	1	1	—	—

Workflow	Status	Object	Actions	Last Updated
Change ticket status when a customer replies to an email	Active	Tickets	1	May 6, 2025
Change ticket status when an email is sent to a customer	Active	Tickets	1	May 6, 2025
Pipeline is "Support Pipeline", Ticket status is "New"	Active	Tickets	2	Mar 6, 2026
Pipeline is "Support Pipeline", Ticket status is "Closed"	Active	Tickets	1	May 6, 2025
Re-engagement Workflow	Active	Contacts	3	Mar 14, 2026
Send Special Offer	Active	Contacts	2	Jun 7, 2025
Become New Lead	Inactive	Contacts	1	Jun 7, 2025
Welcome New Lead	Inactive	Contacts	3	Jun 7, 2025
MQL to SQL	Inactive	Contacts	1	Jun 7, 2025
SQL to Opportunity	Inactive	Contacts	1	Jun 7, 2025
Opportunity to Customer	Inactive	Contacts	1	Jun 7, 2025
Convert to MQL	Inactive	Contacts	1	Jun 7, 2025
Engaged List Nurture	Inactive	Contacts	2	Mar 1, 2026
Add Engaged to List	Inactive	Contacts	2	Jun 7, 2025
New Deal Created	Inactive	Deals	2	Mar 6, 2026
Assign to SDR	Inactive	Contacts	1	Jun 7, 2025
Open Deal Test	Inactive	Contacts	2	Dec 31, 2025
Send an email series when a form is submitted	Inactive	Contacts	4	Aug 11, 2025
Create and assign tasks when a new deal is created	Inactive	Deals	5	Sep 25, 2025
Send re-engagement email to cold leads	Inactive	Contacts	2	Sep 25, 2025
Send an email series when a form is submitted	Inactive	Contacts	7	Mar 7, 2026
Opportunity Workflow Test	Inactive	Contacts	1	Nov 26, 2025
List Test	Inactive	Contacts	1	Nov 26, 2025
Unnamed workflow - 2025-11-27 06:53:27 GMT+0000	Inactive	Companies	0	Nov 26, 2025
Custom object test	Inactive	Contacts	1	Nov 27, 2025