zenpilot

THE ULTIMATE GUIDE

6 Steps to Better Workload Visibility and Management

"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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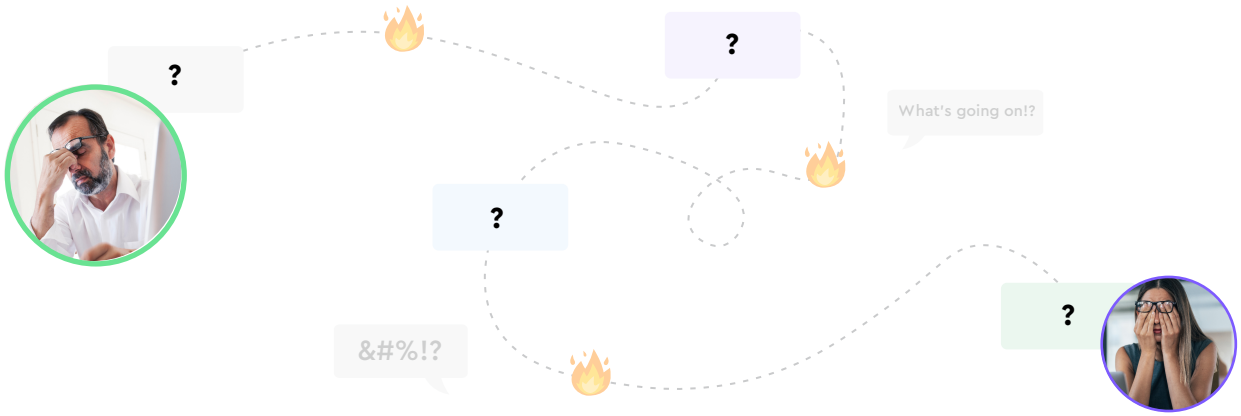
Introduction

Running a marketing agency or professional services firm comes with no shortage of moving pieces. You've got multiple clients, projects, campaigns, and team members to manage. It quickly becomes extremely difficult to understand your team's workload and availability.

Without proper visibility into your workload, here's what happens:

- Employees get overworked and burnt out (a recent Gallup survey found "unmanageable workload" to be the second largest reason for employee burnout).
- Important projects fall through the cracks.
- You take on too much client work without capacity.
- You turn away new business because you assume you're "too busy".



Having clear visibility into your team's workload and capacity is critical. When leveraged properly, it can have a tremendous impact on your employee's satisfaction, quality of client work, new business growth, and overall profitability. But despite this being so critical, theres sadly no magical switch that you can just turn on to solve this problem. Workload visibility takes work, but I'm here to show you the exact work you need to do to achieve this level of clarity.

"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 Ende
COO, Trinity Insight

The Reality of Workload Visibility

I want to begin by setting your expectations. As mentioned, achieving capacity clarity takes work. Let me warn you—if you're buying a new project management platform and thinking that the tool alone is going to show you exactly how much capacity your team has, you're making a huge mistake.

I've seen far too many teams expect a simple "workload" view to solve all their problems. Your "workload" view is simply a canvas with some outlines. It gets you part of the way there, but you'll still need some paint and the numbers—if we're painting by numbers—to fill in the lines.

I'm not saying tech isn't a part of the equation; it's just not the final solution. To get an accurate picture of workload, you need to combine the right processes, with the right habits, and the right tech. **Processes, habits, and tech are your three-legged stool to clarity.**

The right processes lead to detailed tasks, accurate time estimates, due dates, and assignees. The right habits lead to work being scheduled consistently and accurately, work being completed on time (or being appropriately rescheduled if not), a single source of truth, and a system that matches reality. And the right tech leads to a system that elevates your processes and habits—And yes, I'd recommend ClickUp for this. This is the mindset and formula you'll need when thinking about workload.

In this guide, I'll walk you through five practical ways to build a better *Workload View* in ClickUp. After that, we'll take a step back and discuss your team's planning, assigning, and completion of work; this will also have a significant impact on your *Workload View's* accuracy.

Also, if you've never used ClickUp—or have limited experience with the tool—reading our ***"How to Use ClickUp"*** *guide will provide you with a lot of additional context and tips as you read through this guide. Use both of these free resources to help you on your journey to clarity. And if you have any questions along the way, let's chat!*

Step 1: Build a Workload View in ClickUp

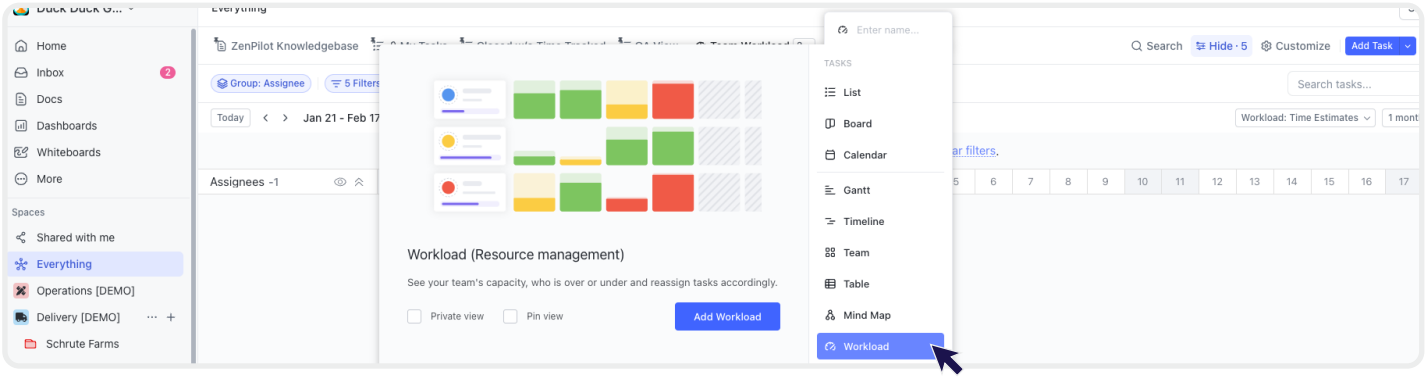
Step 1 is relatively easy. You need to add a *Workload View* to your ClickUp *Workspace*. And if you're using another project management system at the moment, they should have something similar as well, but I'd recommend ClickUp as your tool of choice (I'll be dropping my reasons for ClickUp as you read through this guide).

ClickUp has a unique—and rather amazing in my opinion—*Hierarchy* that allows you to break down projects into multiple hierarchical levels of *Spaces*, *Folders*, *Lists*, and *Tasks*. This is perfect for organizing work and projects, but having a universal *Workload View* is crucial to roll up all your active work into a single place. That said, building your *Workload View* at ClickUp's *Everything* or *Workspace* level is critical to actually get full oversight into everything going on in your business.

That said, here are the steps to create a Workload View:

1. Navigate to the *Everything* level at the top level of your ClickUp *Workspace*.
2. Click on "Views" in the left sidebar.
3. Click the "Add View" button and select "Workload" as the *View* type.
4. Give your View a name like "Team Workload".
5. Click the "Add Workload" button.

This will create a new *Workload View* defaulted to a weekly timeframe. At first, you may not see any *Tasks* populate, but we'll cover how to configure the settings for accuracy next.



For now, take note of the following in your new Workload View:

- You can toggle between weekly and two-week views.
- Switch between *Time estimate* (my recommendation), number of *Tasks*, *Points*, or a *Custom Field*.
- Change *Assignee* filtering and grouping.

And now that you've built your *Workload View*, let's discuss customizing your *View* settings to show the most complete and accurate workload.

Configure Your Workload View Settings

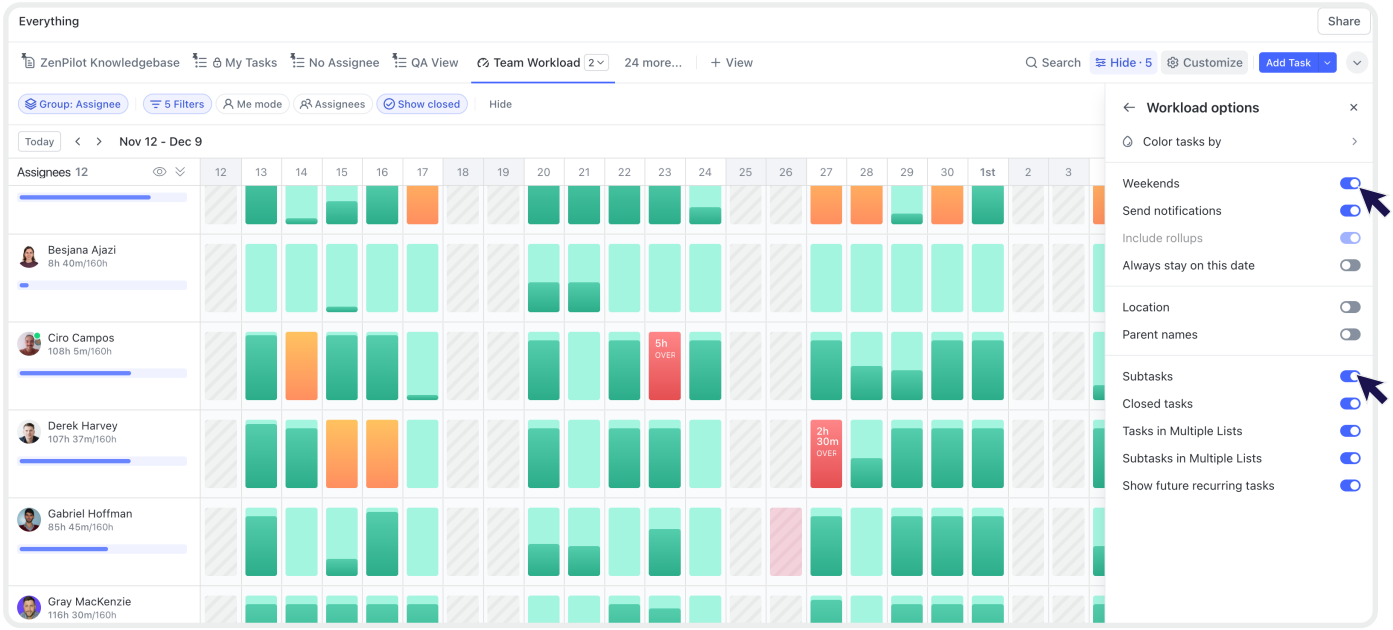
Just like any *View* in ClickUp, when you create your *Workload View*, you'll need to edit a few settings before you're ready to roll.

First: Show Subtasks

The biggest adjustment you'll need to make is adjusting your *View* to show *Subtasks*. Your team should be working out of *Subtasks* (more on this later); if *Subtasks* aren't turned on in your *Workload View*, then nothing will show up.

To make this change, navigate to and click on the "Customize" button, choose "Workload Options" and toggle on "Subtasks".

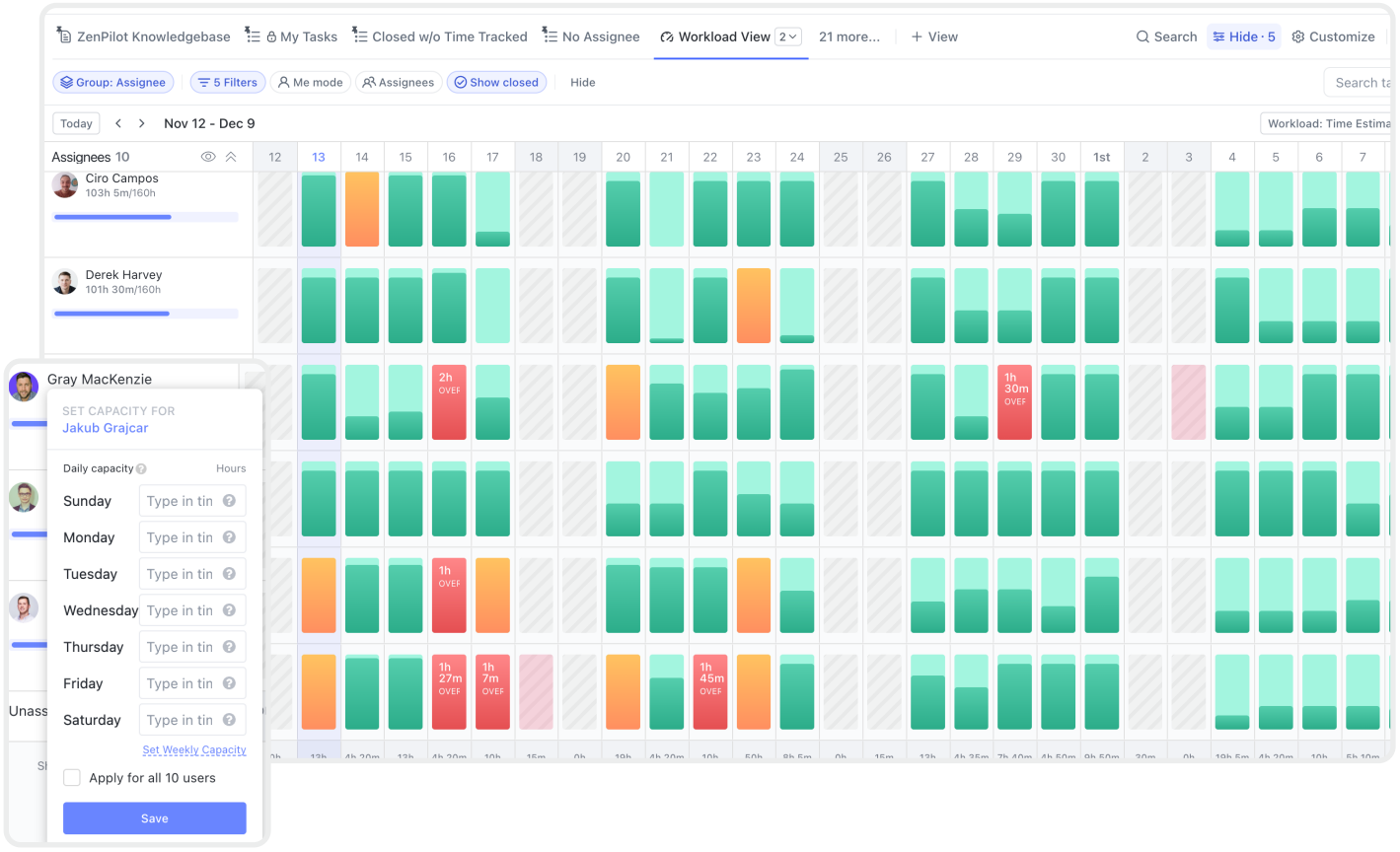
I'd recommend leaving everything else turned on, too. It's important that you don't miss out on any *Tasks* in your *Workspace*, because those contribute to the workload!



Second: Show Weekends

I'm not encouraging or saying you should be working on weekends, but I do recommend leaving "Weekends" turned on in your *Workload View*. It's not uncommon that a *Task* ends up accidentally falling on a weekend.

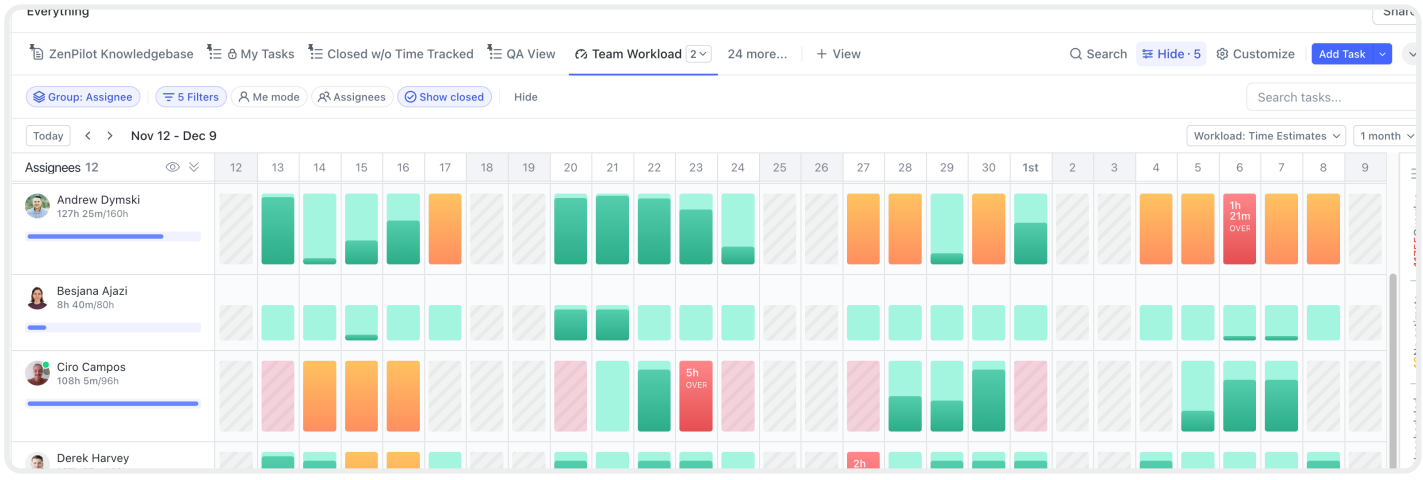
If you show weekends in your *Workload View*, you'll be able to easily spot those issues and remap due dates instead of letting those *Tasks* sneak past you and then accidentally overbooking your team on Mondays. That would make for some real "Sunday Scaries," wouldn't it?



Third: Add Custom Capacities

Within your *Workload View*, you'll also have the option—depending on your *ClickUp Pricing Plan*—to adjust weekly or daily capacity for your team. This can be extremely helpful if you work on a 4-day work week or have full and part time employees.

Again, this is dependent on your *ClickUp Pricing Plan*, so you may need to upgrade if this is a necessary feature. You can read more about Clickup Pricing Plans in our article, **"How to Choose the Right ClickUp Pricing Plan"**.



Fourth: Create a Monthly View of Workload

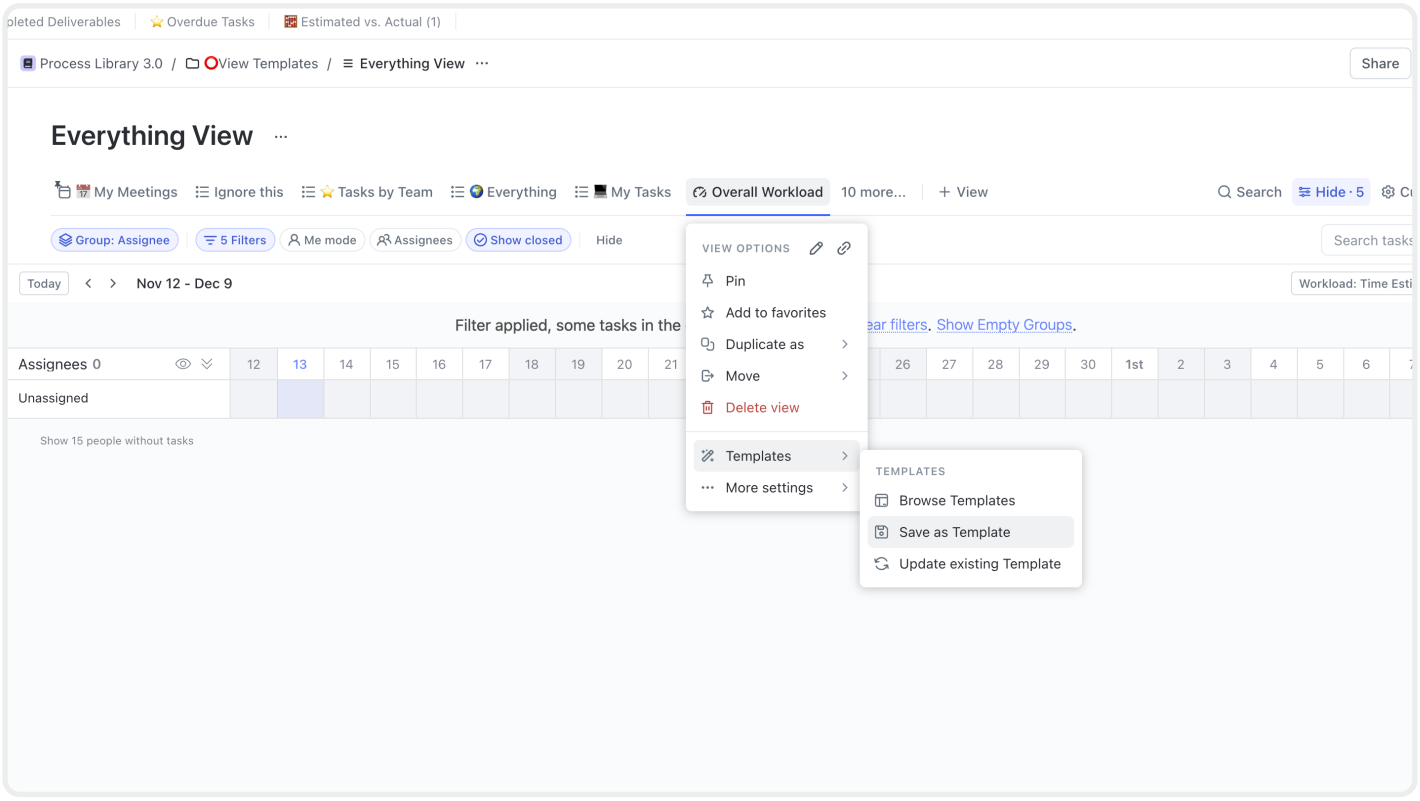
Most teams like to look at work months at a time. If you're running *Sprints*, two weeks is probably fine, but it can be helpful to get a little glimpse into the future. That said, the *Everything* level *Workload View* is sadly only going to show you a 1 or 2-week window (at the time of this being written).

Your *Workload View* can show a month at a time at the *Space*, *Folder*, or *List* levels, but it can't show a month at the *Everything* level. Sad, I know, but there is a workaround!

Here's how to create a Monthly Workload View:

1. Create a *Workload View* at a *Space*, *Folder*, or *List* level in your *Workspace*. I prefer to have some *View Templates* in my "Process Library", so that's where I built this (screenshot below).
2. Adjust your *Workload View* settings, and make sure you adjust your time frame from 1 week to month.
3. Now, save this *View* as a *Template* in the ClickUp *Template Center*.
4. Go back to your *Everything* level *Workload View* and deploy your new *Workload View Template*. Once the *Template* is deployed, you'll be able to view a full month of workload. Boom!

Now, after you've successfully configured your monthly *Workload View* at the *Everything* level, it's time to bring this to life/start painting within the lines—if we continue our painting analogy.



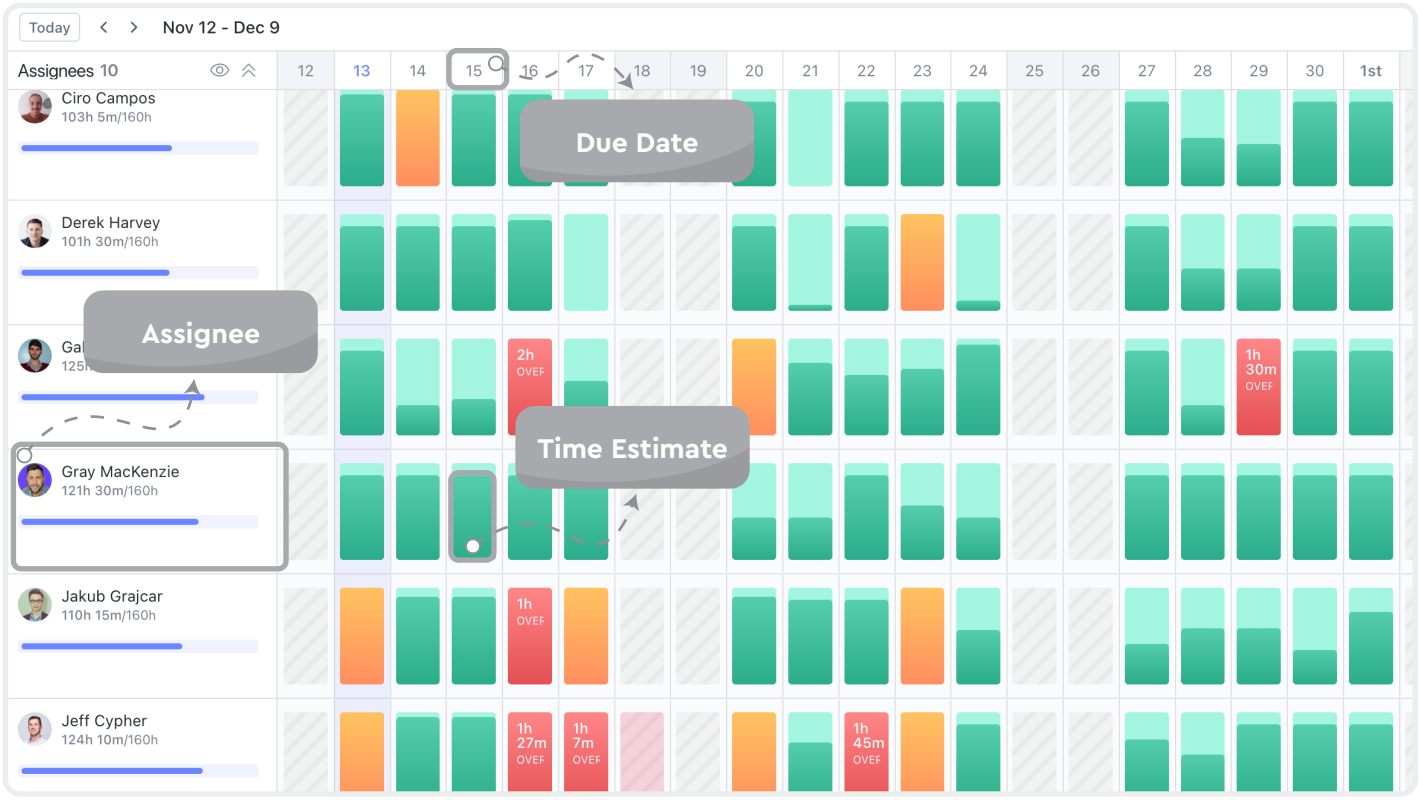
Step 2: Populate Your Workload View

Now that you've created your *Workload View*, let's discuss what it takes to get tasks to populate that *View* accurately. First, it's important you understand what will actually populate your *Workload View*.

Every Task in ClickUp requires three key ingredients:

- **An Assignee:** The *Task* must be assigned to someone.
- **A Due Date:** The *Task* must have a *Due date* set.
- **A Time Estimate:** The *Task* must have an estimate of how long it will take to complete.

If any of these three items—*Due date*, *Time estimate*, and an *Assignee*—are missing from a *Task*, it will not be factored into your *Workload View* properly. I understand that this may seem obvious, but I've audited hundreds of ClickUp *Workspaces*, and there are just too many *Tasks* out there that are missing at least one of these. Don't make this same mistake.

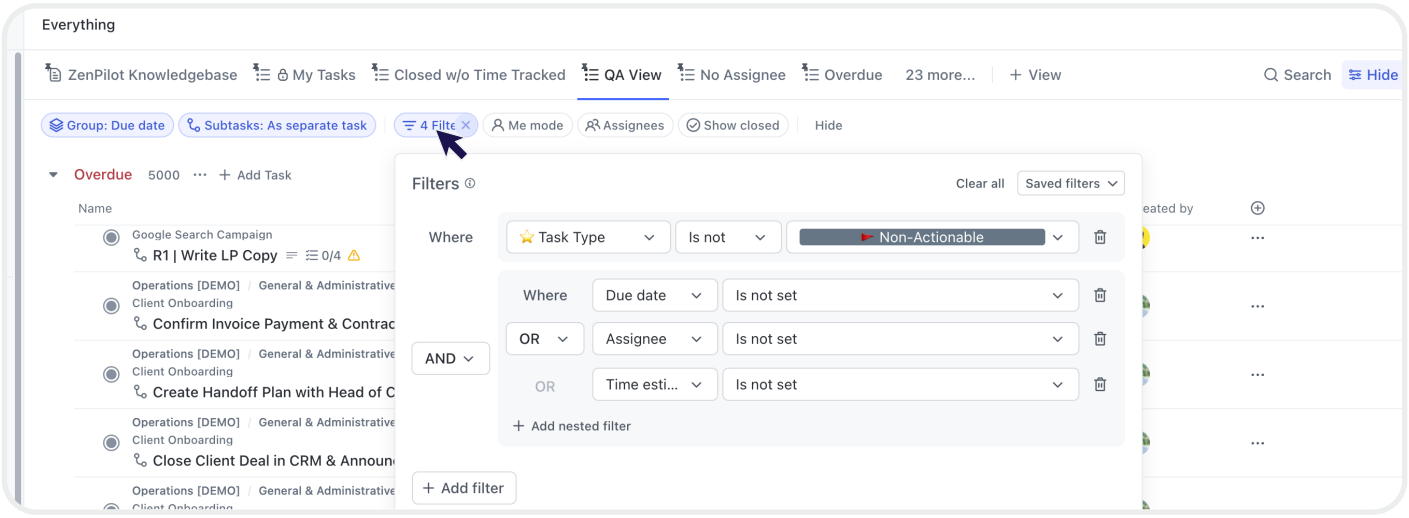


To help with this—and a big reason I recommend ClickUp—you can create a "QA" View to audit all of the *Tasks* in your ClickUp *Workspace*. There are other project management tools out there that can do something similar, but ClickUp is a clear leader in this category.

Here's how to build a "QA" View in ClickUp:

- Navigate to the *Everything* level and click "+ View". Find "List" and click "Add List". This can be private or public. if you don't want anyone else to edit or mess this *View*, make it private.
- After your *View* loads, rename it "QA View".
- Navigate to "Customize" and begin adjusting the *List* settings.
  - You'll want to show 5 *Fields*—*Comments*, *Assignee*, *Due date*, *Time estimate*, *Created by*.
  - You'll use boolean logic for the *Filters*.
    - Where *Task Type* is *Non-Actionable* (this will get rid of any task that is not actionable; therefore, it doesn't have an assignee)
    - Now, click "+ Add nested filter".
      - Where *Due date* is not set;
      - Or *Assignee* is not set;
      - Or *Time estimate* is not set.
  - You'll want to *Group* by *Due date*.
  - Your *Subtasks* should be shown "As separate tasks".

This *View* leverages ClickUp's boolean logic to show any task that's missing a *Time estimate*, a *Due date*, or an *Assignee*.



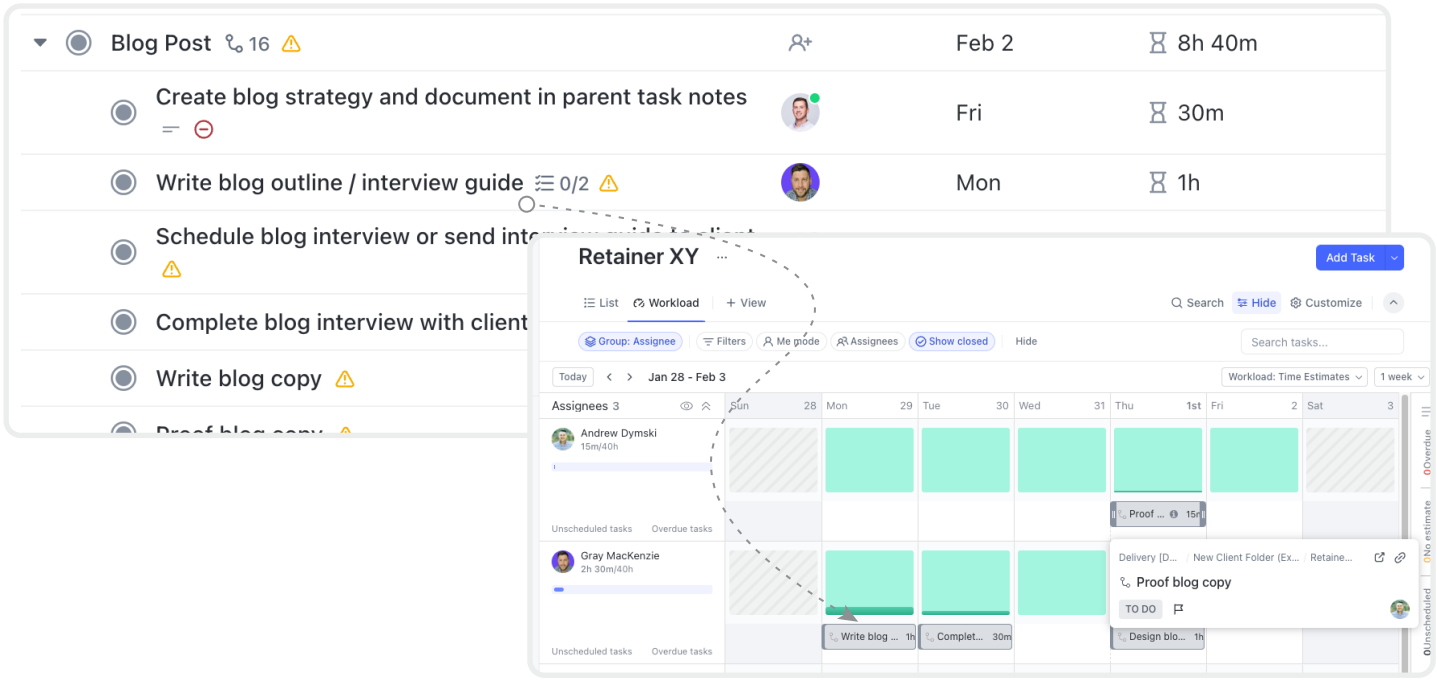
The process is simple after you create this *View*. On a daily basis, someone on your team—we recommend having a ClickUp Champion—should use this *View* to ensure that every *Task* has a *Time estimate*, *Due date*, and an *Assignee*. If they don't, use the "Created by" *Field* to reach out to the *Task* creator to get the *Task* finalized. When a *Task* has everything it needs, it will disappear from the *View*!

This will keep your *Tasks* clean, but this is only step #1. Here are a few more tips to keep your *Workload View* moving in the right direction.

Tip #1: Break Down Larger Tasks

To make your *Workload View* as accurate as possible, you want to keep *Tasks* broken up into smaller "bite-sized" pieces. Most teams don't provide enough granularity in their *Tasks*, and it leads to minimal visibility and work slipping through the cracks.

I've seen plenty of teams make the mistake of having one *Task* for a blog post, assigning it to three different people, with a *Start date* of November 7th, a *Due date* of November 14th, and a *Time estimate* of 9 hours. With that *Task* structure, you'll end up splitting the *Time estimate* among the 8 days, with each person having the 9 hours assigned to them as well. On top of that, nobody really knows what they are responsible for, and work will most likely slip through the cracks.

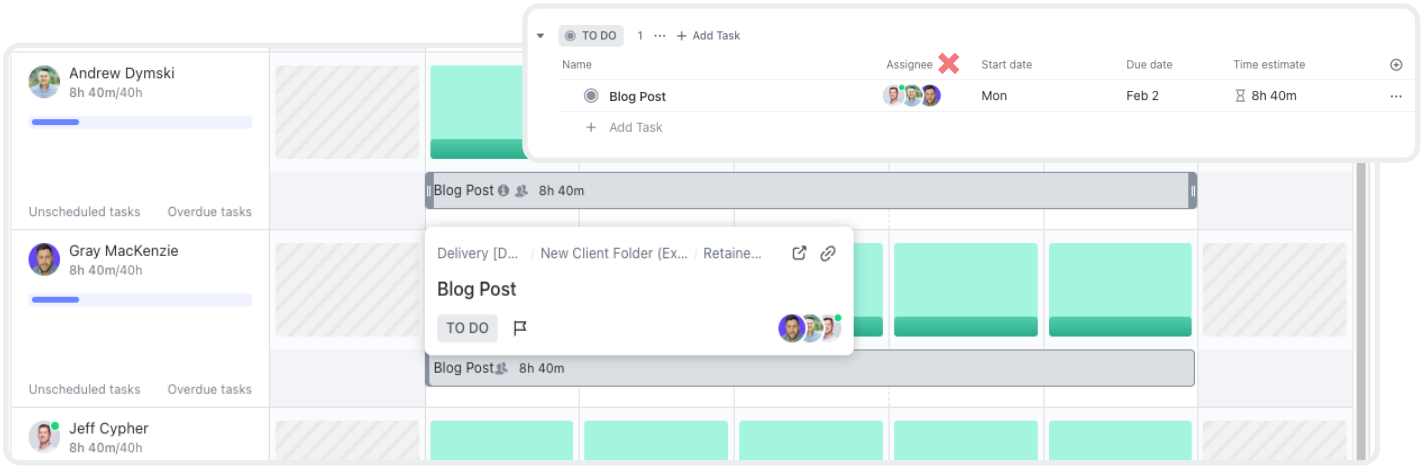


If you split this blog post into different *Tasks*—write the post, review the post, design the creative, and publish the post—and each person is assigned to their *Task*, with a *Time estimate*, and a *Due date*, you'll minimize work slipping through the cracks and get a much more accurate picture of how much work is on each person's plate.

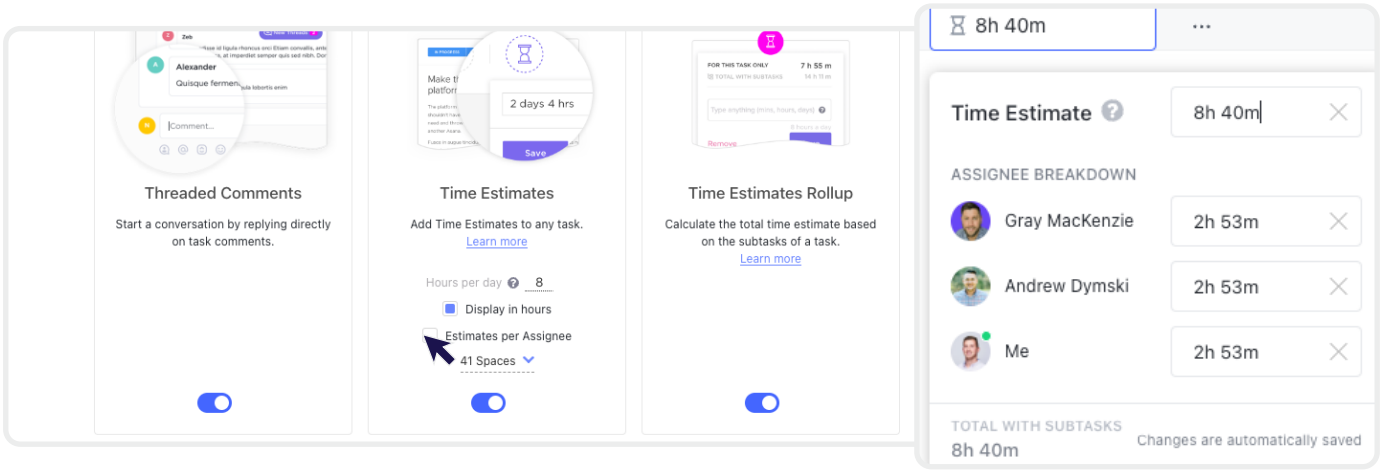
Now, let me warn you. Some teams go a bit too far with *Task* granularity. You want work broken down for clarity and visibility purposes, but if you find yourself with hundreds of 5- to 20-minute *Tasks*, you've gone too granular. There's a happy medium here. If you need a trusted partner to help with this, **book a call with my team.** We can help you build gold-standard workflows and processes in ClickUp. That said, every *Task* in your *Workspace* needs to follow the "one user, one sitting" methodology, which we'll describe more in the next few pages.

Tip #2: Assign Only One Person Per Task

One of the biggest mistakes teams make in ClickUp is assigning a *Task* to multiple people. Please, resist the urge to assign multiple people to a single *Task*. Assigning a *Task* to multiple people creates ambiguity around who is responsible for completing it and messes up your *Time estimates*.



Both people will get the same *Time estimate* applied to them unless you have *Estimates per Assignee* turned on. This *Estimate per Assignee ClickApp* feature will take a *Task's Time estimate* and split it amongst the *Assignees*.



However, turning this on can potentially lead to problems. The *Estimates per Assignee* setting moves a *Time estimate* from a *Task* to the *Assignee*. It sounds more complex than it actually is. Simply put, if you reassign a *Task*, the *Time estimate* will seem to disappear. This is because the *Time estimate* was removed with the old *Assignee*. It's not the end of the world, but it can cause some confusion and headaches.

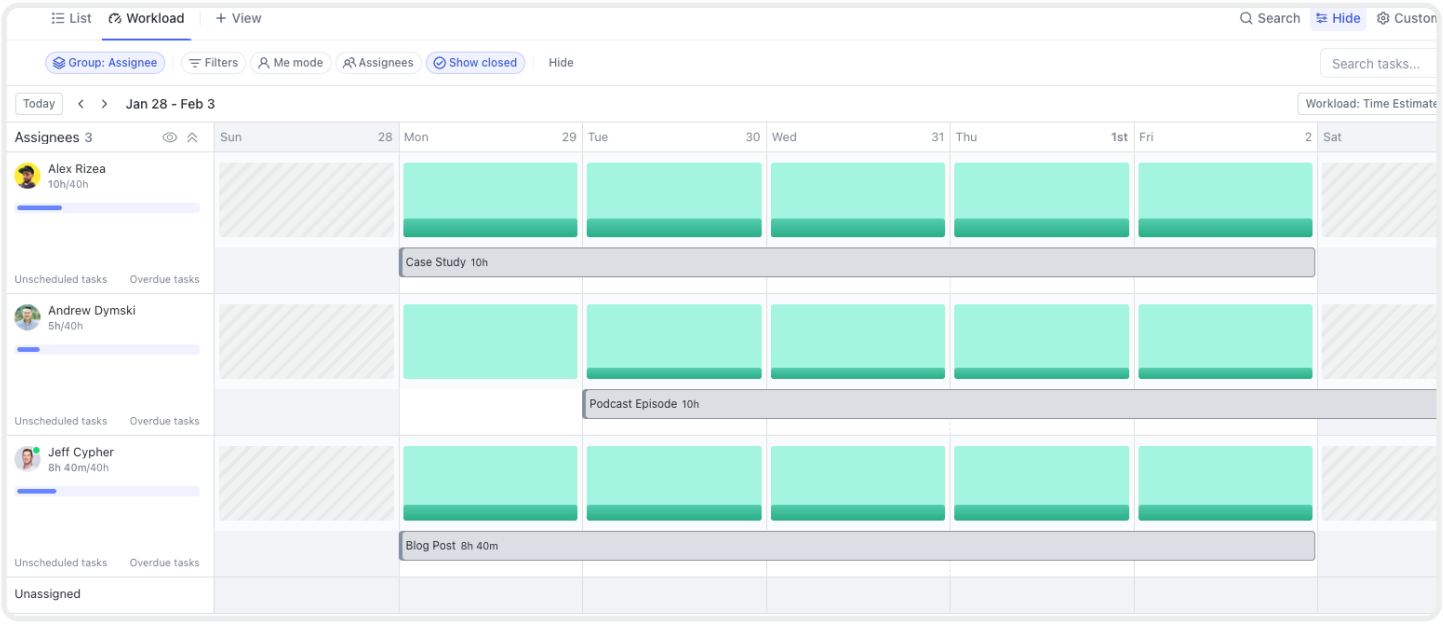
To save yourself from headaches, just stop assigning multiple people to *Tasks*.

Tip #3: The Due Date is the "Do" Date

One of the best things you can do for your *Workload View* is to make your *Due dates* the DO dates. And yes, this strategy involves getting rid of *Start dates* completely. Crazy, I know...

This can be a big change for some, but hear me out.

When you use both *Start dates* and *Due dates* in ClickUp—or any other project management system—you're taking a *Time estimate* and splitting it up across multiple days. By default, ClickUp will split the *Time estimate* evenly across the days between the *Start* and *Due date*.



Ask yourself this, "how often does someone actually work like this on a *Task*?" It may occur sometimes depending on the project and your team's size, but it's not common.

I recommend you break your *Tasks* up into smaller "bite-sized" pieces so that every *Task* can be started and completed on the same day. This provides clarity for the team on what they actually need to do, and show you where you currently are on larger projects.

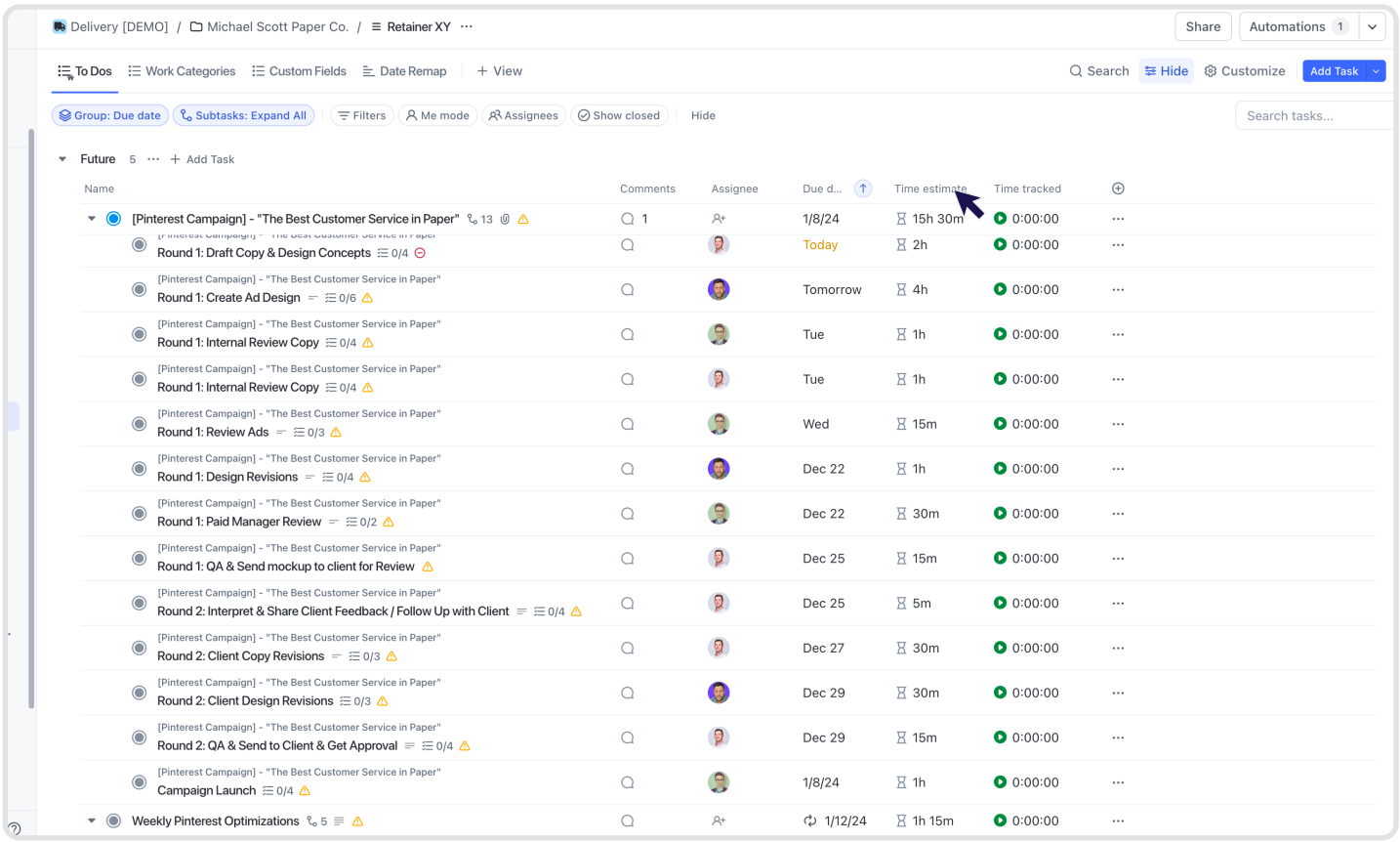
At ZenPilot, we've helped close to 3,000 teams streamline their operations in ClickUp and this is typically one of the biggest operational shifts we ask teams to make. It's not always easy, but if you're reading this guide because you're looking for more visibility in your project management system, it will help.

Tip #4: Time Estimates Under 4 Hours

Continuing with our *Due date* is the DO date theme, you'll need to make sure that every *Task* can be completed in 4 hours or less.

If a *Task* takes longer than 4 hours, split it into two or three *Tasks* and label them as "Phase 1: Task", "Phase 2: Task", "Phase 3: Task"... you get the point. This will ensure that *Tasks* aren't spanning across multiple days. When someone finishes Phase 1 of a *Task*, they can close it out. They'll move on to Phase 2 tomorrow or today if they have the capacity to do it.

By ensuring that your team doesn't half-complete a *Task*, you'll make sure the *Time estimate* always falls on the correct day.



When *Tasks* are only half-complete, this is when your *Workload View* will lose its accuracy. There's no advanced logic in any project management system at the moment that can subtract your *Time tracked* from your *Time estimate* and push that *Time estimate* to the next day. This may be the reality someday, but for now, try your best to avoid it.

Tip #5: Remap Due Dates

And finally, last but not least, you'll need to keep *Due dates* up to date.

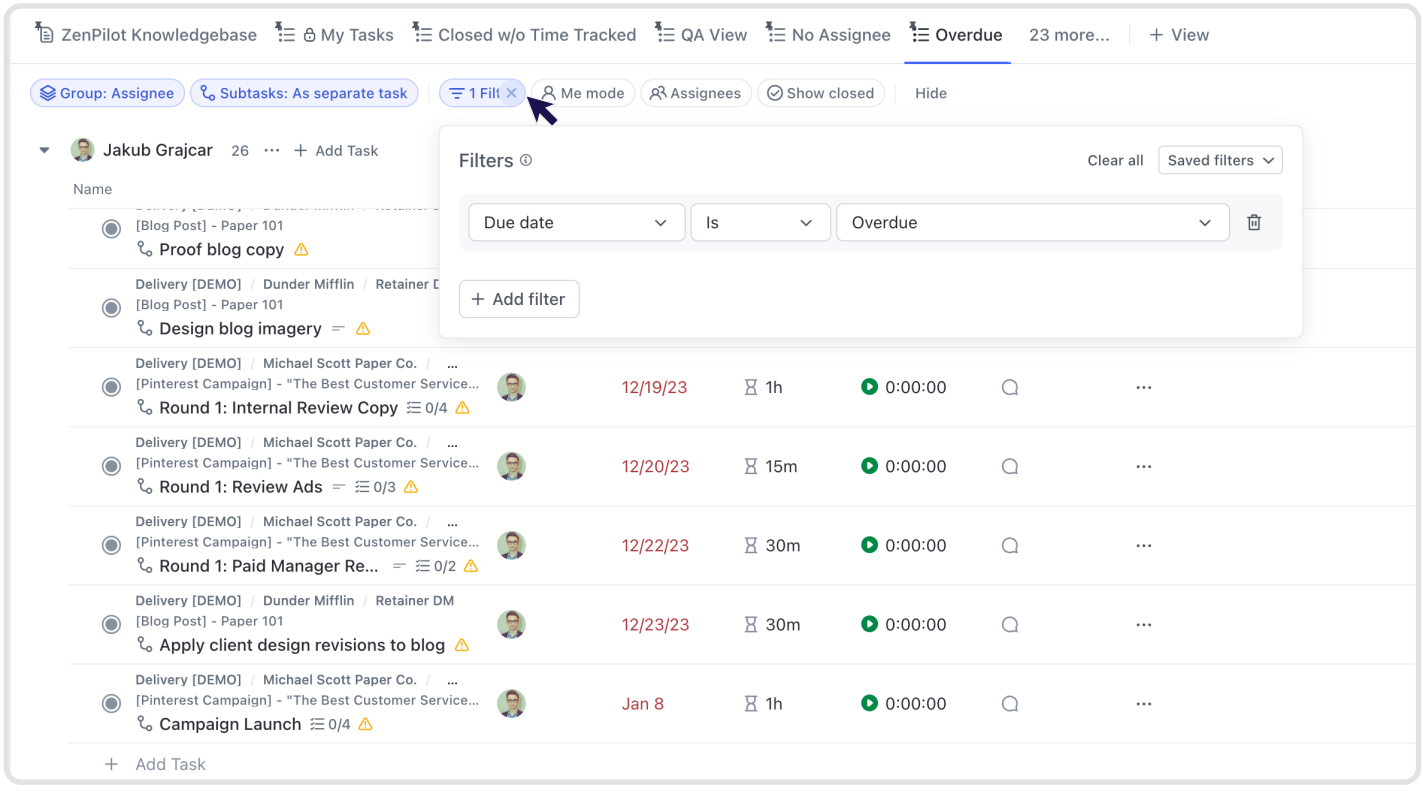
There's a good chance that some *Tasks* will fall overdue—other work comes up, someone falls behind, and a *Task* needs pushed until tomorrow. This isn't the end of the world. but if *Due dates* are not adjusted, you'll lose visibility on your precious *Workload View*.

As I mentioned earlier, the *Workload View* is populated by *Time estimates*, *Due dates*, and *Assignees*. If one of my *Tasks* was due two days ago, but it's still not complete, and the *Due date* wasn't updated to today or tomorrow, it won't show up in my workload for today.

Someone may assign me more work because they think I have 2 hours of capacity, but that 2 hours is actually booked with overdue work.

You need to push your team to build healthy habits here. Everyone should be remapping *Due dates* and leaving comments as to why the *Task* was pushed.

Additionally, to hold the team accountable and minimize this mistake from happening, I recommend that you build an "Overdue" *View* at the *Everything* level. This will funnel all overdue work to one singular *View* to be managed appropriately.

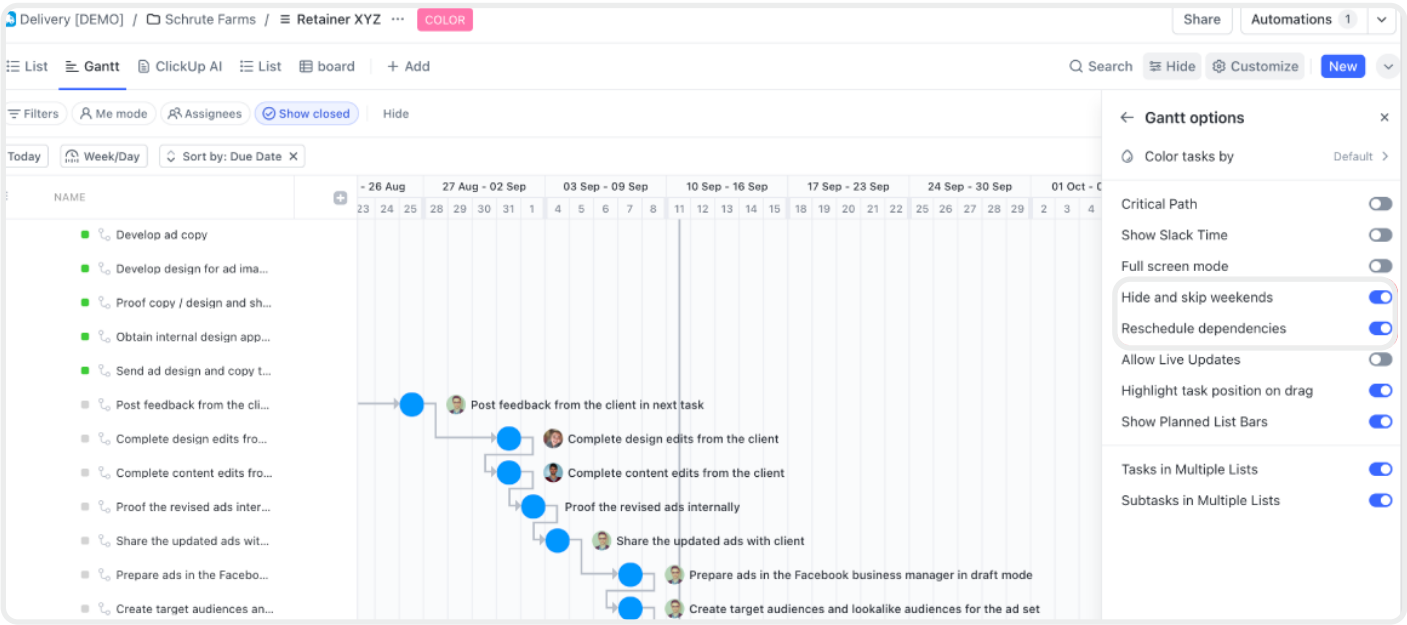


Creating your "Overdue" View is quite simple. Here's your instructions:

1. Navigate to the *Everything* level and click "+ View".
2. Find "List" and Click "Add List". This can be private or public. if you don't want anyone else to edit or mess this *View*, make it private.
3. After your *View* loads, rename it "Overdue Work".
4. Navigate to "Customize" and begin adjusting the *List* settings.
   A. You'll want to show 5 *Fields*—*Comments*, *Assignee*, *Due date*, *Time estimate*, *Time tracked*.
   B. You'll filter where *Due date* is "Overdue".
   C. You'll want to *Group* by *Assignee*.
   D. Your *Subtasks* should be shown "As separate tasks".

This *View* can be built at the *Everything* level or within your *Spaces*. You can leave this responsibility to your team leads or assign your ClickUp Champion to take on the responsibility for your full team.

Along with this *View*, you'll want to leverage the *Gantt View* in ClickUp to remap *Due dates*. The *Gantt View* is an easy way to remap *Due dates* and skip the weekends! For more details on this, read our article, **"How to Best Leverage ClickUp's Gantt Chart"**.



Overall, these five tips will work seamlessly together to build you a more accurate *Workload View*. As mentioned, it's hard work, and you'll need good habits from the team to make this work as well. Train and coach your team on what they need to do, and then hold them accountable to that standard.

And if you need help coaching your team and holding them accountable, we can help. **Click here** to book a call with my team.

Step 3: Document Your Processes

After reading through the last section, you may be wondering, "Well, that all sounds great, but how do I actually get all of those *Tasks* properly structured in ClickUp? And do it efficiently?" ClickUp *Templates* are where you really start to unlock the clarity that ClickUp can provide. And yes, ClickUp's *Template Center* is another reason I'd highly recommend ClickUp to most teams. Other project management systems have their own template functionality, but in my opinion, none of them compare to ClickUp's.

Templates help you standardize your work, connect your SOPs to tasks, and provide clarity for everyone—especially with workload.

You'll most likely struggle to gain momentum in workload visibility by creating every *Task* from scratch. There is a lot of room for error in accurate *Time estimates*, and it will take too much time to get every *Task* into the system.

Documenting your processes and saving them as ClickUp *Templates* helps you get more *Tasks* into your *Workspace* with more accurate *Time estimates*, *Due dates*, and *Assignees*. And that's just one of many benefits.

You'll struggle to hire, scale, and retain clients without documented processes, so you might as well start documenting them today.

If you don't have a single process built, I recommend you start by grabbing our **Process Prioritization Worksheet** to prioritize what needs to be built first. And while you grab and get started on that exercise, let's walk through building these in ClickUp.

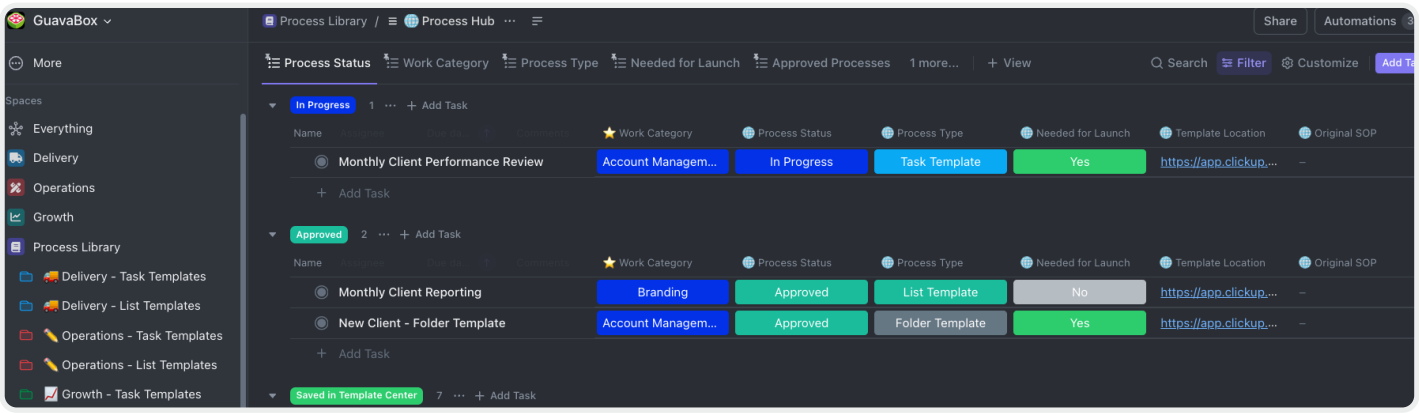
DELIVERABLES & PROJECTS	PROCESS TYPE	SERVICE LINE	POINT PERSON	FREQUENCY	DOCUMENTATION NEEDS	PAIN	SCORE
Facebook Ad Campaign Audit	Deliverable	Paid Social	Karen	5	4	5	14
Create Client Brand Style Guide	Deliverable	Branding	Bob	5	5	4	14
Complete Monthly ClickUp Analysis	Deliverable	Internal Operations	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	12
Monthly Reporting Setup	Deliverable	Review & Strategy*	Mike	2	5	4	11
Complete Monthly Strategy Meeting	Deliverable	Review & Strategy*	Bob	5	3	3	11
Webinar	Deliverable	Inbound Content	Mike	4	4	3	11
Website Design	Project	Web	Mike	4	4	2	10
	Project	Branding	Bob	4	4	2	10

ClickUp Template Best Practices

The beauty of the ClickUp *Template Center* is your ability to turn almost anything into a *Template*. I could probably spend all day talking about the different types of *Templates* and how they're all used, but I'll stay focused here and just give you the best practices as they pertain to workload visibility. However, if you do want a more thorough overview of ClickUp *Templates*, I suggest you read our article, **"How to 10x Productivity With ClickUp Templates"**.

1. Build a "Process Library" Space

Before you dive into the deep end of the ClickUp *Template Center*, you need to create a "Process Library" *Space* in ClickUp. This will serve as a dedicated area to house all of your *Template* source files.



Why should you create a ClickUp "Process 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 "Process Library".

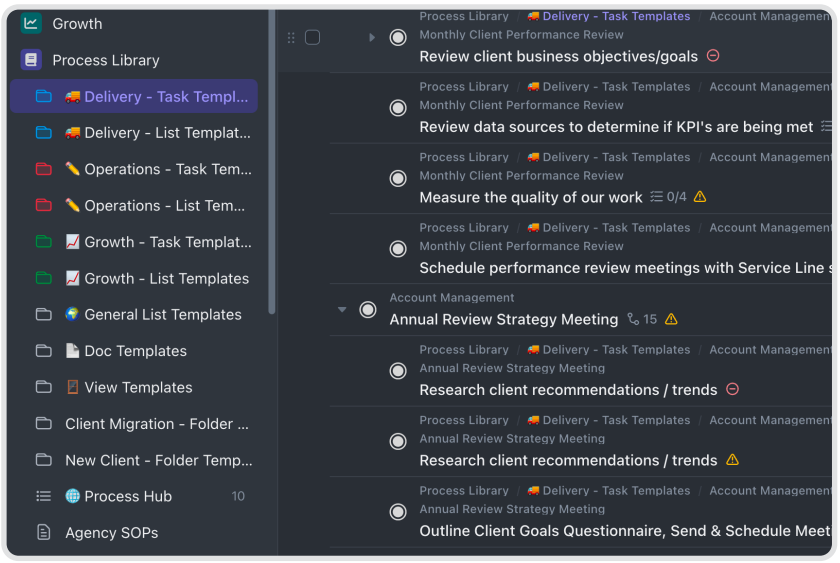
Having these *Template* source files on hand makes updating and maintaining *Templates* easy. Your *Templates* should never be static. You'll be updating them regularly. Especially in the marketing world, things change, and this has an impact on our processes.

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 "Process Library".

How Should Your Process Library Be Structured?

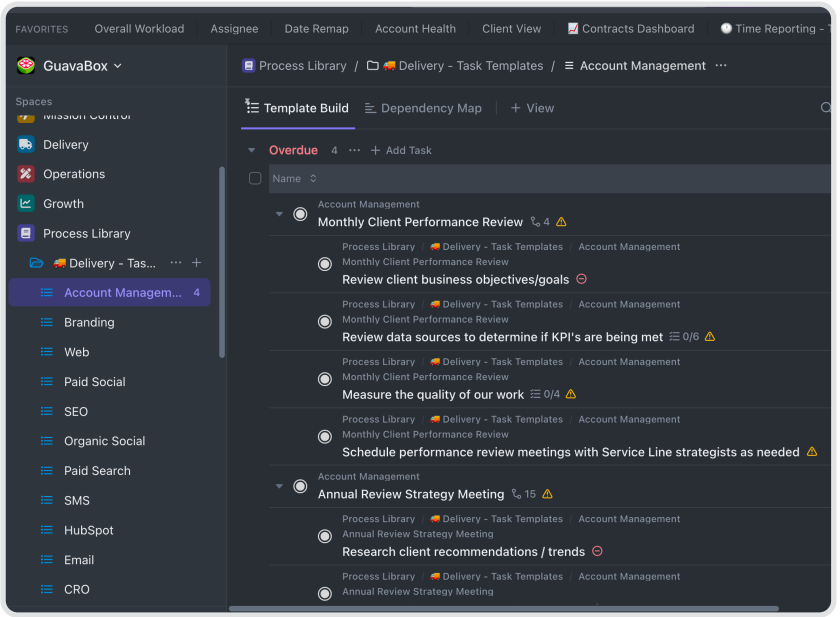
Your "Process Library" should contain a logical *Folder* structure to organize your process *Templates*. We suggest your *Templates* are organized by department, work category, and *Template* type (similar to how your ClickUp *Hierarchy* is organized):

- **Space:** Process 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 focused *Templates*. It could be structured like this:

- **Folder:** Delivery *Task Templates*
  - **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 or service line. It could be structured like this:

- **List:** Email
  - **Parent Task:** Newsletter
  - **Parent Task:** Drip Campaign
  - **Parent Task:** Promotional Email

Each of these would contain the *Subtasks* needed to complete that deliverable, but more on that later.

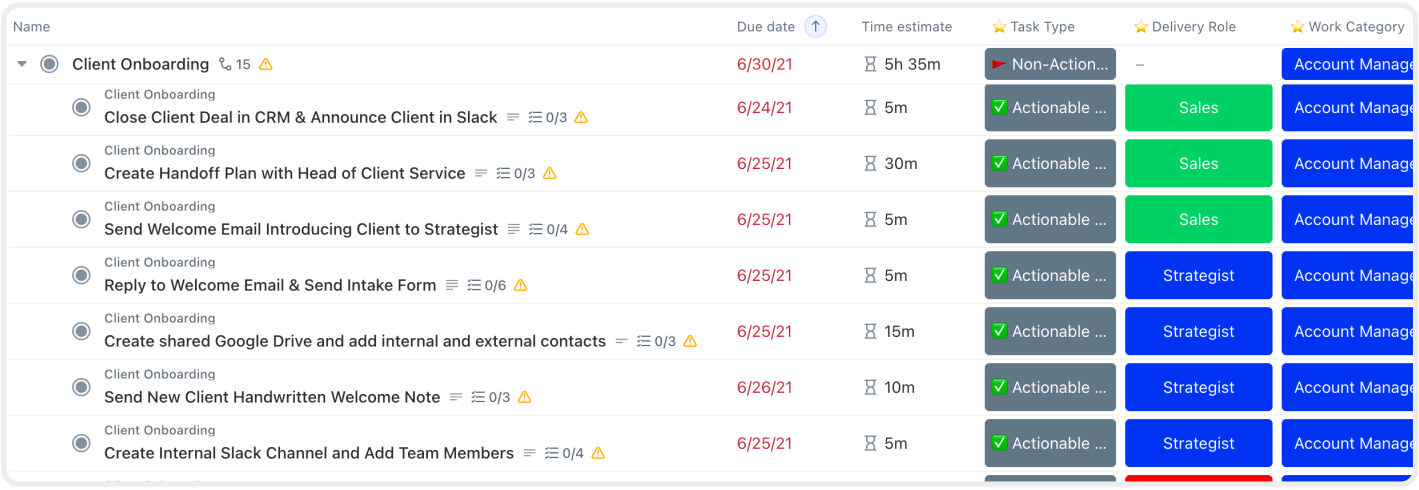
2. Use Folder, List, and Task Templates for Your Processes

After you've built your "Process Library" you can now start documenting your processes and saving them as ClickUp *Templates*.

Folder, *List*, and *Task Templates* are the most common ClickUp *Templates* that you'll use.
Yes, you can use a *Space Template* if you want to (especially in the very beginning), but *Folder*, *List*, and *Task Templates* will be leveraged the most.

Here's how they'll work:

1. *Task Templates* will be used for deliverables - blog posts, meetings, financial reports, audits, etc.
2. *List Templates* will be used for projects - website builds, implementations, etc.
3. *Folder Templates* will be used mostly for client service teams because they can be leveraged to templatize your client folder structures.



Name	Due date	Time estimate	Task Type	Delivery Role	Work Category
Client Onboarding 15	6/30/21	5h 35m	Non-Action...	–	Account Manage
Client Onboarding Close Client Deal in CRM & Announce Client in Slack 0/3	6/24/21	5m	Actionable ...	Sales	Account Manage
Client Onboarding Create Handoff Plan with Head of Client Service 0/3	6/25/21	30m	Actionable ...	Sales	Account Manage
Client Onboarding Send Welcome Email Introducing Client to Strategist 0/4	6/25/21	5m	Actionable ...	Sales	Account Manage
Client Onboarding Reply to Welcome Email & Send Intake Form 0/6	6/25/21	5m	Actionable ...	Strategist	Account Manage
Client Onboarding Create shared Google Drive and add internal and external contacts 0/3	6/25/21	15m	Actionable ...	Strategist	Account Manage
Client Onboarding Send New Client Handwritten Welcome Note 0/3	6/26/21	10m	Actionable ...	Strategist	Account Manage
Client Onboarding Create Internal Slack Channel and Add Team Members 0/4	6/25/21	5m	Actionable ...	Strategist	Account Manage

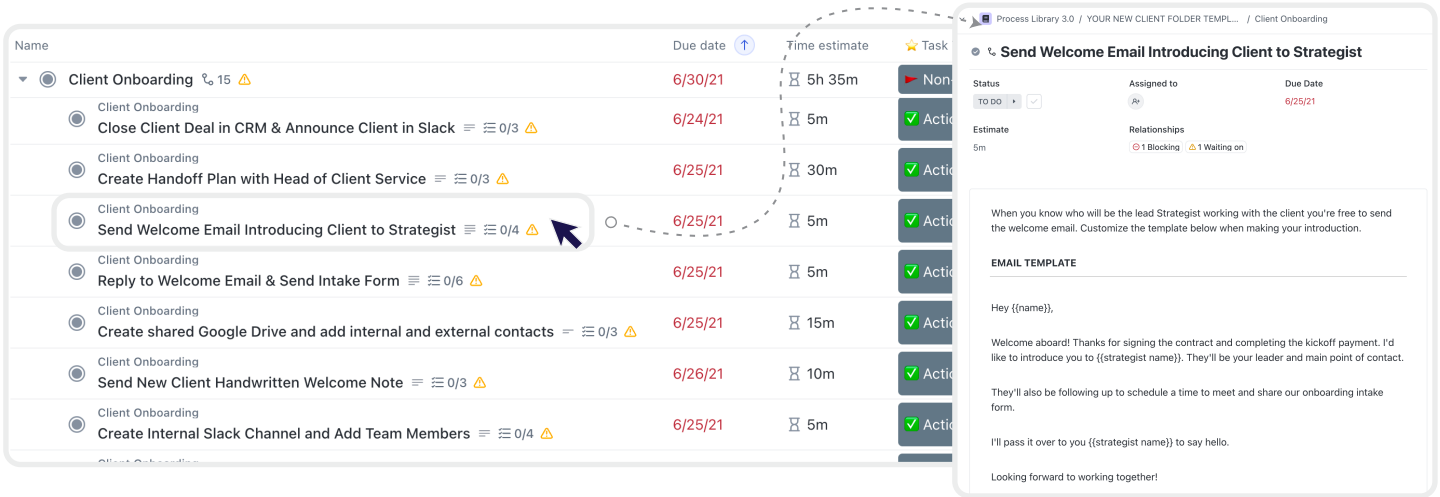
When you build these *Templates*, you'll want to follow the tips I recommended earlier—break down larger tasks, keep time estimates under 4 hours, assign only one person per task, and remember that the due date is the DO date.

> **"Having all of our processes in order helps us deliver amazing results and get great NPS results and feedback, leading to more clients coming through the door."**
>
> **Matthew McIver**
> *CEO/Founder, Commence Studio*

Here's an example of what a Task Template could look like:

1. [Parent Task] Blog Post
    A. [Subtask] Develop blog strategy and document it; Due on Monday; Time Estimate = 2 hours; Assigned to Strategist.
    B. [Subtask] Write the first draft of the blog post and send to proofer; Due on Tuesday; Time Estimate = 3.5 hours; Assigned to Copywriter.
    C. [Subtask] Review the blog post and provide feedback; Due on Tuesday; Time Estimate = 30 minutes; Assigned to Proofer.
    D. [Subtask] Make edits of blog post and send to client for review; Due on Wednesday; Time Estimate = 2 hours; Assigned to Copywriter.
    E. [Subtask] Receive feedback and make adjustments; Due on Friday; Time Estimate = 1 hour; Assigned to Copywriter.
    F. [Subtask] Send the blog to client for review; Due on Friday; Time Estimate = 15 minutes; Assigned to Copywriter.
    G. [Subtask] Receive client feedback and make any necessary changes; Due on next Wednesday; Time Estimate = 1 hours; Assigned to Copywriter.
    H. [Subtask] Design blog imagery; Due on next Wednesday; Time Estimate = 2 hours; Assigned to Designer.
    I. [Subtask] Upload assets to website and launch; Due on next Thursday; Time Estimate = 2 hours; Assigned to Strategist.

When building out these *Templates*, you'll also want to make sure you add in *Dependencies* to help leverage the *Gantt View* for remapping *Due dates* in the future. And if you want to take these even further, I suggest you make the process live where the work get's done and embed your SOP or any additional documentation in to your process *Templates*. If you've created SOPs, use the *Task Description* feature to link out to that SOP document, video tutorial, or template. Or, you can just use the *Task Description* to write out instructions for how to complete that specific *Task*.



When your processes are combined with the *Tasks*, your teams compliance rate for actually following that process will go through the roof. Not that this has much to do with workload visibility, but since we're talking about process *Templates*, I might as well mention it.

Aside from what I've mentioned here, there's a lot more I'd recommend when building out your process *Templates* in ClickUp. If you want to build gold-standard process *Templates* I recommend you read our article, **"How to 10x Productivity With ClickUp Templates".**

3. Save and Deploy Your Templates

After you've built and saved your processes as *Templates*, you'll want to start using them.

Just find your *Template* in the ClickUp *Template Center* and click "Use Template". If you've built your *Templates* following the framework we've discussed, you'll be bringing all the necessary ingredients your *Tasks* need to populate the *Workload View*. Plus, you'll have way more defined *Tasks* than you would if you had to build them from scratch.

This provides clarity to you and your team. If you want any visibility into workload, project progress, or anything for that matter, build your processes in ClickUp and save them as *Templates*.

"Leadership now has a clear view of bandwidth and capacity, the staff understands exactly what is expected of them when they sit down every morning, and our clients have improved visibility into their deliverables. "

Kevin D'Arcy
CEO & Founder, ThinkFuel Marketing

And yes, over time, you'll want to optimize your *Templates*. That's why you've built a "Process Library." Spend time monthly or quarterly evaluating your *Time estimates* or *Due date* maps to see if they're accurate. If not, make updates. This will make your *Workload View* more accurate the next time you deploy that process *Template*. But more on this later...

And remember, if you'd like the assistance of ClickUp's highest-rated solutions partner to help you build your processes as *Templates*, **book a call with my team.**

Step 4: Capture ALL Work in ClickUp

After you've started leveraging your ClickUp *Templates*, it's time to continue building on that momentum. For teams servicing clients, they often begin by getting their delivery-focused work into ClickUp first.

Nothing wrong with this, but if you want an accurate *Workload View*, you obviously need to think beyond delivery work. Internal meetings, professional development, and admin work all take time during the day.

Here are a few work categories that also need to be tracked in ClickUp:

1. **Internal Meetings:** Recurrent meetings like stand-ups, planning sessions, one-on-ones, etc. Track prep time, actual meeting time, and follow-up tasks.
2. **Growth Tasks:** Strategic planning, selling, marketing, etc.
3. **Operations:** Invoicing, payables, tech management, hiring, training, and other internal tasks.
4. **Professional Development:** Coursework, webinars, live events, and other professional development tasks.
5. **Admin:** Checking and responding to email, filling out a daily scorecard, engaging on socials, etc.

You can leverage *Templates* for all of this work as well. Additionally, take advantage of ClickUp's *Recurring Tasks* feature to make recurring work a bit easier to create, manage, and get added to your *Workload View*.

And aside from these categories, you also want to make sure Out of Office is taken in to consideration. If someone isn't in the office, your *Workload View* should reflect this.

This doesn't need to be a complex process. You can simply leverage a *Task* with a *Start date* (when they are first OOO), a *Due date* (when their last day of OOO is), and a *Time estimate* (total time they are out for). Assign this *Task* to the person who will be OOO, and it'll fill the *Workload View*. And if you want to take this further, you could even use ClickUp *Forms* for your team to submit OOO time to make this process even easier. That's the beauty of ClickUp.

Make "If it's not in ClickUp, it doesn't exist" a key rule for your team. The key is creating a single source of truth in your project management system. If you can do this, you'll have a much more accurate view of workload.

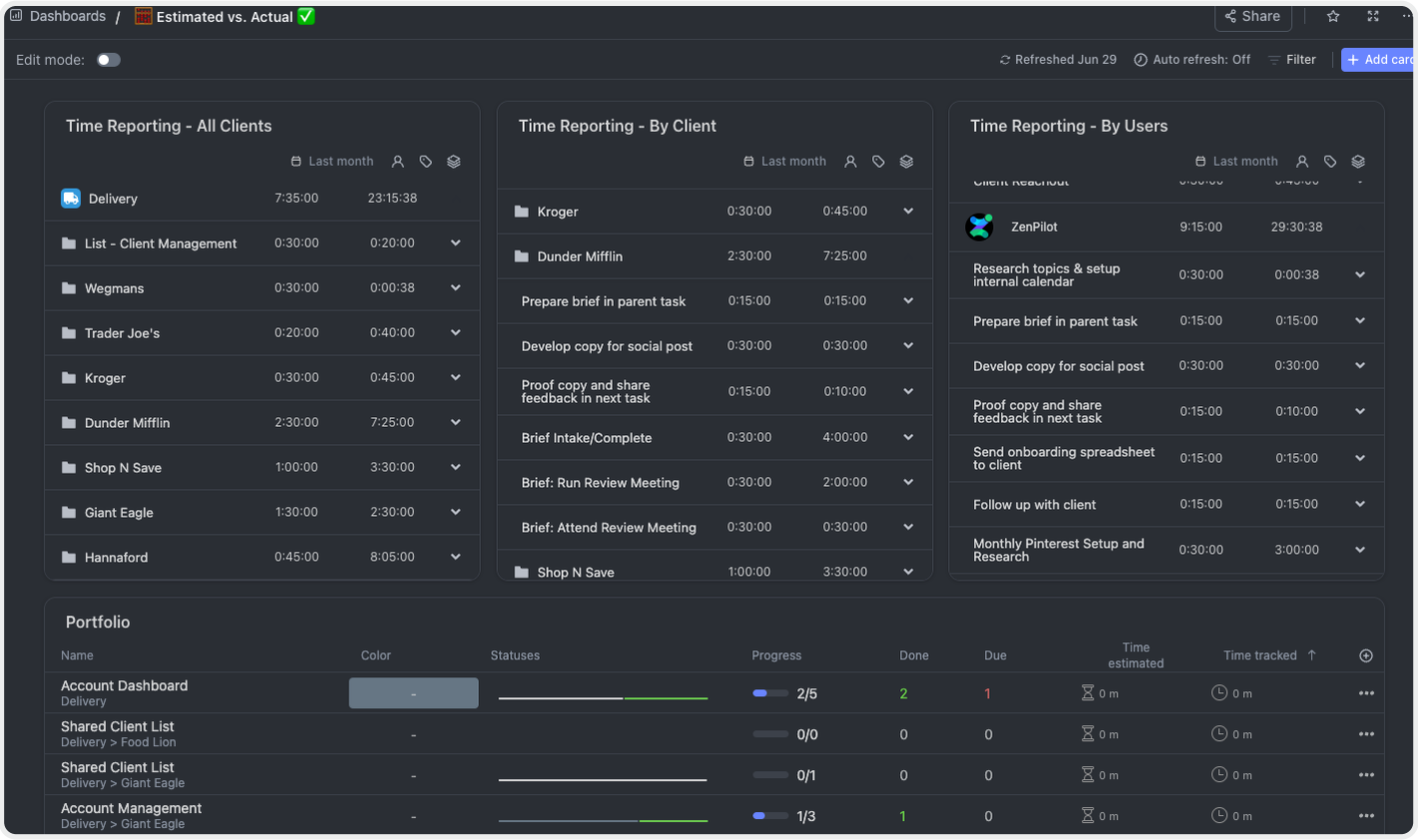
Step 5: Continuously Optimize

Unfortunately—or if you prefer a good challenge, thankfully—this is only the beginning. Once you've developed your processes and gotten all of your work into ClickUp, you need to continue optimizing what you've built.

Here are a few ways to continuously optimize your *Workload View* accuracy.

Analyze Trends in Estimates vs Actuals

Inaccurate *Time estimates* will ruin your *Workload View*. I'll be honest, it's hard to get these spot on, but over time and through repetition of consistent processes, you'll put together some pretty accurate *Time estimates*. To do this, you need to create a ClickUp *Dashboard* comparing *Time estimates* vs *Time Tracked* on *Tasks*. This *Dashboard* will help you analyze trends where *Time estimates* are inaccurate, and you can use this data to make adjustments to your process *Templates*.

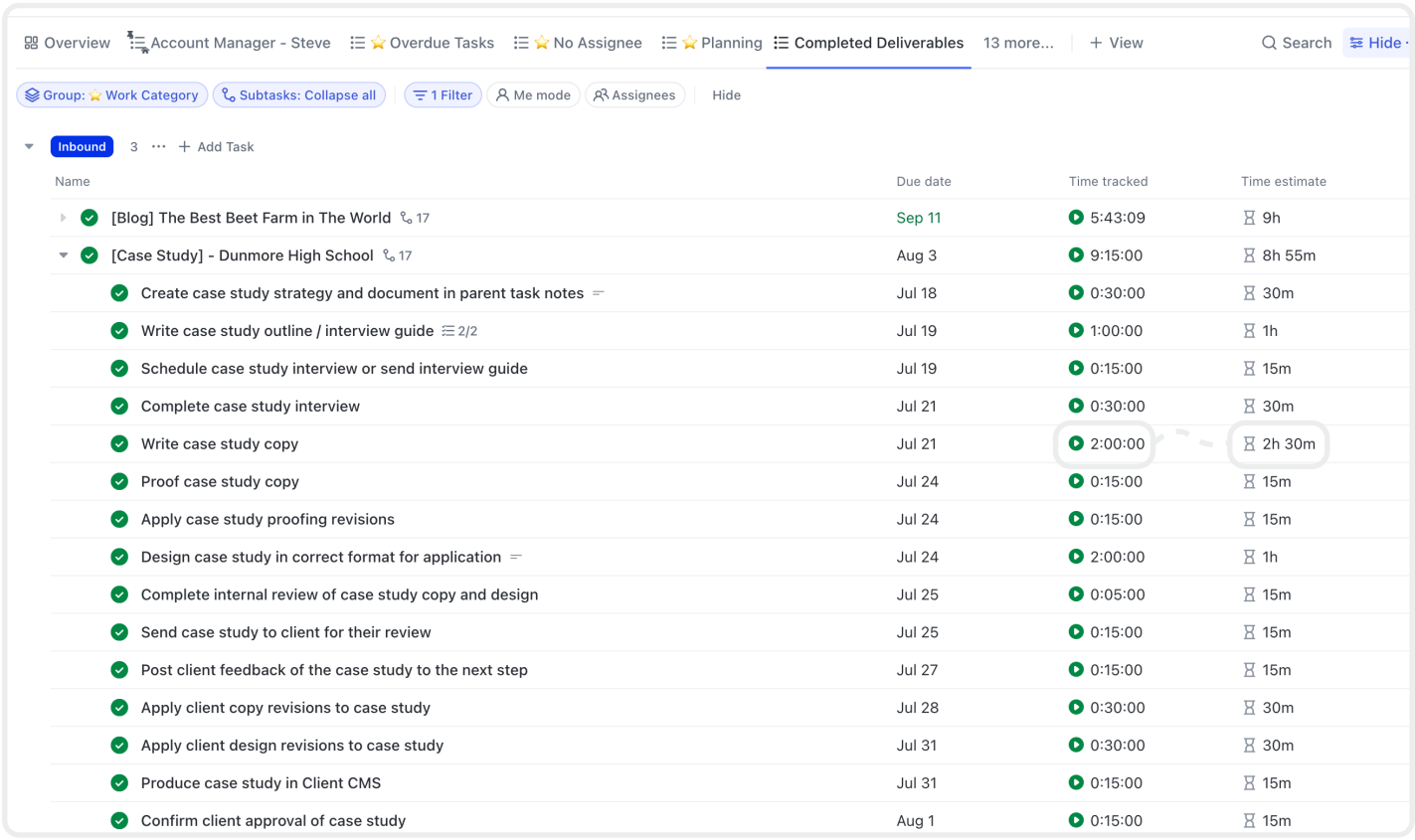


As I've mentioned before, I'd recommend that you hire a ClickUp Champion to analyze this data on a daily, weekly, and monthly basis. The more accurate you can get your *Time estimates* on your process *Templates*, the more accurate your *Workload View* will be.

Audit Completed Projects

If you bill hourly or are looking at your profit margins, you're probably already looking at *Time tracked* for your completed client projects.

Similar to your *Dashboard* comparing *Time estimates* and *Time tracked*, you can also leverage ClickUp *Views* that show completed projects with their *Time estimates* and *Time tracked*. Use this *View* to pinpoint discrepancies and make adjustments to your *Templates*. If there are *Tasks* that are taking longer than the *Time estimate* across multiple clients and people, you'll know you need to adjust the *Template*.



Additionally, you'll want to navigate *Due date* changes to see if you need to adjust your date map in your process *Template* as well. Clicking in to a *Task* will show you all the history and activity that happened within that *Task*—including *Due date* changes.

Review Overdue Tasks

As mentioned earlier, regularly review overdue *Tasks* and update *Due dates* to keep workload forecasts realistic. You'll want a ClickUp Champion or project manager to be in charge of this process.

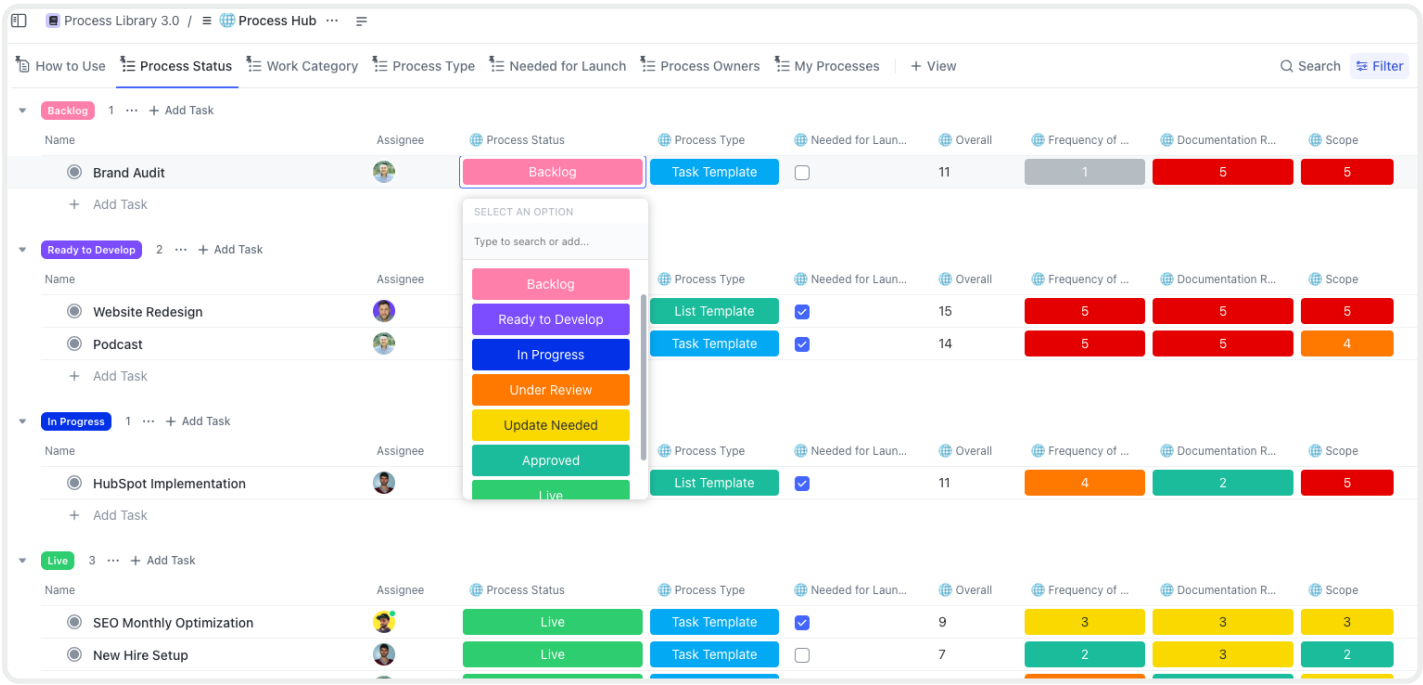
Aside from just moving *Due dates*, your ClickUp Champion should also be pushing the team to adopt this habit themselves. If there's a member of your team who isn't updating their *Due dates* consistently, have a conversation with them. Most often, you need to explain the why. "We need you to update your ClickUp to help us understand your workload. If we don't know how much capacity you have, we may end up putting too much on your plate, and we don't want that!"

Developing healthy habits across your team is a massive contributor to success in your *Workload View*. When your team is consistently tracking time, completing *Tasks*, moving *Due dates* when necessary, etc., you'll have a much more accurate *Workload View*.

Remember—Habits, processes, and technology—that's the formula for clarity.

Adjust Your Templates

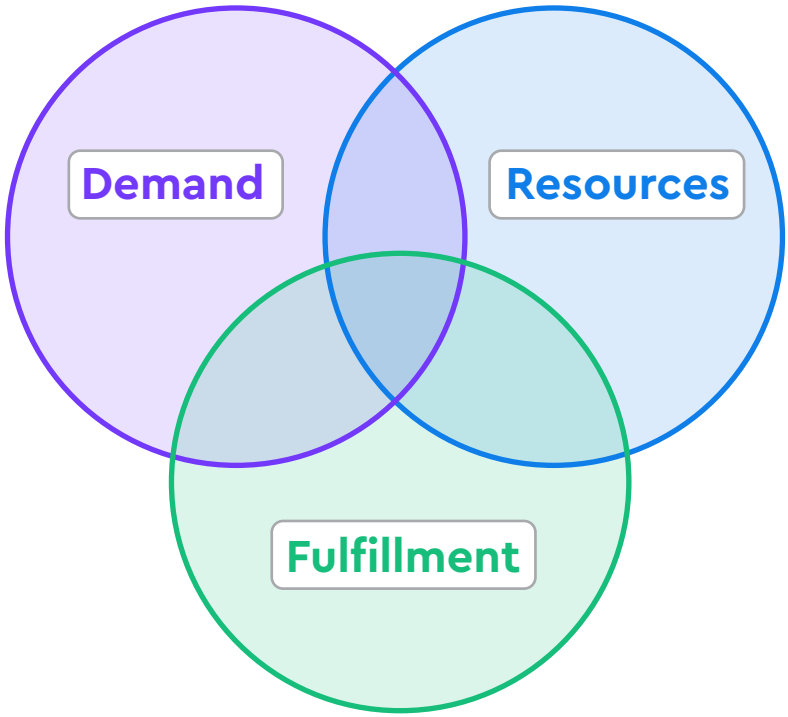
Lastly, based on findings from your analysis, edit your process *Templates* to improve *Time estimates*, *Due dates*, etc. You built a "Process Library" for a reason. Use it! Within your "Process Library", you can also build a "Process Hub" (shown below) that provides a place for your team to document changes, statuses, and necessary adjustments to your process *Templates*.



Step 6: Workload-Driven Project Management

Now, let's shift gears slightly and conclude with how your team is planning, assigning—using your *Workload View*—and delivering work. If you've made it this far, you're now equipped with a *Workload View*, process *Templates*, a single source of truth, and a method for optimization.

That's all great, but there's the whole massive step before you actually go and deploy those process *Templates*, especially for client work. Internally it may be different, but you'll need clearly defined roles and a process for creating work with clients, deploying this work with *Due dates*, assigning this work, and actually executing it. To achieve sustainable growth and success here, it's crucial to strike a balance between three main roles—Demand, Resources, and Fulfillment.



Demand: This element represents the client's requirements and/or what needs to be accomplished. It involves account managers who interact with clients, understand their expectations, strategize plans for upcoming projects, and deploy tasks.

Resources: This element pertains to the time and place where a project will be executed. It involves project managers ensuring that the expectations set by account managers are synchronized across various teams, scheduled accordingly, and tasks are assigned.

Fulfillment: This element is the actual execution of tasks. Whether by full-time employees, part-time contractors, or even partner agencies, this is where promises made to clients are fulfilled.

Demand determines what we're going to do (and why we're going to do it), Resources determine how we're going to do it, and Fulfillment gets it done.

When all three work in harmony, you'll deliver work on time, within budget, and everyone will be happy. But if harmony is lost, you begin to over- or under-deliver for clients, over- or under-utilize team members, and hurt productivity and profitability.

Understanding Demand

What Does the Demand Role Do?

The person in the Demand role is responsible for being the main point of contact with clients, understanding their goals, and coordinating the connection of strategy to reality.

They take leadership in:

1. Reporting results to clients, revising strategies as needed, and deploying and configuring *Templates* (*Tasks*) to accomplish goals within agreed timelines.
2. Balancing client requests with budgets and monitoring external costs and internal resources.
3. Bringing clients back to reality by discussing budgets—points, hours, or dollars—with them and prioritizing what needs to be done. Yes, sometimes you need to say "no".
4. Working alongside Resources and Fulfillment to ensure that client work is delivered on-time and on-brief.
5. Working closely with Resources to keep client expectations in line and prevent fires.
6. Providing context with the Fulfillment team to get tasks done right the first time.

Who Should Fill the Demand Role?

The best case scenario for teams is to have dedicated Account Managers to fill this role. **However, this role can also be filled by:**

1. Team representatives depending on the type of project/service line.
2. A POD lead that is a consistent point of contact for clients but also sits in the Resource seat.
3. Or a lead strategist who leads the client relationship but also fills some of the Fulfillment seats for clients.

Regardless of who fills this seat, the most successful teams have one person managing the client relationship to ensure there is accountability, simplicity for the client, and always context into the work being done.

Understanding Resources

What Does the Resources Role Do?

At a high level, the person in the Resources role is responsible for managing workload and making capacity driven decision to assign work while monitoring timelines.

They take leadership in:

1. Forecasting and scheduling work while holding the team accountable on due dates.
2. Looking ahead to identify resourcing gaps in Fulfillment.
3. Monitoring and managing task statuses to keep projects moving.
4. Following up on tasks that continue to be rescheduled without context.
5. Working with Fulfillment to prioritize work assignments.
6. Communicating with Demand when projects need to be remapped from delays or shifting priorities.

Who Should Fill the Resources Role?

The best scenario for teams is that they have dedicated Project Managers fill this role.

For larger teams, you may have dedicated Project Managers who coordinate with Team Leads. Team Leads may make the final call on assignments based on their team's skills and bandwidth, but often times, Team Leads trust the Project Managers to assign work. Both of these scenarios work as long as there is standardization across the team. **However, in some scenarios this seat can be filled by:**

- Team or Department leads
- Account Managers who cover both Demand and Fulfillment
- Lead Strategist who wears a ton of different hats (common for smaller firms)

Your ClickUp Champion will come from Resources. They are in charge of monitoring and managing the system—holding the team accountable and keeping your PM system clean, organized and matching reality.

Understanding Fulfillment

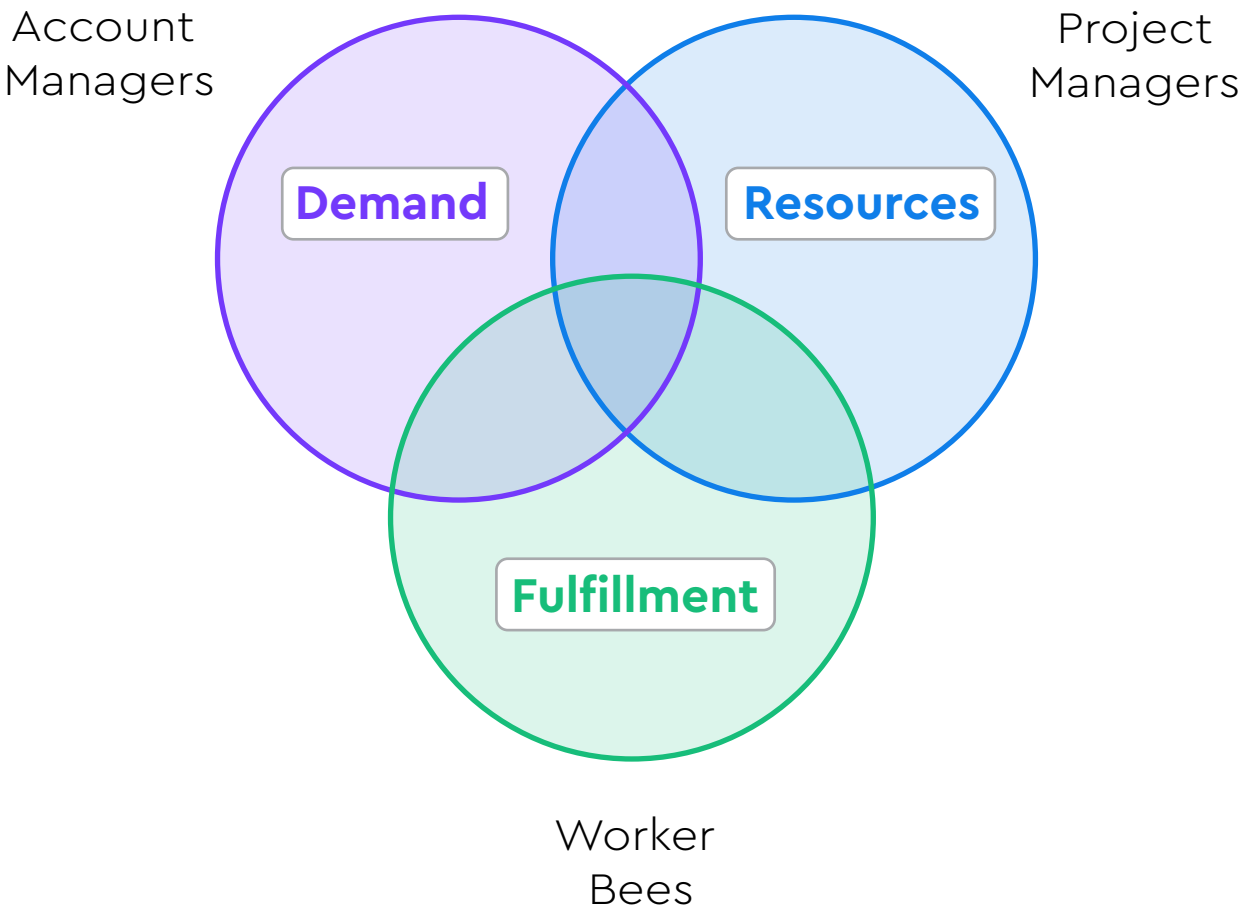
What Does the Fulfillment Role Do?

The Fulfillment role is responsible for completing—with flying colors—the work assigned to them. It sounds simple, doesn't it? It is, until they are assigned tasks without context, instruction,s or due date. Hence the need for proper balance amongst the three roles.

This is where a lot of teams struggle. Most teams can often put together a killer strategy and timeline, but they don't have the processes and systems in order to execute on that plan. Every task is important. Everything takes time. And time is valuable.

Who Should Fill the Fulfillment Role?

The Fulfillment role can be filled by full-time employees, part-time contractors, or even partners.



And now that we know who fills each of these roles, let's discuss how these roles can work together harmoniously.

The Push and Pull: Creating a Harmonious Balance

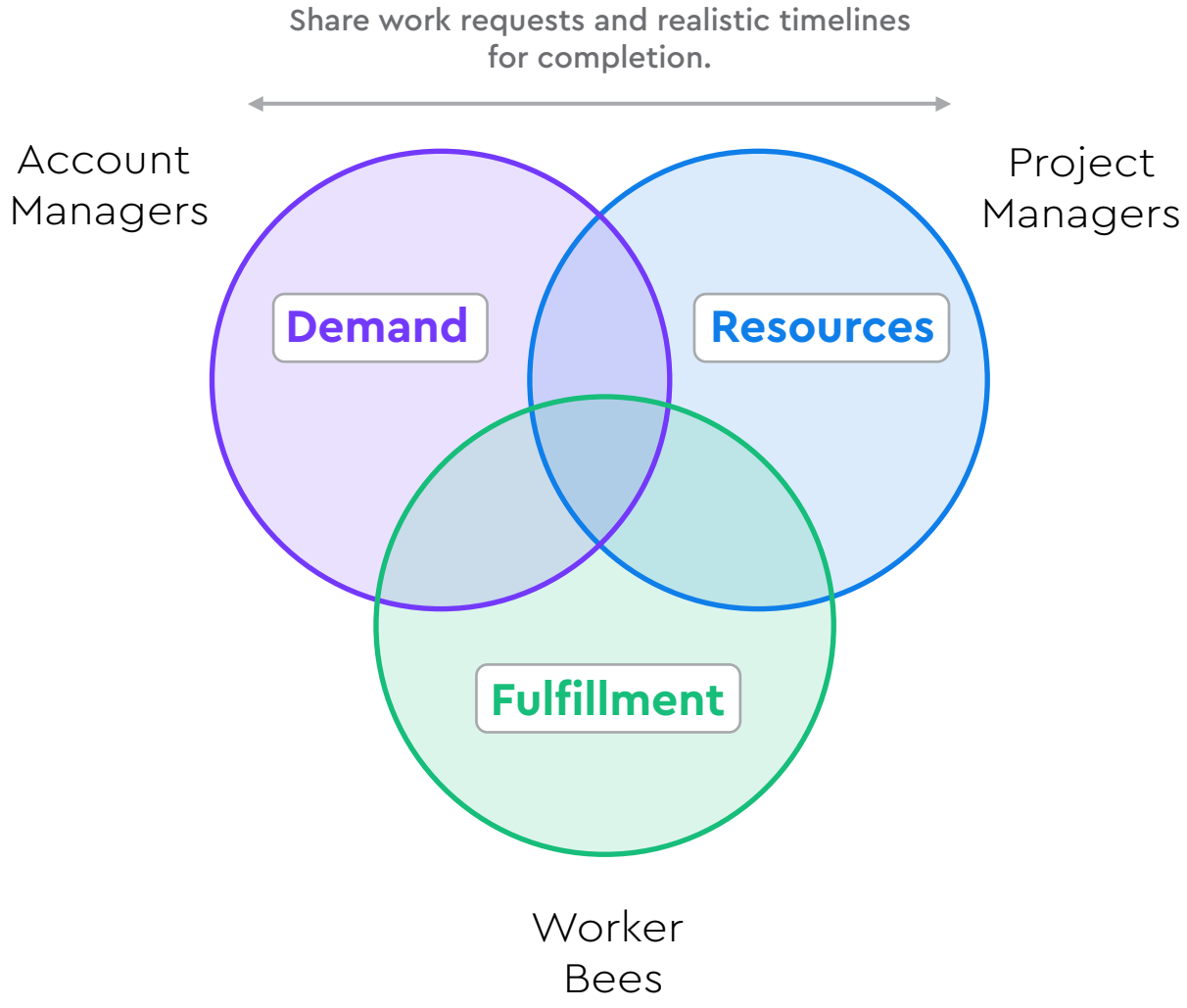
Establishing harmony amongst Demand, Resources, and Fulfillment requires constant 'push and pull' between roles. This involves sharing work requests, formulating realistic timelines, assigning tasks, deciding priorities, gathering context, and delivering quality results promptly.

Demand and Resources

Between Demand and Resources, there is a constant exchange of work requests and feedback regarding the feasibility of timelines.

The account managers communicate the client's needs, and the project managers respond with timelines that align with the available resources.

Account managers may push work and a deadline that isn't manageable. Project managers need to push back, provide realistic expectations and/or pull in additional resources if possible and necessary.



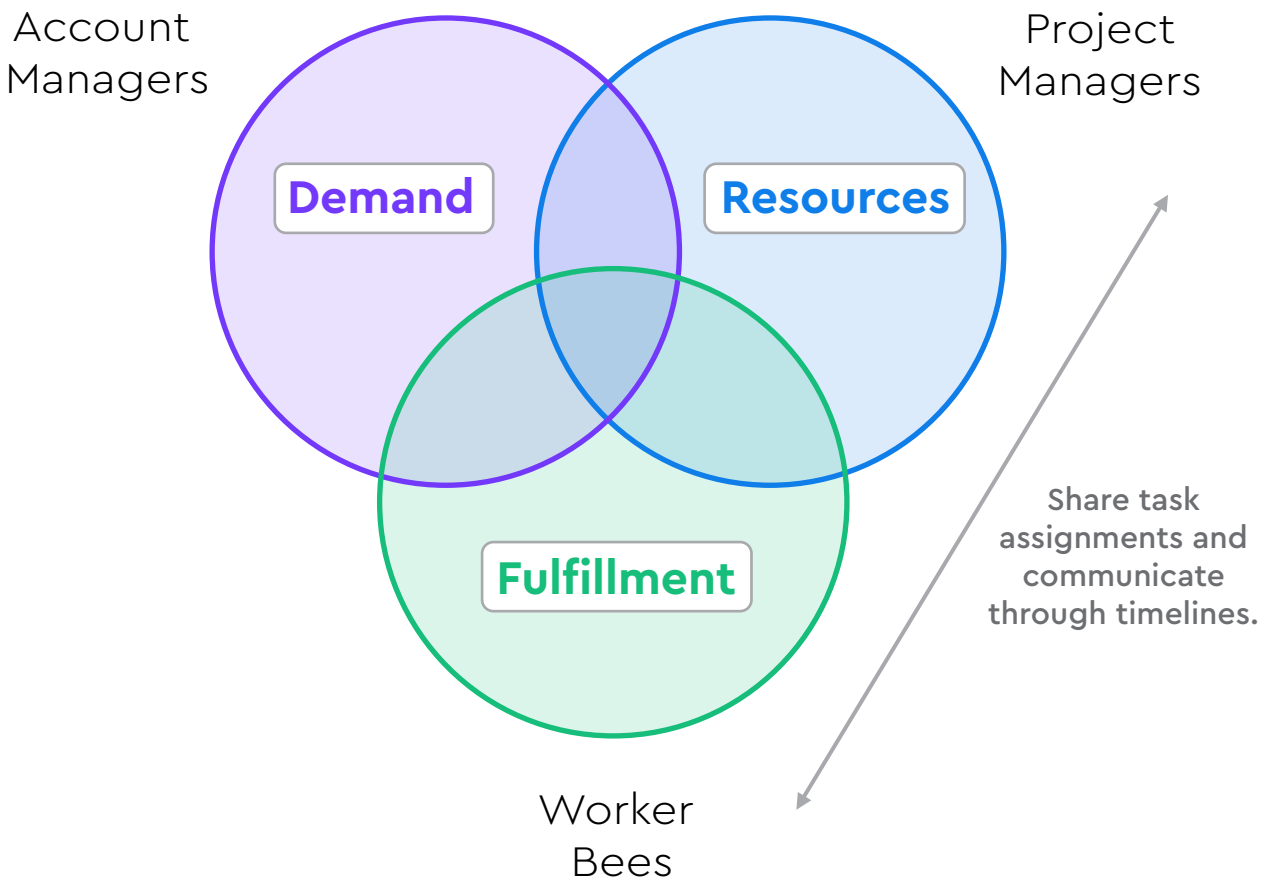
Resources and Fulfillment

Similarly, between Resources and Fulfillment, there's an active dialogue involving task assignments and timeline negotiations.

Project managers orchestrate the entire task load, managing workloads, coordinating between projects, and ensuring the right person is assigned the right job.

They communicate with team leads to identify suitable candidates and delegate tasks. If there are any adjustments needed due to delays or other hitches, the project managers address those dynamically.

As projects are launched and actively worked on, it may be necessary for Fulfillment to push due dates or reassign tasks to other team members. Effective communication amongst Resources and Fulfillment is crucial to ensure that progress continues smoothly.

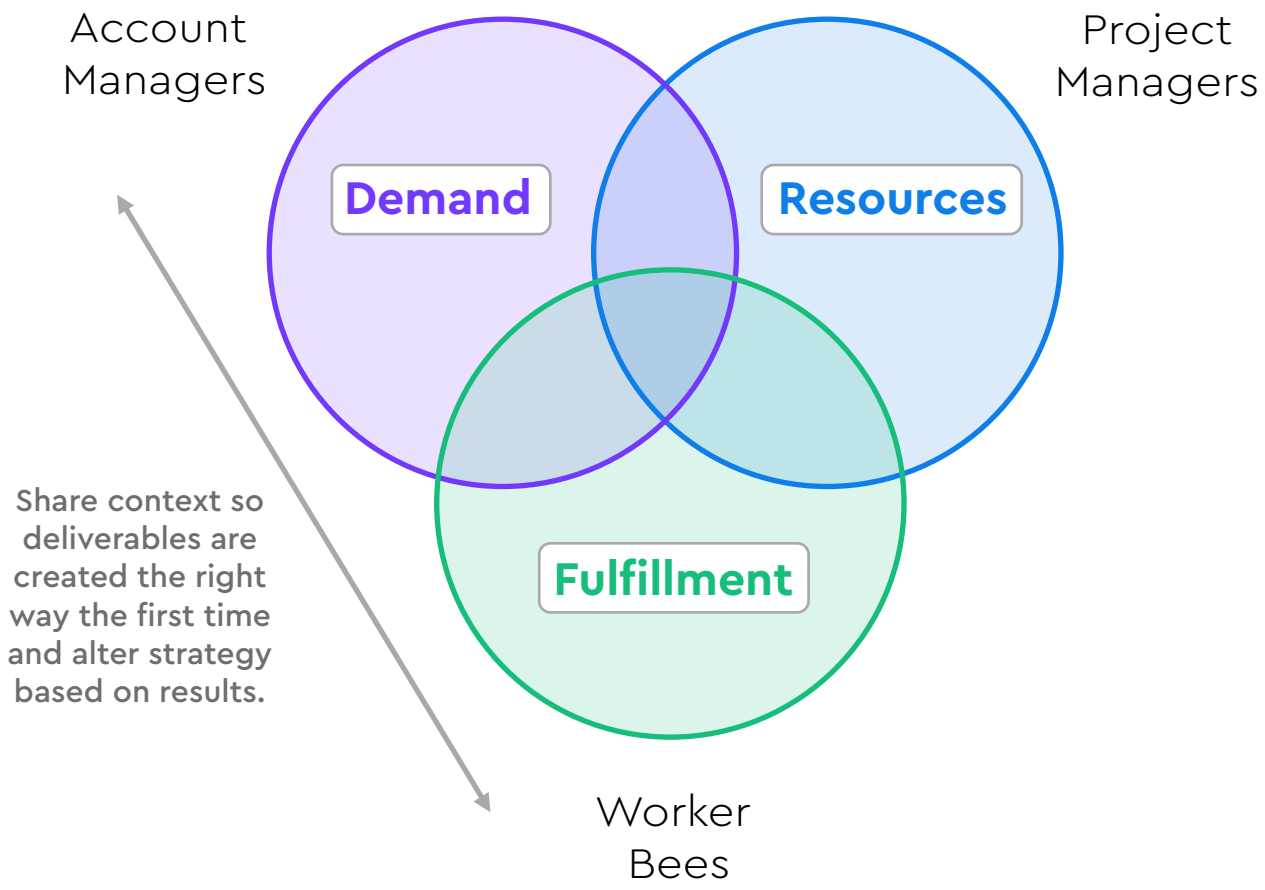


Demand and Fulfillment

Lastly, the interaction between Demand and Fulfillment revolves around context.

1. What does the client desire?
2. What is their vision of the end product?
3. What does a quality deliverable look and feel like?

This involves account managers providing context around deliverables for fulfillment to create things right the first time and knock every project out of the park. It's important to clarify the client's expectations right out of the gate to avoid time-consuming revisions later. Healthy communication between Demand and Fulfillment ensures that no task is assigned out without any context or instruction—improving productivity and quality of work.



The Push and Pull: Creating a Harmonious Balance

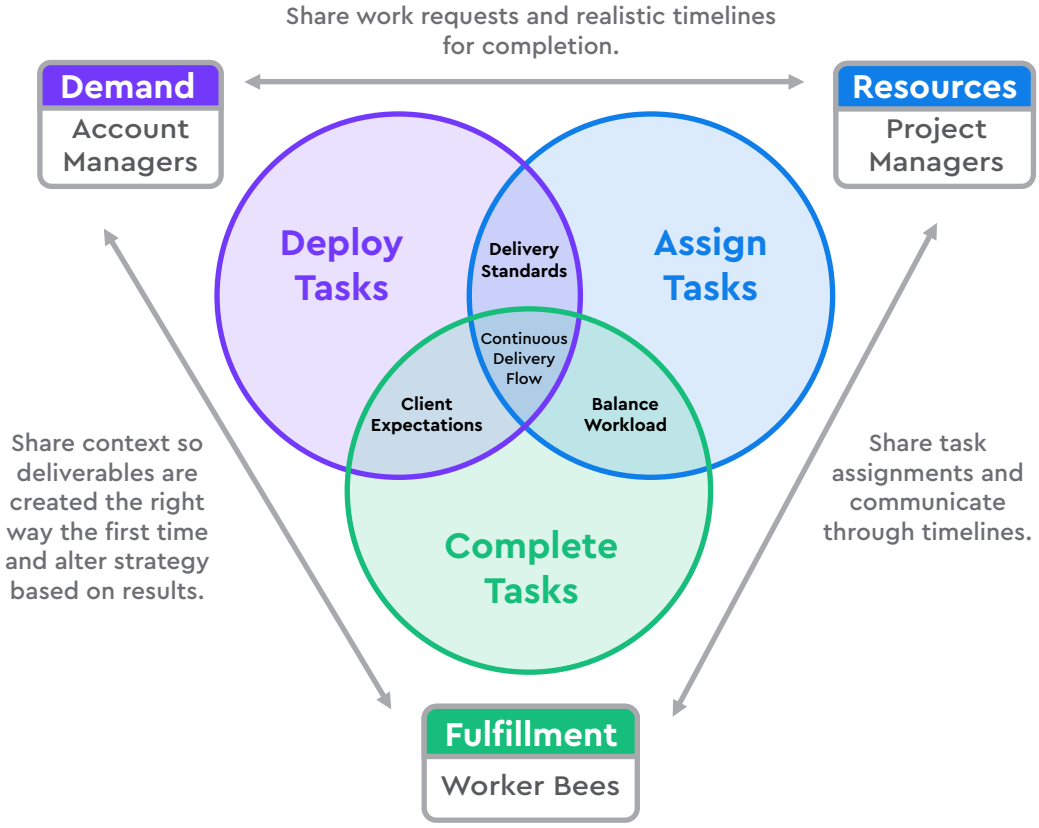
In summary, Demand, Resources, and Fulfillment all work together in harmony to help clients reach their goals.

To achieve this goal, they have their core responsibilities:

1. Demand deploys *Tasks*—using your ClickUp *Templates*.
2. Resources assigns *Assignees* to *Tasks*—leveraging your *Workload View* to check capacity.
3. Fulfillment completes *Tasks*—leveraging those detailed ClickUp *Templates* to see all of their work and context in one place!

And aside from their core responsibilities, they also have shared responsibilities:

1. Demand + Resources determine delivery standards to meet client expectations within budgets.
2. Resources + Fulfillment communicate and define workload balance to maximize the utilization of the team and identify potential bottlenecks.
3. Demand + Fulfillment identify and document client expectations for deliverables and timelines.
4. All are working to create a continuous delivery flow of a streamlined strategy, timeline, and execution.



Strategize → create work → Deploy *Tasks* → assign *Tasks* → complete *Tasks* → document findings and improvement opportunities → optimize process *Templates* → repeat

Conclusion: Achieving Workload Clarity

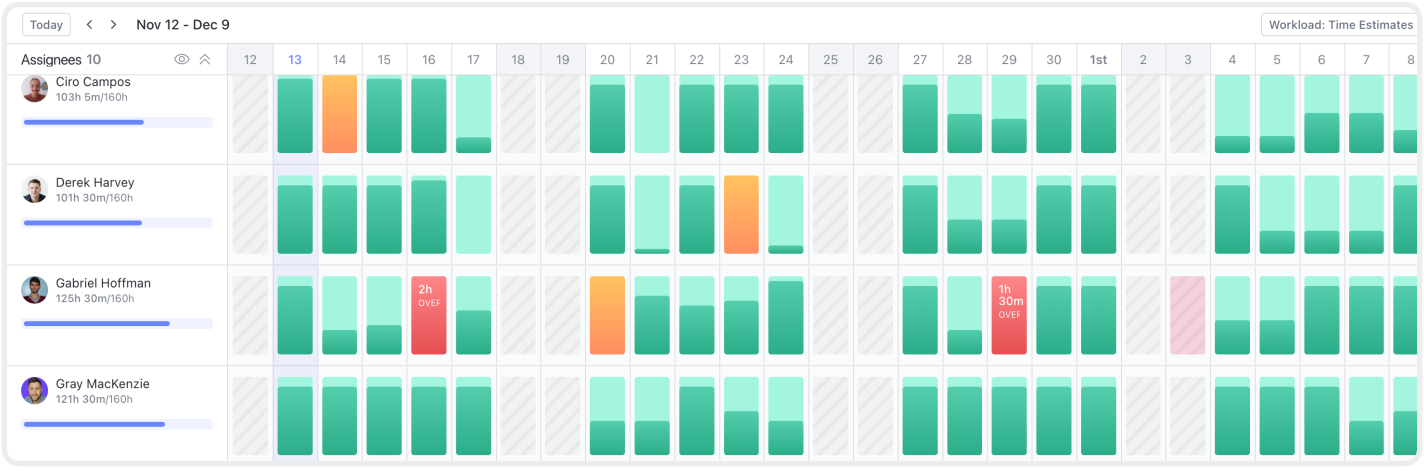
All of this is a continuous effort to improve habits, leverage and optimize your process *Templates*, and use the tech—ClickUp—to streamline and make everything easier. Remember, technology alone won't solve everything, nor will top-notch processes. To gain clarity, you need the right processes, habits, and technology. But don't expect to master them all in a week. Forming habits, perfecting processes, and learning new technology takes time. Trust me, the time and effort are worth it.

"The real game changer of working with ZenPilot was the visibility it gave us into our whole business. I can now feel peace knowing where projects are at, see blocks coming ahead of time so we can proactively communicate with clients, and plan out work accordingly with my team.

There is no way I could've built out all the top-tier processes we did in such a short amount of time without ZenPilot—or train my team on healthy project management habits. ZenPilot is hands down one of the best investments we've made as a business. They help us live up to our value of excellence. If you have any doubts, leave them at the door and jump in!"

Rebecca Nash
Director of Operations, Beam Content

Understanding workload and capacity is a must-have. When your *Workload View* is accurate, it can have a tremendous impact on profit margins, employee satisfaction, and quality of work. If you know exactly how much time your team has, you can sell with confidence, schedule and assign work with confidence, and scale sustainably.



Looking for an 'Easy Button'?

At this point, you're hopefully seeing a much more accurate *Workload View* and experiencing a more productive, profitable and healthy team. If you did and are, let us know! We'd love to hear about your success story.

However, if you need any help executing these strategies and solving your lack of visibility problem, please reach out.

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→ 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.

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Jeff Cypher
Head of Marketing, ZenPilot

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