THE ULTIMATE GUIDE

ClickUp for Agencies

"Since becoming our first partner in 2018, ZenPilot has stood out as the go-to solution for agencies who want to get the most out of ClickUp.

Their commitment to truly solving for the customer and providing the best customer experience is perfectly aligned with our mission at ClickUp - and it shows up in their results and the feedback we consistently hear about ZenPilot."

Zeb Evans

Founder & CEO, ClickUp

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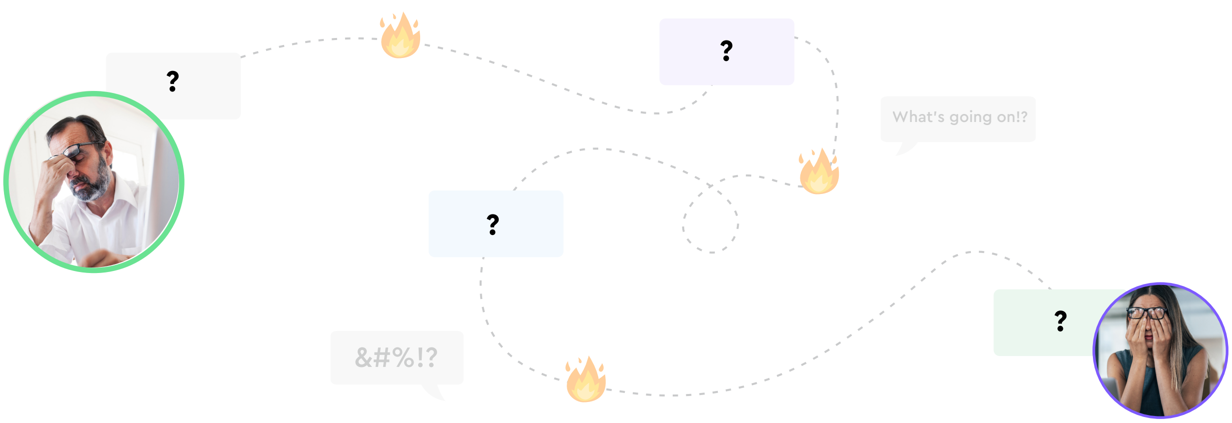
Introduction

We speak with a wide range of agency owners and operators on a daily basis. Some are managing large or rapidly growing teams; others are small, early-stage, or strictly consulting firms. Most offer some flavor of digital marketing—inbound, content, email, SEO, paid search, paid social, web, etc. Others are design, development, and product firms. But they're all trying to solve the same core problem:

How do we tame the chaos of agency life?



This is where **ClickUp** comes in.

If you're ready to finally take the chaos out of project management with ClickUp, go grab yourself a cup of coffee, sit back, and let's begin your journey to clarity. This guide will walk you through our proven implementation process and our ClickUp System that's helped thousands of agencies build more productive, profitable, and healthy teams inside of ClickUp.

And at any point during this process, if you want an agency operations and ClickUp expert to lead you through this process, **schedule a call with us.** We've helped agencies double productivity, grow profits by $1.2 million in year 1, triple headcount seamlessly, and improve client retention. Okay, let's begin.

"Our team is more efficient, productive, and healthier. I was always wary of how much of our work could be put into processes, but this has completely changed my mind. If you want to take your agency to the next level, ZenPilot is a must!"

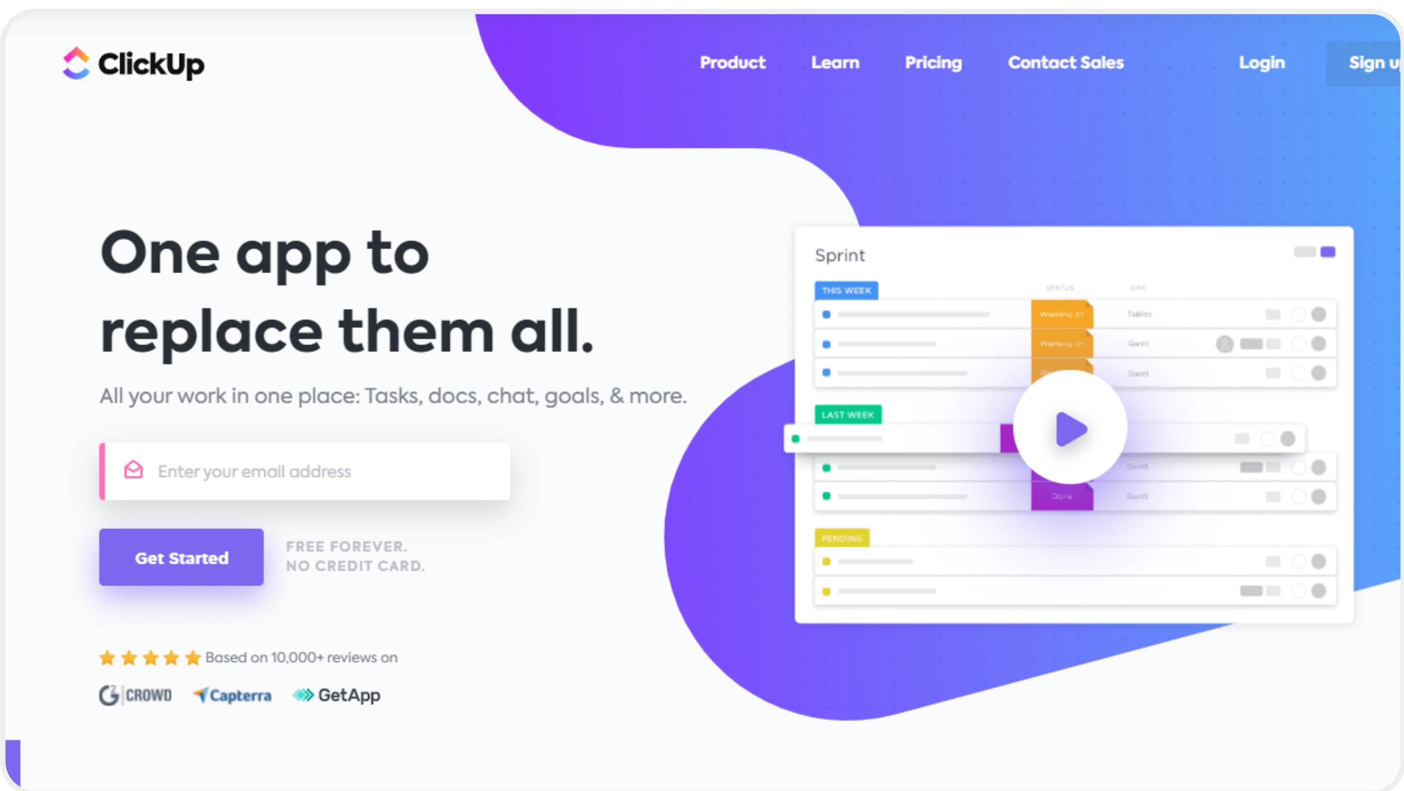
Kyle Harms
CEO, Hot Sauce

What is ClickUp?

ClickUp is the fastest-growing and one of the best project management tools for digital agencies. It has all the features a digital agency could need in a project management tool:

- Robust hierarchy for managing projects across a variety of clients.
- Customizable permissions for working with team members, contractors, and clients.
- Integrated time tracking and estimates.
- Customizable dashboards and reporting tools.
- A myriad of views: lists, boards, calendars, Gantt, timelines, workloads, etc.
- Native docs and chat, notifications and reminders, custom fields, goal tracking, and more.
- An extensive suite of native & 3rd-party integrations, plus apps for every platform.
- There are a lot of good project management platforms out there (and we'll briefly discuss the industry leaders next) and there are large agencies running on a variety of platforms with varying degrees of success.

Let's be clear, your overarching system for client delivery matters more than the specific project management tool you employ. That said, having the right tool for the job is worth its weight in gold. In this guide, we'll be covering both how to get the most out of ClickUp as well as how to think about work management in general at your agency.



Why ClickUp for Agencies?

This question comes up all the time. Five years ago, we would have spent more time debating the merits. At this point, we tell most people to go try out the tools themselves (with a clear idea of what they need to accomplish), and we believe the choice becomes obvious.

But you're reading this because you want our answers to the test, not the homework assignment itself, so...

We recommend ClickUp for agencies specifically because:

- ClickUp's *Hierarchy* is uniquely well-suited to agency needs (managing work across clients, in addition to internal projects).
- The customizable *Views* allow your team to see and work with the data that is most relevant to them, in a visualization they prefer, while still engaging with the same underlying data.
- The native *Time Tracking* makes reporting much simpler and more accurate than tying together separate tools.
- ClickUp's *Template* capabilities are unmatched and make it very easy for agencies to build plug-and-play process *Templates* for everything they do.
- ClickUp's product development velocity is unmatched, and they pair the ability to execute with a strong vision for the future.
- Pricing-wise, ClickUp is very friendly for scaling agency teams. For more information on their pricing plans and which you should choose, check out our article: **How to Choose the Best ClickUp Pricing Plan**.

We'll cover a few of these points later in this guide, but this is not an exhaustive discussion on the merits of ClickUp vs. other agency project management tools. To begin, let's set the technology to side and focus on how you'll actually navigate your operational challenges in your organization effectively.

"Now that we have our [ClickUp] system in place, my leadership team is able to make decisions on data and facts vs. what we think is happening. Additionally, now we have one system that tells us where we stand on any piece of work. "

Kim Garmon Hummel
Chief Growth Guide, Sauce Agency

The Formula for Taming the Chaos of Agency Life

Regardless of the tool, every project management platform implementation has a clearly defined goal - clarity. Over the past 10+ years, we've helped 3,000+ agencies achieve clarity through our approach we call the 1-3-5 formula.

One Goal - Clarity

The number '1' in the 1-3-5 Formula stands for our primary goal, which is to create clarity at every level of an organization.

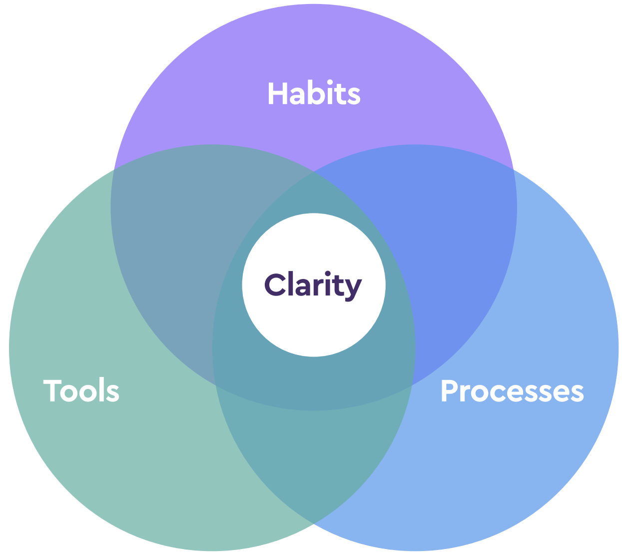
- At the **leadership level**, it looks like having the correct data to make crucial decisions around staffing, pricing, service lines, and client strategy.
- At the **account and project management level**, it looks like having clarity into your team's workload, your clients' results, and a completely accurate, live view of every campaign, deliverable, and task for your clients.
- At the **individual contributor level**, it looks like having clarity into exactly what is on your plate every day, the gold-standard process to complete that work, and specific, documented expectations from management about how your agency operates, what exactly is expected of you, and how you should be prioritizing, completing, and communicating about your work.

In our experience working with 3,000+ different firms, we've found that the root of most operational inefficiencies—and reason your project management system isn't working—can be traced back to a lack of clarity.

Three Key Components - Tools, Processes, and Habits

Once you define the goal, the next number, '3', represents three key components to achieve it: tools, processes, and habits.

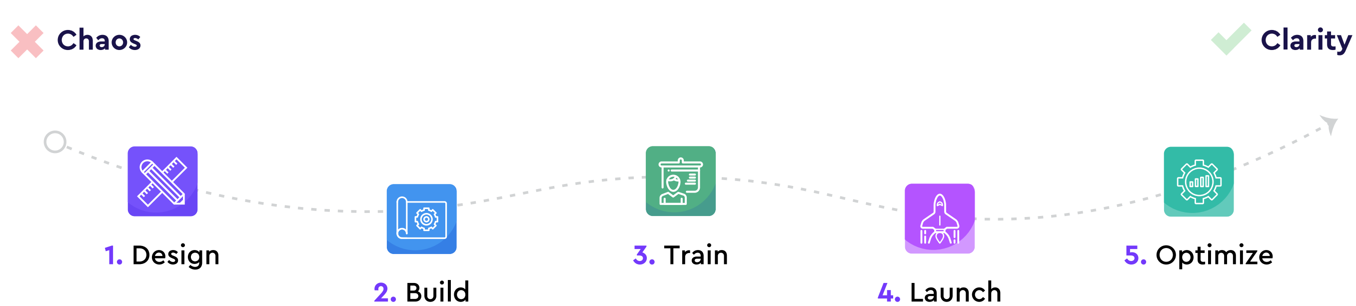
- You need **the right tools** in place for efficient operations. But that's not all.
- You also need **well-defined processes** to decrease the mental load on your team, improve hand-offs and keep projects on track.
- And you need **healthy habits** across the team to bring everything together. Without good habits, even the best tools and processes will fall short of delivering the desired results.



Five Steps to Success

The final number '5' refers to the five-step method we advocate to reach operational excellence: design, build, train, launch, and optimize.

- **Design.** Design a system that will help your organization establish a clear vision of the ideal solution. This should encapsulate behavioral standards, procedural excellence, and the technical blueprint for world-class tooling.
- **Build.** With a clear vision and structure in place, you now need to construct the tooling and processes. This isn't just about setting up tools; it's about integrating them into a cohesive tech stack that supports your agency's unique needs and requirements.
- **Train.** Train your team on the habits and processes that will make your agency successful. This includes setting clear rules of engagement and empowering your team with the right knowledge and resources.
- **Launch.** Launch the new system and monitor its use and effectiveness.
- **Optimize.** Observe what works and what doesn't and make changes accordingly.



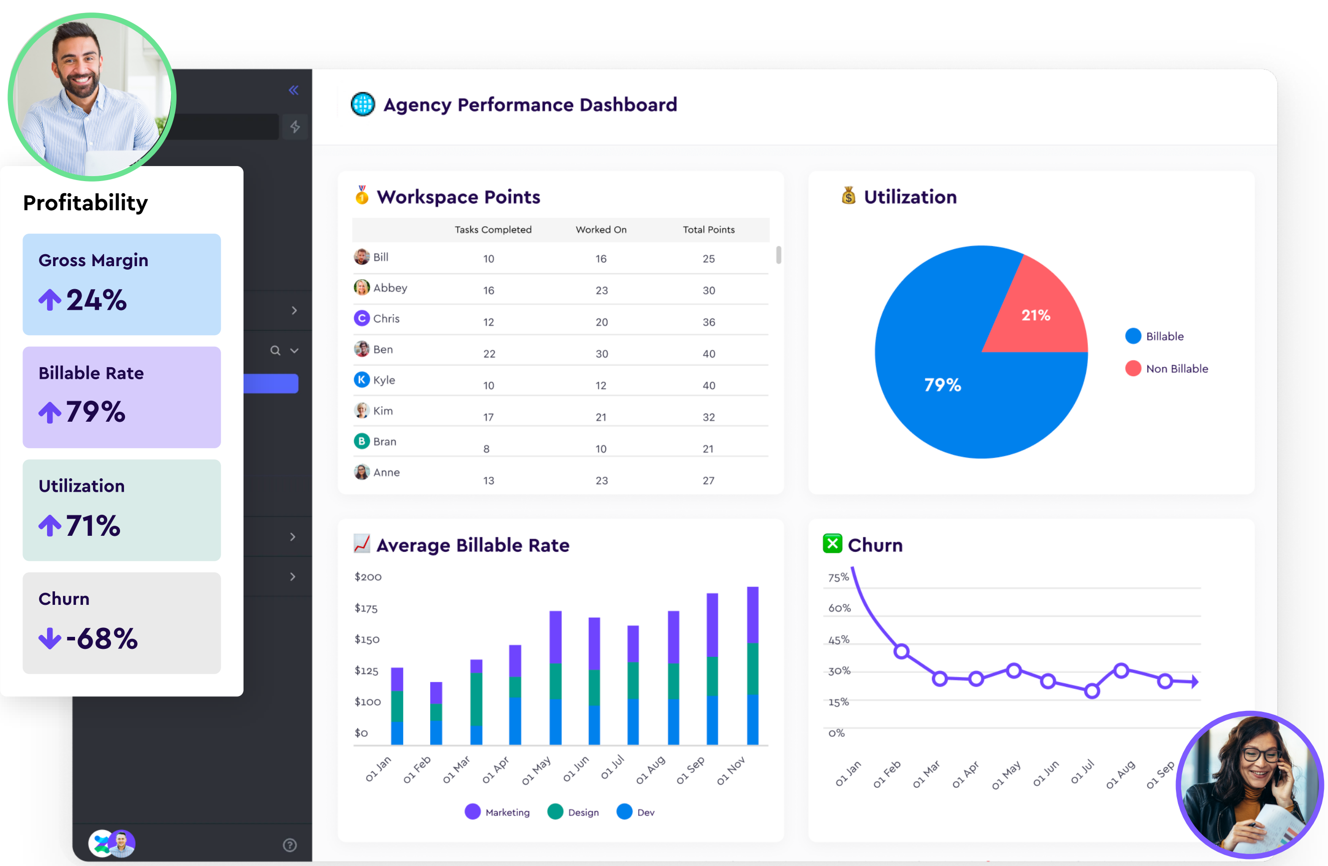
Trust the Process

To achieve your goal, you need to **eliminate friction between people, technology, and processes.**

Each step we've listed is equally important. Do NOT rush. Prepare yourself to spend the next 8-10 weeks implementing our proven ClickUp System. And yes, that may sound like a lot of time, but you're doing more than implementing a project management tool, you're completely transforming the way that you operate, in a good way.

You're building a system that will help you deliver work more profitably, cut down on all the Slack messages to try to get clarity, and stop dropping balls on client work. And you're building a system that will help you hire and onboard people faster to help agency leadership get out of doing the actual client work and spend more time leading better.

If you get this right the first time, it will save you a lot of headaches. Please read through this guide from cover to cover before you even touch ClickUp. And if you want my team to come in and implement our entire ClickUp System for you, to save you thousands of human hours and months of hard work, **book a call with my team**. We can only work with so many agencies per month, so if you needed this implemented yesterday, don't wait. Now, lets get started..



THE FOUNDATION

Understanding ClickUp

Organizing Work at Your Agency

Many agencies inadvertently limit their potential for achieving a comprehensive view of progress, workload, and time allocation by falling into a fundamental trap in their project management approach.

This common misstep is neglecting to document and consider internal work. Given the pressure to deliver for clients, it's all too easy to deprioritize the agency's own needs.

Examine the marketing strategies of numerous agencies, and you'll see this issue glaringly apparent. Agency owners love to quote clichés about the cobbler's children, but it's primarily an excuse for not having our act together as business owners.We need to step up and do better. This applies to your operations as well. Plan, manage, and track your internal work as well as your client work in the same unified system.

Your work in all three areas of your business should be reflected in your project management tool. Let's look at the best way to do this.

We break every agency business down into 3 areas:

- **Growth.** This covers your business development activities, including marketing and sales.
- **Delivery.** This covers all client service-related tasks.
- **Operations.** This covers the remaining aspects of your business, mainly human resources, finance, and legal responsibilities.

Your work in all 3 areas of your business should be reflected in your project management tool. To summarize, Growth is where you make your commitment, Delivery is where you fulfill that commitment, and Operations acts as the vital 'catch-all' drawer—keeping the business running smoothly, fostering team growth, protecting your business, and investing in self-improvement.

The business model is simple, not easy. Let's walk through exactly how to set this up in ClickUp. And yes, we're going to get a bit technical in this chapter.

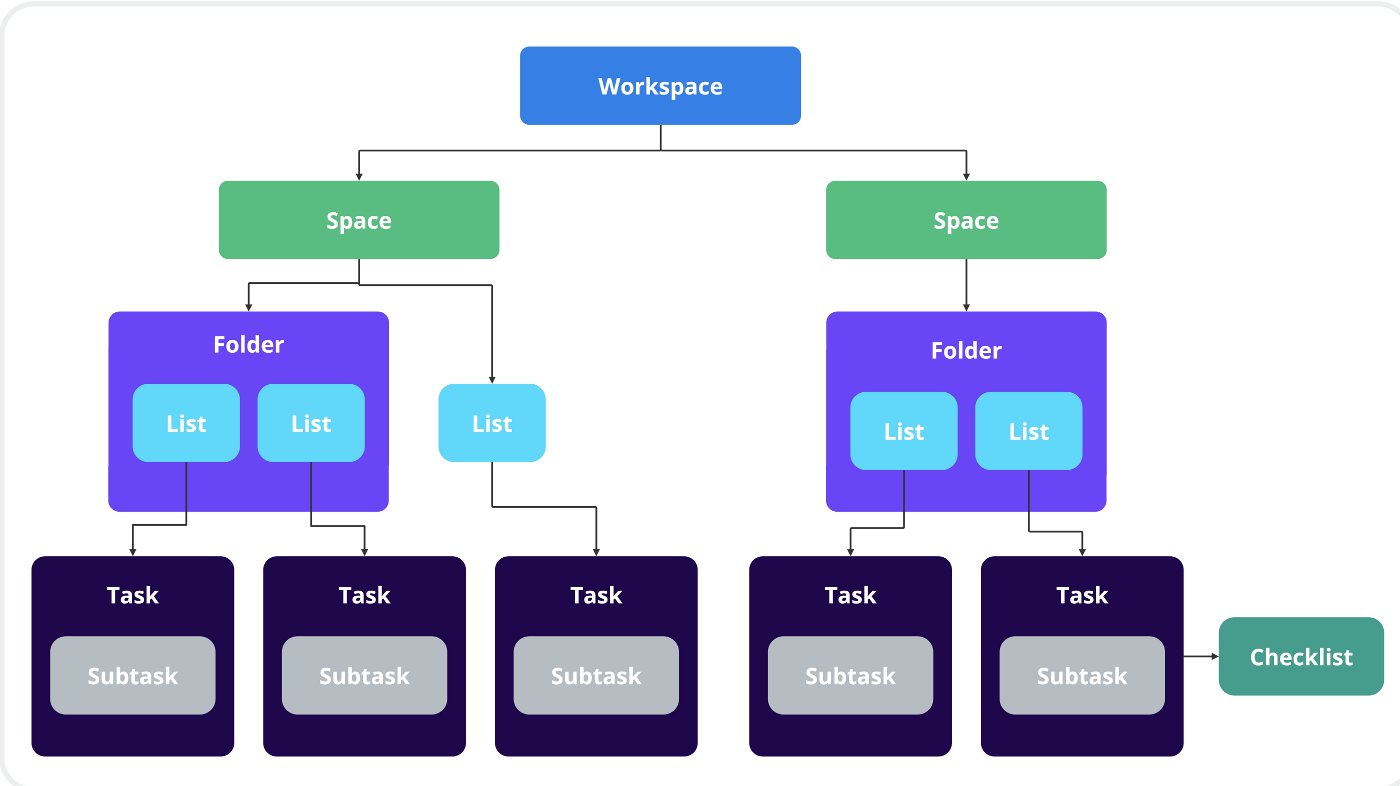
ClickUp Feature #1: The Hierarchy

To begin, we need to briefly cover ClickUp's *Hierarchy*. Understanding the ClickUp *Hierarchy* is crucial both for setting up your *Workspace* properly and for taking full advantage of features like *Views*, *Custom Fields*, and *Automations* later on. So let's take you on a tour of the *Hierarchy* to make sure you understand it completely and how to set it up specifically for agencies.

Here are the main layers of organization within ClickUp:

- **Workspace.** When you join ClickUp, you create a user account and a *Workspace*. The *Workspace* is the highest level in ClickUp's *Hierarchy* and is typically named after your business. All work is organized within this *Workspace*.
- **Space.** *Spaces* are the next level in the *Hierarchy* and represent different departments or teams within an organization. Users can create multiple *Spaces* to keep their work organized.
- **Folder.** *Folders* can be created within *Spaces* to group together *Lists* and *Tasks*. While not necessary, *Folders* can be very helpful in organizing similar work. They often represent sub-departments, or for agencies, clients.
- **List.** *Lists* are where the work lives. *Lists* can be used to represent work categories, service lines, retainers, or projects.
- **Parent Task.** *Tasks* are the actual work in your ClickUp *Workspace*. In most cases, *Parent Tasks* are best used to represent a deliverable or project phase/milestone, but they can also exist on their own without *Subtasks*.
- **Subtask.** *Subtasks* are *Tasks* that fall under your *Parent Tasks*. *Subtasks* are best used to represent actionable steps or *Tasks* that need to be done to complete the *Parent Task* (a deliverable or project phase/milestone).
- **Checklist.** *Checklists* are the final level in the *Hierarchy* and can be added to any *Task*. They are best used as reminders for someone when completing a *Task*. They'll help ensure your team follows your process when completing their work.

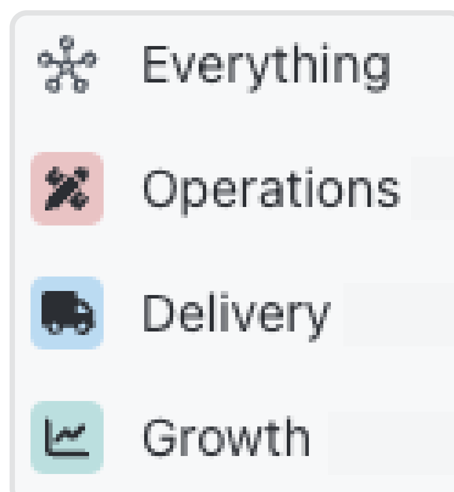
By using multiple layers in the *Hierarchy*, you'll keep your *Workspace* much more structured and organized—which will pay dividends in the long run.



The ClickUp Hierarchy for Agencies

To give you a visual of what this will look like for your agency, here's a quick example. As we discussed earlier, most client servicing teams—whether a marketing or creative agency, consultancy, financial services, or accounting firm—all have three main departments within their organization:

- **Growth**
- **Delivery**
- **Operations**

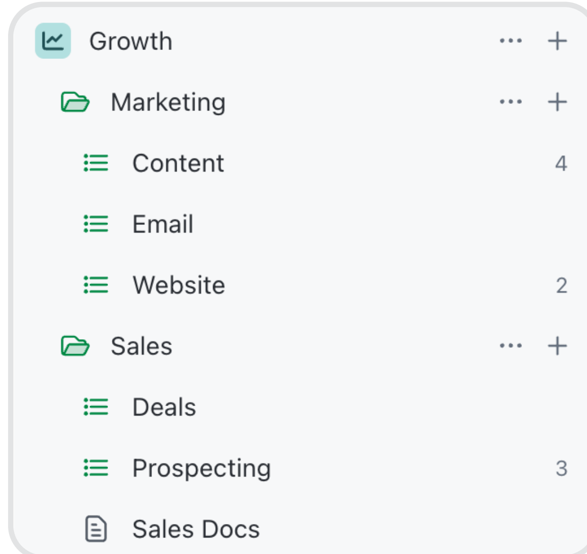


The way that the ClickUp *Hierarchy* is then built to reflect this bucketing of work would be simple. You'll have a *Space* for Growth, a *Space* for Delivery, and a *Space* for Operations.

Now beneath those *Spaces* we have our *Folders* and *Lists*.

The 'Growth' Space would look like this:

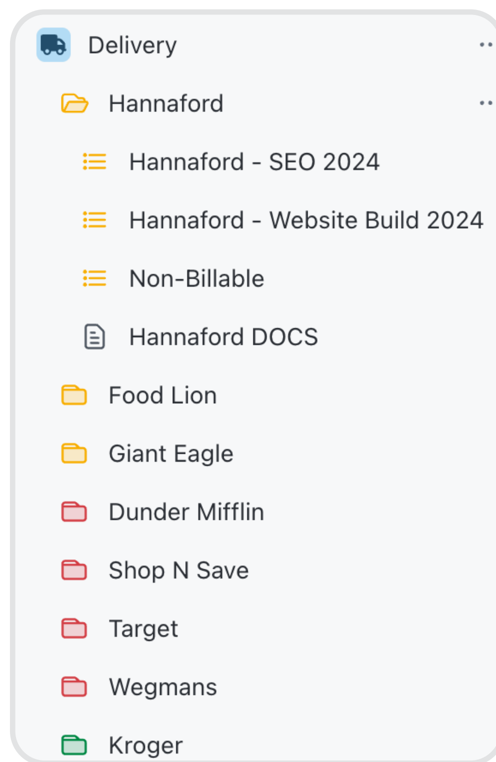
- Space - Growth
  - Folder #1 - Sales
    - List #1 - Prospecting
    - List #2 - Deals
  - Folder #2 - Marketing
    - List #1 - Website
    - List #2 - Content
    - List #3 - Email



Work in the 'Growth' *Space* is grouped together by department/team, broken into sub-departments, and then further broken up in to work categories. The 'Operations' *Space* would follow a similar design.

The 'Delivery' Space would be slightly different, but it would look like this:

- Space - Delivery
  - Folder #1 - Client X
    - List #1 - Retainer XYZ (List for all tasks associated with a clients monthly, quarterly, or yearly retainer)
    - List #2 - Website Project (List related to a one-off billable item which is NOT included in their retainer).
    - List #3 - Non-Billable (List for all client-related non-billable tasks)
  - Folder #2 - Client Y
    - List #1 - Retainer ABC
    - List #2 - Non-Billable



Work is grouped together by client—helping with organized time tracking, project progress, and contract pacing—and then broken up into projects (whether an ongoing retainer or a more formal project).

Lists in the 'Delivery' *Space* could also be broken down into 'Service Lines' (e.g., Paid Social, Organic Social, SEO, ABM, etc.) or 'Project Phases' (e.g., Blueprint, Implementation, Optimization), but in our experience, it's best to keep it simple with contract *Lists*—either projects or retainers.

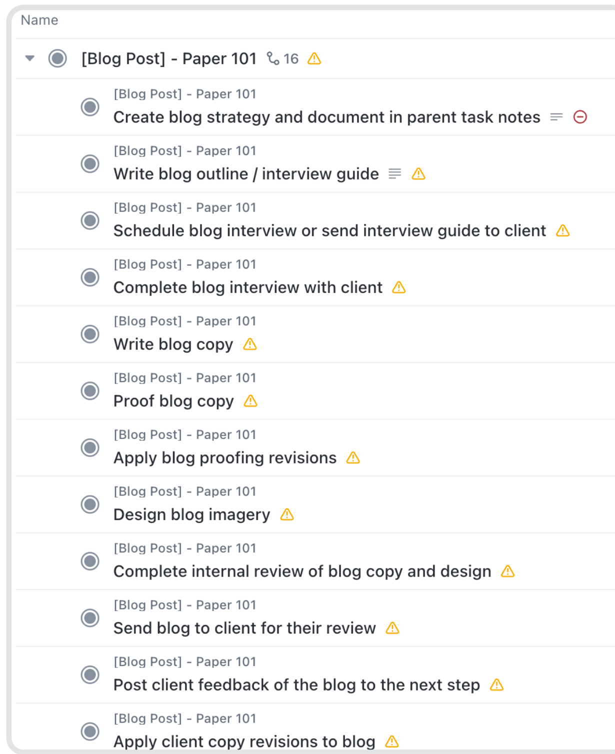
You can also leverage a 'Client Management' *List* in this Delivery *Space* that will be the home for some onboarding *Tasks* and *Tasks* that are 'Delivery' related, but not related to a specific client. Just make sure that every *Task* has a home to live.

Task locations are important! Especially if you're tracking time and want to know where your team is spending their time, or how profitable a certain service is. Placing *Tasks* in random *Lists* (or even private *Lists*!) is the worst thing you can do. You'll lose a lot of visibility and insights for your business.

Lastly, the Parent Tasks and Subtasks structure would look like this:

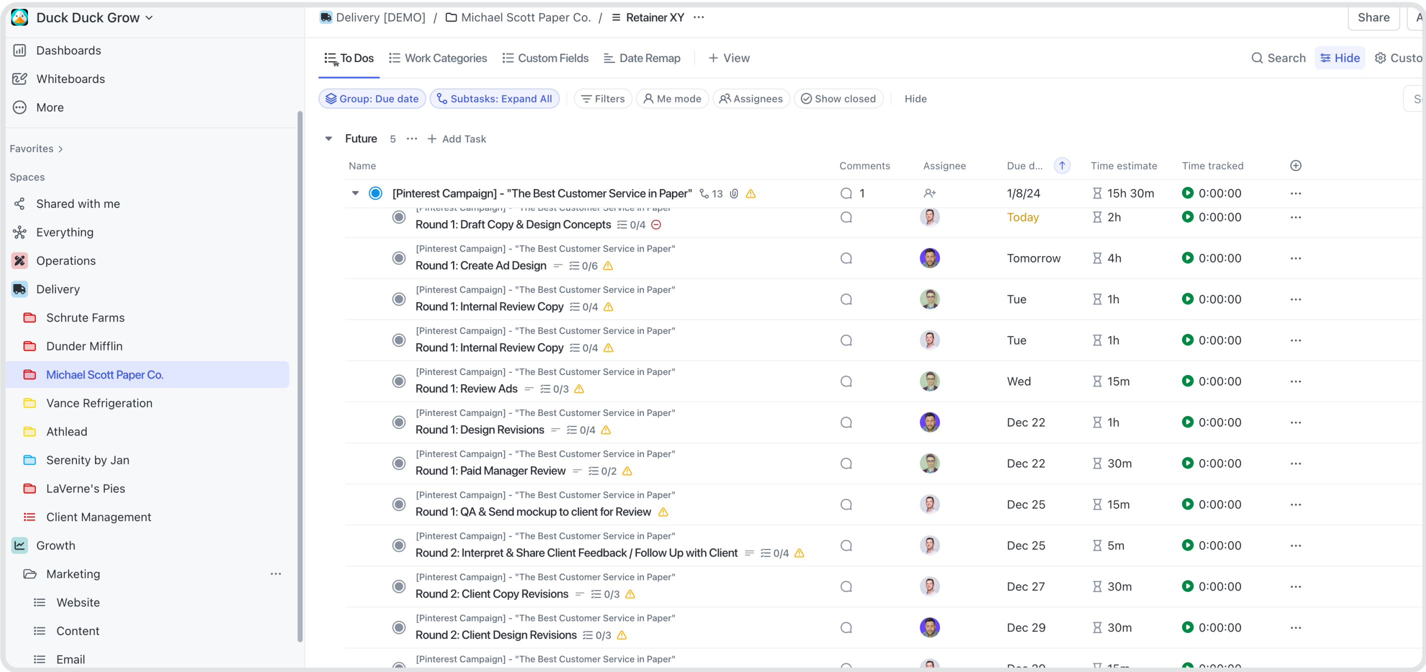
- **Parent Task** - Blog Post
  - **Subtask #1** - Create Blog Post Strategy
  - **Subtask #2** - Review Strategy and Outline Blog
  - **Subtask #3** - Approve Blog Outline
  - **Subtask #4** - Write Blog Copy
  - **Subtask #5** - Review Blog Copy
  - **Subtask #6** - Apply Blog Proofing Revisions
  - **Subtask #7** - Design Blog Images
  - **Subtask #8** - ....
  - **Subtask #x** - Publish Blog Post

This structure will help pass work back and forth, while also providing good visibility in to how far along the deliverable or project actually is.



The biggest mistake teams make in ClickUp is creating one *Parent Task*, assigning it to multiple people, and hoping the team will just magically pass work back and forth in the one *Task* without anything slipping through the cracks. News flash - this doesn't work!

For a more thorough overview on the best *Task* structure in ClickUp, watch our video tutorial, **'The Best Way to Structure Tasks in ClickUp'.**



ClickUp Feature #2: The Template Center

Now that you've got a slight understanding of the *Hierarchy* in ClickUp, let's nerd out for a second and talk about *Templates*. And as much as I want to skip ahead to start discussing *Views* and *Custom Fields*, I think it's important that you understand how the ClickUp *Template Center* works.

ClickUp *Templates* are where you really start to unlock productivity and efficiency gains inside of the system. *Templates* help you standardize your work, connect your SOPs to *Tasks*, and provide clarity for everyone. You could go and start adding *Tasks* to your *Workspace* all willy-nilly, but leveraging ClickUp *Templates* is the way to go, trust me.

Not saying you can't ever add an ad hoc *Task* to your ClickUp *Workspace*, but if you can leverage ClickUp *Templates* for 85-90% of your *Task* creation, you'll get way more out of ClickUp and build a much more productive and profitable business.

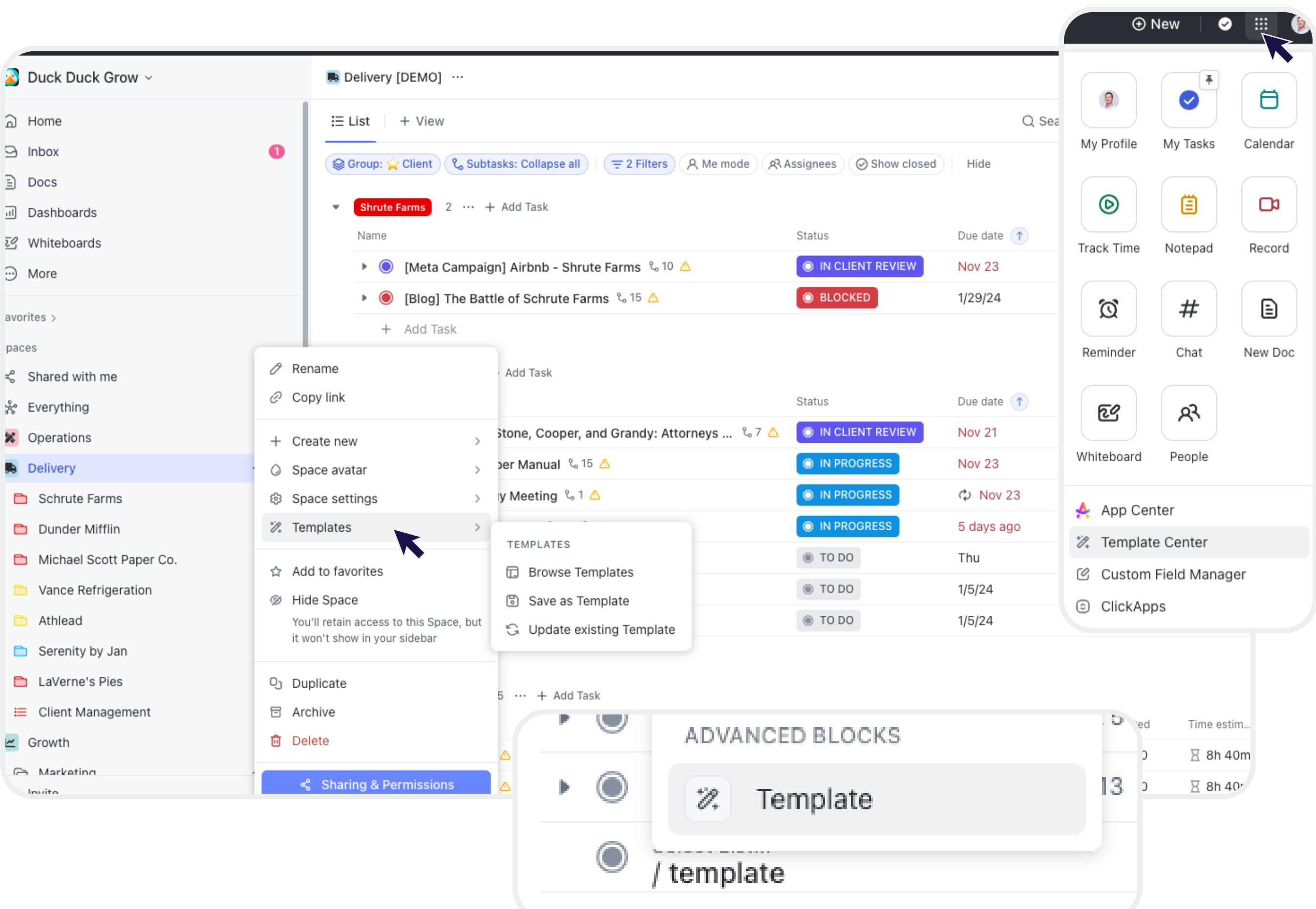
And if you want to make the most out of the ClickUp *Template Center*, and get a more thorough deep dive into the best practices and *Template* building process, I recommend you read our article (+ video tutorial), **'How to 10x Productivity With ClickUp Templates'**.

Let's highlight some of the basics...

Where Can You Find the ClickUp Template Center?

Thankfully, finding the ClickUp *Template Center* is relatively easy. You can find the *Template Center* multiple ways:

1. Navigate to your *Sidebar Menu* on the left. Hover over any *Space*, *Folder*, or *List*, and click on the ellipsis that shows. Click on 'Templates' and then click 'Browse Templates'.
2. You can also leverage *Slash Commands*. Type "/Template" anywhere you can type in ClickUp and you'll be able to pull up the *Template Center*.
3. Lastly, you can find the *Template Center* in your *Quick Action Menu* in the top right of your screen. Click on your *Quick Action Menu* (represented by 9 dots) and select the 'Template Center' icon.



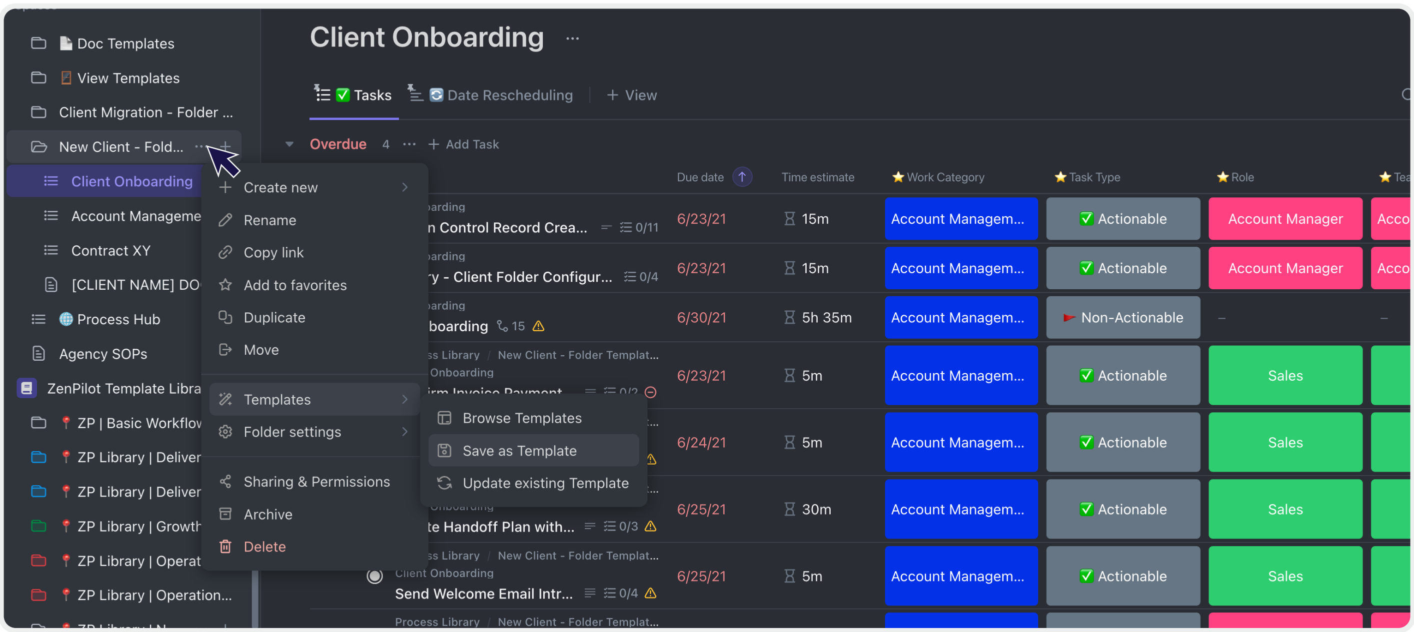
The ClickUp *Template Center* will be populated with ClickUp *Templates*. You can get started with some of these if you'd like, but be aware that all of them come with different *Statuses* and *Custom Fields* which could lead to complexities in your *Workspace*.

What Can You Save as a Template in ClickUp?

As I discussed earlier, the beauty of ClickUp is the *Hierarchy*. Well, the even more beautiful part is that you can create a *Template* at just about any level of the *Hierarchy*. You can create *Space Templates*, *Folder Templates*, *List Templates*, *Task Templates*, *Checklist Templates*, *View Templates*, *Doc Templates*, and *Whiteboard Templates*!

How Do You Save a Template?

Saving *Templates* will follow a fairly similar process to finding the ClickUp *Template Center*. Navigate to your *Sidebar Menu* on the left. Hover over any *Space*, *Folder*, or *List*, and click on the ellipsis that shows. Click on the *Templates* icon and then click 'Save as Template'. You can also navigate to any *Task*, *Doc*, *View*, *Checklist*, or *Whiteboard* and follow the same process.



You'll also see an 'Update existing Template' option. And yes, this does exactly what it sounds like. You can save *Templates*, and update them. But now, you're probably wondering, "how do I manage all of my *Templates* and update them?". And given that there a lot of types of *Templates* that can be leveraged, how should we use them? And how the heck do we manage them (from building, to updates, etc.)?

Great questions, but I'm actually going to punt that part of the conversation to later when we actually discuss building your agency's greatest asset—your 'Template Library'. As much as I want to dive into the deep end here to discuss the ins and outs of ClickUp *Templates*, you need to understand *Views* and *Custom Fields* and how they fit into *Templates* first.

ClickUp Feature #3: Custom Fields

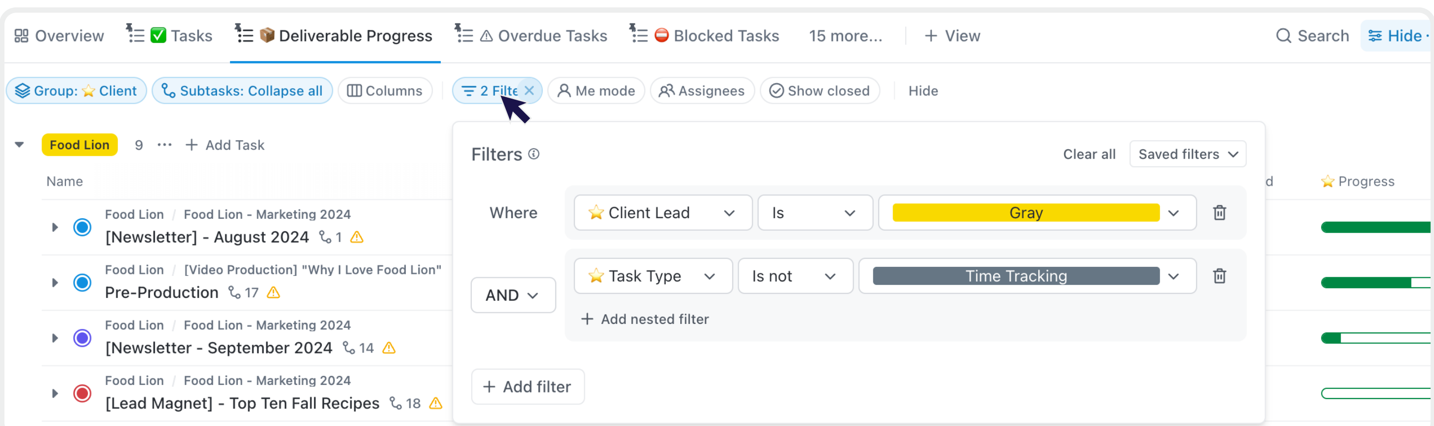
Custom Fields can be dangerous in ClickUp. Depending on your personality type, you may go and create hundreds of different *Custom Fields* because you'll think you'll need them. But the reality is, you probably don't.

Creating hundreds of different *Custom Fields* in your ClickUp *Workspace* (without understanding how they work and where they live) can lead to some nightmares down the road. This *Custom Field* craziness will make it much harder to create *Dashboards* and *Views*. Plus, your team may get confused to which *Custom Fields* they should and shouldn't be using.

What Are ClickUp Custom Fields?

Simply put, *Custom Fields* in ClickUp are ways of adding different types of data or unique identifiers on to your ClickUp *Tasks* to customize and personlize your *Workspace*.

1. They allow you to segment data for *Views* and *Dashboards*.
2. They allow you to add more information to your *Tasks*.
3. And they provide you with *Automation* capabilities (mainly because they can act as triggers) .



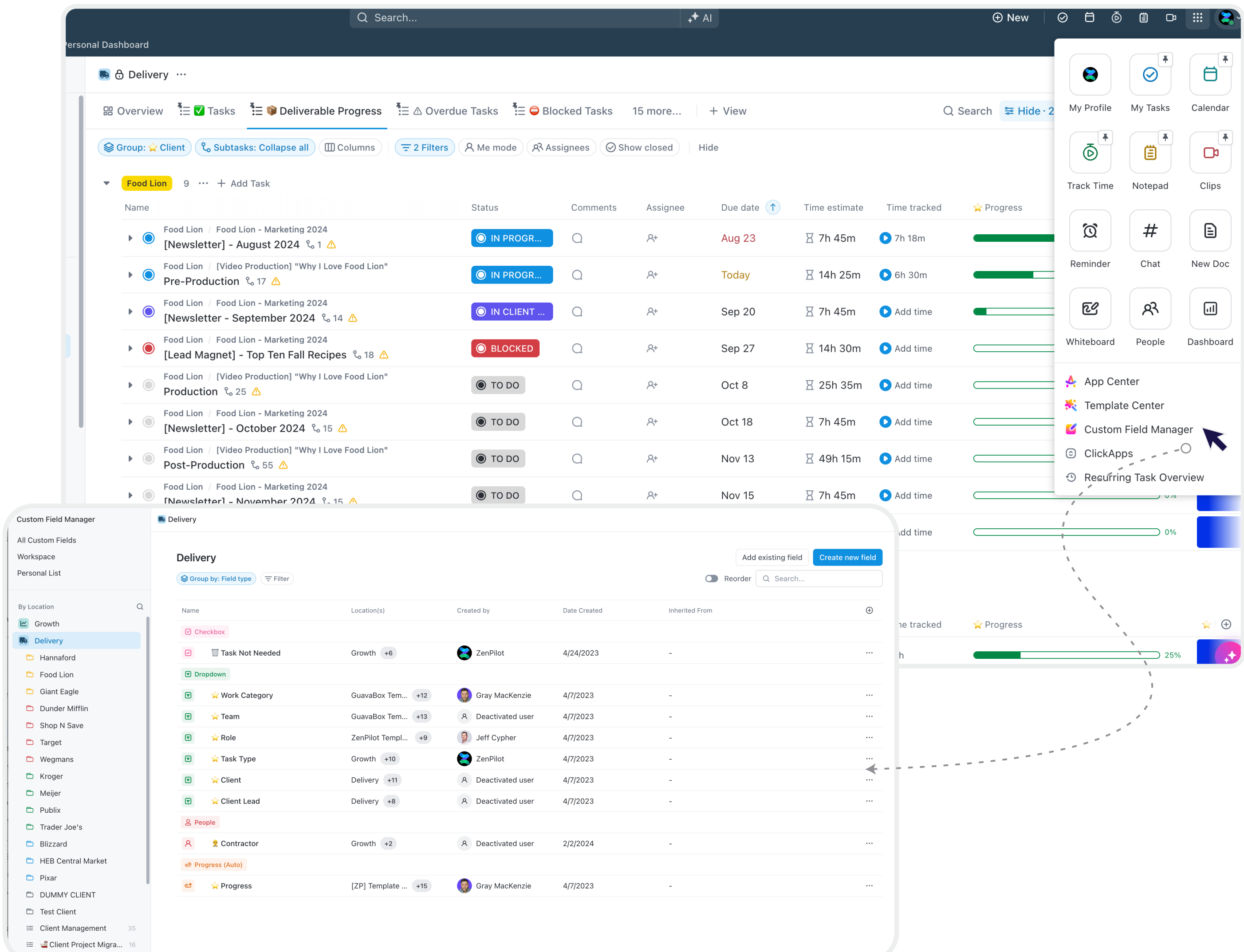
Where Are Custom Fields Located?

This is important. *Custom Fields* can live at any level of your ClickUp *Hierarchy*.

To add a *Custom Field*, you can either navigate to your *Custom Field Manager*, which you'll find in your *Quick Actions Menu* in the top right corner of your screen. Or you can go to any *View* in your *Workspace* and click on the "+/Add a Column" button that'll you'll see on the right side of your *View*.

Be careful. If you click "+/Add a Column" at your *Everything/Workspace* level, you will be adding a *Custom Field* to your entire *Workspace*—meaning that every *Task* in your ClickUp *Workspace* will now have that *Custom Field* applied to it.

You don't typically want this. It may not mean as much to you right now, but as you build more advanced solutions in ClickUp (like a CRM), you don't want *Custom Fields* you're using for your Growth team to live on those records living in your CRM.



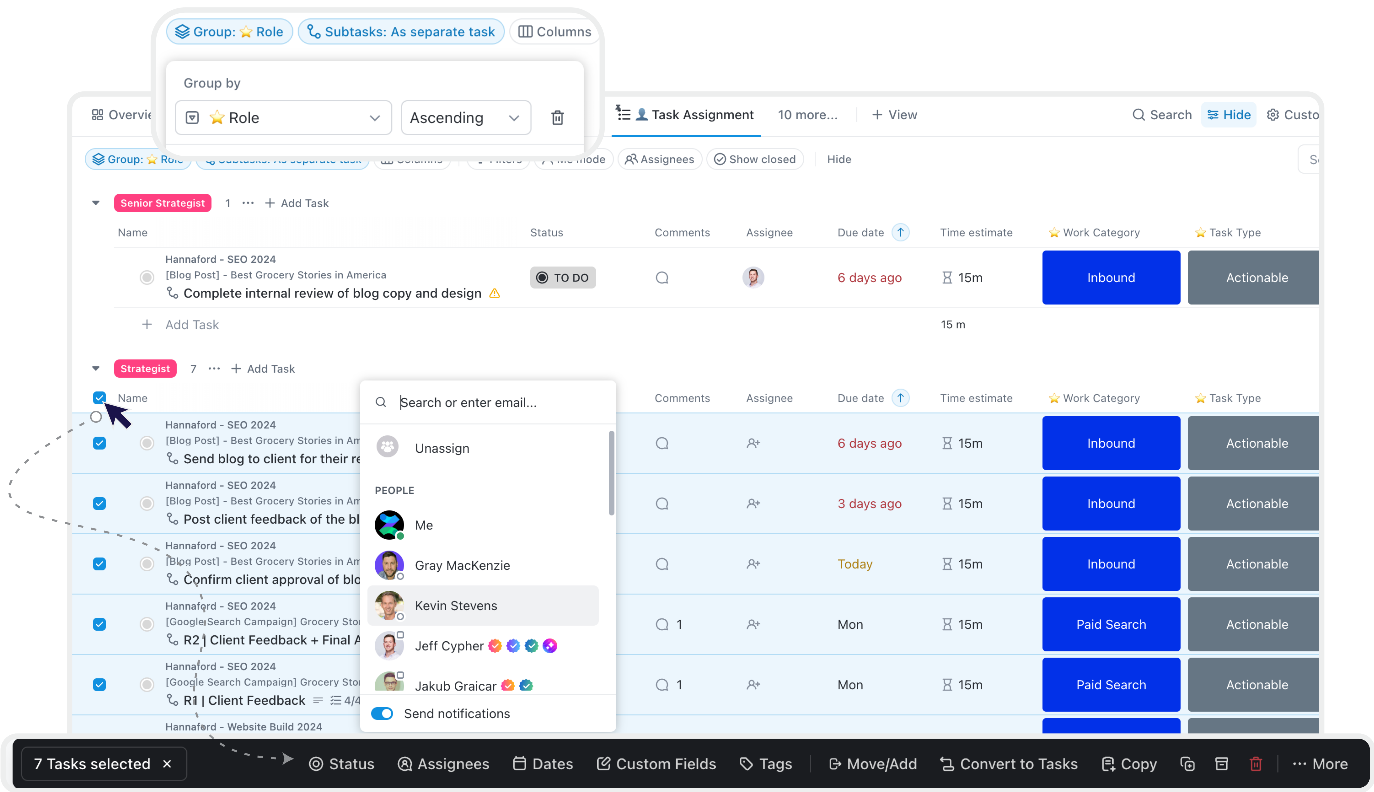
Keep your *Custom Fields* located no higher than your *Spaces*. If you want to add a *Custom Field* to a *Space*, just navigate to that *Space*, pull up a *View*, press the "+/Add a Column" button and add a new *Field* here. This will allow you to use the *Custom Field* on every *Task* in that *Space*.

Why Do Custom Fields Matter?

Custom Fields are what will unlock future custom *Views* and *Dashboards* in the future.

For example, we use a 'Role' *Dropdown Custom Field*. This is built in to our *Templates* in the 'Template Library' *Space* (more on this later). This *Custom Field* will be populated with different roles that our team has—copywriter, admin, proofer, strategist, account manager, designer, engineer, etc.

Every *Task* in our ClickUp *Templates* will then get this *Custom Field* applied to it. When the *Template* is deployed, we can group all of the *Tasks* that have the 'Copywriter' *Role* applied to it, and assign those *Tasks* in bulk (using the *Bulk Action Toolbar*).

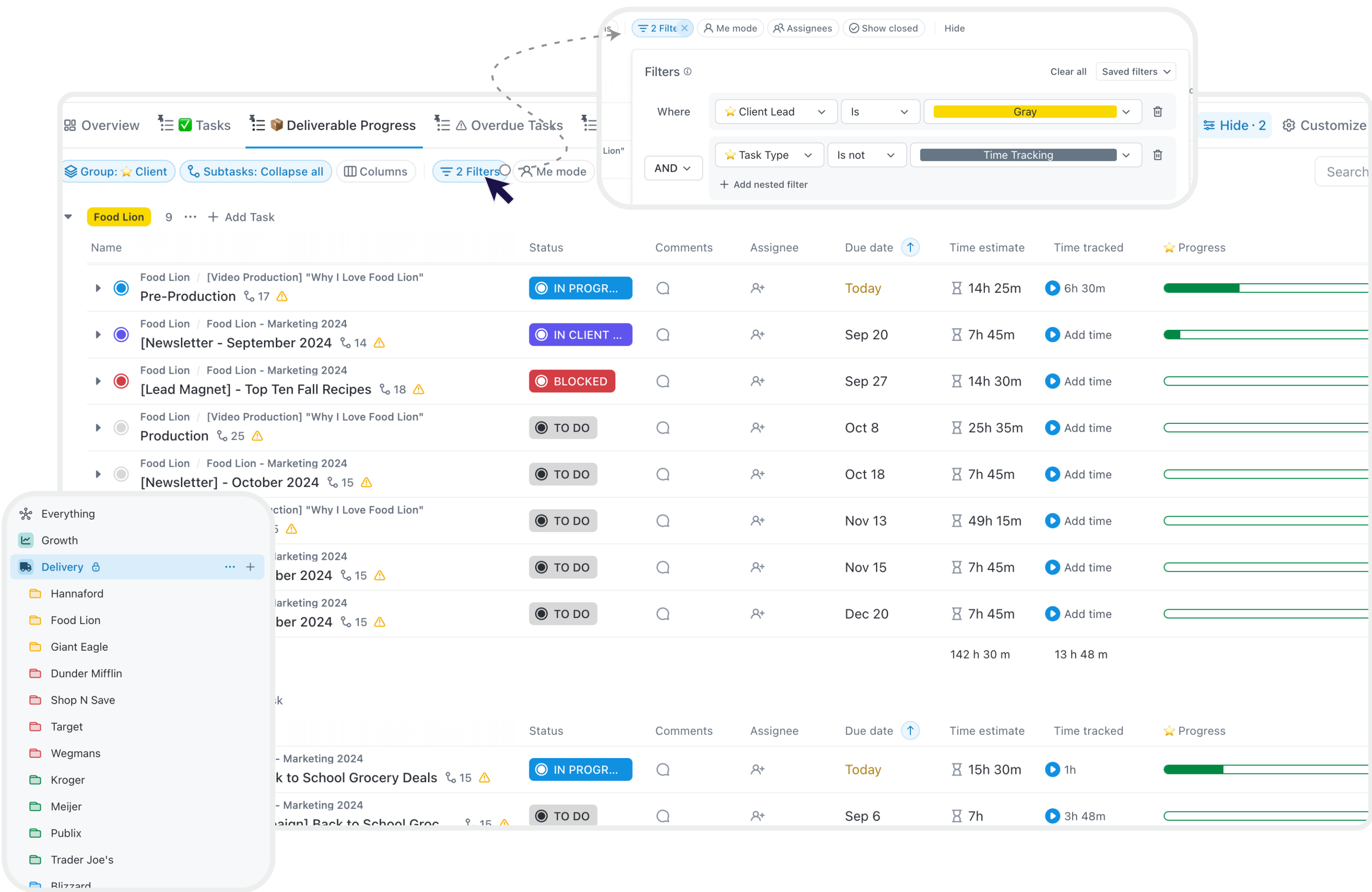


This process saves us a few minutes on the *Task* deployment process. And as you scale, this can save days, if not weeks, of admin time per year!

For an overview of how this process works, watch our video tutorial, **'The Fastest Way to Assign Work in ClickUp'**.

Secondly, we also leverage a 'Client Lead' *Dropdown Custom Field*. This field can be applied to every *Task* that falls within that client lead/account manager's book of business. An account manager may have 10 different clients. Within each of these clients, they have 4-5 different deliverables being worked on, and each client has a team of 5 people.

If an account manager wants to see all of the work across those 10 different clients in one place, you can create a *View* that shows all *Tasks* that have that *Custom Field* applied to it. Instead of that account manager having to navigate through a bunch of *Folders* and *Lists* in ClickUp, they'll have one *View* where all of this is showing.



And this also explains why the *Hierarchy* is important. You can create a *List View* in your 'Delivery' *Space* and see work across multiple Client *Folders*. If your Clients were *Spaces*, it wouldn't be as easy.

And this all applies to ClickUp *Dashboards* too! There are more *Custom Fields* than the two options I just listed out, but those are a few that are extremely helpful to leverage for agencies. For a more thorough overview on *Custom Fields* and the *Fields* we recommend in ClickUp, watch our video tutorial, **'5 Custom Fields You Need in ClickUp'**.

ClickUp Feature #4: Views

Getting your ClickUp infrastructure in place and initial work added in is fun, but configuring *Views* in ClickUp is where things finally start to pay off. Most teams will start by setting up a bunch of random *Views* in their *Workspace*. This is fine, but as you build ClickUp, an overabundance of *Views* with no distinct purpose can overcrowd you *Workspace* and lead to confusion across your team.

And confusion isn't going to help get your team bought in to the platform. This is a big reason why teams fail to successfully implement their project management system. We recommend only building the *Views* you need, and standardizing them across your *Workspace*.

This is exactly why you need to know about *View Templates*. Plus, you can build *Views* in to your *Space*, *Folder*, and *List Templates*. This will save you hours of hard work and headaches if you get your desired *Views* built in to your *Templates*. That way you don't have to go and set up every *View* from scratch!

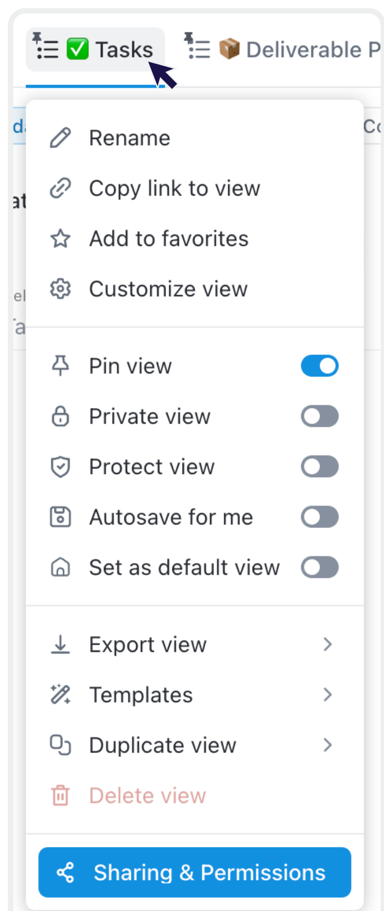
If you're looking for a more thorough guide on *Views*, I recommend you watch our video overview, **'Everything You Need to Know About ClickUp Views'**.

But since you're here, let me give you a few pointers.

Top Tips for ClickUp Views

Tip #1 - Public vs. Private Views

This may not be a tip as much as it is a warning. When *Views* are created, they'll be set as public, unless you choose to make them private (or if you have the *Default Private Views ClickApp* turned on then just disregard that).

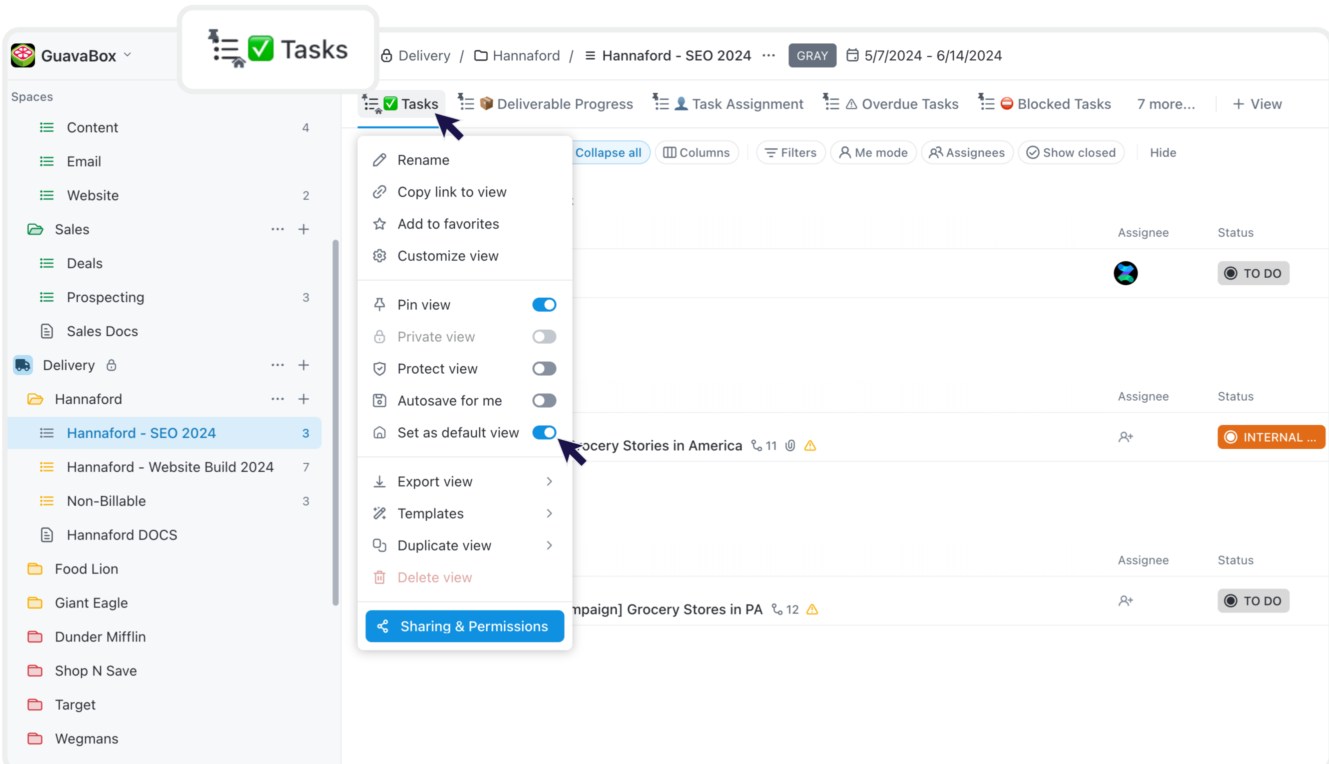


If a *View* is public, this means that everyone in your ClickUp *Workspace* will see this *View*, and can make changes to this *View*. If a change is made to the *View*, everyone will see the changes. However, if you want to restrict people from changing a *View*, you can click on that *View* and toggle on 'Protect view'. This will restrict anyone from editing your beautiful *Views* you created and keep your *Workspace* in check. If a *View* is private, this means that only you can see it. You'll know it's a private *View* when it has a little 'Lock' icon next to the *View*. You can edit, change, and adjust this *View* without anyone else seeing the changes.

Tip #2 - Use "Default for everyone" On Important Views

As mentioned, it's important to keep your *Views* standardized and strategic. But, you can have dozens of *Views* at any location which can be confusing.

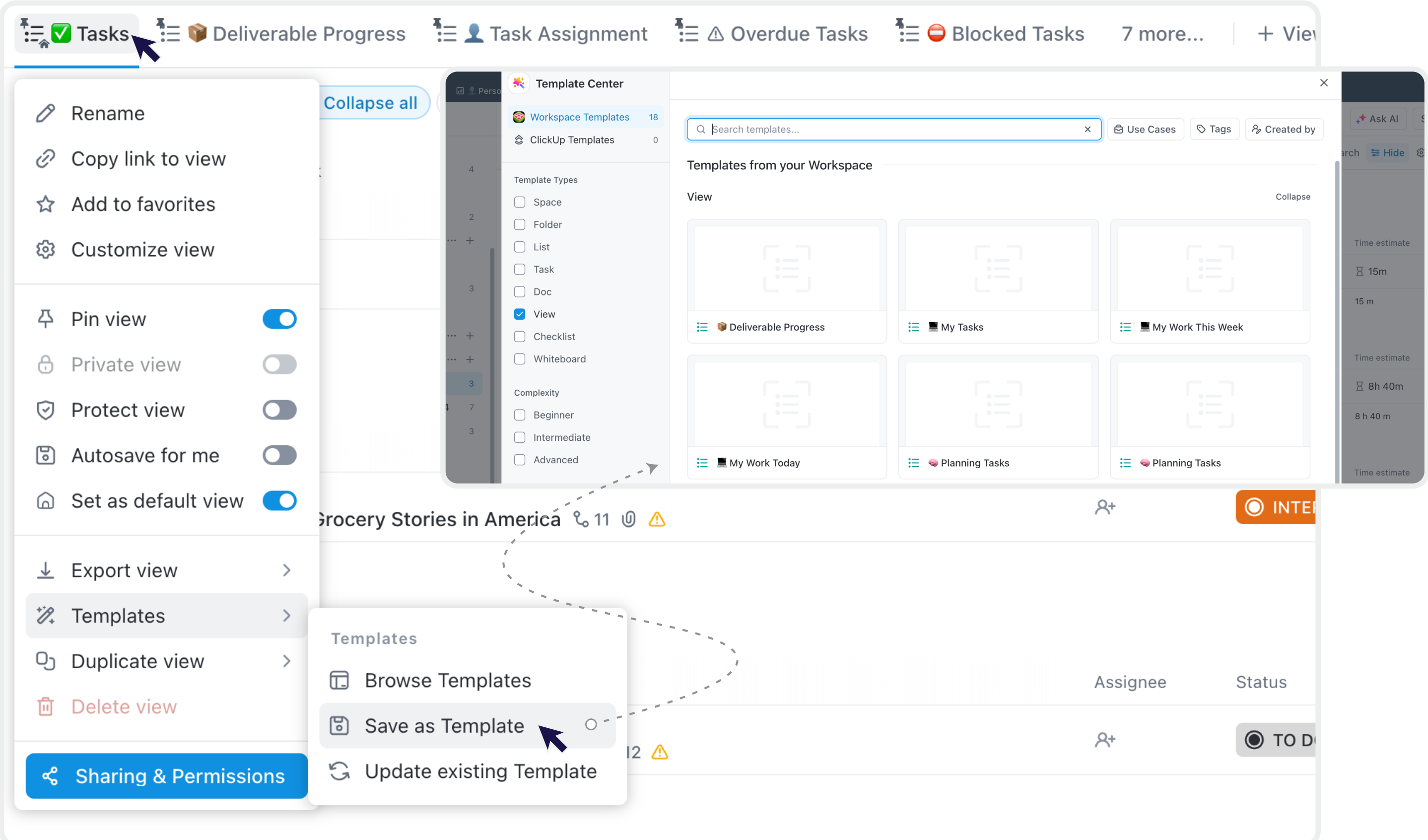
If there is one particular *View* that you want everyone to see when they click on to a *Space*, *Folder*, or *List*, use the 'Default for everyone' setting. This can be found in the *Views* settings, and when toggled on, it'll force everyone to that particular *View* when they navigate to that location.



Tip #3 - Create View Templates

Another way to help keep your *Views* standardized is to use *View Templates*. We'll dive deeper in to the *Views* you'll need for you agency later on, but using *View Templates* makes it much easier to keep your *Workspace* cleaner. And it's extremely easy to save and deploy *View Templates* too.

1. Create your *View* with all the filters, groupings, settings, columns, etc., that you want.
2. Hover over that *View* and right click. Once your *View* settings show, navigate down and click on 'Templates' and 'Save as Template'.
3. Now, if you'd like to deploy this *View* in another location in your *Workspace*, navigate to another *View* and follow the same instructions. Only this time, select 'Browse Templates', and then find your *Template* and click 'Use Template'.

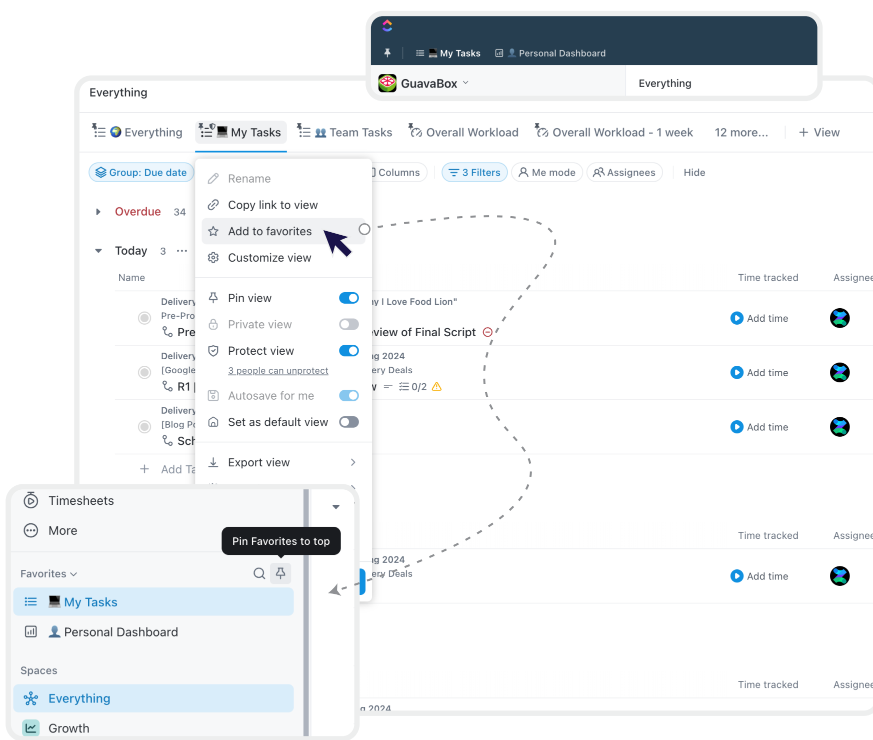


Tip #4 - "Favorite" Your Favorite Views

Lastly, you and your team will have a few *Views* that you'll use on a regular basis. Favoriting a *View* allows you to pin them to the top of your screen like a bookmark.

Here's how to do this:

1. Navigate to your *View* and click on it.
2. Click on the 'Add to favorites' button.
3. Find your *Favorites* in the *Sidebar Menu* above your *Spaces*.
4. Hover over the *Favorites* section and click on the 'Pin to favorites' icon.
5. You'll now be able to easily navigate from *View* to *View* with only a few clicks!

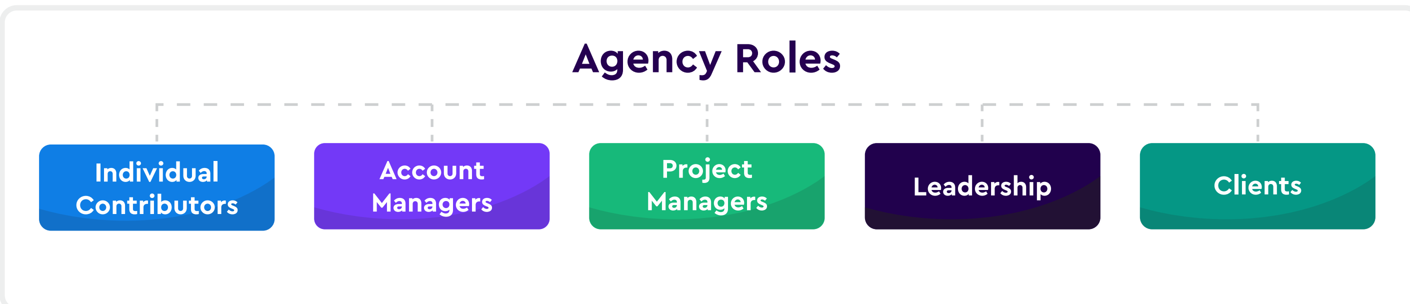


Understanding Views for Each Agency Role

Now, this is the most important part part of creating *Views*. You must keep *Views* simple. And to keep it simple, you need to create specific *Views* for specific roles on the team. Every agency has at least five roles that are each looking for distinct *Views* in their project management system. Thankfully, ClickUp makes it extremely easy to create *Views* and *Dashboards* for these specific team members.

However, though these *Views* and *Dashboards* are easy to create, you need to populate them with real data to make them meaningful. We will jump into that conversation in a few minutes, but for now, let's focus on what ClickUp can bring to the table for each role.

And for a more visual walkthrough of this, refer to our article and video tutorial, '**This Is What Your Agency Project Management System Should Look Like**'.



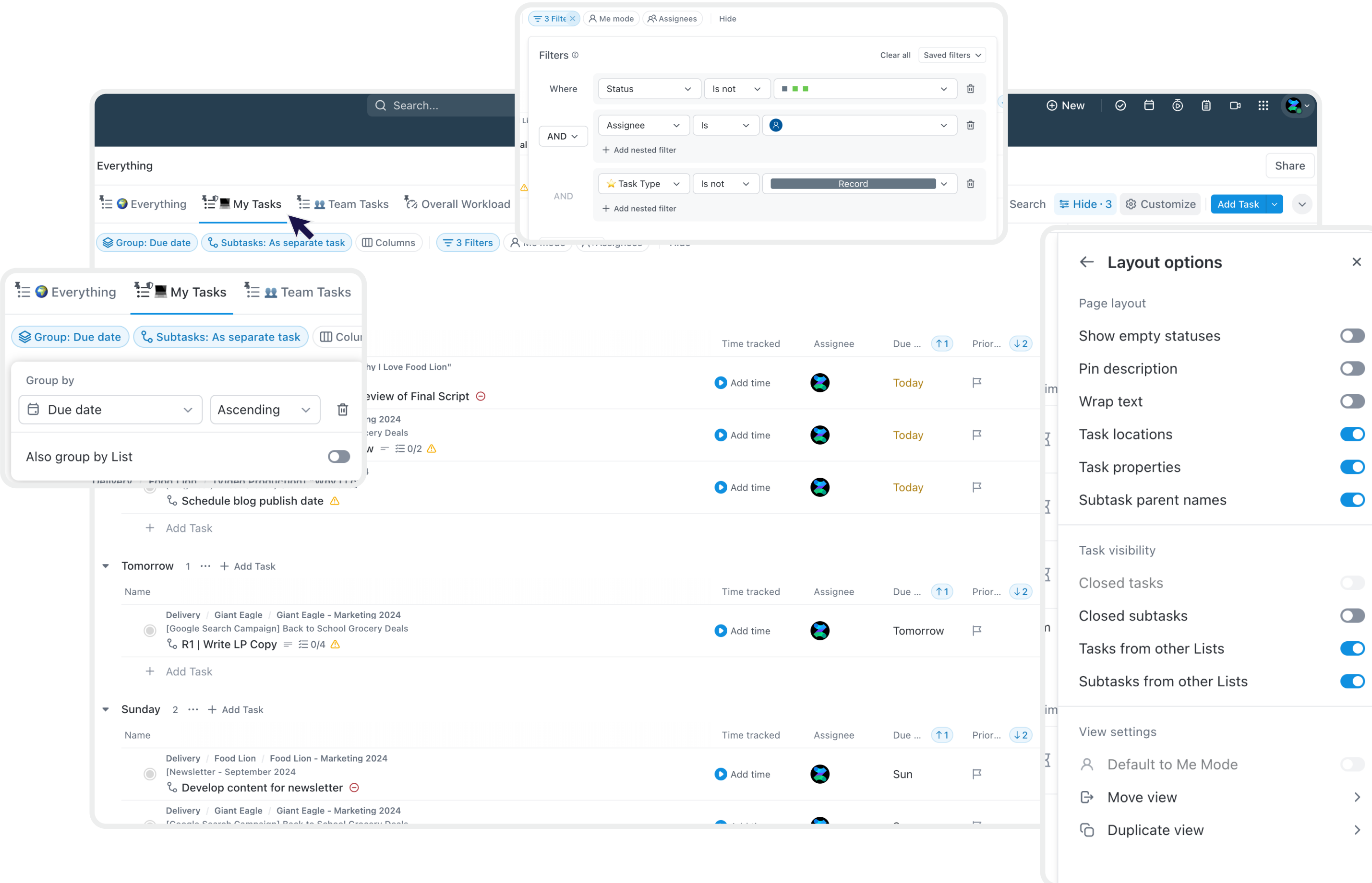
1. Individual Contributors

These are the people who just need to see the work on their plate on a daily basis. For them, having a dedicated place to see just the work that's assigned to them is extremely important. You'll want to build out a dedicated 'My Tasks' *View* for everyone in your *Workspace*. The 'My Tasks' *View* allows me to not only filter out unnecessary *Tasks*, but also add in custom columns, show breadcrumbs and more detailed *Task* locations, and most importantly, only see the *Tasks* that are specifically assigned to me.

To create the 'My Tasks' *View*, you'll want to build one out for each person on your team at the *Everything* level in ClickUp. That way, you can fully customize it with their name, utilize the 'assigned to me' filter so it only shows their assigned work, and really tailor it specifically for their needs.

This *View* can be customized to everyones liking and be turned in to a *Private View* so only they can see it and access it. This is a *View* that you'll want to have saved as a *Template* and make sure everyone *Favorites* it for easy access.

For a deeper dive, watch **'ClickUp for Individual Contributors'**.



2. Account Managers

Next, you'll have account managers who need a broader view of client work. They may have their day-to-day activities that an individual contributor would have as well, but their concerned with more than just what's on their plate.

Account managers should able to easily answer these questions in ClickUp:

1. Where do projects currently stand for each client?
2. Are there any issues I need to discuss with clients?
3. How are we pacing on billable hours/points for each client? Are there any "scope creep" issues looming?
4. Have my clients paid their invoices?
5. What are the results of what we've worked on and how do these line up with our client objectives?

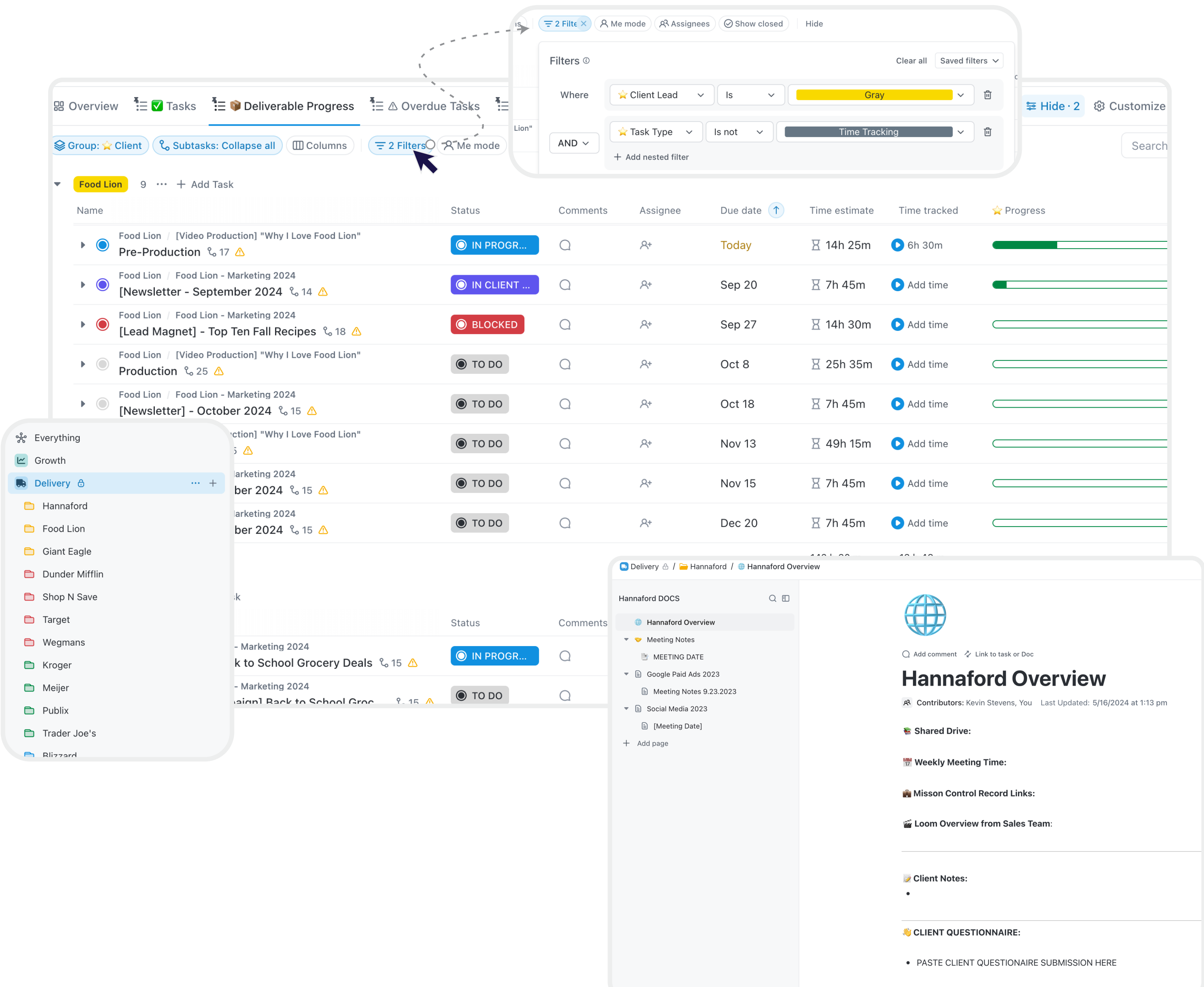
There are a few *Views* to create for this role, but my favorite is the 'Deliverable Progress' *View*.

They don't want to have to go and click into each individual Client *Folder* just to check status. Instead, they need one singular *View* where they can see *Tasks* and deliverables from all of their assigned Client *Folders* filtered into one *View*.

With the *Hierarchy* we discussed earlier in place, I can create a single *View* at the 'Delivery' *Space* that filters for only the *Tasks* relevant to a specific account manager.

Additionally, in ClickUp, you can create *Views* and *Dashboards* to help account managers take notes, track invoices, track client health, and keep tabs on how they're pacing with client budgets.

For a deeper dive, watch **'ClickUp for Account Managers'.**

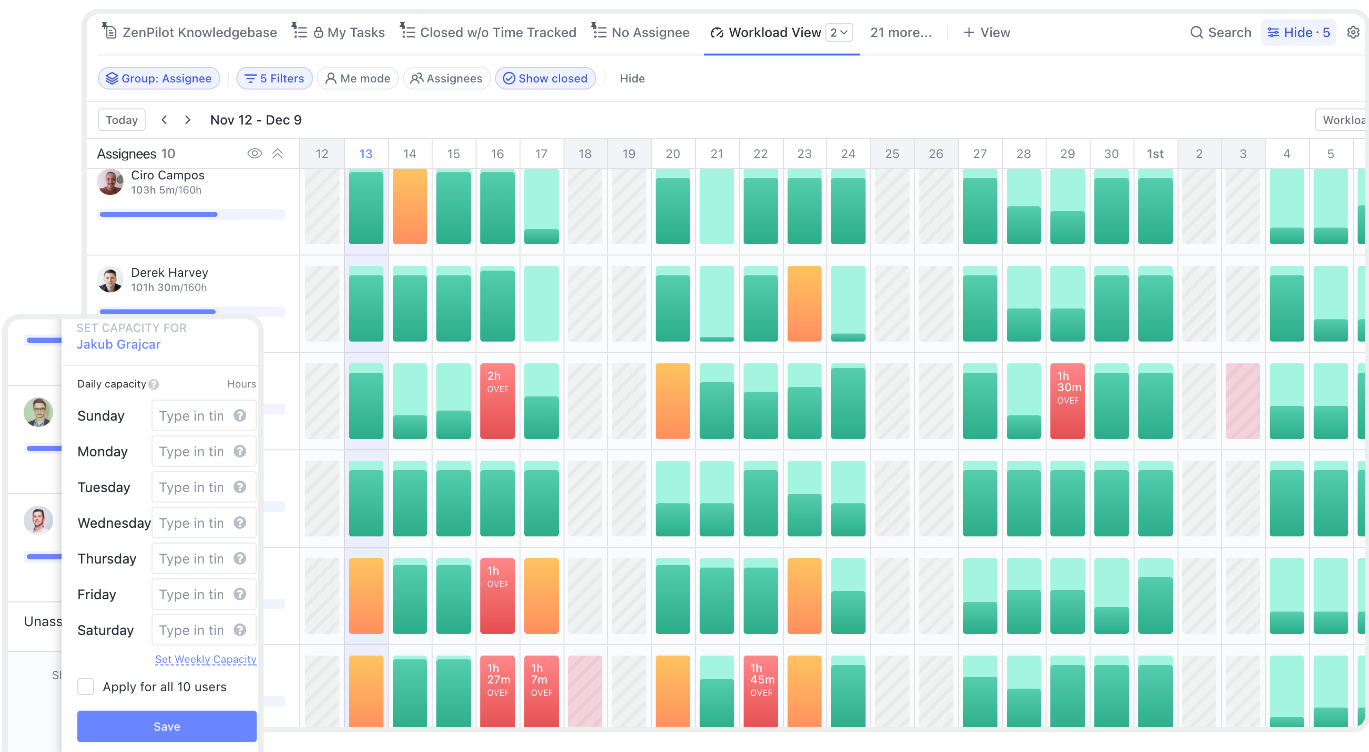


3. Project Managers

Using our ClickUp System, you'll be making the lives of your project managers much easier. Project managers are in charge of setting realistic timelines and deadlines based on capacity, and holding the team and clients to those deadlines. **With ClickUp, we need to make sure its easy for them to:**

1. Get an accurate picture of team capacity and workload.
2. Create and assign new projects easily.
3. Manage projects and timelines on a regular basis—understanding the status of each client project.
4. Adjust timelines when necessary.

Again, there are a few *Views* to create for this role, but my favorite is the 'Workload' *View*. This is one of the most important *Views* for agencies. Every agency needs to know how much capacity their team has to take on another project or just understand if they're way overstaffed. Thankfully, in ClickUp, it's extremely easy to create, but unfortunately, hard to get accurate (that's why you're reading this guide, though! We're here to help 🙂).



You'll want to build your Workload *View* at the *Everything* level in your ClickUp *Workspace*.

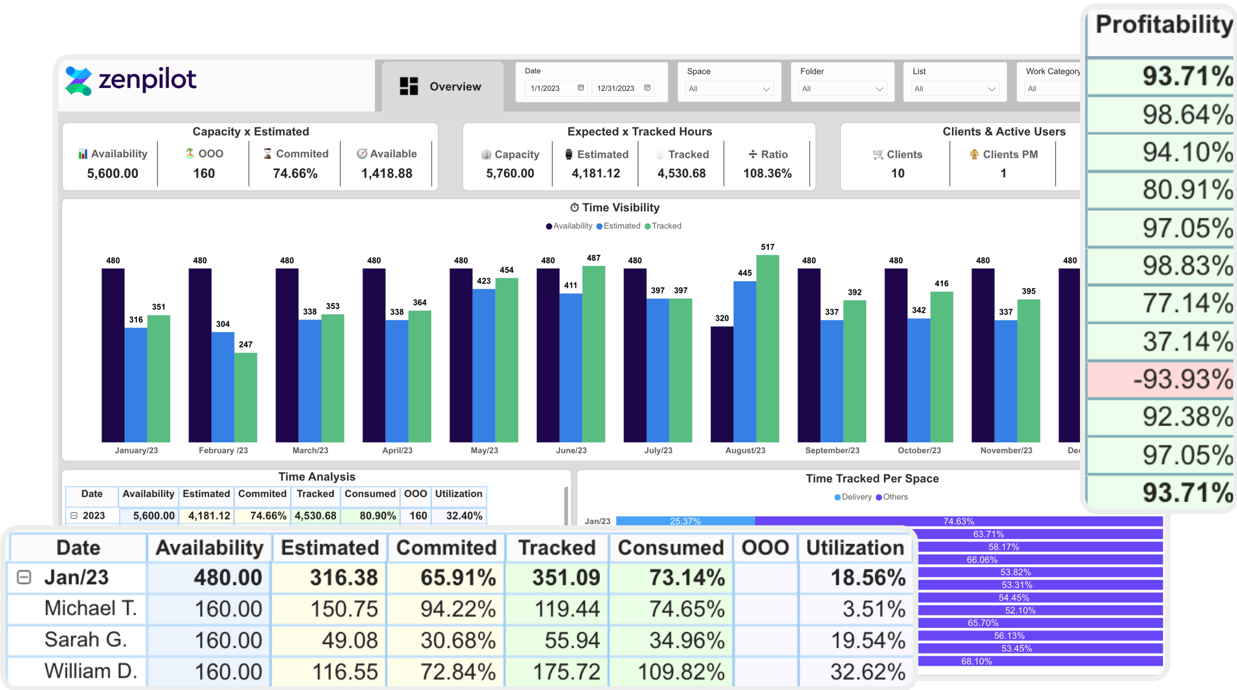
Aside from this *View*, you can also create *Views* and *Dashboards* to help project managers easily create and assign *Tasks*, remap *Due Dates*, and manage project timelines.

For a deeper dive, watch **'ClickUp for Project Managers'.**

4. Leadership

Now, hopefully your leadership team isn't as much in the weeds as your other team members are with client work. You should be building a system that gives your leadership team a fantastic 30,000-foot view of the business. **This comes down to understanding and being able to answer key questions that'll drive the health of the business forward:**

1. How profitable are our clients and projects?
2. How utilized is our team?
3. What's the overall health of our client relationships?
4. How is our team performing?



In ClickUp, you can create custom *Dashboards* that pull data from your projects and tasks to visualize key metrics around profitability, utilization, team performance, and client health.

For a deeper dive, watch **'How to Track Profitability and Utilization in ClickUp'.**

> **"After ZenPilot and ClickUp helped us gain full visibility into our production resources, we've been able to increase utilization by 29% which has been a huge win for our team."**
>
> **Nate End**
>
> *COO, Trinity Insight*

BONUS: Your Clients

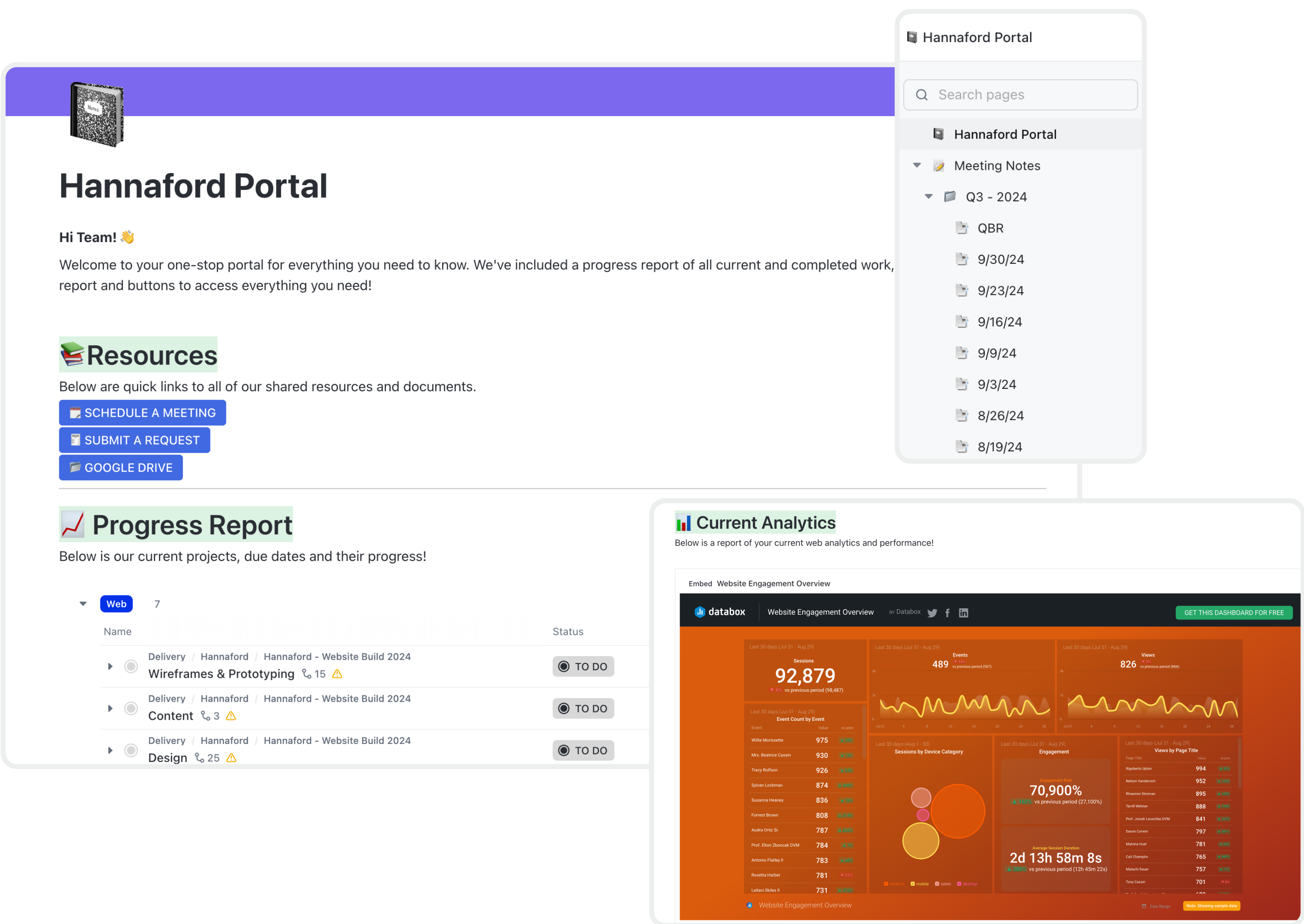
Yes, your clients need to know what's happening as well. Plus, if you want them to provide feedback and complete their work, you'll want to make sure they have visibility.

While clients may not directly use ClickUp (though they can if you'd like!), it should be able to generate reports or Views that answer their key questions:

1. What work has been completed since our last meeting?
2. What were the results of that work?
3. What did we learn?
4. What's the plan moving forward?

ClickUp makes it extremely easy for you to create a client *Dashboard* or portal to show them the work you've done for them, the work you're doing for them, and the results.

For a deeper dive, watch **'How to Create a Client Portal in ClickUp'.**



ClickUp Feature #5: Statuses

ClickUp ships with a number of *Status* options. Most teams make the mistake of creating different *Statuses* for every team, department, or project. This can become a nightmare. My advice—you need to standardize these across *Spaces* and don't deviate once you've settled on the system that works for your workflow.

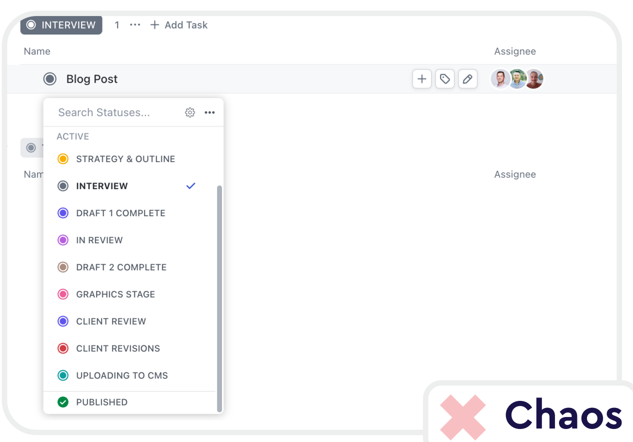
Most Teams Make Two Big Mistakes With ClickUp Statuses

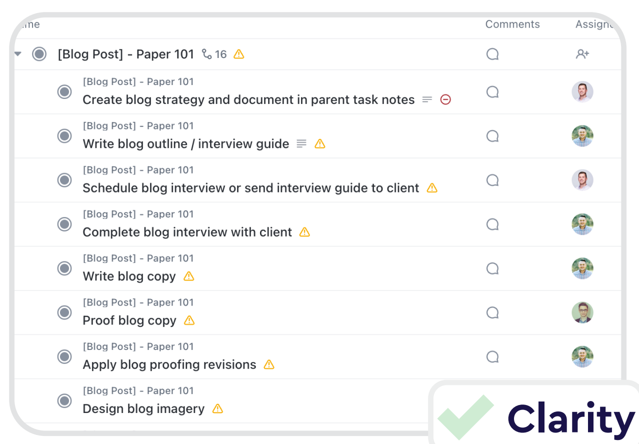
❌ Statuses become the source of truth for what step a project is on

Earlier, I recommended a *Parent Task* and *Subtask* structure that will pass work back and forth. Additionally, that structure will show and tell everyone that we just completed the first draft of our blog post or we sent the blog to our client.

But in reality, most teams build one *Parent Task*, assign a few people to it, and use the *Status* to show what stage or what step a project or deliverable is in. This will make work slip through the cracks, you'll lose workload visibility, and nobody will know who is in charge of what.

We'd recommend that 99% of the time, a status is either *To-Do* or *Complete*. Again, keep it simple. Your team will thank you for it (especially your project managers). And you'll thank yourself for it.





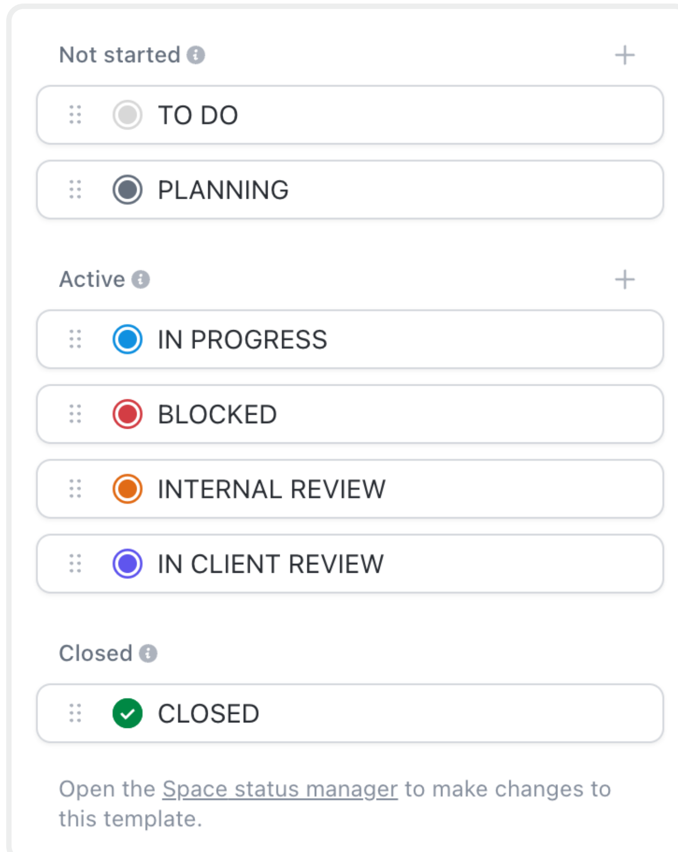
❌ Statuses are different for every department, team, and work category

Secondly, inconsistent or different *Statuses* will become a nightmare when you create *Dashboards* or *Views*. It's hard to fully explain this right now, but feel free to experiment by creating different *Statuses* at every *Space* or *Folder*. Now, navigate to the *Everything* or *Workspace* level, create a *View*, and try to *Filter* or *Group* by *Status*. It's not easy... Don't do it. Keep it simple. You'll thank me later.

To be honest, the keys to *Statuses* that work (i.e., are actually used and updated consistently by your team) are:

1. **Simple.** Keep them as simple as possible while still providing valuable information with a quick glance.
2. **Training.** Train the entire team on exactly what each *Status* means and how it should be used.

Here's our default set of agency Statuses:



Not Started:

1. **Planning.** This is used for configuring projects and planning work before launch (a backlog status).
2. **To Do.** The *Task* is scheduled and ready to be worked on.

Active:

1. **In Progress.** Work has begun on this *Task*.
2. **Blocked.** The *Task* is blocked by an unforeseen delay, usually on the client side, that needs to be resolved before work can move forward.
3. **Internal Review.** The initial work has been completed and the *Task* is waiting on feedback or approval from an internal team member.
4. **Client Review.** The initial work has been completed, may have been reviewed internally, and has been shared with the client for review.

Closed:

1. **Closed.** The *Task* or *Subtask* work has been completed.

These all ship with standard definitions and training so all current and future team members know exactly why, when, and how to use each *Status*.

Checkpoint - **Understanding ClickUp**

At this point in your implementation, you should have:

- [ ] **Agency Work Organization →** A general understanding of how work is best organized for agencies and how it's reflected in ClickUp.
- [ ] **ClickUp Hierarchy →** A general understanding of ClickUp's *Hierarchy* - *Workspace*, *Space*, *Folder*, *List*, *Parent Task*, *Subtask*, and *Checklist*.
- [ ] **Views →** A general understanding of how *Views* work in ClickUp and the roles you'll be building *Views* for.
- [ ] **Custom Fields →** A general understanding of how and when to use *Custom Fields* in ClickUp.
- [ ] **Task Statuses →** A general understanding of *Task Statuses* in ClickUp. Keep these consistent!
- [ ] **Templates →** A general understanding of ClickUp *Templates*, how they work, and how we'll use them to boost productivity in Clickup.

As you've probably noticed, as I've given you a rather thorough walkthrough (though I really haven't even scratched the surface) of some of the core ClickUp features, ClickUp is a blank canvas and extremely customizable. **This is exactly why we start every implementation with a 'Design' phase.**

You need to have the system designed (*Hierarchy*, *Custom Fields*, *Views*, *Integrations*, *Workflows*, *Automations*, etc.) first. Otherwise, everything else could fall apart. That being said, I want you to pocket everything we just walked through because now it's time to start walking through our proven implementation process to get your *Workspace* finally set up for your team.

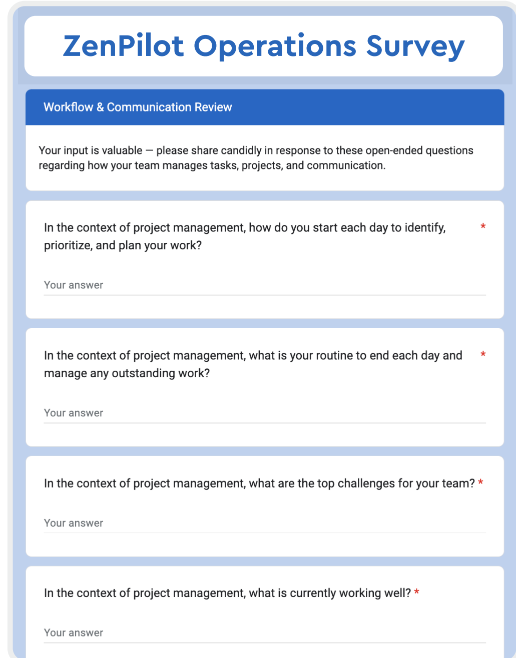
PHASE 1

Design

Understand Your Agency Problems

With a basic understanding of how ClickUp operates, it's time to dive into the work at hand. To begin, it's crucial to gain a comprehensive understanding of your agency's primary areas of friction and discomfort. We suggest starting by surveying your team to achieve this goal. **Craft a survey that ask questions like:**

- How do you start each day to identify, prioritize, and plan your work?
- What is your routine to end each day and manage any outstanding work?
- What could be improved when it comes to your teams communication habits?
- What's working well and not well for your team?



ZenPilot Operations Survey

Workflow & Communication Review

Your input is valuable — please share candidly in response to these open-ended questions regarding how your team manages tasks, projects, and communication.

In the context of project management, how do you start each day to identify, prioritize, and plan your work? *

Your answer

In the context of project management, what is your routine to end each day and manage any outstanding work? *

Your answer

In the context of project management, what are the top challenges for your team? *

Your answer

In the context of project management, what is currently working well? *

Your answer

Ensure that the survey is anonymous, if necessary, so that team members can provide honest feedback without fear of negative consequences. You can also schedule one-on-one meetings and host all-hands meetings to gain more insights. Opening up multiple avenues for feedback serves all personalities at your agency. **Secondly, assess your current operation. Focus on these 7 key areas:**

1. **Services & Methodology.** What are your primary service lines and how do you structure client engagements?
2. **Tools & Communication.** What project management, time tracking, and budgeting tools do you currently use?
3. **Resource Management.** How do you manage forecasting and capacity planning?
4. **Account Management.** Does your team have a standard meeting frequency, agenda, and follow-up process in place?
5. **Project Management.** Who has the ability to add, manage, and adjust tasks in your current project management platform?
6. **Internal Knowledge Sharing.** How many deliverables and projects are supported by documented processes within your organization?
7. **Contract Tracking & Reporting.** What is your current process for tracking budgets for clients?

From both your team's and leadership's perspectives, you can create an excellent document outlining the issues, challenges, pain points, and objectives.

Audit Your Current PM and Processes

Now, it's time to thoroughly examine your current project management system and processes. Take a closer look at your existing setup with your team, particularly your project and account managers.

Identifying the root cause of friction is critical.

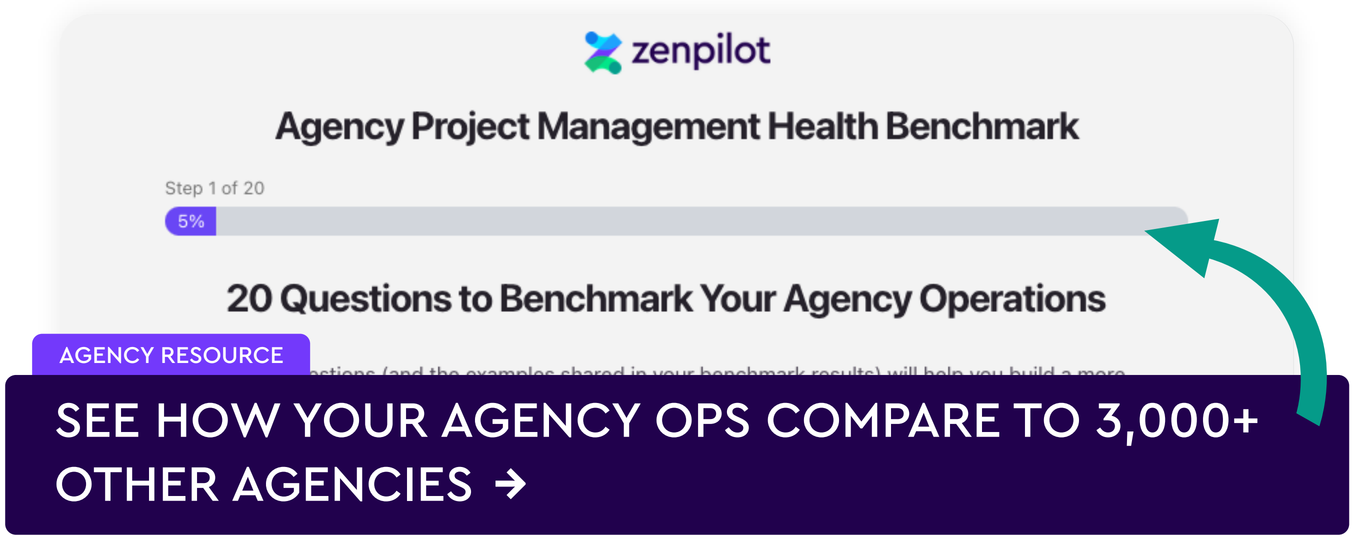
- Is it a technology issue?
- a process problem?
- or misaligned team expectations?

Blaming technology is the typical excuse, but it's often not the real problem. More frequently, agencies lack predefined processes and healthy work habits, leading to a disconnect in technology usage.

Remember, a project management system solves nothing on it's own.

To effectively address your pain points, start by documenting them and categorizing them. Prioritize the issues that matter most to you and your team and solve for those. If you're unsure about how your current operation stacks up against industry standards, don't worry. You can benchmark yourself against 3,000+ other agencies using our free **Agency Project Management Health Benchmark**. This 20-question survey will provide you with a unique result that you can compare to our benchmark database to see how your agency is performing.

Ultimately, you need to get clarity on the outcome you truly want and understand what's actually holding you back from achieving that outcome.



Identify Key Processes and Prioritize

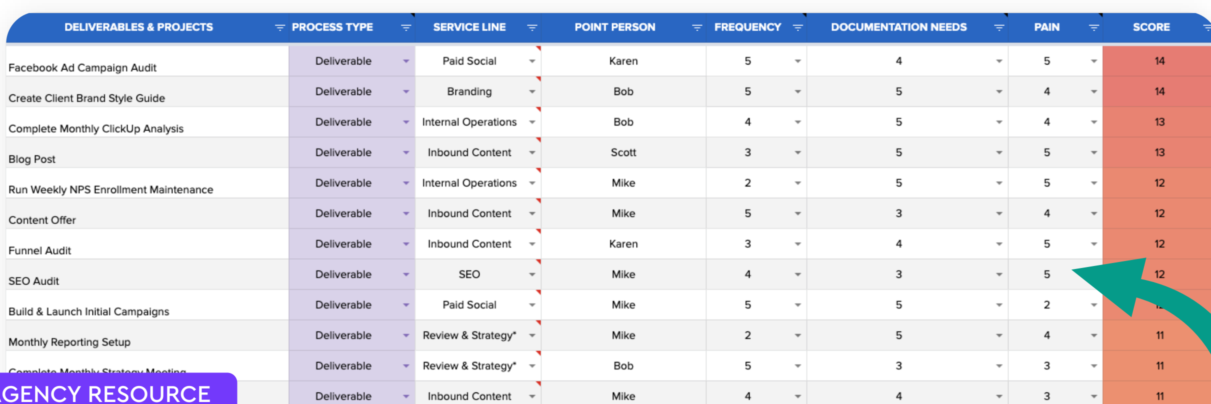
Once you have conducted a comprehensive assessment of your operations, it is time to take a break and understand all the services you offer to your clients.

For successful implementation, agencies must have well-defined playbooks and processes. If you're relying on your team to just spin up random tasks without your proven process for what makes your agency unique, successful, and able to drive results for your clients, you'll deliver extremely inconsistent work and results for your clients. And inconsistent work and results leads to frustrated clients, frustrated team members, and ultimately, churn. We don't want that.

And yes, you may be a bit intimidated now that we're telling you you'll need to document your processes to make this implementation successful. Process documentation is hard work. This is why it is crucial to prioritize what needs to be developed first. And maybe this will also encourage you to niche down a little and not try to do everything for everyone 😉. Not that you do, but I have seen that a lot before.

I recommend that you bring your team together, identify the core functions of your business (marketing, sales, operations, etc.), and evaluate your agency's current strengths and weaknesses. This will provide you with the necessary data to create a proper roadmap.

Additionally, begin by listing everything you do for clients. Then prioritize it based on how difficult it is, how much documentation you have on it, and how frequently you perform it (you can use our 'Process Prioritization Worksheet'). This will give you an excellent starting point for determining which processes should be developed first. Do not worry about building anything yet; that will come soon.



DELIVERABLES & PROJECTS	PROCESS TYPE	SERVICE LINE	POINT PERSON	FREQUENCY	DOCUMENTATION NEEDS	PAIN	SCORE
Facebook Ad Campaign Audit	Deliverable	Paid Social	Karen	5	4	5	14
Create Client Brand Style Guide	Deliverable	Branding	Bob	5	5	4	14
Complete Monthly ClickUp Analysis	Deliverable	Internal Operations	Bob	4	5	4	13
Blog Post	Deliverable	Inbound Content	Scott	3	5	5	13
Run Weekly NPS Enrollment Maintenance	Deliverable	Internal Operations	Mike	2	5	5	12
Content Offer	Deliverable	Inbound Content	Mike	5	3	4	12
Funnel Audit	Deliverable	Inbound Content	Karen	3	4	5	12
SEO Audit	Deliverable	SEO	Mike	4	3	5	12
Build & Launch Initial Campaigns	Deliverable	Paid Social	Mike	5	5	2	[illegible]
Monthly Reporting Setup	Deliverable	Review & Strategy*	Mike	2	5	4	11
Complete Monthly Strategy Meeting	Deliverable	Review & Strategy*	Bob	5	3	3	11
[illegible]	Deliverable	Inbound Content	Mike	4	4	3	11

AGENCY RESOURCE

FIND OUT WHERE YOUR AGENCY PROCESS GAPS ARE →

The Finished Product

Finally, prior to diving into ClickUp, you need to first sketch out a technical blueprint.

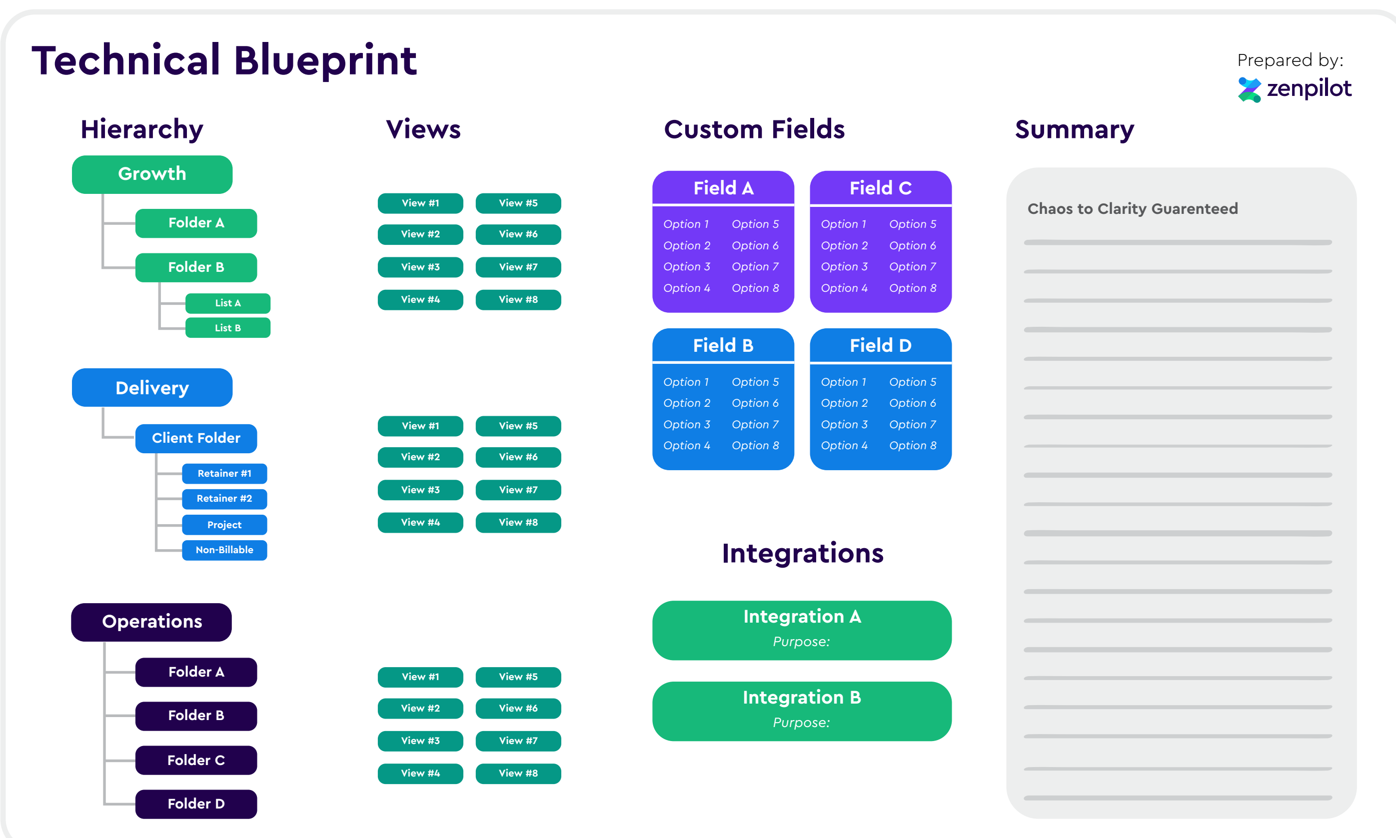
Your blueprint is a detailed map of your ClickUp *Hierarchy*, *Views*, *Custom Fields*, *Automations*, *Integrations*, and resourcing flow.

We recommend drawing this out in Miro, Lucid, or in a ClickUp *Whiteboard*. This will help you and team visualize, understand, and implement it.

Most importantly, you need to have an organized structure for you Client *Folders*.

Make sure you document your agency 'Service Lines' and 'Delivery Roles' too. Understanding both of these elements will help you populate *Custom Fields*.

And remember, if you want an agency operations expert to create a detailed technical blueprint for you, **book a call with us and let's get started**.



Checkpoint - **Design**

At this point in your implementation, you should have:

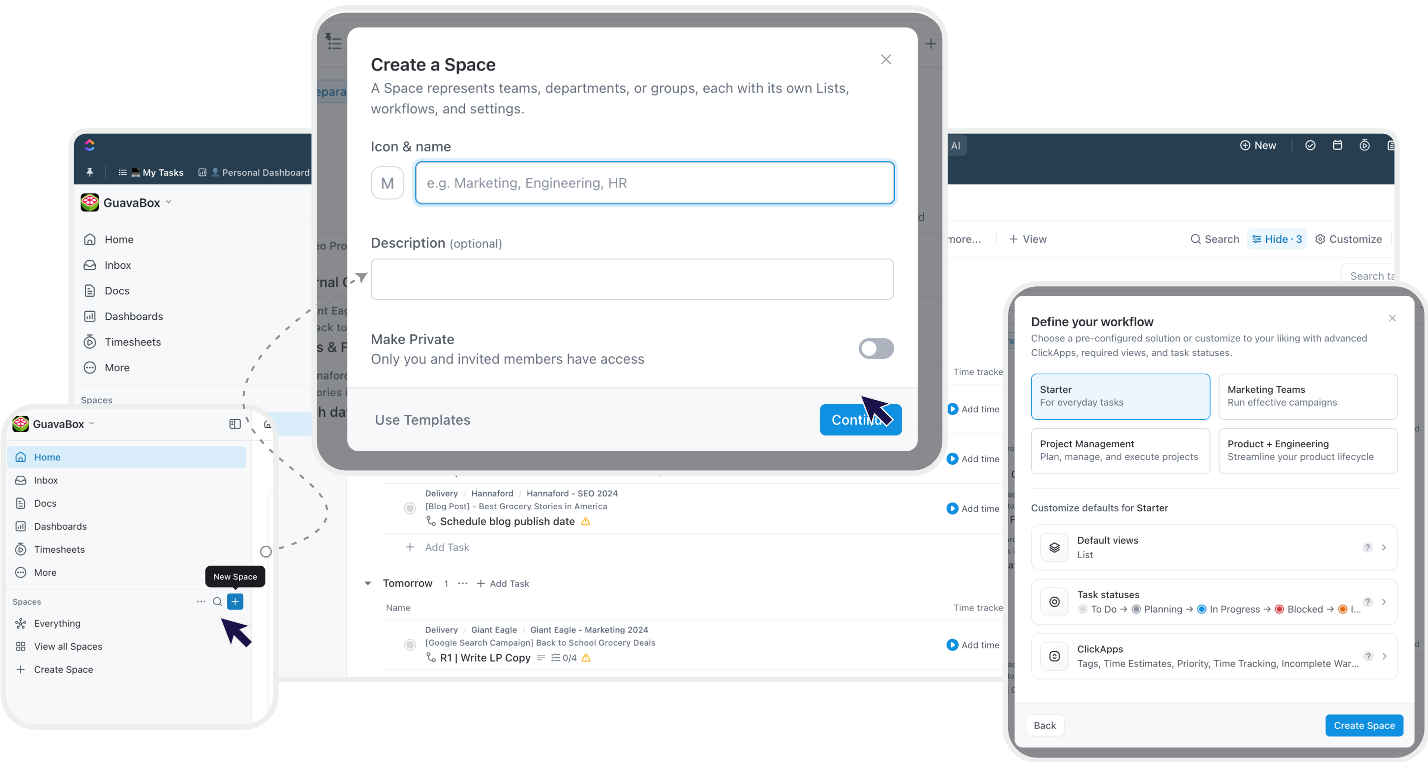
- [ ] **Pain Points & Problems →** A full understanding of your agencies pain points and problems.
- [ ] **Team Survey Results →** Responses from all of your team members from a brief survey on their thoughts. Your team needs to have some input in this process.
- [ ] **Process Prioritization →** A list of all of your deliverables and projects that you do for clients. Who is the process lead? What service line is it apart of? Is this process needed for launch?
- [ ] **Hierarchy & Structure →** A diagram of your *Spaces*, *Folders*, *Lists*, *Views* and *Custom Fields*. This can be adjusted as you go, but it's good to have an intial framework.
- [ ] **Service Lines →** A list of your agencies service lines.
- [ ] **Delivery Roles →** A list of your agencies delivery roles.
- [ ] **Integrations →** A list of potential and needed integrations with ClickUp to make sure your tech stack communicates.
- [ ] **Goal →** A clearly defined goal for what success looks like with this implementation.

PHASE 2

Build

Build The Structure

Now that you've identified current challenges, pinpointed process gaps, designed your system, and thought strategically about how your work will be organized in ClickUp, you can start building everything out. We'll begin by building out the main structure—*Hierarchy*, *Views*, *Custom Fields*, *Integrations*, etc.—before we add any work in to the platform. Remember, our recommendation is that you have three main *Spaces*—Growth, Delivery, and Operations—to organize work at your agency. We'll build out a few other *Spaces* later, but we need to start there.



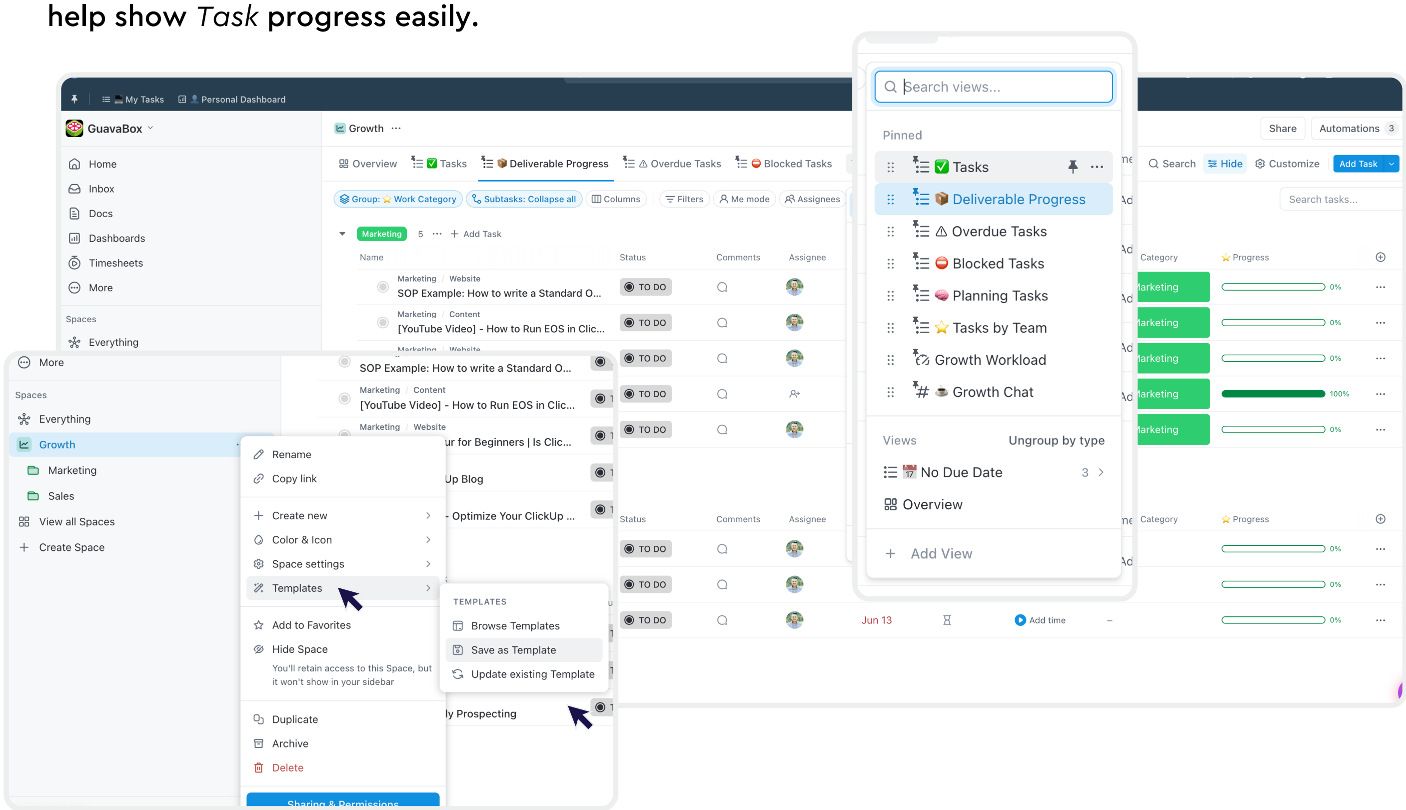
You'll begin by creating your first Space. The workflow is fairly straightforward:

1. Hover over the '+' icon next to *Spaces* and click it to begin creating a *Space*.
2. Enter your desired *Space* name and description (let's start by building your 'Growth' *Space*) and adjust the *Space* color and avatar.
3. Choose whether to make it private or public to your whole team. I'd recommend just keeping this public for now. You can change it later if necessary.
4. Select your preferred *Statuses*. You can leverage our *Statuses* as I mentioned earlier. And you can create a *Status Template* if you'd like, but keep these simple!
5. Toggle on important *ClickApps* like *Time Tracking* or *Time Estimates*.
6. Add in any required *Default Views*. You can just start with a *List View*. We will customize these later on.
7. Click 'Create Space' to finish.

Now, once that *Space* is created, you can begin customizing it by adding a few *Views*.

There are many Views that you can create, but here are a few I'd recommend creating right out of the gate:

1. **Tasks.** This is a basic *List View* that shows *Tasks* that still need to be complete for this client. This is often the 'Home Base' and you can 'Set as default view'.
2. **Overdue Tasks.** This is a *List View* that shows all of the *Tasks* that are overdue.
3. **Workload.** This is a *Workload View* that shows your teams workload.
4. **Blocked Tasks.** This is a *List View* that shows all of the *Tasks* that are blocked.
5. **Deliverable Progress.** This is a *List View* that only shows *Parent Tasks*—deliverables or milestones—and the progress of those *Tasks*. You can use the 'Progress (Auto)' *Custom Field* to help show *Task* progress easily.



Once you've got your main *Space* structure nailed down, you can either save it as a *ClickUp Template* or just find the '...' next to your *Space* on the left-hand menu and click 'Duplicate'. Duplicate your *Space Template* at least three times so that you have your 'Growth', 'Delivery', and 'Operations' *Spaces* ready to go.

You can follow a similar process to set up your *Folders* in your 'Growth' and 'Operations' *Spaces*, but I want you to hold off on setting up your *Folders* in your 'Delivery' *Space* for now—I've got a great shortcut for those.

Integrate Your Tech Stack

Aside from just setting up your ClickUp, it's important to determine what other tools need to communicate with ClickUp as well (e.g., HubSpot CRM, Harvest or Everhour, Typeform, Slack, etc.).

You don't need to have all of these ready to go on day one. You can add more as you go, but it is helpful to have everything plugged in to start building that single source of truth and cohesive tech stack that will make your agency a well-oiled machine.

I'm not going to go into crazy detail on each of the integrations that ClickUp offers because there are thousands, but the Slack and HubSpot integrations are a few of my favorites.

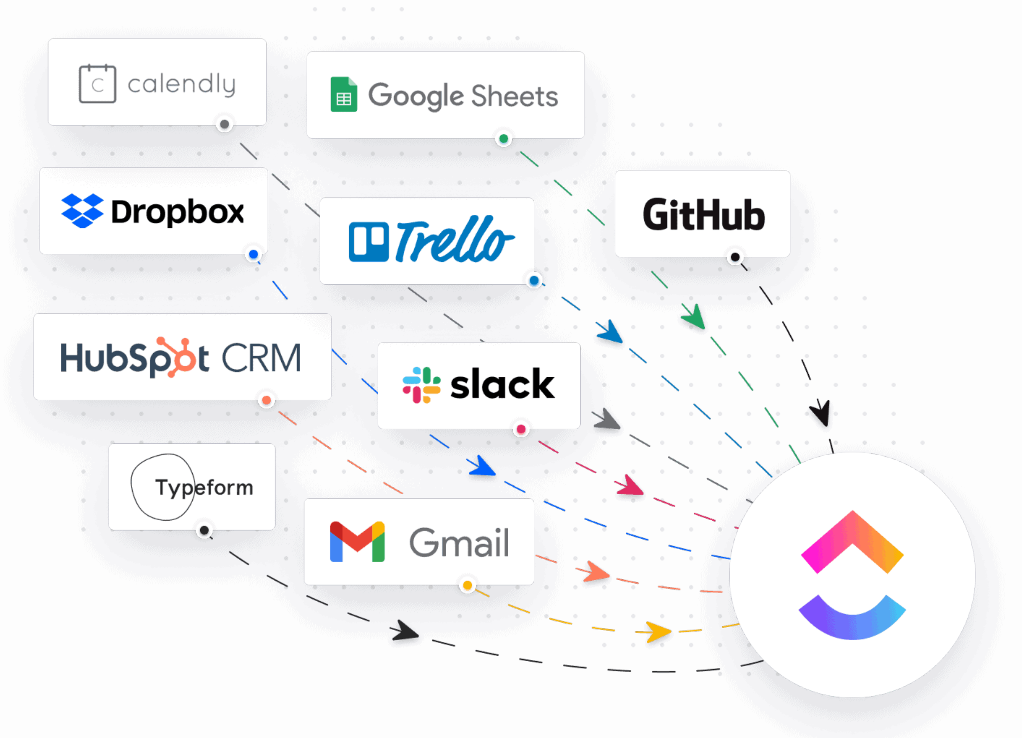
Here's a video tutorial that shows you how to integrate ClickUp and HubSpot.

Here's a video tutorial that shows you how to integrate ClickUp and Slack.

And don't feel limited by just their native integrations, either. You can use ClickUp's API or tools like Make and Zapier for some more advanced functionalities. For example, we've used Make to sync invoice records from QuickBooks and Xero to ClickUp for easy invoice management.

Once you feel like you've connected your tech stack, based on what you sketched out in your blueprint, it's time for my favorite and probably the most important part of the process—process building.

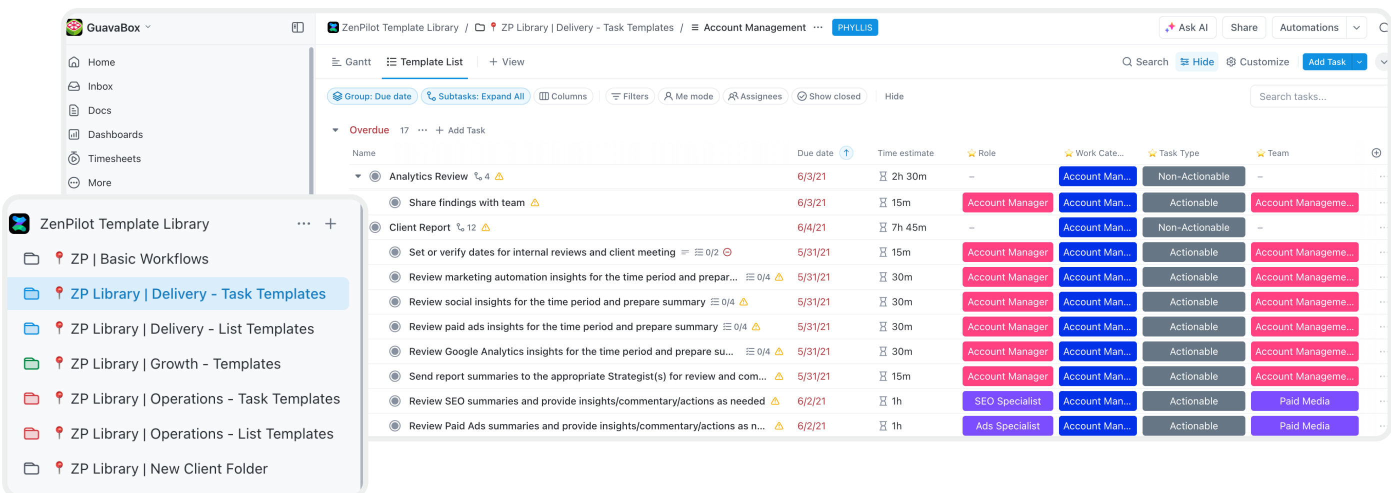
And remember, if you need help integrating your tech stack to build a single source of truth, **book a call with my team.** We can help.



Build Your Processes, Then Save as Templates

One of the most important steps in any project management platform implementation is building out your processes in the tool. Most agencies want to skip toward the end and just get their team in the tool. Don't. Remember, a project management platform (yes, even ClickUp) solves nothing on its own. If you jump ahead, you'll risk everything falling apart.

You should have already identified and prioritized all of your processes. If not, take a step back and complete that before moving into process building. You won't have time to build everything out all at once, so start with what's most important and necessary for launch.



As discussed earlier, ClickUp has an amazing *Template Center* feature within the tool, but you'll need to get all of your processes built out first before this can become effective. The first step will be building your agency's greatest asset—your 'Template Library'

Your 'Template Library' will be a dedicated ClickUp *Space* to house all of your ClickUp *Template* source files.

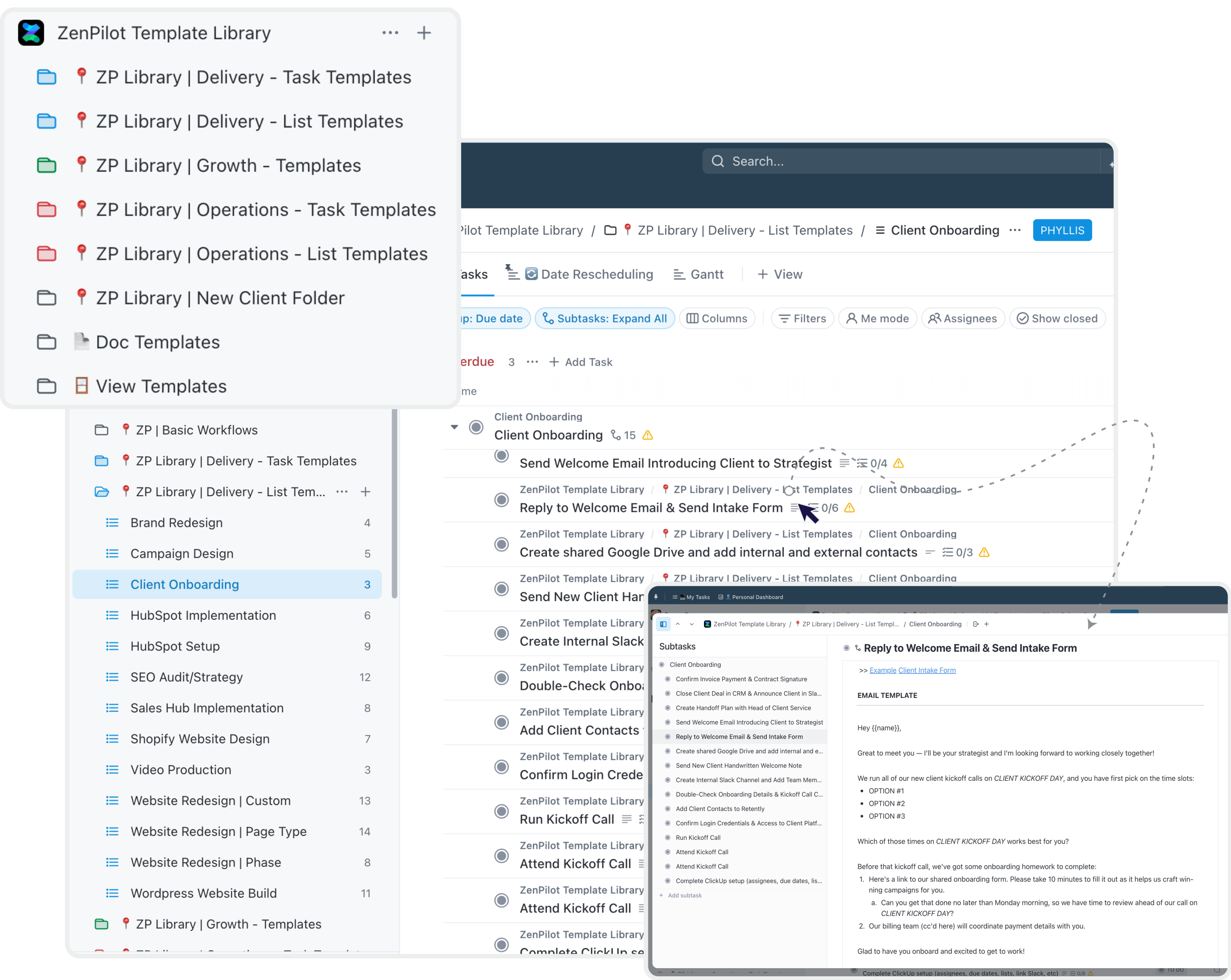
> **"The framework for setting up our processes and executing them was phenomenal. This was the missing piece. Yes, ClickUp provided the technology, but we had never sat down and written out our processes step-by-step. The process that ZenPilot provided for process building was a game changer for us."**
>
> **Matt Guevara**
>
> *Founder, Venn Digital Marketing*

Why Should You Create a ClickUp 'Template Library'?

I'll be honest, the biggest limitation to the ClickUp *Template Center* is the inability to edit *Templates* directly in the *Template Center*. Once a *Template* is saved, you cannot edit it unless you have the source file for that *Template* built somewhere in ClickUp—hence the reason for the 'Template Library'.

Having these *Template* source files on hand makes updating and maintaining *Templates* easy. Your *Templates* should never be static. You'll be updating them regularly. Especially in today's world, things change, and this has an impact on our processes.

If you're brand new to ClickUp, or just new to using *Templates*, this might not mean much right now, but when you have 20, 50, or 100+ *Templates*, you'll realize why I'm telling you to build this out now. Overall, invest time upfront to build your dedicated 'Template Library' *Space*.

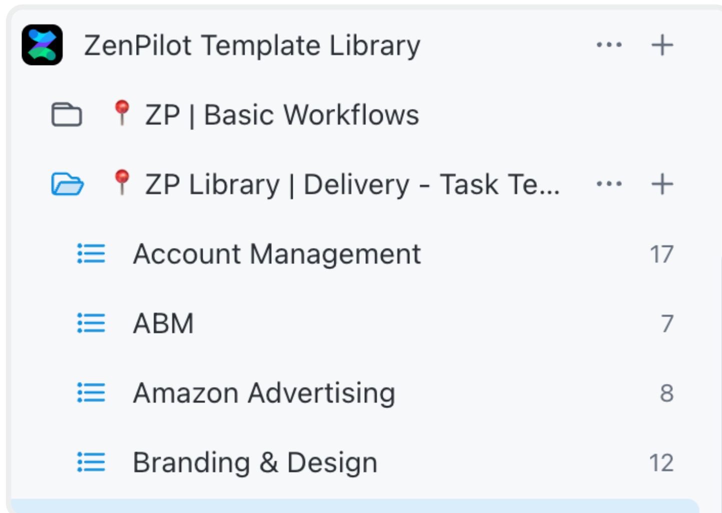


Why Should You Create a ClickUp 'Template Library'?

Your 'Template Library' should contain a logical *Folder* structure to organize your process *Templates*. We suggest your *Templates* are organized by department, work category, and the type of *Template* that it is. We'll mainly be leveraging *Task*, *List*, and *Folder Templates*, but also using some *Views* and *Documents*.

[Space] Template Library

- [Folder] Delivery Task Templates
- [Folder] Delivery List Templates
- [Folder] Growth Task Templates
- [Folder] Growth List Templates
- [Folder] Operations Task Templates
- [Folder] Operations List Templates
- [Folder] New Client Folder Template
- [Folder] View Templates
- [Folder] Document Templates



Then within those high-level *Folders*, create additional organization based on work categories or service lines for your delivery *Templates*.

For example, under the 'Delivery Task Templates' Folder you could have:

- [List] SEO
- [List] ABM
- [List] Email
- [List] Account Management

Each one of these *Lists* would then host all of the deliverables related to that work category.

For example, underneath the 'Email' List, you could have:

- [Task] Newsletter
- [Task] Drip Campaign
- [Task] Promotional Email

Each of these would contain the *Subtasks* needed to complete that deliverable, but more on that in just a moment. Now, after you've prioritized the processes that you need to build and designed your 'Template Library' *Space* it's time to start building your processes in ClickUp and saving them as *Templates*.

The Three Template Types That Will Power Your Agency

1) Task Templates - Deliverables

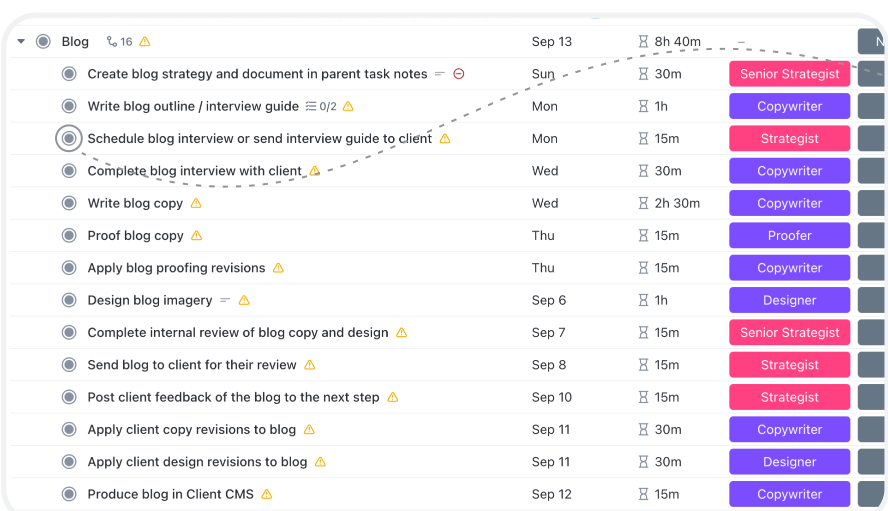
Task Templates will be the most used *Template* for 95% of teams. As mentioned earlier, these will represent your deliverables or "tools in your toolbox". You'll use these *Templates* over and over again.

Let's walk through building a polished *Task Template* using a common agency example—blog posts. Inside your 'Template Library', within the 'Delivery - Task Templates' Folder and 'Inbound' List, we'll start by creating a *Parent Task* called 'Blog Post'.

Now beneath that Parent Task, we'll create Subtasks for each of the individual components:

1. **Develop blog strategy and document it** → *This is the task (Subtask in ClickUp parlance) for the strategist.*
2. **Write the first draft of the blog post and send to proofer** → *This is the task for the copywriter.*
3. **Review the blog post and provide feedback** → *This is the task for the proofer.*
4. **Make edits of blog post and send to client for review** → *This is the task for the copywriter.*
5. **Receive feedback and make adjustments** → *This is the task for the copywriter.*
6. **Send the blog to client for review** → *This is the task for the strategist.*
7. **Receive client feedback and make any necessary changes** → *This is the task for the copywriter.*
8. **Design blog imagery** → *This is the task for the designer.*
9. **Publish blog post** → *This is the task for the strategist.*

For best results, assign each *Subtask* to one person and ensure that they can complete it in one sitting, with a *Time Estimate* of no more than 4 hours. This approach will promote efficient collaboration within the team, offer transparency to management, and ensure that nothing slips through the cracks.



Every task should have:

- **A time estimate** - for populating workload.
- **A due date** - for scheduling and remapping work.
- **Custom fields** - for filtering.
- **Descriptions** - for SOPs and "How To" guides.

Additionally, you'll want to make sure you have multiple rounds of revisions built into your processes. If most clients are receiving two rounds of revisions, then make sure those are baked into your processes. Now, once your workflow is designed, you need to make sure your *Subtasks* are populated with the appropriate data:

1. **Due Dates.** *Due dates* in your *Templates* represent a date map. You should only care about the distance between each of the dates—not the actual date itself. Pick a date for your first *Subtask* and then work from there. You can remap these *Due Dates* when you deploy the *Template*.
2. **Time Estimates.** *Time Estimates* are what they sound like—how long do you think each task should take? As mentioned, we recommend that each of your *Subtasks* is broken up enough so that each *Subtask* takes no longer than 4 hours. This will help you track progress on work and provide a much more accurate *Workload View* in ClickUp. And yes, if a *Subtask* takes longer than 4 hours, just break it up into multiple *Tasks* (i.e., design blog imagery session #1 and design blog imagery session #2).
3. **Roles.** *Roles* (or 'Delivery Roles' represent who will be assigned to this *Task* in the future. This is displayed by a *Dropdown Custom Field*. This makes it much easier to assign work in the future and make smarter hiring decisions. We don't assign *Tasks* in the 'Template Library' because there is no guarantee that the *Assignee* will be the *Assignee* every time this *Template* is deployed. We're building these *Templates* to scale.
4. **Dependencies.** Link your *Tasks* together in the *Gantt View* for easy date remapping (and skipping weekends) in the future. It's easiest if you build these in a waterfall fashion, where the last *Subtask* of your sequence will block the *Parent Task*. **Learn more about how to use the Dependencies here.**
5. **Checklists.** Add *Checklists* to your *Subtasks* to provide reminders for seasoned users so they don't forget to complete certain steps related to a *Task*.
6. **Description.** This is important. You need to make sure that the process lives where the work gets done. Each *Subtask* should have written or video instructions attached or embedded in the *Task Description*. This can be a link to an SOP document, template, or video overview. If you want to systematize your business and make it easy to onboard new employees and delegate work, then this is the step you cannot forget.
7. **Additional Custom Fields.** Add in additional *Custom Fields* that you want included in your *Templates*. We've leveraged 'Task Type' and 'Work Category' *Fields* to help filter these *Tasks* in the future.

The key to all of this is starting simple and building from there. To save time and get implemented quickly, you can skip the *Checklists* and *Task Descriptions* at the beginning. The basic workflow is the most important part, but adding in the *Checklists* and *Task Descriptions* is where you really start to unlock the power of ClickUp. For a more thorough overview, **watch our video tutorial 'The Ultimate Guide to Systemize Your Business'.**

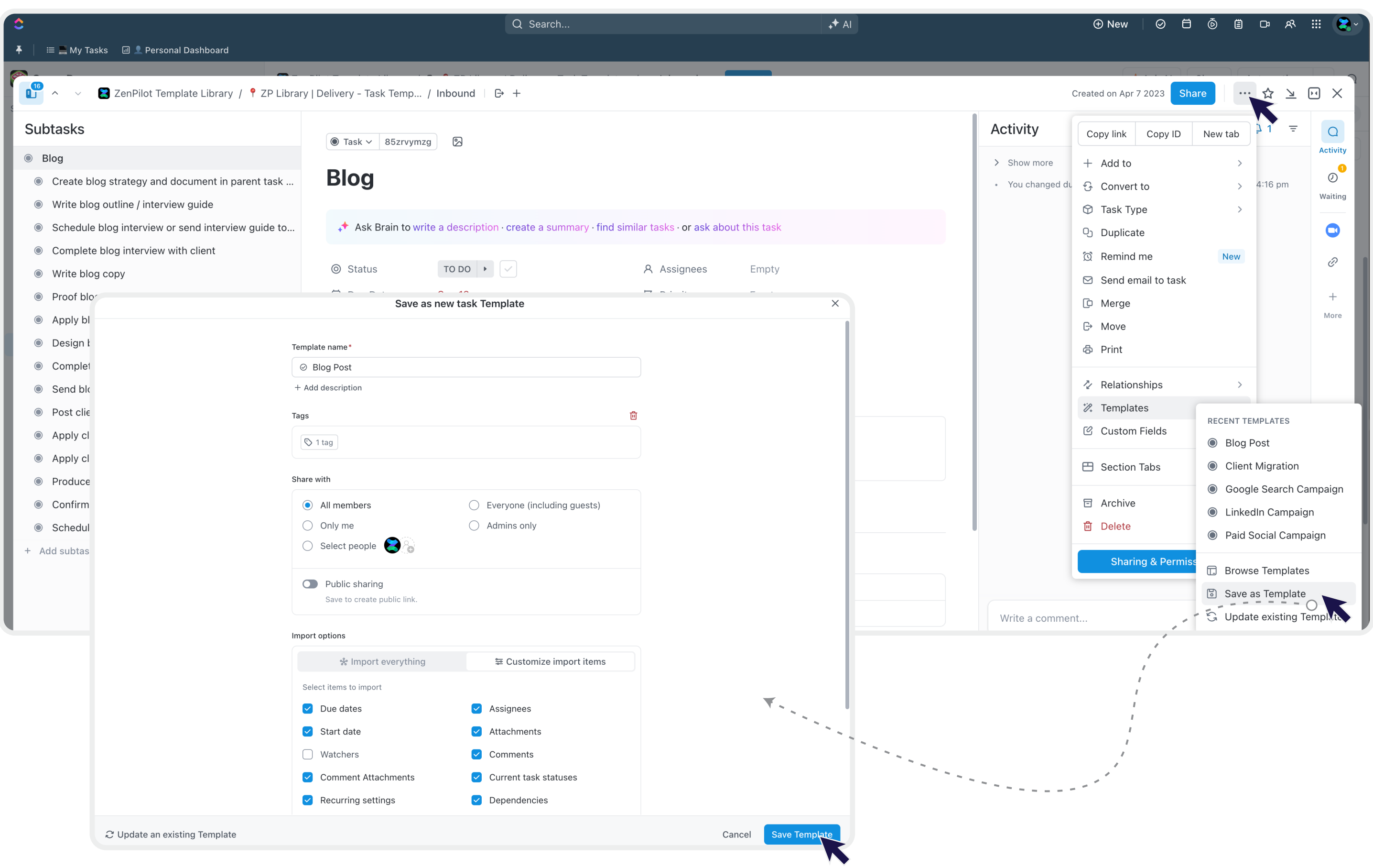
How to Save a Task Template

With your structure in place, we can now save your process to the ClickUp *Template Center*.

Here's how to do it:

1. Navigate to and click on the *Parent Task*.
2. In the *Task View*, click on the '...' in the top right corner (labeled as 'Task Settings').
3. Select 'Template Center' and then 'Save as Template'.
4. Name it something like 'Blog Template'.
5. Add relevant *Tags* like "Inbound" for easy searching and filtering. These *Tags* should match your work categories/service lines.
6. Adjust permissions and sharing settings if relevant.
7. Toggle off any unnecessary custom elements you want to exclude. For example, you'll want to toggle off "Watchers". If you don't, you'll be a *Watcher* on every *Task* that's deployed from this *Template* and that'll lead to an overwhelming amount of notifications.

Once completed, your 'Blog Post' *Task Template* now neatly appears inside the ClickUp *Template Center* ready for easy reuse anytime you need to write a blog for a client.



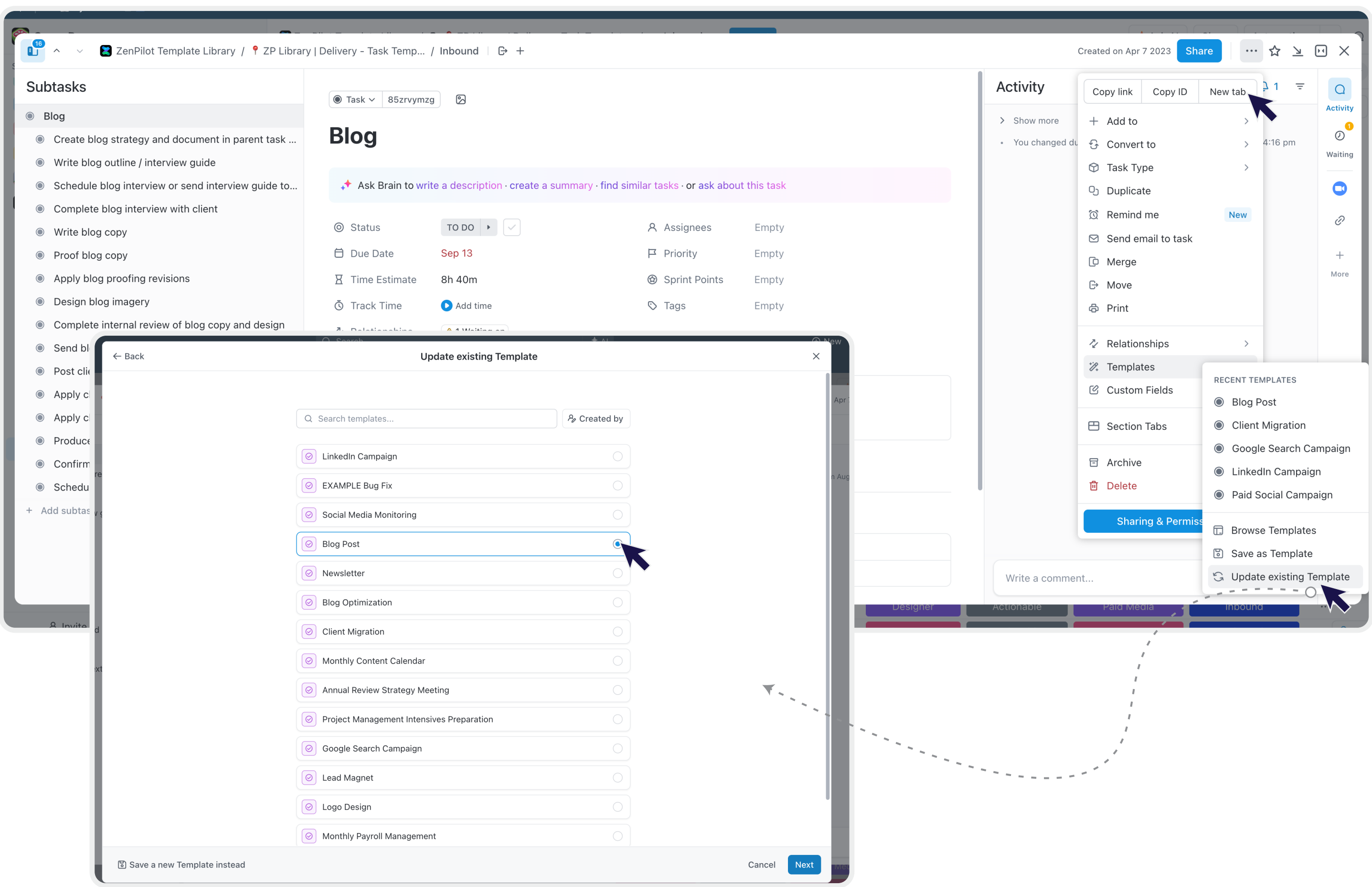
How to Update a Task Template

Now, if you make an adjustment and need to update your Template, this is easy thanks to the 'Template Library' that you've created.

Here's how to do it:

1. Go to the *Task* in your 'Template Library' and make whatever adjustment you need to make.
2. After you're done making changes, click on the *Parent Task*.
3. In the *Task view*, click on the '...' in the top right corner (labeled as 'Task Settings').
4. Select 'Template Center' and then 'Update Existing Template'.
5. Find your existing *Template* and click 'Next'.
6. Adjust any details on the next screen—name, import options, permissions settings, etc.—and then click 'Save Template'.

Once completed, your *Template* has now been updated inside the *Template Center*. The next time someone deploys the *Template*, it will use your new version. Please note that this will only impact future deployments of this *Template* and will not have any impact on *Tasks* that have already been deployed from this *Template*.



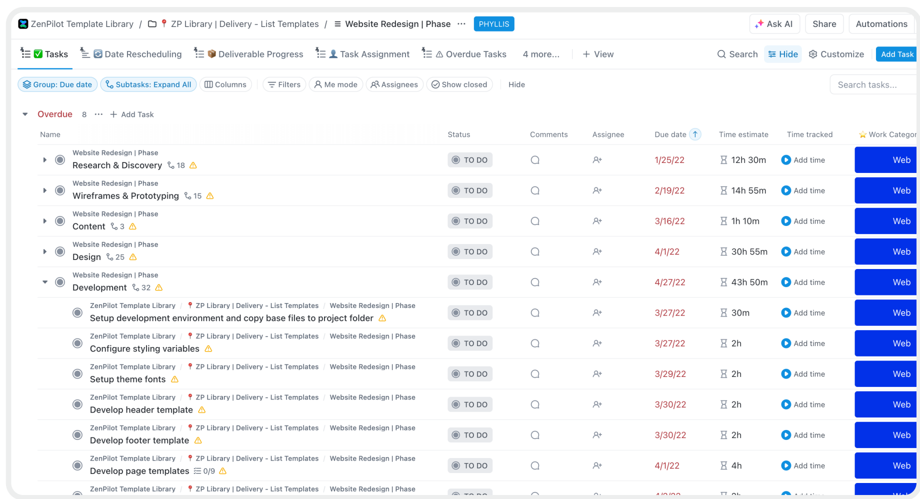
2) List Templates - Deliverables

List Templates will be the second-most-used *Templates* for agencies. *List Templates* make it much easier for project managers to set up and assign larger projects like website redesigns, client onboardings, HubSpot implementations, and more.

Let's walk through building a polished *List Template* using a common agency example—website builds. In this example, let's build out a multi-phase 'Website Redesign' *List Template*. For starters, *Parent Tasks* may operate slightly different in a *Task Template*. With a *List Template*, your *Parent Tasks* are represented by milestones within a project.

Within a 'Website Redesign' List, your Parent Tasks may look something like this:

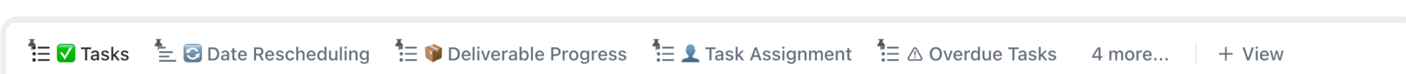
- Research & Discovery Phase
- Wireframes & Prototyping
- Content Phase
- Design Phase
- Development Phase
- Launch Phase
- User Guide
- Post Launch Phase



Inside of each *Parent Tasks* lives more granular *Subtasks* like conducting customer interviews, writing website copy, presenting design concepts, migrating custom functions, refining page speed optimizations, etc. These will also include any preset meetings that happen in cadence with your website phases. Your *Tasks* within your *List Template* should bring the same information that your *Task Templates* brought.

Additionally, your List Template can include additional List Settings that an ordinary Task Template cannot bring with it:

- **Views.** Includes multiple *List*, *Gantt*, *Timeline*, and *Calendar Views* for visibility.
- **Automations.** Includes any ClickUp *List Automations* that can help automatically assign *Custom Fields*, change *Statuses*, etc.
- **Documents.** Includes any ClickUp *Documents* that can be useful for website page creation, strategy, and/or prototyping.



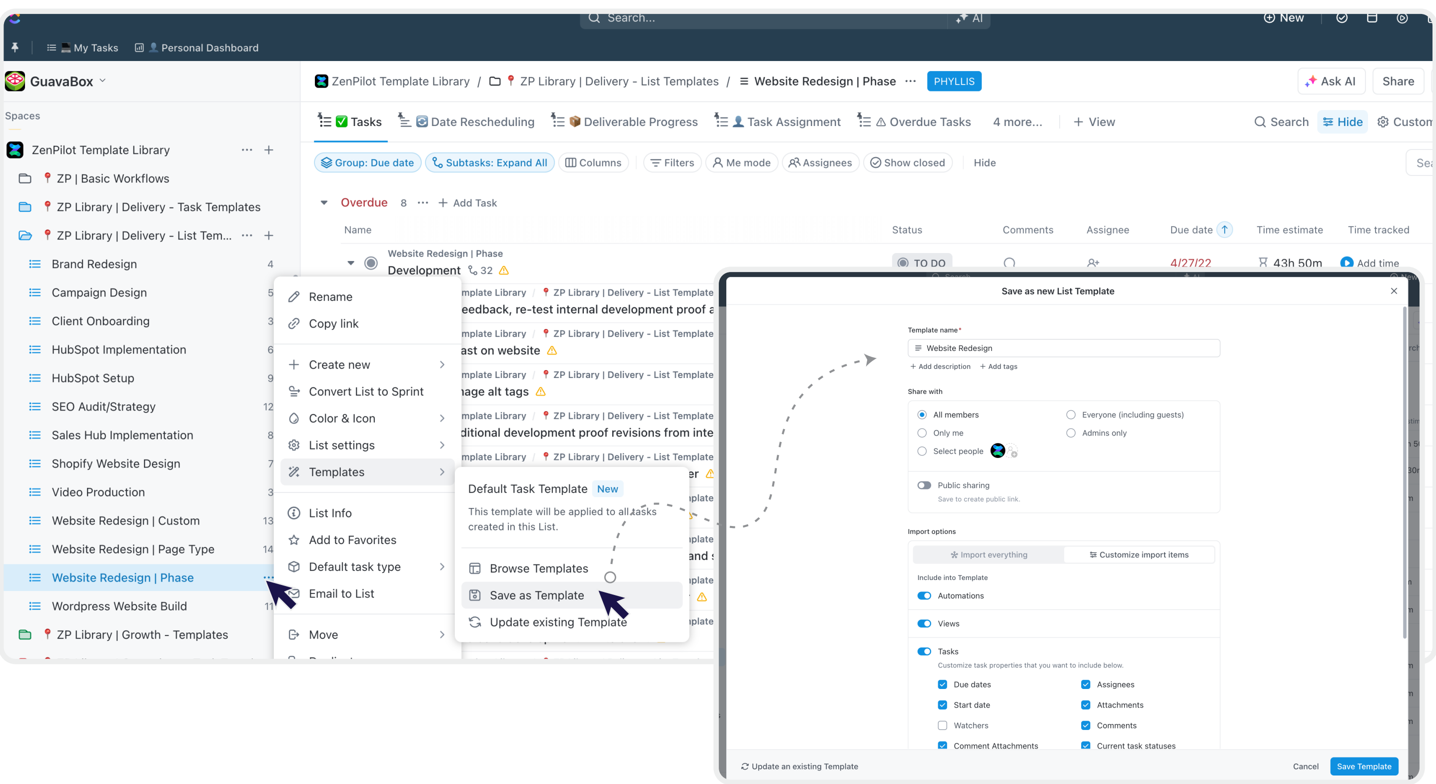
How to Save a List Template

With your structure in place, we can now save it to the ClickUp *Template Center*.

Here's how to do it:

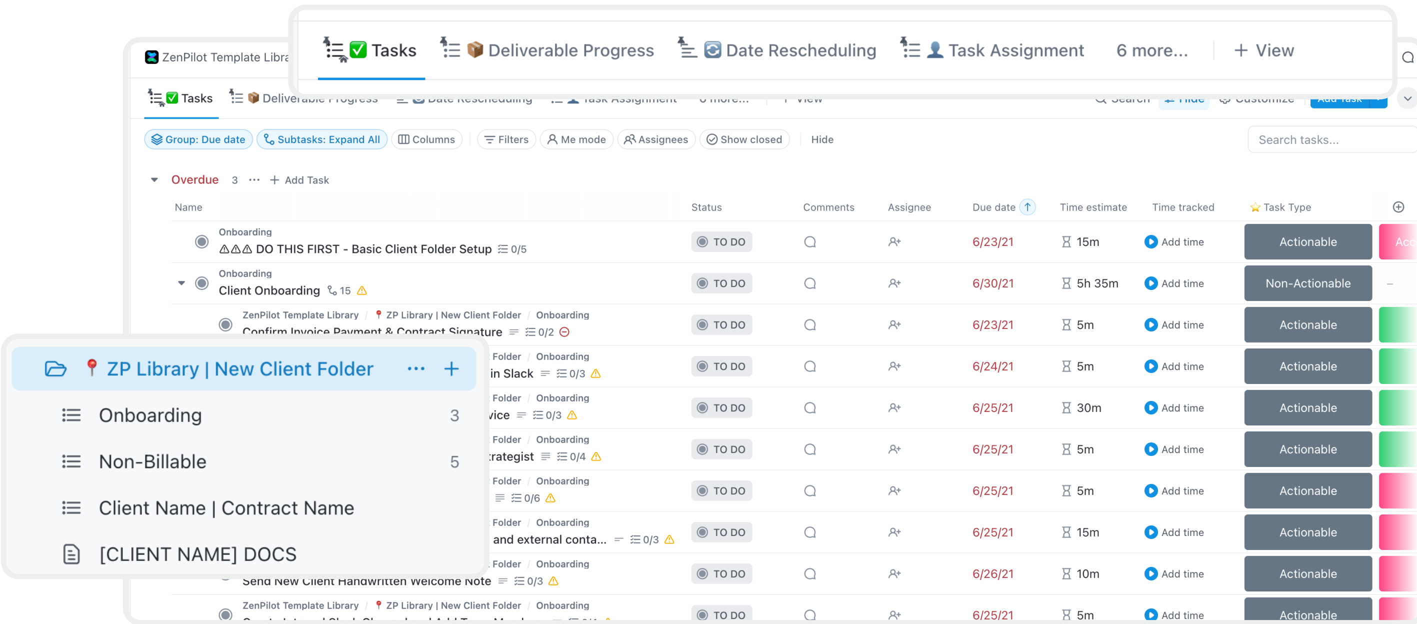
1. Navigate to the *List* (on the left sidebar) and click on the "..." (labeled as 'List Settings')
2. Select 'Template Center' and then 'Save as Template'
3. Name it something like 'Website Redesign'
4. Add relevant *Tags* like "Web" for easy searching. These *Tags* should match your work categories/service lines.
5. Adjust *Permissions* and *Sharing Settings* if relevant
6. Toggle any unnecessary custom elements to exclude. You'll want to exclude 'Watchers' from this. Otherwise you'll be a *Watcher* on every *Task* that's deployed from this *Template* and we don't want that.

Your 'Website Redesign' *List Template* now appears inside the ClickUp *Template Center* ready for easy reuse anytime you need to design a website for a client.



3) Folder Templates - Clients

Folder Templates are the homes where your *List* and *Task Templates* will actually be deployed and live. The main *Folder Template* that you'll want to create is one for your clients' *Folders*. You can create *Folder Templates* for your *Folders* in your 'Growth' and 'Operations' *Spaces*, but they won't be as important. You'll be onboarding new clients regularly; therefore, it's important to have a *Folder Template* ready to deploy when you're onboarding a new client. The *Folders* in your other *Spaces* will be a bit more stationary, and you won't need to add new ones often.



Why Use 'Client' Folder Templates?

1. **Streamline onboarding.** You can streamline onboarding by providing onboarding *Tasks* and assignments directly after a new client closes. Your *Folder Template* can come prepackaged with onboarding *Tasks* to make onboarding much more streamlined and efficient. You'll see the *Folder Template* and this process in action in our recent article, **'Streamline Onboarding With the ClickUp + HubSpot Integration'.**

2. **Improve team ClickUp usage.** When you standardize your ClickUp *Workspace* with *Views*, *Statuses*, *Custom Fields*, *Processes*, and your *Folder* & *List Structures*, there's a much higher chance that your team will actually use the system correctly and not get overwhelmed. *Folder Templates* help you standardize everything to make it much easier for your team to understand and use.

3. **Centralize client data.** When every 'Client' *Folder* contains client documents and agenda templates, you'll find it much easier to centralize client data in one place and provide consistency for your team.

Setting up *Folder Templates* will be less about the *Tasks*, and more about the structure of your *Folders*. Yes, you'll have your onboarding process built directly in the *Folder Template*, but the rest of the *Lists* within your 'Client Folder' *Template* will most likely be blank.

How Should You Structure Your Client Folder Templates?

Here's how you should structure your 'Client Folder' *Template*:

1. **[Folder] Client Folder Template.** You'll begin with the Client *Folder*. This *Folder* will have a few *Views* and *Documents*.
   A. **Tasks**. This is a basic *List View* that shows *Tasks* that still need to be complete for this client. This is often the 'Home Base' and you can 'Set as default view'.
   B. **Date Rescheduling**. This will be a *Gantt View* that allows you to easily remap *Due Dates* of projects for this client.
   C. **Deliverable Progress.** This is a *List View* that only shows *Parent Tasks*—deliverables or milestones—and the *Progress* of those *Tasks*. You can use the 'Progress (Auto)' *Custom Field* to help show *Task* progress easily.
   D. **Task Assignment.** This is a *List View* that leverages your 'Role' *Custom Field* to assign work. Just group *Tasks* by the 'Role' *Custom Field* in this *View* and use the *Bulk Action Toolbar* to select and assign *Tasks* in bulk.
   E. **Recent Comments.** This is an *Activity View* that shows all communication (ClickUp *Comments*) happening within the *Client Folder*.
   F. **Client Docs**. This is a *Doc View* that provides a client overview and meeting notes/agenda template to store all client info and notes in one place.
2. **[List] Onboarding.** You'll build your client onboarding process directly into your *Folder Template*. This will be a *List* with all of the *Tasks* needed to onboard a new client. When a client is onboarded, this *List* can be archived.
3. **[List] Contract XY List.** You'll build an empty *List* that will serve as a home for all of your work. This List will be renamed to reflect the name of your contract with the client. All work for this contract will live in this list for easy time tracking and updates. You'll also leverage similar *Views* to those at the *Folder* level and build them in to this *List*.
4. **[List] Non-Billable.** You'll build an empty *List* that will serve as a home for all of your non-billable work associated with that client. This is an optional *List*, but is helpful for agencies that have internal syncs or account management *Tasks* that they don't bill the client for.
5. **[List] Shared Client List.** This *List* is also not required, but offers an easy way to communicate with clients in ClickUp. If you prefer to create a *List* that your share with clients to communicate with them, assign them *Tasks*, show them work you've done, etc. you can create a separate *List* in your *Folders* and invite them to it.

After you've built your *Folder Template*, you can save this *Template* by following the exact same process as saving *Task* and *List Templates*. The only difference is you'll be accessing the *Folder Settings* instead of the *Task* or *List Settings*.

Checklist - **What Makes a Great Template?**

To keep an organized system, it's extremely important to make sure your processes are clean. They don't have to be perfect, but they need to be structurally sound to set your agency up for success. Follow this checklist below to ensure your templates are set up correctly:

- [ ] **Task Names →** *Subtask* names should be action-oriented. Start with a verb to clarify what needs to be done (e.g. "Write Blog Post"). *Parent Task* names should be nouns (e.g. "Blog Post").
- [ ] **Process →** Every *Subtask* should have a checklist for completion and any helpful context or other forms of instructions (video, pictures, etc.) in the description.
- [ ] **Time estimates →** Each *Subtask* should have an estimated amount of time.
- [ ] **Due Dates →** Every *Task* should have a *Due Date*, and *Subtasks* should have correlated *Due Dates*. You will be able to remap *Due Dates* when you deploy your *Templates*.
- [ ] **Custom Fields →** Every *Task* should have a preset value for a 'Role', 'Work Category' and 'Task Type' *Custom Field*.
- [ ] **Dependencies →** *Dependencies* should be baked into your *Templates*.
- [ ] **Consistency →** Your naming structure and format should be consistent.

Pro Tip: Keep it Simple

ClickUp has been on the market long enough that we're starting to work with more and more agencies who have been ClickUp customers and users for a while. It's rare to find a team with a truly coherent working methodology that is clearly documented in ClickUp.

Instead, we often find agencies who really like the software and the flexibility but realize that they are missing insights and causing inefficiencies because every agency team member uses ClickUp in a slightly different way.

Do yourself a favor when you're starting out with ClickUp: **keep it simple.**

Until you know a) that you need a piece of functionality, and b) that you have a plan for implementing that feature in a coherent way across the entire team, don't toggle it on!

Most teams should not initially get carried away with features like:

- *Priorities*
- *Automations*
- *Tags*
- Endless *Custom Field* Options

Those are all incredibly powerful tools, but with great power comes great responsibility. Nothing kills proper ClickUp adoption faster than overwhelming a team without a clear vision and structure.

"ZenPilot came in with a framework, implementation, and training resources to move our agency through a lot of change in the way our 30 member team does things....change management that is super hard like task and time tracking!

They really know ClickUp, and we do some crazy complicated things in there. If you need help scaling and measuring operational performance in your agency, ZenPilot is a great partner to get it done."

Ben Labay
CEO, Speero

Checkpoint - **Build**

At this point in your implementation, you should have:

- [ ] **Template Library →** A seperate *Space* in ClickUp to store all of your process *Template* source files.

- [ ] **Task Templates →** All "needed for launch" *Task Templates* (deliverables) have been built and saved in the ClickUp *Template Center*.

- [ ] **List Templates →** All "needed for launch" *List Templates* (projects) have been built and saved in the ClickUp *Template Center*.

- [ ] **Folder Template →** A client *Folder Template* has been created and saved in the ClickUp *Template Center*.

PHASE 3

Train

Pick a Launch Date and Create a Migration Plan

One common stumbling block for agency teams when implementing ClickUp is their migration plan. Many times, they face issues such as part of the team migrating as early adopters, a few client projects being moved, and one client project being maintained in two separate systems.

This situation often leads to problems where someone can't find the necessary information and realizes it's in the other system. As a result, things become messy, people get frustrated, and the momentum of the migration project stalls.

To avoid these pitfalls, it is essential to establish a clear launch date for migrating to ClickUp. This date should be set between 2 weeks and 6–8 weeks in the future. Once the launch date is determined, create a comprehensive launch plan and share it with your team.

Before launch, you need to:

- Set up your structure correctly.
- Develop and implement standardized processes and templates.
- Train your entire team on the unified way you'll use the software.
- Set up any required integrations with other tools or systems.
- Migrate your active work and configure it in ClickUp.
- Organize a launch party to celebrate the transition. 🎉

This is all worth it, but none of it is easy. Plan your project well and hold each other accountable to execute it well.

Pro Tip: set your team's expectations correctly. Change is hard, and many teams struggle with the new platform for the first week or two until they start to get value back out of the new system and new habits. The key is to push through the discomfort to reach the point where you start to earn the rewards from your investment.

If your team has been in ClickUp for a month or longer and they still don't like it or don't feel that it has added value, you need to take a hard look at your current setup and probably get outside eyes on the problem. It may be structural, or it may be cultural, but something is wrong.

And remember, if you need an agency operations expert who has taken 3,000 teams and over 10,000 people through this operational transformation, **schedule a call with us**.

Train Your Team on The Software AND Expectations

Setting your agency up for success while using ClickUp boils down to having the right framework, having clear rules of engagement, educating everyone on why and how to follow those rules, and then disciplined accountability in your execution.

That training piece should revolve around 2 types of education:

- **Ground Rules** → Your expectations and ground rules around project management as a whole.
- **Basic Training** → Orientation to ClickUp itself, your tool, and how to use it.

For example, we put every single agency team member of every single agency who works with us through a "Project Management Certification" program.

The first thing they learn is the 10 Commandments. These basic expectations are detailed and applied to real-world situations.

Commandment #1 is → If it's not in ClickUp, it didn't happen.

There's little value in doing things halfway. If you want the ability to accurately forecast your agency's workload, follow a trail to figure out where things went off track for a client project, or reward team members who deliver the best work, you need that work to be centralized in ClickUp.

Explain that expectation and show your team what that looks like.

If you're not working with us, build your own list of expectations and turn it into a training product for new hires.

Add detailed walkthroughs of how you want the tool to be used and the daily habits each team member needs to adopt.

Then keep that training up to date.

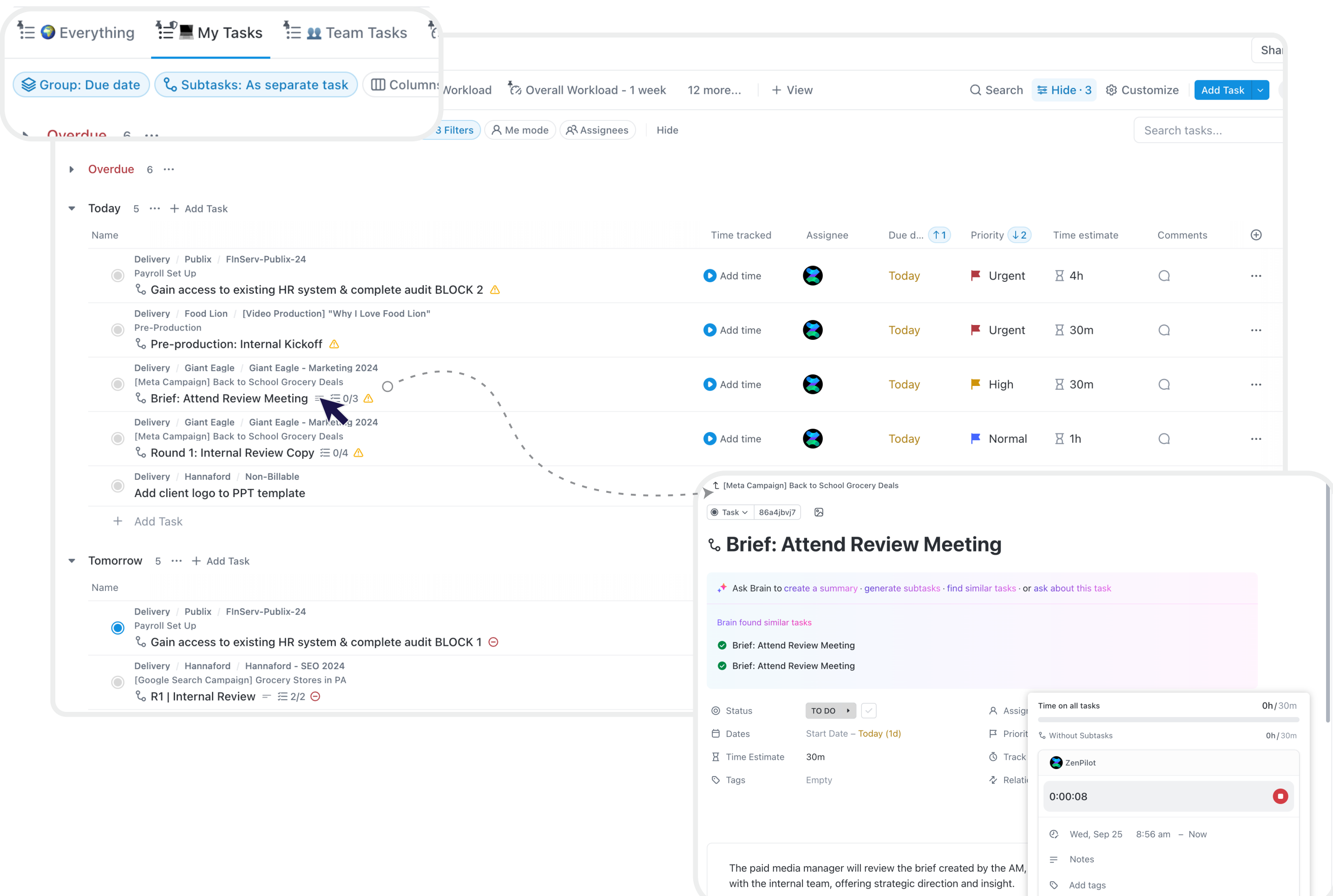
You will have better data to improve your decision-making, and your team will be more productive, aligned, and grateful.

Pro Tip: Train Your Team How They'll Be Working

It's extremely important to walk through certain scenarios, best practices, and proper habits, but it's important to show your team how work is going to flow through the system.

The two most important components to this will helping them set up their main 'My Tasks' *View* and customizing their ClickUp *Inbox* and *Notification Settings*.

Everyone should live out of their 'My Tasks' *View* and ClickUp *Inbox*. This is where they will find their work, complete their work, track their time, and communicate.



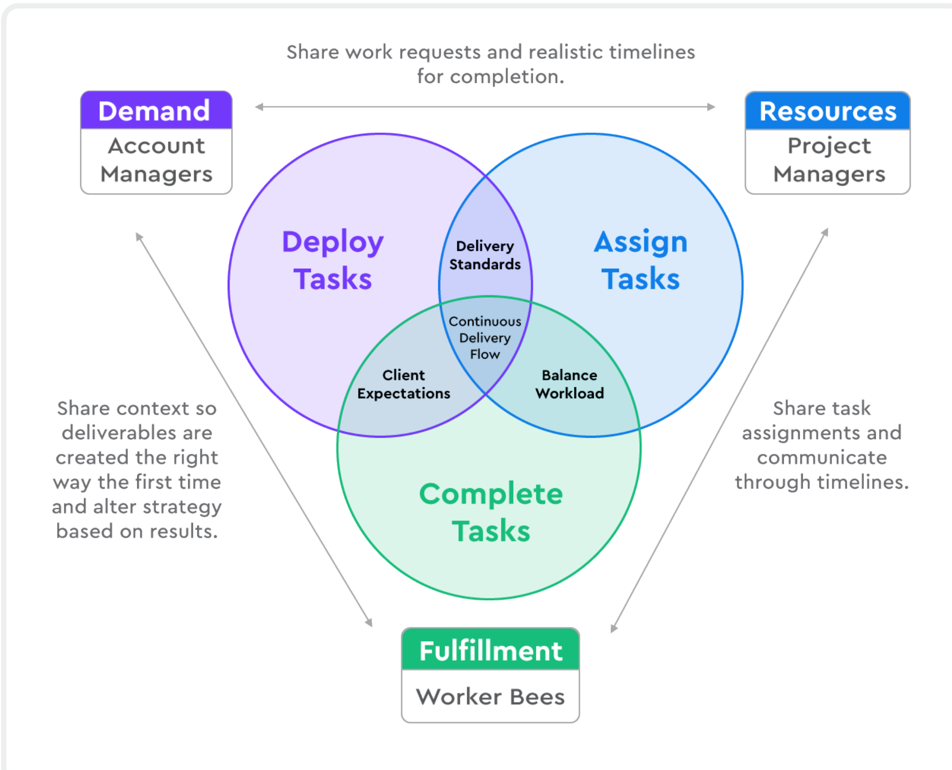
Additionally, for best results, your *Parent Tasks* should serve as your communication hubs. The *Parent Task* and *Subtask* structure we've been discussing will serve you well here. Each person will be assigned to *Subtasks*. The *Parent Task* will NOT be assigned.

Your team should work in *Subtasks*, but navigate to the *Parent Task* when communicating, sharing updates, and drafts, etc., with the rest of the team. Your *Parent Task* is your source of truth for that deliverable. If you follow this framework, your team will have a much easier time getting all the context they need to complete their work.

That's obviously just one piece to the puzzle, but it's important and can solve a lot of headaches. Train your team how to do all of that. Give them clarity. If everyone uses the system in a similar way, you'll be much better off and will actually be able to sleep easy at night.

Besides this, you'll want to train whom and how you'll be creating work, assigning work, adjusting timelines and priorities, etc.

At ZenPilot, we always document a resourcing flow featuring three main pillars: Demand, Resources, and Fulfillment. Demand (account management) works closely with clients to determine what we're going to do (and why we're going to do it), Resources (project management) determines how and when we're going to do it, and Fulfillment (individual contributors/worker bees) gets it done.



When all three work in harmony, you deliver on time, within budget, and everyone is happy.

Here's a few additional resources for you:

1. ClickUp for Account Managers
2. ClickUp for Project Managers
3. ClickUp for Individual Contributors

Again, document this for your team, train them on it, and hold the team accountable to those expectations.

Checkpoint - **Train**

At this point in your implementation, you should have:

- [ ] **Migration plan → A full migration plan with scheduled team training sessions and a launch date.** *Make sure you assign migration leads for each client. Don't bottleneck all of this work on yourself.*

- [ ] **Recorded Training → A recorded training and additional documentation providing a brief ClickUp orientation and your project management ground rules.**

- [ ] **Live Training → A live walkthrough to reiterate what the team learned in your recorded trainings.** *You'll want to leave plenty of time for Q&A to make sure the team feels comfortable. And make sure everyone has their profile set up and have customized their notification settings.*

- [ ] **Clear Expectations → The team knows and understands your expectations of them inside of ClickUp.**

PHASE 4

Launch

Migrate and Launch in ClickUp 🚀

You've almost made it. Your launch party is on the horizon, but there's a lot of work ahead of us. Migration can be a stressful time. There's a lot of work to move over. Focus on migrating work for one client at a time. If you try to do too much at one time, work can slip through the cracks. I'll add that we aren't going to be doing the classic CSV export from your old system and CSV import into ClickUp here. We just spent a lot of time building plug-and-play process *Templates* for a reason. We're going to be using those to create work.

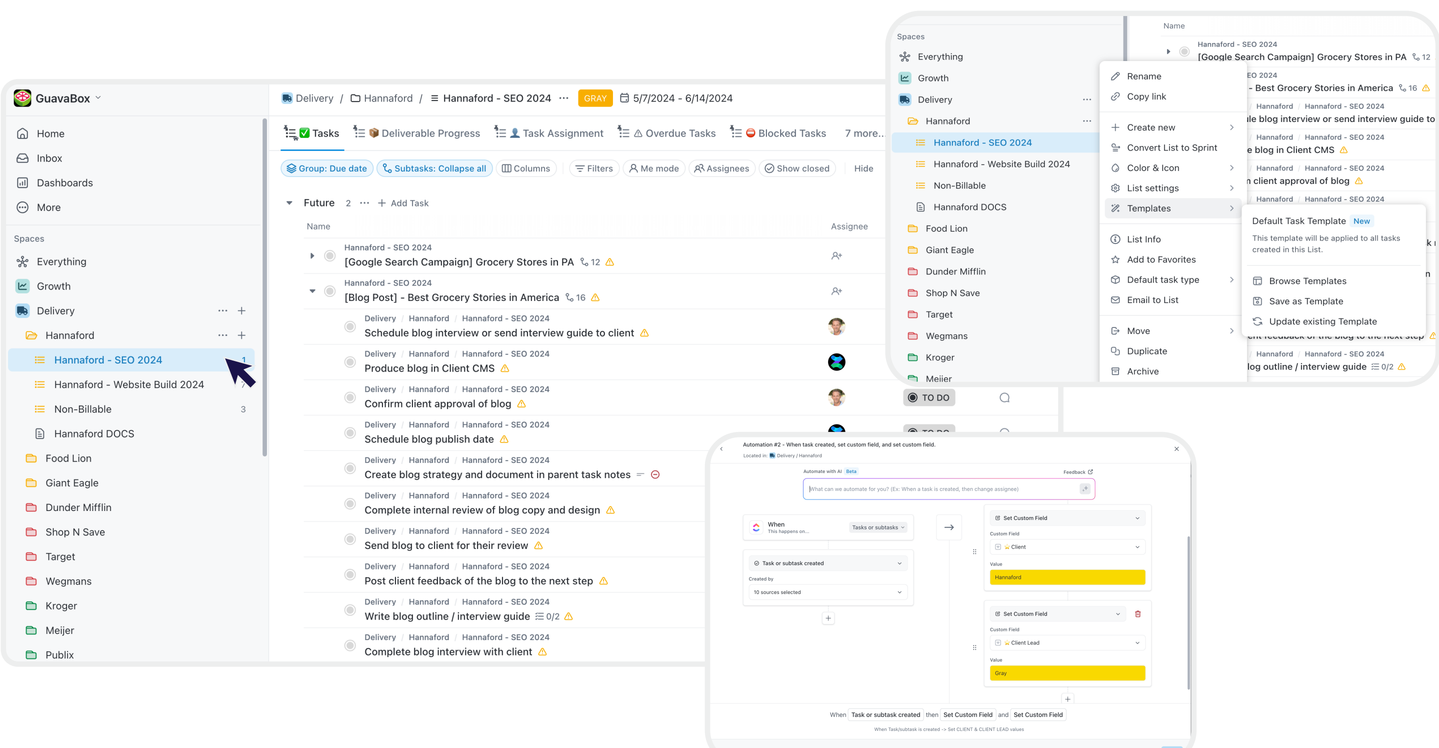
Additionally, you should have already built out your main *Spaces*—'Growth', 'Delivery', 'Operations'. If not, go back a few steps and get those *Spaces* in so that you have places for work to live. We'll focus primarily on the 'Delivery' *Space* here. Getting that work set up is typically mission-critical, and everything else can be a secondary priority.

Here are your migration steps:

- **Client Folder.** Go to your 'Delivery' *Space* and begin by deploying your 'Client' *Folder Template*. When deploying this *Folder* you can rename the *Folder* to match the client's name.
- **Lists.** After the *Folder* is deployed, make sure you have your needed *Lists* configured. You should have a placeholder *List* already in your *Template*, so feel free to duplicate that if you have multiple retainers with one client. You'll add any projects (like a website design, HubSpot implementation, etc.) in just a moment.
- **Views & Docs.** Additionally, after the *Folder* is deployed, make sure the *Docs* and *Views* at the *Folder* and *List* levels are all set up how you want them. Since you used a *Template*, they should be good to go, but feel free to customize them a bit as you see fit.
- **Automations.** Another recommendation I have is that you set up a *Folder Automation*. Click on the '...' next to your *Folder*, find 'Folder Settings' and 'Automations'. Now, you'll want to set up an *Automation* that says, 'when a task or subtask is created', then 'set custom field' for 'Client' to the client's name and 'Client Lead' to the client lead/account manager. Those are two *Dropdown Custom Fields* you'll want to create and populate with values aligning with your clients and client leads, but they're super helpful for creating *Views* and *Dashboards* in the future. Essentially, they just help make sure those *Custom Fields* are applied to every *Task* that gets added to that *Folder*.
- **Deliverables.** After those *Automations* are set up, find the appropriate *List* and begin deploying your *Task Templates*. ClickUp allows you to remap *Due Dates* when deploying *Templates*. However, if you need to make tweaks and adjust some *Due Dates* later, you can use your *Gantt View* for that.

- **Projects.** Projects—saved as *List Templates*—will be deployed as separate *Lists* in the 'Client' *Folder*. Go to the 'Client' *Folder Settings*, find the *Template Center*, and deploy the appropriate *List Template*. You'll be able to remap *Due Dates* when the *Template* is deployed. Plus, you can even skip weekends when deploying *List Templates* in ClickUp!
- **Close Out Completed Tasks.** Obviously, you may be midway through some projects with clients. When you deploy a *Template*, you may have some *Tasks* that are already completed. If that's the case, just go ahead and select all of those *Tasks* and close them out. We want to get all of your work matching reality in ClickUp.
- **Ad Hoc Tasks.** You'll probably have some random ad hoc *Tasks* that need to be added to ClickUp as well. If that's the case and they aren't in a *Template*, add them as actionable *Parent Tasks* in the system. Just make sure they have an *Assignee*, a *Due Date*, a *Time Estimate*, and any necessary *Custom Fields*.
- **Assign Work.** After all client work has been added to their *Folder*, use your 'Roles' to assign work to the team. You'll want to have a 'Task Assignment' *View* at the *Folder* and/or *List* level that shows 'Subtask as separate tasks' and groups your *Tasks* by the 'Role' *Custom Field*.
- **Finalize & Repeat.** Once all the work is deployed and assigned, double-check to make sure the work matches reality. After you've finished migrating work for this client, move on to the next!
- **Launch.** After all client work has been finished, you're ready to launch!

Migrating client work is the most important. After you've completed your 'Delivery' *Space*, continue setting up work in your 'Growth' and 'Operations' *Spaces*. You'll follow a similar process to set up work there.



Checkpoint - **Launch**

At this point in your implementation, you should have:

- [ ] **Launched!** 🚀 → All tasks have been migrated using your templates and work has been assigned.

- [ ] **Single Source of Truth** → All active work should be in ClickUp and nowhere **else.** *Other project management tools can be referenced for some context, but all active tasks should live inside of ClickUp.*

- [ ] **Internal Tasks Setup** → Client work will be the main focus. However, work on getting internal meetings, professional development, marketing, and other internal tasks in the system.

PHASE 5

Optimize

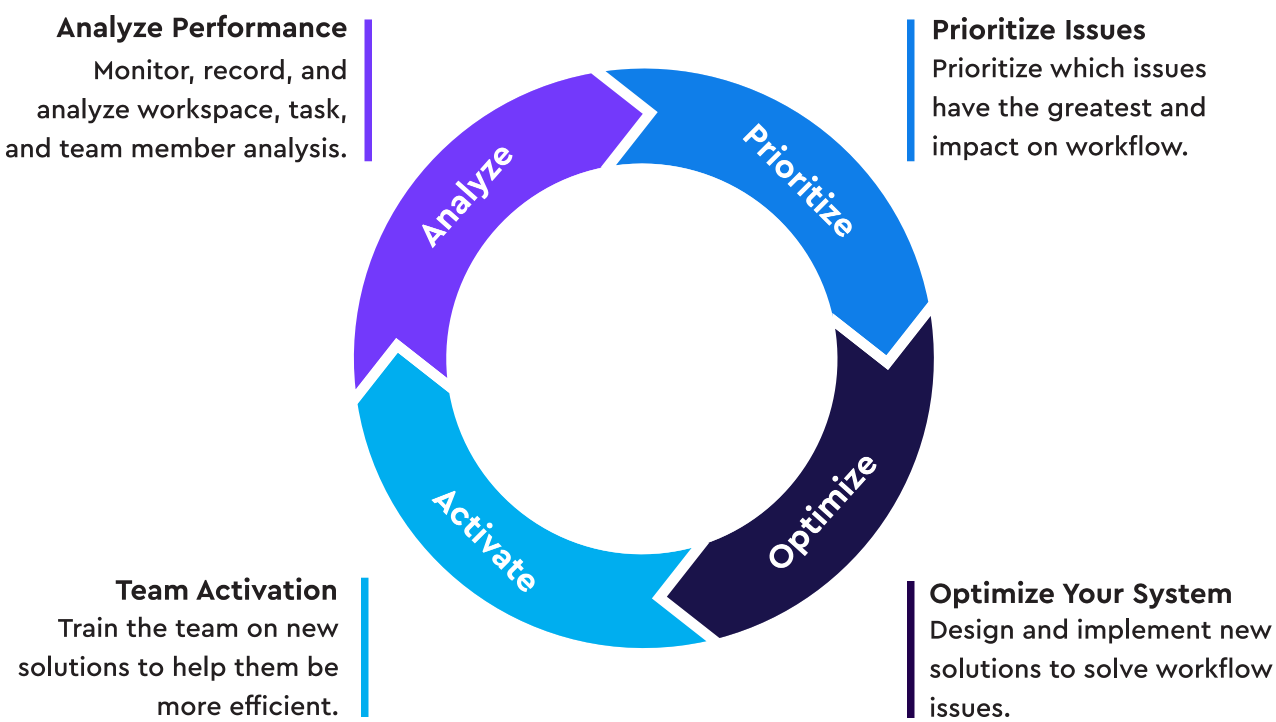
Hold Everyone Accountable

Once you've launched ClickUp at your agency, there are a handful of specific things you should do to help your team get up to speed quickly and then hold everyone accountable to the standards you've set.

Specifically, within the first 2 weeks, you should set up a 1-on-1 meeting with each team member to assess their usage and spot any issues as early as possible. Look at obvious things like their time tracked and time estimated totals, overdue *Tasks*, completed *Tasks*, and profile setup. If someone doesn't have a 'My Tasks' *View* created, that's an issue. If someone has 200 unread notifications, that's also an issue. Your team should be striving for 'Inbox Zero' every day to help everyone communicate well in ClickUp.

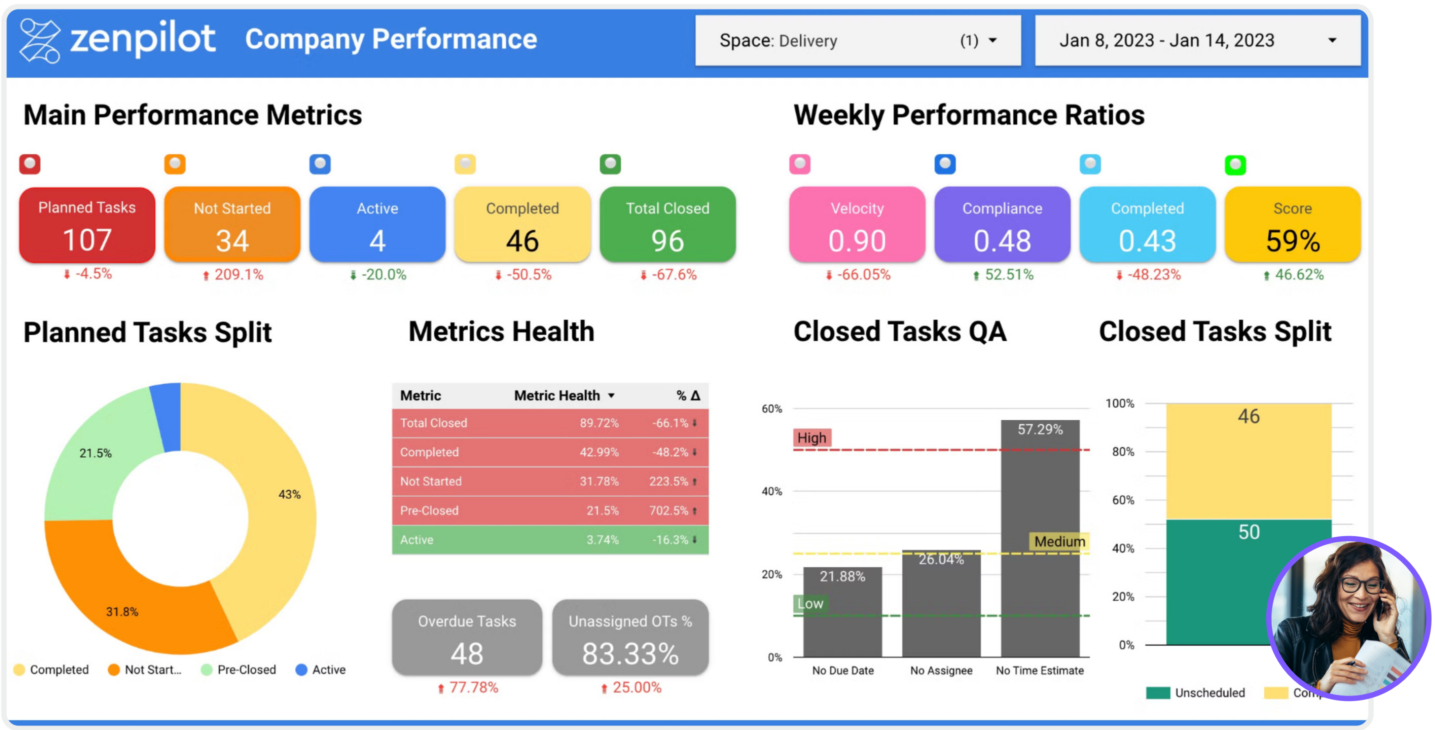
When analyzing your team we recommend you follow this four step accountability process:

1. **Analyze Performance.** Monitor, record, and analyze workspace, task, and team member performance.
2. **Prioritize Issues.** Prioritize which issues have the greatest impact on workflow.
3. **Optimize Your System.** Design and implement new solutions to solve workflow issues.
4. **Team Activation.** Train the team on new solutions to help them be more efficient.



Assign a ClickUp Champion

To help optimize your ClickUp *Workspace*, we recommend you assign someone on your team to act as your ClickUp Champion. This person will execute the consistent checks, address minor issues, escalate major issues as needed, and surface insights and aggregated data to the management team. To build healthy habits across your team, you need to be following clear cadences for accountability, analysis, and improvement.



Who Should Your ClickUp Champion Be?

Crucially, the agency owner cannot be the person monitoring ClickUp usage and spotting issues. In a very small firm and for a very short time period, that may be excused, but it never ends well. Your ClickUp Champion should be someone who loves ClickUp, is process-driven, systems-minded, is comfortable managing up, has empathy for the team, and is very organized and structured in their personality.

Your Champion will be pinging your team members to help coach and manage. They need to be able to hold the team accountable and not be afraid to call people out when they're not living up to the expectations that were set. It's not usually difficult to find this person. Most often, we spot ClickUp Champions early on in the implementation process.

And this won't be a full-time job. ClickUp Champion duties should only take 10-15% of someone's workload.

What Does Your ClickUp Champion Do?

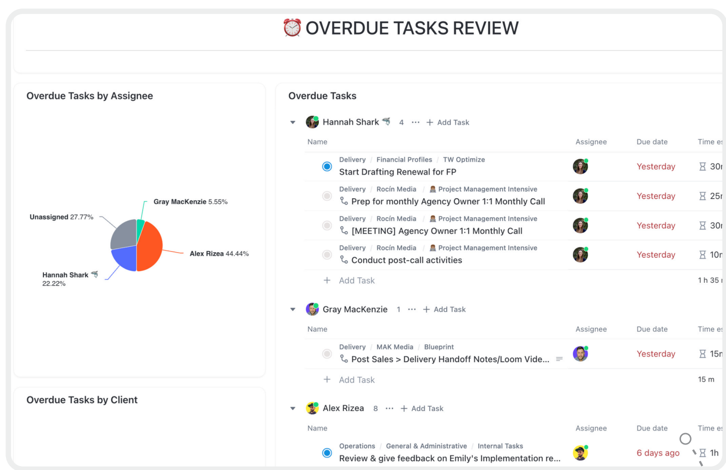
The ClickUp Champion is responsible for the following tasks:

1. **The Daily Spot Check →** A 10-30 minute audit (depending on firm size) at the end of each workday. They'll be checking for overdue *Tasks*, time tracking data, *Tasks* without *Due Dates*, *Time Estimates*, or *Assignees*, and *Custom Field* compliance.
2. **The Weekly Roundup →** A slightly deeper analysis of the team's habits (time tracked, notifications, overdue *Tasks*, etc.) on a weekly basis that leads to a short aggregated report for the team and management. Oftentimes, we recommend sending a weekly update to the full team on who's performing well and not so well. Gamification always helps!
3. **The Monthly Review →** A monthly review that analyzes all 'Weekly Roundups' and pulls data for management that will impact resource allocation, project scoping, pricing, hiring, etc.
4. **The Quarterly Analysis →** A comprehensive analysis that impacts time estimates, project planning, recruiting and hiring, client relationships, etc.

You can create ClickUp *Dashboards* to help your ClickUp Champion perform their duties. I recommend you build out a 'ClickUp Leaderboard Dashboard' to track this. For additional assistance, you can watch our video tutorial here, **'How to Manage Your ClickUp Workspace'**.

And although it may seem tempting, don't skip these tasks. Build a well-documented process and hand it off to a detail-oriented team member who can follow the process and deliver the insights and accountability you need to get the most out of your investment in process development and ClickUp.

Here's a more thorough overview: **'The ClickUp Champion: The Role Used by 3,000+ Teams to Get ClickUp Right'**.



COMPANY LEVEL HIGHLIGHTS:
- Weekly Score: 86/100
- Completed Ratio decreased by 11%
- Pre-Closed tasks percentage increased by 65%
- Overdue Tasks decreased by 50%

ASSIGNEE HIGHLIGHTS:
- Almost everyone **closed 100% of their work on time**
- Almost no issues with Overdue Tasks across the board
- Brooklin and Sabina faced issues reading and clearing his notifications last week
- Rebecca faced issues in ending the week with less than 10 Overdue Tasks

ACCOUNT MANAGER HIGHLIGHTS:
- 95% of Client facing work was closed on Time
- Sabina (50 tasks are missing assignees)

SUMMARY:
- There was a decrease in overall performance compared to the previous week
- Avoid closing tasks that were not scheduled to happen within the measured week

Checkpoint - **Optimize**

At this point in your implementation, you should have:

- [ ] **1-on-1s →** Meet with everyone on the team to check in on how things are going. Check on their set up and make sure they are understanding what's expected of them.

- [ ] **ClickUp Champion →** A ClickUp Champion has been promoted and is monitoring the system daily, weekly, monthly, and quarterly.

- [ ] **Feedback →** Gather feedback from the team and make adjustments. *We recommend you create an internal feedback form in ClickUp and block off at least one morning per week to focus solely on improving your processes.*

- [ ] **Prioritization & Optimization →** Track issues and prioritize them. Determine what has the biggest impact on workflow and look for ways to optimize the system.

BONUS

Tracking Client Health

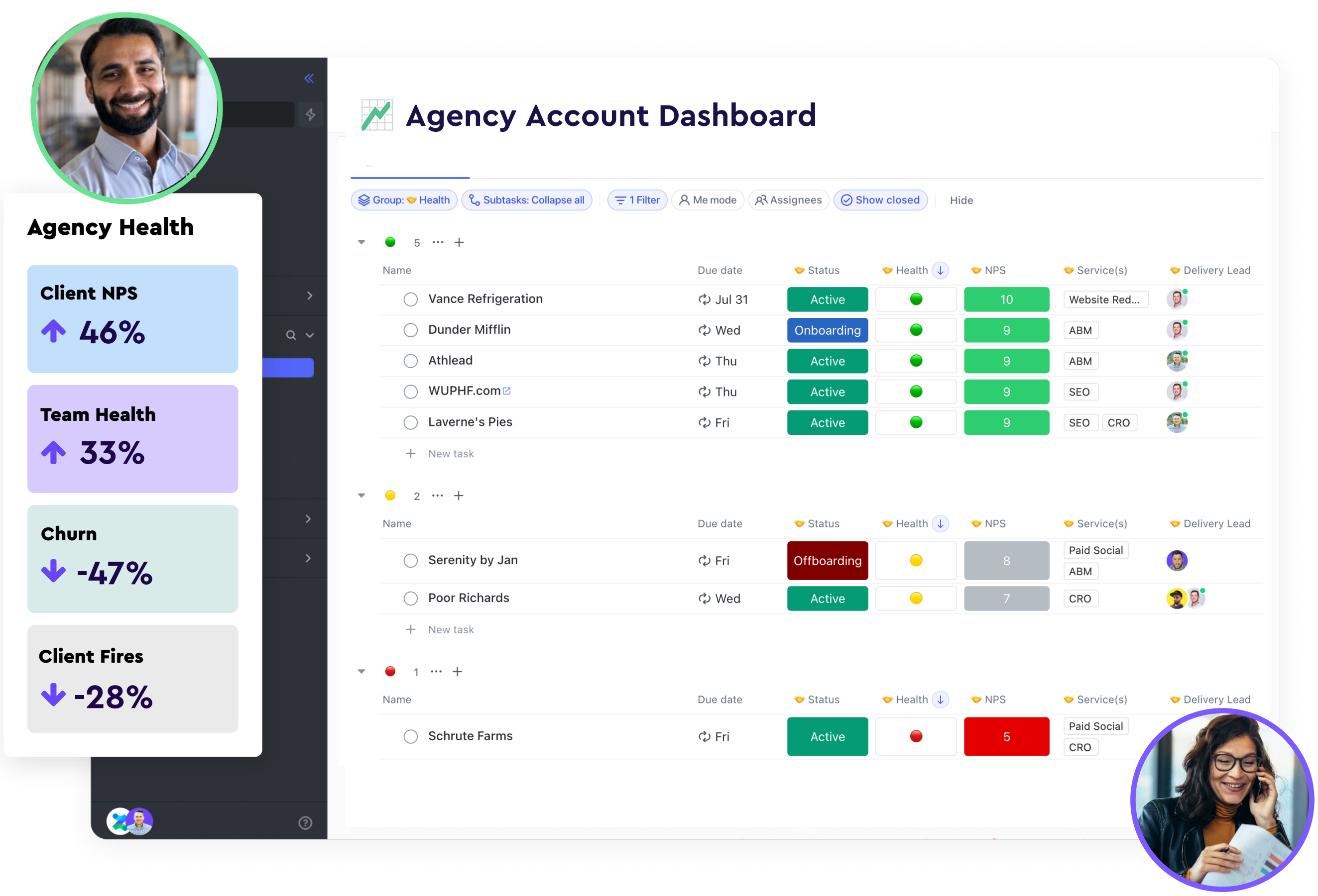
Building a Client Health Tracker

Once your team is working in the new system, there's one more *Space* I'd highly recommend you add to your ClickUp *Workspace*. You can call this a client dashboard, CRM, health tracker, or whatever makes most sense to your agency. The name isn't as important as the concept.

Simply put, this is a way for you to build a single source of truth for all your client data (objectives, statuses, budgets, health scores, NPS, billing information, notes, etc.). Instead of your leadership team having to spend hours trying to chase down account managers or navigate through multiple systems to find out where clients are and how healthy they are, you can have one place in ClickUp to manage all of this.

The real advantage of this is that it's built directly into the system where your delivery team spends all their time. When you have a health tracker or an account dashboard storing client data directly next to the active work that's happening for them, you'll get both the high-level overview that you need and the granular details—helping you catch issues before they become client fires.

Besides just a data storage system, this is also a way for you to encourage your team to be more proactive and flag issues early to address them quickly.



Here's How To Build Your Health Tracker

You'll begin by creating a *Space*. The workflow is the same as creating your other *Spaces*. The only difference here is that for *Statuses*, you'll only need an 'Open' and 'Closed' *Status*. We don't need all the other *Status* options because everything living in this *Space* will be a 'Record' as opposed to an 'Actionable' *Task*. Feel free to use ClickUp's *Task Type* feature to label everything in this *Space* as 'Records'.

Additionally, you won't need to have any *Folders*. You'll just create one *List* called 'Health Tracker' inside of your 'Agency Client Health Tracker' *Space*. Again, name this whatever makes the most sense to you. The key here is the *Custom Fields*. You'll be adding a lot to keep track of data. These *Custom Fields* will live inside this *Space* and this *Space* only. Don't add these *Custom Fields* to your other *Spaces*.

Here are the Custom Fields you'll need:

1. **Status.** A *Dropdown Custom Field* that designates a client's status (i.e., onboarding, active, offboarding, inactive).
2. **Objective.** A *Text Custom Field* that explains the objective of what a customer is trying to accomplish.
3. **Health Score.** A *Dropdown Custom Field* displays a client's health score on a 🟢,🟡,🔴 or 1-5 scale.
4. **NPS.** A *Dropdown Custom Field* that can be manually edited based on the client's NPS score or can be brought in through an automation (i.e., sending a Retently score to ClickUp through a Make automation).
5. **Service(s).** A *Label Custom Field* that shows what service(s) a customer is receiving (i.e., ABM, SEO, Paid Social, Website Redesign, etc.).
6. **Delivery Lead.** A *People Custom Field* that shows who the account manager/delivery lead is for a client.

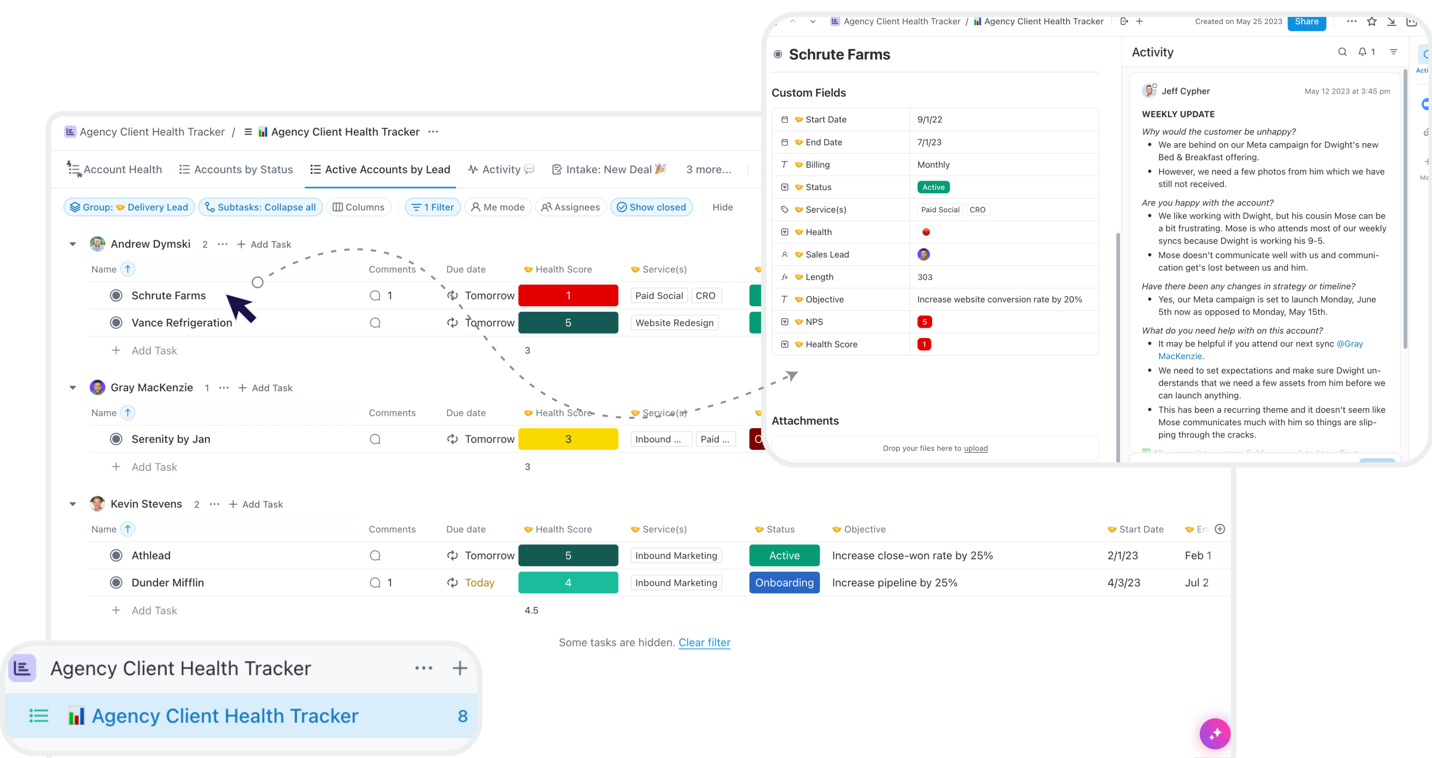
	Status	Health Score	Objectives	Service(s)	Lead	Updates
Client #1	*Onboarding*	🟢	*Increase Web Traffic 25%*	*SEO*	*Jeff*	*We are right on schedule.*
Client #2	*Active*	🟡	*Increase Pipeline 50%*	*SEO, ABM*	*Jeff*	*Doing well! Two more days of onboarding!*
Client #3	*Offboarding*	🔴	*Increase Conversions 35%*	*CRO*	*Gray*	*Projects [illegible]*

And these are just a few recommendations, you can continue to add more and more based on what you need. Some options include start/end dates, revenue, billing details, a link to your service agreement, primary contact details, etc.

Once you get your *Custom Fields* all set up and ready to go you can start adding *Views*. Similar to your *Custom Fields*, you can add a lot of different *Views*, but I'd keep it simple to start.

1. **Account Health.** This is your main *View* in the tracker. This is just a basic *List View* that shows the current 'Health Score' of all of your active clients. You'll want this *View* to group all of the *Tasks* (client records) by 'Health Score' *Custom Field*.
2. **Accounts by Status.** This is another basic *List View* that shows all of your active clients. This *View* is grouped by the 'Status' *Custom Field* to show you which clients are onboarding, active, off boarding, etc.
3. **Active Accounts by Lead.** This is another basic *List View* that filters *Tasks* (client records) by your 'Delivery Lead' *Custom Field* to show you how well your delivery leads/account managers are doing.

Now, once your *Custom Fields* and *Views* are all ready to go, you can start adding in *Tasks*. Your *Tasks* in this *List* should line up with what you have in the 'Delivery' *Space*. Make sure that every client engagement (or deal) has it's own *Task*.



Here's How To Bring Your Health Tracker to Life

At this point, you've built a great database to store all of your client data, but now, here's where it really starts to pay off.

To help your team become more proactive and help you understand the reasons behind all of those health scores, you'll want to have your account managers/client leads update these records on a weekly basis (or directly after their meetings with the clients).

Every week, your account managers will navigate to the *Task* that represents a client engagement for which they're responsible. They'll update the 'Health Score', 'NPS', 'Status', and anything else you need them to update. Additionally, they'll be shedding some light on that 'Health Score' in the comments section within that *Task*.

They should be answering questions like:

1. **Why might the customer be unhappy?** This helps you understand if there might be any potential issues in the future even if the client is happy right now and gets your account management team to be more proactive.
2. **Are you happy with the account?** This helps you understand how your account managers are feeling internally about the client.
3. **Have there been any changes in strategy or timeline?** This helps you understand how we're pacing towards the client objectives that were set during the sales or onboarding process. And if not, why not?
4. **What do you need help with on this account?** This helps you understand if more resources might be needed to get this client back on track.

Collecting this data on a weekly basis will make it much easier for your leadership team to spot issues and prevent client fires. Plus, it'll help hold your account managers accountable and keep them proactively managing their clients.

And if your sales team is following along, it's amazing context to see how things are going since the deal has been sold, and tell them if maybe they should check in or potentially ask for a testimonial!

Why Build a Health Tracker?

Not only has this been a game changer at managing our clients here at ZenPilot, this has also become the core client management system in over 3,000 different agencies that we've worked with. And the results speak for themselves.

> **"ZenPilot has been the most impactful agency operations investment we've ever made. They understood our situation, know ClickUp inside out, and led our team to a successful implementation. If you're serious about scaling your agency, you need to talk to ZenPilot - they transformed how we work and led a 300% improvement in efficiency."**
>
> **Michael Lisovetsky**
> *Co-founder JUICE*

Agencies using this system have seen:

1. Improved client retention (in some cases, they've cut churn in half!)
2. Stronger client relationships, leading to a steady stream of referrals (word-of-mouth for the win)
3. Teams addressing client needs more efficiently and with better alignment (truly delivering better work, faster)
4. And canceling the chaos of agency life by spotting issues before they turn into client fires

This is a great pairing to have with your 'Growth', 'Delivery', and 'Operations' *Spaces*. And if you don't want to build it from scratch, you can also access our **'Agency Client Health Tracker ClickUp Template' here.**

> **"Our agency has tried many project management tools over the years, but when we migrated to ClickUp we finally felt like we got it right. But hiring ZenPilot to help us implement it was an even better decision -- easily the best investment we made in our agency's growth.**
>
> **In the year since implementing ClickUp, our business has doubled, and our project management systems and structure have been able to adapt and scale with us."**
>
> **Whitney Parker Mitchell**
> *CEO & Founder, Beacon Digital Marketing*

Advanced Use Cases and Optimization

There's so much more to ClickUp and specifically how agencies should leverage it. Once you focus on the basics and gain more momentum in the system, you can begin to think about ways to optimize and build more assets within the system. If you have specific features you'd like to learn about, reach out and let us know. We'd love to chat!

Here's a few advanced solutions and additional resources I'd recommend:

1. Internal Wiki. Create an internal wiki or knowledgebase in ClickUp to keep your SOPs and tasks in one system
2. HubSpot Integration. Leverage the HubSpot to ClickUp integration to streamline onboarding.
3. CRM. Build a CRM directly in ClickUp.
4. Client Portals. Build client portals for your clients in ClickUp or communicate with clients directly in ClickUp.
5. Contractor Management. How to manage contractors and freelancers in ClickUp the easy way.
6. Lead Tracking. How to track and manage leads in ClickUp.
7. Goal Tracking. How to track goals, KPIs, and OKRs in ClickUp.
8. Project Management Ratio Reporting. Start tracking compliance, completed, and velocity ratios in ClickUp to improve project planning and execution.
9. Agile in ClickUp. Implement an Agile framework for your team in ClickUp.

Start simple, gain momentum, and then explore what else is out there. Or just hire a Verified ClickUp Consultant like ZenPilot, to help you make the most out of your ClickUp investment 😄.

> **"Since following ZenPilot's strategy and best practices, our team is saving hours per team member every week. Communication has improved across the team and we're able to give our clients better visibility in their campaigns. Margins have increased because of the efficiency as well."**
>
> Chris Dubois
> *Lean Labs*

Looking for an 'Easy' Button?

At this point, you've hopefully successfully self-implemented ClickUp and are experiencing a much healthier, productive and profitable team. If you did and are, let us know! We'd love to hear about your success story. **However, If you need some guidance on taking the chaos out of project management and getting ClickUp implemented for your team, please reach out.**

3,000+ agencies have hired us to:

- Design their entire agency operating system
- Build SOPs as easy-to-deploy ClickUp templates for all of their core business processes
- Train their entire team and build healthy habits that deliver consistently great client results
- Create incredible efficiency by implementing world-class tooling and workflow automation
- And give them a single source of truth with all the metrics to operate better businesses

Taking your operations seriously will change your life. And I want you to experience this life-changing impact.

→ We've helped business owners increase productivity by 400%, completely remove themselves from operations, and sell their business.

→ We've helped businesses grow profits by $1.2 million in year 1, triple headcount seamlessly, and improve client retention.

→ We've helped lead complete culture resets, increased employee satisfaction, and slashed team turnover.

If you're ready to experience the power of world-class operations, schedule your free ops clarity call here. On that call, we'll review your goals and current situation—then design the playbook to help you build a truly gold-standard operation in ClickUp.

SCHEDULE MY FREE STRATEGY OPS CALL →

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ZenPilot helps you put an end to chaotic project management so that you can stop switching tools, frustrating your team, and wasting thousands of dollars in lost productivity every month.

Our proven playbook is built on 10+ years of agency operations experience. And as ClickUp's largest implementation partner, we've helped over 3,000 agencies deliver better client services without all the chaos. For more information, visit *www.zenpilot.com*

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