

Before your LinkedIn agent sends anything

Six checks for a first pilot or a changed sender, workflow or integration.

☐ 01 Identity

Record the intended team and exact sender. Resolve a mismatch before proceeding.

Team / sender: _____

☐ 02 Permissions

Check reported access and account readiness for the specific action.

Evidence / warning: _____

☐ 03 Freshness

Record the source and last observed or synchronized time. Read the original context.

Source / timestamp: _____

☐ 04 Review

Verify the chosen workflow's actual approval setting and the exact recipient and message.

Reviewer / control: _____

☐ 05 Outcome

Keep the action receipt. Inspect completion; pending or ambiguous does not mean sent.

Receipt / final state: _____

☐ 06 CRM, if used

Check the expected contact, activity or task in that system separately from the FirstTouch result.

Record / result, or N/A: _____

A connection is setup evidence. It is not proof of approval, sending or CRM sync.

Planning worksheet, not an automated test or authorization to send. September 22, 2026.

Read the guide: firsttouch.com/blog/how-to-connect-claude-to-linkedin