

The Naming Convention One-Pager

AI can't reuse what isn't named consistently. Standards aren't optional anymore — they're mandatory.

1. Custom Fields — one field, one fact

- **snake_case, always.** `lead_source`, `intake_offer`, `stage_reason` — same casing in every account.
- **Prefix by group.** `intake_*`, `billing_*`, `ops_*` — so AI (and VAs) can find the family fast.
- **No duplicates by another name.** “Lead Source” and “`lead_source`” are two fields and one mess.

2. Tags — tag on intent, not activity

- **Format: category:meaning.** `intent:ready-to-buy`, `status:onboarding`, `source:webinar`.
- **One tag = one meaning.** Across ALL client accounts. If it means three things, it means nothing.
- **Kill orphan tags monthly.** A tag no automation reads is a tag nobody needed.

3. Pipeline Stages — instructions, not vibes

- **Name the action owed.** “New Lead — Awaiting First Call” beats “Warm” every time.
- **Every stage has an exit.** If a contact can sit there forever, the stage is a shelf, not a step.
- **Same stages, same order.** Across every account in the niche — that's what makes cloning possible.

4. Workflows — trigger → outcome

- **Name: Trigger → Outcome.** “Form Submitted → Booking Nudge.” You know what it does without opening it.
- **Every workflow exits.** No stop rule = the 2am triple-text. Fail loud, not silent.

Before any build — the 3-line rule

- 1) One convention doc for fields, tags, stages, and workflows — per niche, not per client.
- 2) Every build (AI or human) reads it before creating anything.
- 3) Anything off-convention gets FLAGGED, not created.