



Commence Studio Increases Client Satisfaction with Streamlined Operations

CASE STUDY



"We've learned so much by sponging up how ZenPilot operates itself. What ZenPilot has done is just mind-blowing to me.

With ZenPilot's help, we're now setting better expectations in the sales process, seamlessly passing work across teams, and creating a better client experience right off the bat."

Matthew McIver,
CEO/Founder, Commence Studio

Commence Studio helps purpose-driven brands be seen and heard.

Highlights

Challenges

- No clear playbook for delivering services
- Limited visibility into capacity for resource management
- No single source of truth for client work
- Vague timelines and task assignments

Overview

Commence Studio is a 9-year old creative agency focused on aiding businesses of all sizes - small, medium, and enterprise - in starting, growing, and renewing themselves through design and technology.

They offer a range of services from branding, packaging, e-commerce development, and digital marketing.

Despite their success, the agency was grappling with process issues that hindered their scalability and client relationships.



"We were experiencing a lot of things slipping through the cracks, both internally and on the client side. We knew it was time for a change." said Matthew McIver, CEO of Commence Studio

Solution

Commence Studio
partnered with ZenPilot
who:

- Revamped their ClickUp hierarchy to provide full visibility into agency work
- Provided pre-built ClickUp process templates to streamline work creation, assignments and due dates
- Coached, trained and certified their whole team
- Developed dashboards and views - providing insights into client timelines, health and team capacity

Results

- An extremely smooth onboarding process
- Clarity into timelines and task assignments
- A single source of truth and full context into client projects and expectations
- Visibility into capacity and workload

The Challenge

Similar to most teams, Commence Studio had self-implemented ClickUp. And despite it helping them create and assign tasks, they didn't have an optimal structure or the processes in place to take full advantage of the platform. As projects came in, they'd build tasks from scratch - decreasing productivity, organization, and client satisfaction.

In addition to their lack of processes, there was no single source of truth and client data lived across multiple tools. Client notes and communication were hosted in their CRM, proposal software, ClickUp, email, and text, making it difficult for the team to have full context into their assigned work.

Matthew explains: "There was a lot of back channeling, DMs, and one-on-ones, which made it so there were no breadcrumbs anywhere."

Matthew also lacked visibility into his teams capacity and workload. Sitting in a sales role, this made it difficult for him to have the confidence that his team had bandwidth to take on another client. Despite the team delivering amazing results for clients, it wasn't always a smooth and healthy process.

Lastly, similar to most agencies, the Commence team dealt with scope creep and project delays. Most of this resulting from:

- Lack of understanding on client expectations, scope of work, and deliverables
- Confusion on task assignments and timelines
- And an inconsistent usage of sales notes

Despite Matthew's eye for design and creative thinking, he hadn't put as much effort into the operational side of things.

The Commence Studio team eventually took a hard look in the mirror and knew if they really wanted to scale and grow beyond 7 employees, they needed to restructure their ClickUp hierarchy, productize their services, document their processes, and build healthy habits in ClickUp.

"We used to be a really scrappy team. We'd roll up our sleeves and get work done for clients. We'd still deliver consistency from client to client, but it was exhausting. Plus, as we brought on new team members, it was very difficult to onboard them without SOPs or playbooks for them to follow," explains Matthew.

Matthew spent time researching how they could make this next step in their agency journey and was eventually referred to ZenPilot. He spent a few weeks digesting their content and knew they were the right partner to get the job done.

The Solution

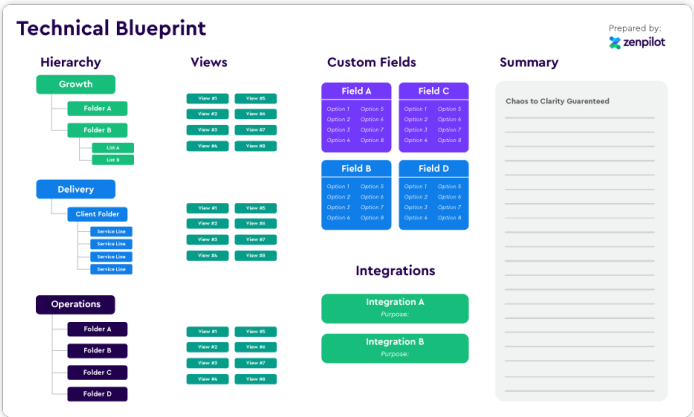
Commence Studio followed the ZenPilot 1-3-5 Formula to lead them through their project management transformation.

Over the course of 3 months, ZenPilot helped the Commence team use the right tools, build the right habits, and execute the right processes.

The Blueprint

First, ZenPilot worked with Commence Studio to fully understand their operation - surveying their team, benchmarking current performance, defining behavioral standards, and prioritizing their process needs.

After a few short weeks, ZenPilot designed a technical blueprint, strategic recommendations, and a detailed implementation plan to help Commence Studio overcome their pains, frustrations, and surpass their goals.



Although Matthew had the option to self-implement The Blueprint from ZenPilot, he decided to invest in ZenPilot to lead his team through the implementation process.

"ZenPilot was the largest investment I've ever made as an agency owner, but once I had clarity and confidence in the ZenPilot systems and implementation team, it was a no-brainer to say, 'hey, let's proceed'. I knew I needed an army to do this. I couldn't go do this by myself. My team and I felt extremely supported the whole way through," explains Matthew.

The Implementation

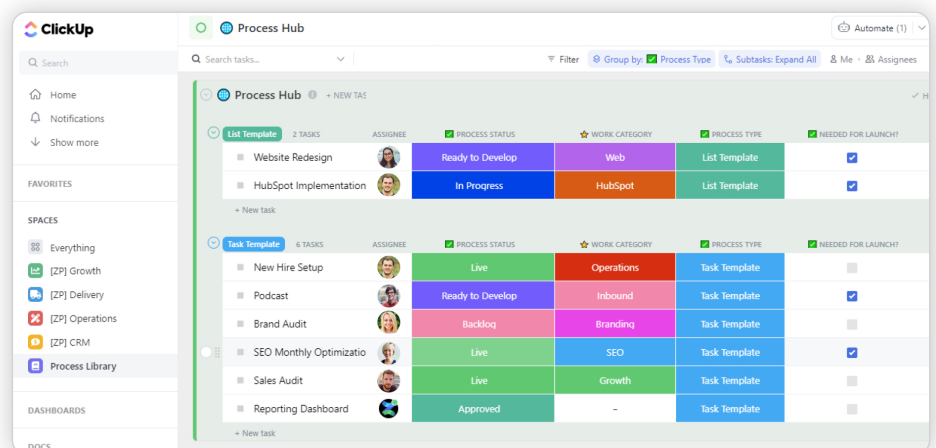
With the technical blueprint in hand, ZenPilot moved into the second phase of the project - Implementation. This involved bringing The Blueprint recommendations to life.

ZenPilot began by overhauling Commence Studio's existing ClickUp hierarchy. This revamped hierarchy provided a system with better usability, visibility and organization.

ZenPilot installed new spaces and folders, views and custom fields, automations, a detailed agency knowledge base, dashboards, and a process library of 200+ process templates to speed up the implementation process.

After restructuring the hierarchy, the Commence team received a dedicated coach to lead them through the process of streamlining their operations in ClickUp.

By arming them with pre-built process templates, training courses, and live coaching calls, the Commence team built over 50 detailed process templates in a few weeks - helping them productize and standardize their services.



*"The process hub and library that ZenPilot gave us made me aware of all the blind spots that we had. Even the simple things like onboarding. We didn't have a process for this and we freestyled it every time. **The process library was a huge benefit for us because it gave us a starter kit and helped us productize our services and build them out in ClickUp,**" says Matthew.*

ZenPilot strives to provide a Chick-Fil-A level experience and make this process fun and exciting while being extremely impactful and educational. This helped the improve team buy-in and made the process of process building much more enjoyable.

Matthew says: "I'm a big relationships guy. And the coaches that we worked with at ZenPilot were amazing. We had such an amazing relationship with them. They did such a good job at establishing a great relationship with us and becoming a trusted advisor during this transformational process. It's cool to work with a partner like ZenPilot. These relationships way outlast any software product you could buy."

After the process building concluded, ZenPilot led Commence through launching their new ClickUp system to the whole team.

This involved:

- Coaching the team on how to set up client folders, views, docs, and setting up tasks with their new templates.
- Creating a single source of truth inside their new ClickUp workspace.
- Aligning the team on timeline and expectations.
- Training the team on healthy habits inside of ClickUp.

To help them understand the system and build healthy habits in ClickUp, every member of the team completed ZenPilot's "Agency Project Management Certification" program.

Additionally, ZenPilot held a live team training with the whole agency to reinforce what was taught and answer questions. This helped ensure that the team was aligned and confident with what they were doing.

Jeff Cypher, Productivity Professor at ZenPilot explained: "Launching a new project management tool is a lot of work. When you overhaul the way that the entire team works, it takes a lot of coaching, training and hand-holding to get the team confident and fully bought-in. Change management is never easy, but after helping over 10,000 individual agency members adapt to this new methodology, ZenPilot has mastered the process and built resources to help agencies get their teams excited about this transformation."

Aside from training the team, ZenPilot coached the Commence team through deploying tasks, setting up automations, and assigning work so that every member on the team showed up to work every day with a dedicated list of tasks waiting for them to complete.

After Commence Studios had successfully launched, ZenPilot assigned an internal ClickUp Champion and gave them specific training on how to hold the team accountable—and consistently improve agency performance.

Jeff explained: "Every agency needs a ClickUp Champion. They help the team build the healthy habits you need to have success. Your ClickUp Champion holds the team accountable, keeps the system clean, and helps the team get 1% better everyday. I can't tell you how many agencies miss this step and then lose momentum. ClickUp Champions are the glue that holds all of this hard work together."

The Results

A single source of truth, more confident team, and outstanding client feedback

Shortly after launch, the entire agency had significantly more confidence in the system. Communication is now centralized and there is a paper trail for everything that's happening.

The team no longer has to scroll through Slack, email, texts, and notes to figure out what's going on. This alone makes the team much more productive and efficient.

Additionally, they were able to onboard 4 clients in one week and received tremendous feedback about how organized and smooth the process was.

*Matthew explained: **"We're significantly less distracted (especially in Slack). We are commenting where the work is being done and everything lives in ClickUp.** The team was amazed at the paper trail and context they had on their tasks. It's a game changer!"*

Matthew also discussed the improvements they've already started to see with customer NPS ratings.

"The value of our investment with ZenPilot is paying off with our customer ratings. We have all of our processes in order which help us deliver amazing results and get great NPS results and feedback, leading to more clients coming through the door." says Matthew.

By using the right tools, building healthy habits, and executing the right processes, the Commence team is experiencing a more productive and profitable agency.

Matthew says: "Having systems in place and building healthy habits allows a healthy culture and on time delivery."

The Commence team is excited to continue to optimize what they've created.

With their scalable PM structure and healthy habits to improve performance, the future is bright for Commence Studio.

Matthew explained: "We've learned a lot by sponging up how ZenPilot operates itself. What ZenPilot has done is just mind blowing to me. We've really just learned a lot through the osmosis of working with ZenPilot that we're trying to replicate. Though we do have more work to do, the whole team is thrilled with the system we have in place."



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management implementation**

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