

The Definitive Guide

How to Implement ClickUp For Agencies



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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?**

Enter  **ClickUp**.

To be clear, a project management (PM) tool solves nothing on its own. There are other elements involved in a successful implementation. These revolve around the teams expectations and holding them accountable.

Three key elements for a successful agency project management platform implementation:

Expectations

Consistent structure and clear expectations around how and why the tool will be used.

Technology

The right tool for the job.

Accountability

Shared healthy usage habits across your entire team and accountability to your ground rules.

What is ClickUp?

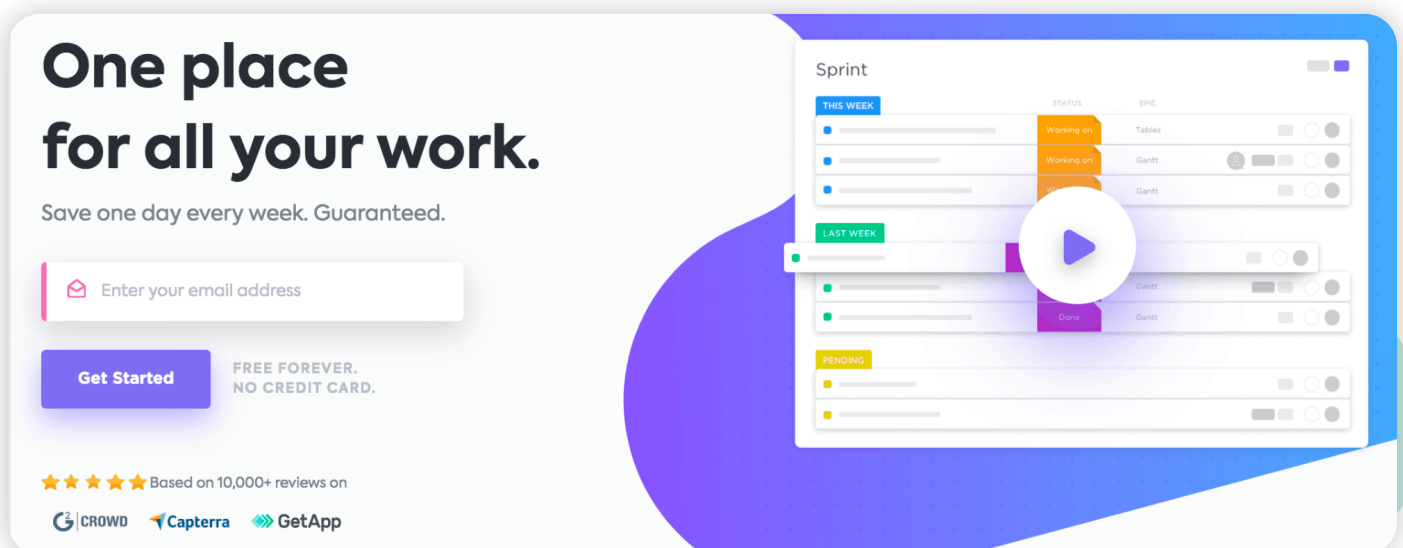
ClickUp is the fastest-growing and one of the best project management tools for digital agencies.

ClickUp has all the features of a modern PM system:

- Robust hierarchy for project and task management.
- 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 PM 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. Your overarching system for client delivery matters more than the specific PM tool you employ.

That said, having the right tool for the job is worth its weight in gold.



The image shows a promotional banner for ClickUp. On the left, the text reads "One place for all your work." followed by "Save one day every week. Guaranteed." Below this is an email sign-up form with a "Get Started" button and the text "FREE FOREVER. NO CREDIT CARD." At the bottom left, there are five stars and the text "Based on 10,000+ reviews on" with logos for CROWD, Capterra, and GetApp. On the right, a screenshot of the ClickUp interface is shown, featuring a "Sprint" view with columns for "THIS WEEK", "LAST WEEK", and "PENDING". A large play button is overlaid on the screenshot.

Why ClickUp for Agencies vs. Asana, Teamwork, Trello, etc?

This question comes up all the time. 3 years ago, we would've 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 you need to accomplish) and I 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 allows 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 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.

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.

Agency Resource

READ OUR FULL GUIDE ON HOW TO CHOOSE THE BEST PM TOOL FOR YOUR AGENCY [HERE](#).

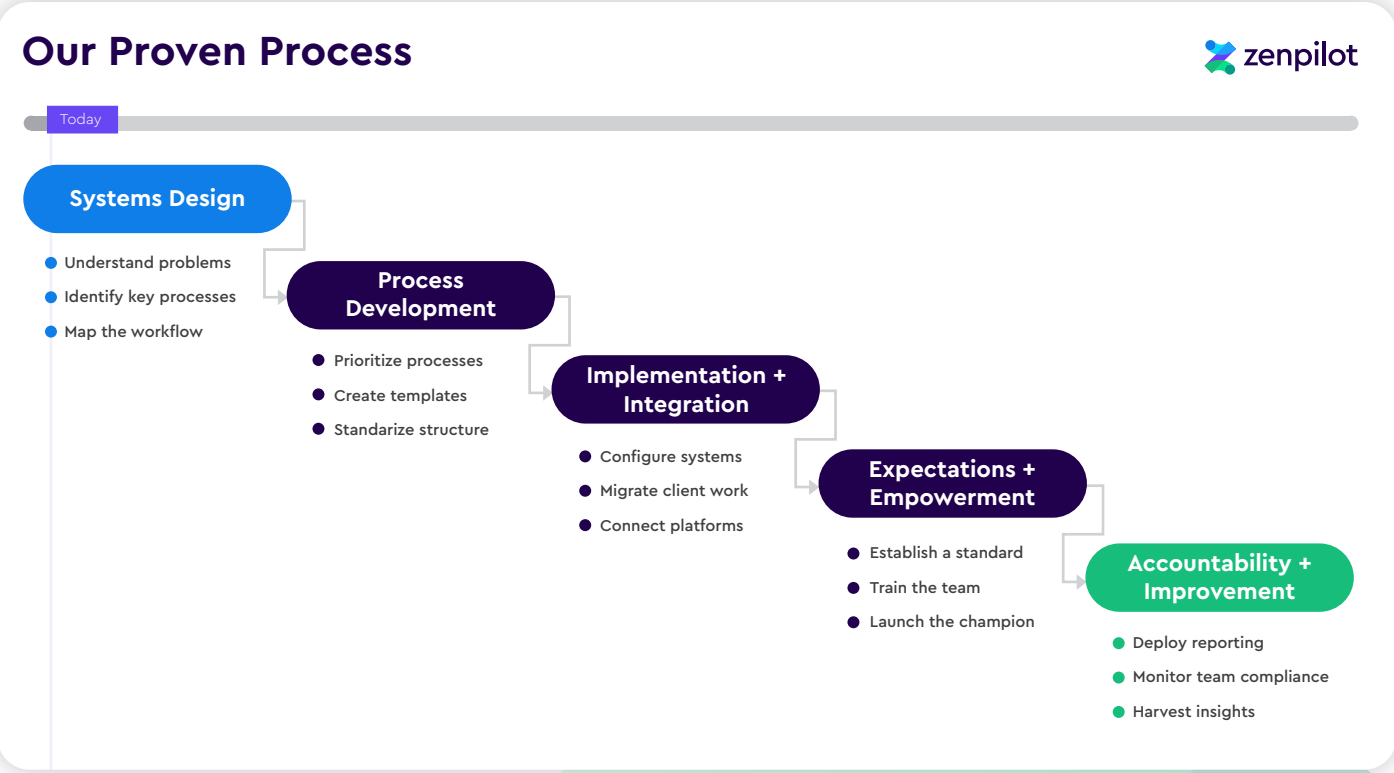


Our Proven Implementation Process

Regardless of the tool, every PM platform implementation should have clearly defined goal. It's important to ask yourself the important question – How can we move towards becoming a **Gold-Standard Agency Operation**?

Gold-Standard Agency Operations eliminate friction between people, technology and processes. Does your technology work seamlessly with your processes? Do your processes make your technology more efficient? And lastly, does your team work in unison within the technology? If not, how do we get there?

We've taken close to 3,000 agencies through a proven 5 step implementation process – Systems Design, Process Development, Implementation & Integration, Expectations & Empowerment, and Accountability & Improvement.



Each step is equally important. Don't rush. Prepare yourself to spend the next 8–10 weeks implementing ClickUp. If you get it right the first time, it will save you a lot of headaches.

We recommend you read this guide cover to cover before doing anything. And if you need a trusted agency operations specialist to lead you through this journey, [book a call here](#).



The Foundation

Understanding ClickUp



Understanding ClickUp

Organizing Work at Your Agency

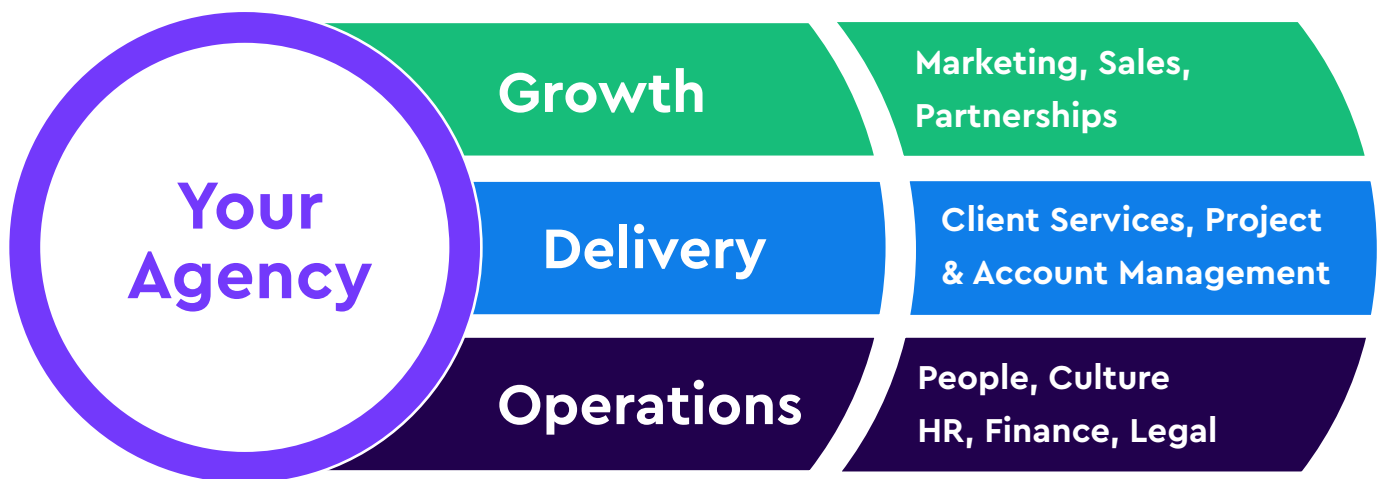
Most agencies make a fundamental mistake with their project management that hamstrings their ability to ever see a holistic picture of progress, workload, and where their time goes. The mistake is the failure to document and account for internal work. It's easy to prioritize client work and push aside your agency's needs.

Go look at the marketing efforts of most agencies and you'll see this first-hand. 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 PM tool. Let's look at the best way to do this.

We break every agency business down into 3 areas:



In summary, Growth is where you make your promise, Delivery is where you keep your promise and Operations is the most important junk drawer in the world – how you keep the lights on, invest in the team and yourself, and protect your downside.

The business model is simple, not easy.

Understanding ClickUp

How to Structure your Agency's Work in ClickUp

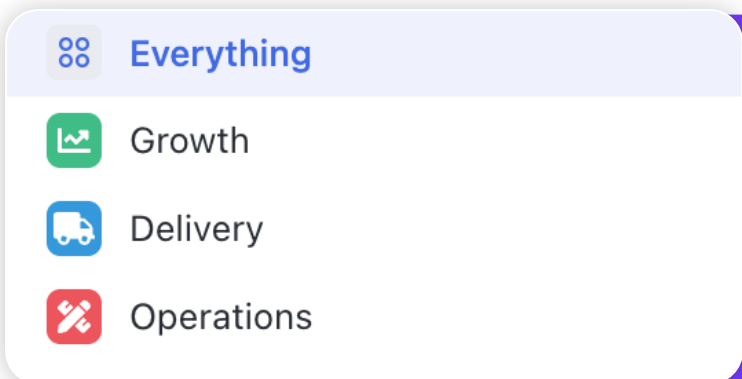
Before we get too technical, let's briefly cover the basics. ClickUp offers a very powerful hierarchy to help agencies organize their work.

Workspace

When you go sign up for ClickUp, you've created both your user account and your Workspace. This Workspace should be named after your agency and it's the only Workspace you'll need across the entire organization. Don't complicate things and go signing up for more Workspaces until you know what you're doing.

Space

The next layer of hierarchy are Spaces. We're going to use these for the areas of your business, so we'll set up 3 spaces and name them – **Growth, Delivery & Operations**.



Everything

- Growth
- Delivery
- Operations

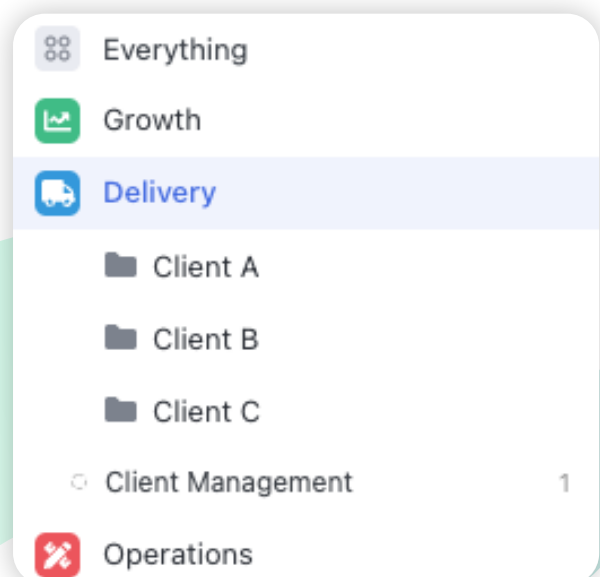
Pro Tip
Don't set all your space up at once.

1. Build your Growth space first and customize all your statuses, ClickApps, and views.
2. Duplicate it twice to create your Delivery and Operations Spaces. You'll still need some tweaks, but it will save you some setup time.

Folders

After Spaces, we have Folders (which are very helpful, but not mandatory). These help further organize work.

If we are looking at the Delivery Space, Folders are best used to organize work by client. Therefore, each client will have their own Folder for their work to live. The Growth Space will have separate folders for Sales & Marketing and Operations can be broken into separate Operational functions.



Everything

- Growth
- Delivery**
 - Client A
 - Client B
 - Client C
 - Client Management 1
- Operations

Lists

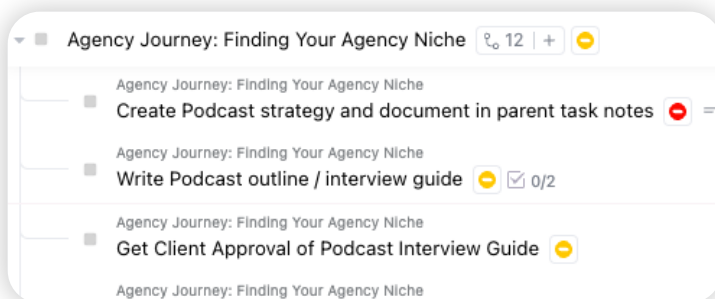
Lists are where your work – Parent Tasks, Subtasks and Checklists – live. They have a bit more flexibility in how they can be used. It all depends on the visibility that you need as an agency owner.

Lists should be broken down into either *Service Lines* (i.e. Paid Social, Organic Social, SEO, ABM, etc.), *Project Phases* (i.e. Blueprint, Implementation, Optimize) or just a *Retainer* list to make it easier (Retainer XYZ).

Parent Tasks

Parent tasks are the next level in the hierarchy. Parent tasks are best used as a deliverable or milestone within a project. Parent tasks help us group related activities (subtasks) together.

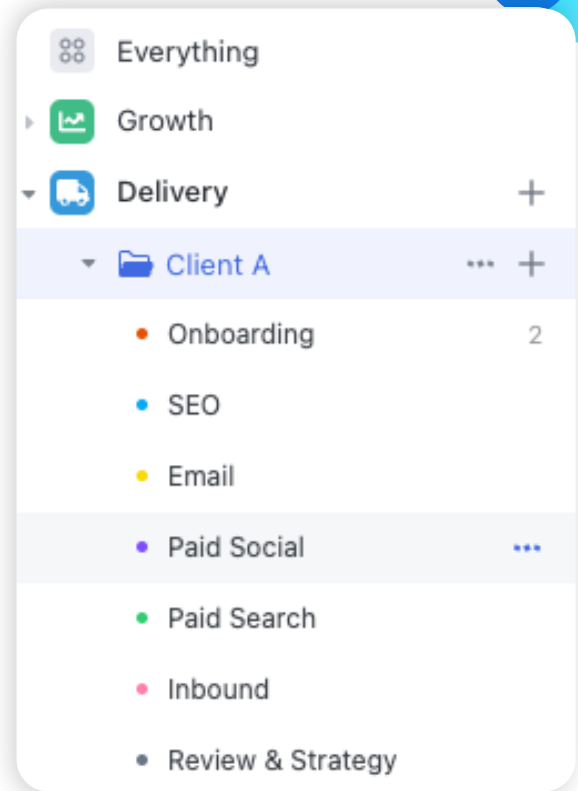
These tasks are often non-actionable and labeled as nouns. For example, If you were producing a podcast episode, the parent task would be the name of the episode (see *example below*).



Checklists

Checklists are the last level in the hierarchy and can be built into any task. Checklists should be used to give someone who completes this task on a regular basis, a few steps they should not forget when completing a certain task.

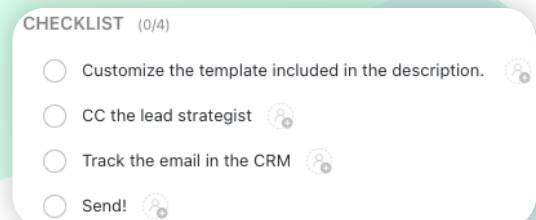
This is not for teaching somebody a process – *you can use descriptions and docs for that* – but rather to jog their memory, just to make sure that they don't forget each step in the process.



Subtasks

Subtasks are actionable tasks wherein it tells someone to do something in a certain duration of time.

Subtasks are grouped together by parent tasks and are the steps it takes to complete the parent task (deliverable or project phase).



ClickUp's Hierarchy For Agencies

Hierarchy	Use	Example(s)
Workspace	Your Agency	Guavabox
Space	Departments	<ul style="list-style-type: none"> - Growth - Delivery - Operations
Folder	Client Folders <i>(Delivery Space)</i>	<ul style="list-style-type: none"> - Client A - Client B - Client C
List	Service Lines <i>(Phases or Retainer List)</i>	<ul style="list-style-type: none"> - Review & Strategy - SEO - Paid Social - Email
Parent Task	Deliverables	<ul style="list-style-type: none"> - Blog Post - Newsletter - Onboarding
Subtask	Action Steps	<ul style="list-style-type: none"> - Write blog post - Review the blog post - Send the blog post to client for review
Checklist	Process	<ul style="list-style-type: none"> - Add in internal links - Optimize images - Adjust alt tags

Understanding ClickUp

Structuring Your Delivery Work

For this example, we're going to specifically focus on your Delivery Space and get the folder structure correct there first. At this level, Folders will be synonymous with Clients. Each client will have their own Folder.

Inside each client Folder, set up Lists for each phase of the client journey or for each discrete service line. For example, if your agency is doing Facebook Ads and email marketing for us (ZenPilot), here's how our client folder would be set up:

- **Onboarding** → Dedicated list for all the standard onboarding items you do for each new client.
- **Review & Strategy** → Specific list for client communication, project management, and general strategy & reporting.
- **FB Ads** → List for all tasks and work directly related to handling Facebook Ads.
- **Email Marketing** → List for all tasks and work directly related to handling Email Marketing.



Understanding ClickUp

Why Is the Structure So Important?

Beyond simply an organizational layer to keep lists manageable and the added bonus of customizing views and access by service line (especially helpful if you use independent contractors to deliver specific services and only need to share limited access), breaking our work into Lists by service line allows us to easily pull metrics about how much time or effort went into each specific service line across the agency.

That ability to measure effort by service line and compare it to revenue to serve as a proxy for determining profitability by service line is crucially important to enable you to make better future-facing business decisions.

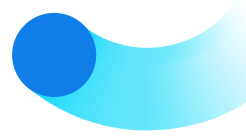
Luke Trewin at Modern Visual (they run on ClickUp as well) is a great example of an agency owner who analyzed his profitability by services and realized he needed to make some significant adjustments. His agency became both more profitable and more fulfilling after making this data-driven decision. You should have the same data and review it quarterly at a minimum.

Service Line Manager					
Account Management Hour...	SEO Hours - 📄	Paid Search - 📄	Paid Social Hours - 📄	Organic Social - 📄	Web DEV - 📄
117 Hrs	164.5 Hrs	43.5 Hrs	48 Hrs	43 Hrs	16 Hrs
Account Management - 📄	SEO Hours - 📄	Paid Search - 📄	Paid Social - 📄	Organic Social - 📄	Web DEV - 📄
145h 55m	123h 3m	41h 25m	87h 10m	87h	22h 25m
Account Management - ✅	SEO Hours - ✅	Paid Search - ✅	Paid Social - ✅	Organic Social - ✅	Web DEV - ✅
94h 31m	47h 6m	21h 20m	47h 38m	53h 36m	13h 34m

Service Line Management Dashboard - tracking budgeted time, actual time estimates from tasks and time tracked per month.

Agency Resource

FREE AGENCY OPS STRATEGY CALL TO DESIGN YOUR GOLD-STANDARD PLAYBOOK. SCHEDULE YOURS [HERE](#).



Understanding ClickUp

Understanding Views for Each Agency Role

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.

If you're wired like us, you love using lists and scanning a lot of information very quickly.

But others like to see information much differently. In that case, you may prefer Kanban boards or visualizing your work on a calendar or timeline.

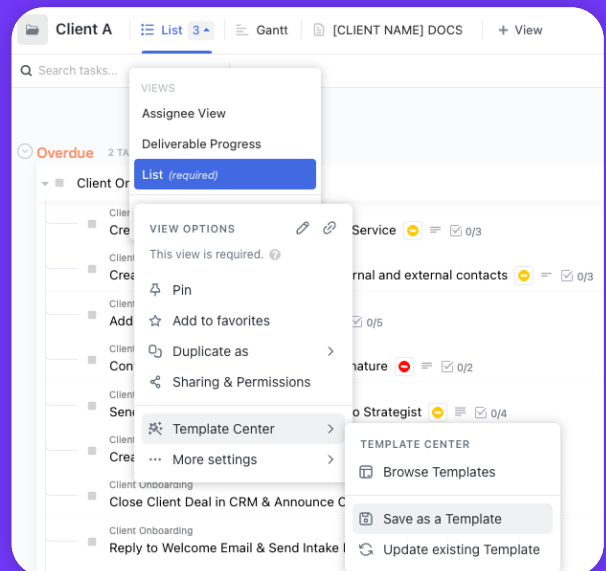
ClickUp allows you to configure as many customized Views as you like at the Everything, Space, Folder, and List levels. This allows me to have my lists or table views easily accessible, while others on my team are working on boards or in Gantt charts.

Like everything, however, ClickUp's greatest strength can easily become its greatest weakness. The incredible power and flexibility can turn into an overwhelming sea of options for new users.

Pro Tip

How to Keep Views From Spiraling Out of Control

- **Step 1** → Set up your default preferred List view and save it as a template. *(image to the right)*
- **Step 2** → Do the same for your board and calendar views.
- **Step 3** → Make sure your Space Settings are taking advantage of default views so that your team has to intentionally deviate from your preferred settings, rather than constantly starting fresh.



💡 Pro Tip

Here's How We Set up List Views Out of the Gate

- **Grouping** → Change "Group By" from "Status" to "Due Date".
- **Priority** → Hide the column for Priority (if you have this ClickApp turned on) – unless you're currently using a Priority feature in your existing PM, it's prone to abuse if it's rolled out without clear definitions and expectations.
- **Time Tracking & Estimates** → Turn on Time Tracking & Time Estimates and add both columns to the view. Put Time Estimated before Time Tracked and sum both columns at the bottom of each group.
- **Comments** → Add the Comments field (quickly allows you to see all comment activity on a Task or Subtask)
- **Subtasks** → Show Subtasks as expanded (hidden by default).
- **Sorting** → Sort the grouping in chronological order by Due Date.

The screenshot shows the Zenpivot interface for an 'Onboarding' project. The task list is grouped by 'Due date'. A 'GROUP BY' dropdown menu is open, showing 'Status (default)' as the current selection and 'Due date' as the selected option. Another 'SHOW SUBTASKS' dropdown menu is open, showing 'Collapse all (Default)' as the current selection and 'Expand all' as the selected option. The task list includes columns for 'COMMENTS', 'ASSIGNEE', 'DUE DATE', 'TIME ESTIMATE', and 'TIME TRACKED'. The tasks are sorted by due date, with the first task due on August 1st. The task list is expanded to show subtasks.

Task	Due Date	Time Estimate	Time Tracked
Client Onboarding	Aug 1	3h 35m	0:00:00
Confirm	Jul 28	5m	0:00:00
Close Client	Jul 28	5m	0:00:00
Create Handwritten Welcome Note	Jul 28	15m	0:00:00
Send Welcome Email Introducing Client to Strategist	Jul 28	5m	0:00:00
Reply to Welcome Email & Send Intake Form	Jul 28	5m	0:00:00
Create shared Google Drive and add internal and external contacts	Jul 28	10m	0:00:00
Send New Client Handwritten Welcome Note	Jul 28	5m	0:00:00
Create Internal Slack Channel and Add Team Members	Jul 28	5m	0:00:00
Double-Check Onboarding Details & Kickoff Call Confirmation	Jul 29	5m	0:00:00
Add Client Contacts to Retently	Jul 30	5m	0:00:00
Confirm Login Credentials & Access to Client Platforms	Jul 30	5m	0:00:00
Run Kickoff Call	Jul 31	1h	0:00:00
Complete ClickUp setup (assignees, due dates, lists, link Slack, etc)	Aug 1	1h	0:00:00
Monthly Reporting Setup	Aug 7	1h 15m	0:00:00
Create Agency Databox account	Aug 2	15m	0:00:00
Add client Databox account and connect data sources	Aug 4	30m	0:00:00



Understanding ClickUp

Set Your Task Status Defaults

ClickUp ships with a number of status options. Standardize these across Spaces and don't deviate once you've settled on the system that works for your workflow.

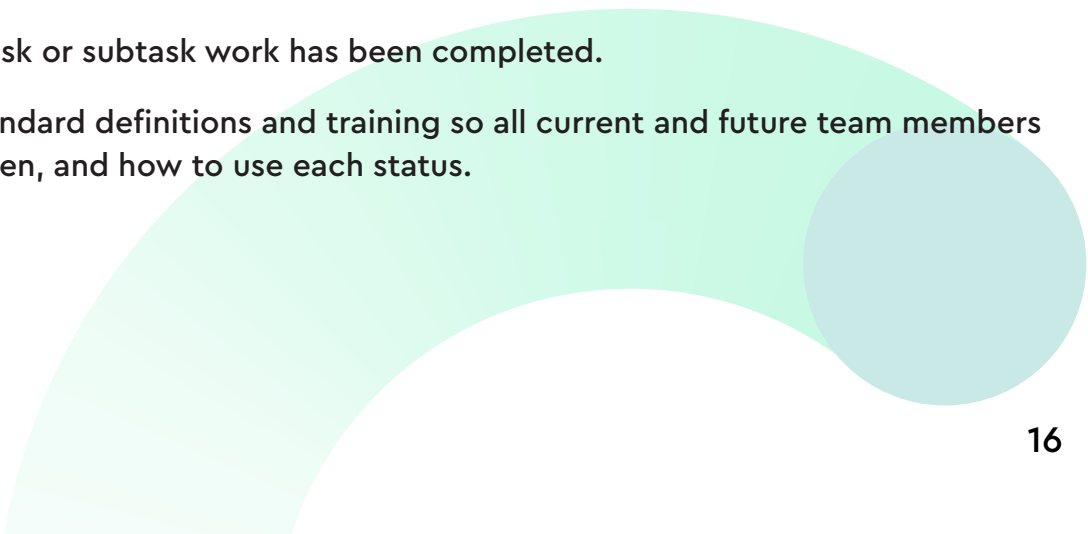
The keys to statuses that work (i.e. are actually used and updated consistently by your team) are:

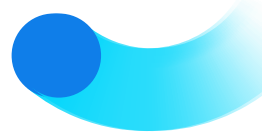
- **Simple** → Keep them as simple as possible while still providing valuable information with a quick glance.
- **Training** → Train the entire team on exactly what each status means and how it should be used.

Our default set of agency statuses is:

- **To-Do** → This task has been created, but has not yet been started.
- **In-Progress** → Work has begun on this task.
- **Internal Review** → The initial work has been completed and the task is waiting on feedback or approval from an internal team member.
- **In Revision** → The initial work has been completed and reviewed and revisions are required.
- **Client Review** → The initial work has been completed, may have been reviewed internally, and has been shared with the client for review.
- **Blocked** → The task or subtask is blocked by an unforeseen delay, usually on the client side, that needs to be resolved before work can move forward.
- **Deliver & Close** → The task or subtask needs a very small addition or edit. Once that is completed, the task may be closed without further review.
- **Complete** → 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.





Understanding ClickUp

Map Advanced Feature Requirements (Integrations, Custom Fields, Tags, etc.)

ClickUp integrates with a number of 3rd-party tools, but define what you truly need before you start browsing the integration options.

The Slack integration, for example, is very handy, but you'll probably overwhelm your Slack Channels if you set up the integration without a plan and leave on the default options.

Similarly, Custom Fields are one of ClickUp's most appealing features.

Wherever possible, try to use Custom Fields rather than Tags.

Tags will always be visible in the UI, so save them for situations where that makes sense (we set up a few specific tags out of the box, and that's it for most agencies). Custom Fields, on the other hand, can be displayed or hidden based on your needs in a specific view.

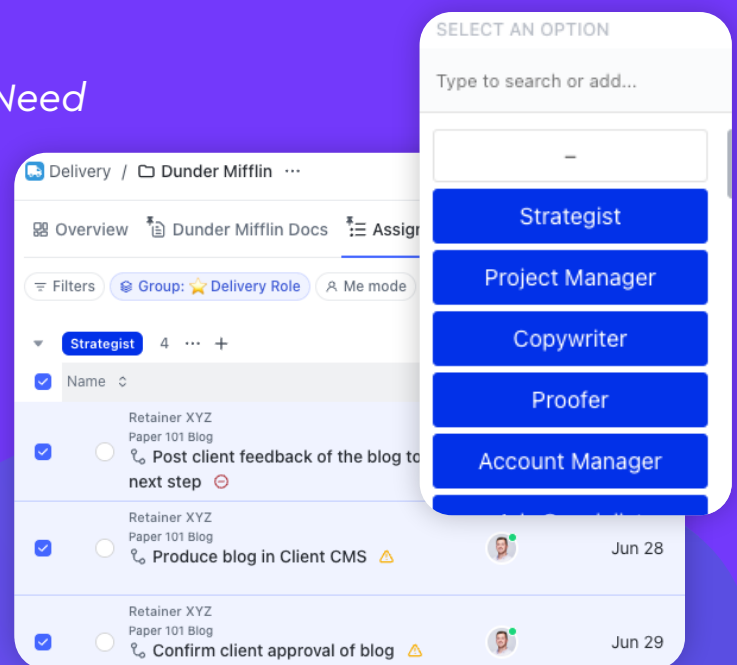
It's tempting to start building Custom Fields for all kinds of things, but map out what you need to get your work done efficiently and start with just that.

Pro Tip

The #1 Custom Field You Definitely Need

Go in and set up a *Dropdown Custom Field* labeled *Delivery Role*. Use this Custom Field to set the role in your agency responsible for completing the specific type of Task or Subtask you are creating.

This becomes incredibly useful for bulk assigning or reassigning tasks either as you're creating a new client project from a template or reassigning work when a team member goes on vacation or leaves the team.



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 ClickUp's most powerful feature – Views.
- 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!*

Keep this information top of mind as you move in to the next phase. You'll be referring back to these pages often.

If you are a visual learner and would like to see this in action, check out the webinar recording below.



Webinar

ClickUp for Agencies

Agency Resource

WEBINAR: LEARN HOW TO SET UP CLICKUP FOR AGENCIES - HIERARCHY, VIEWS, WORKFLOWS AND MORE [HERE](#).

The background is a solid purple color. At the top, there is a large, light blue curved shape that resembles a thick, stylized letter 'C' or a partial arc, with a darker blue circle overlapping its left side. At the bottom, there is a large, teal-colored curved shape, also resembling a thick, stylized letter 'C' or a partial arc, with a darker teal circle overlapping its right side.

Phase 1

Systems Design

Understand Your Agency Problems

Now that you have a general understanding of how ClickUp works, let's get to work.

First, you need to thoroughly understand your agencies largest areas of friction and pain. We recommend that you start off by surveying your team.

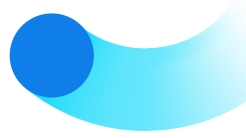
Do they know what they need to do each day? Do they feel their role is clearly defined? Do they feel the team is delivering high quality work to your clients?

Create a survey and deliver it to the team. Let them fill it out anonymously if necessary. This will give you a great perspective on what the team thinks.

Secondly, assess your current operation. Focus on these 7 key areas:

- **Services & Methodology** → What are your primary service lines and how do you structure client engagements? *This is used for your list structure (see page 12).*
- **Tools & Communication** → What tool(s) do you currently use for project management, time tracking and budgeting?
- **Resources Management** → How do you currently manage forecasting and capacity planning?
- **Account Management** → Does your team have a standard meeting frequency, agenda, and follow-up?
- **Project Management** → Who in your current PM platform can add, manage and adjust tasks?
- **Internal Knowledge Sharing** → How many deliverables and projects are supported by documented processes?
- **Contract Tracking & Reporting** → How do you currently track budgets for clients?

Assessing from both your team's perspective and leadership's perspective, you'll put together a great document of problems, pain points and your goals.



Systems Design

Audit Your PM & Processes

Next, you'll want to take a deep dive into your current PM platform and processes.

Walk through your current setup with your team, especially your project and account managers.

What's causing friction? Is it a technology, process or team expectation problem?

Most often, it's not the technologies fault. Agencies fall into the trap of having no pre-defined processes or training, leading to a complete disconnect in technology usage.

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

Write down your and the team's pain points on a document, categorize them and prioritize what matters most.

However, you may feel in the dark and want to see how your current operation stands up against the industry standard. Benchmark yourself against thousands of other agencies by using our free *Agency PM Health Benchmark* below.

With this 20-question survey, you'll be able to get your unique result and compare it to our benchmark database to see how your agency is faring.

The screenshot shows the ZenPilot logo at the top, followed by the title "Agency Project Management Health Benchmark". Below the title is a progress indicator showing "Step 1 of 20" and a 5% completion bar. The main heading is "20 Questions to Benchmark Your Agency Operations". A list of three bullet points explains the survey's purpose and instructions. A blue button labeled "Agency Resource" is visible at the bottom left of the screenshot.

- These questions (and the examples shared in your benchmark results) will help you build a more productive, more profitable agency operation.
- For each question, simply answer using the best-fit response ranging from "Strongly disagree" to "Strongly agree."
- After completing the survey, you will receive your score and full benchmark data. **Let's get started!**



GRADE YOUR PM HEALTH AGAINST 2,700+ AGENCIES WITH THE AGENCY PM HEALTH BENCHMARK [HERE](#).

Identify Key Processes and Prioritize

After you've done a thorough assessment of your operations, it's time to pause and begin thinking about everything you do for clients.

Agencies need to have clearly defined processes for a successful implementation. And yes, we understand every agency has a lot of different deliverables and projects in their tool belt. That's why you need to prioritize what needs to be built first.

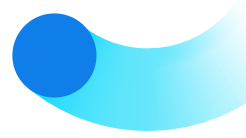
Prioritization is the only way for an agency to function efficiently and focus on the tasks that matter the most. Of course, prioritization needs to be seen as a collaborative task rather than something that a single person decides upon for everyone else. Bring your team together, identify the core functions of your business (marketing, sales, operations, etc.), and take stock of your agency's current strengths and weaknesses. This will give you the data you need to create a proper roadmap.

Start by taking a brain dump of everything you do for clients. Then prioritize it by how painful it is, how much documentation you have on it, and how often you do it (see *template below*). This will give you a great starting point on determining which processes need to be built first.

And don't worry about building anything out yet. That's coming 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	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
Storybr...	Project	Branding	Bob	4	4	2	10
Compl...	Deliverable	Paid Search	Mike	1	4	5	10

PRIORITIZE YOUR PROCESSES WITH THE PROCESS PRIORITIZATION WORKSHEET [HERE](#).



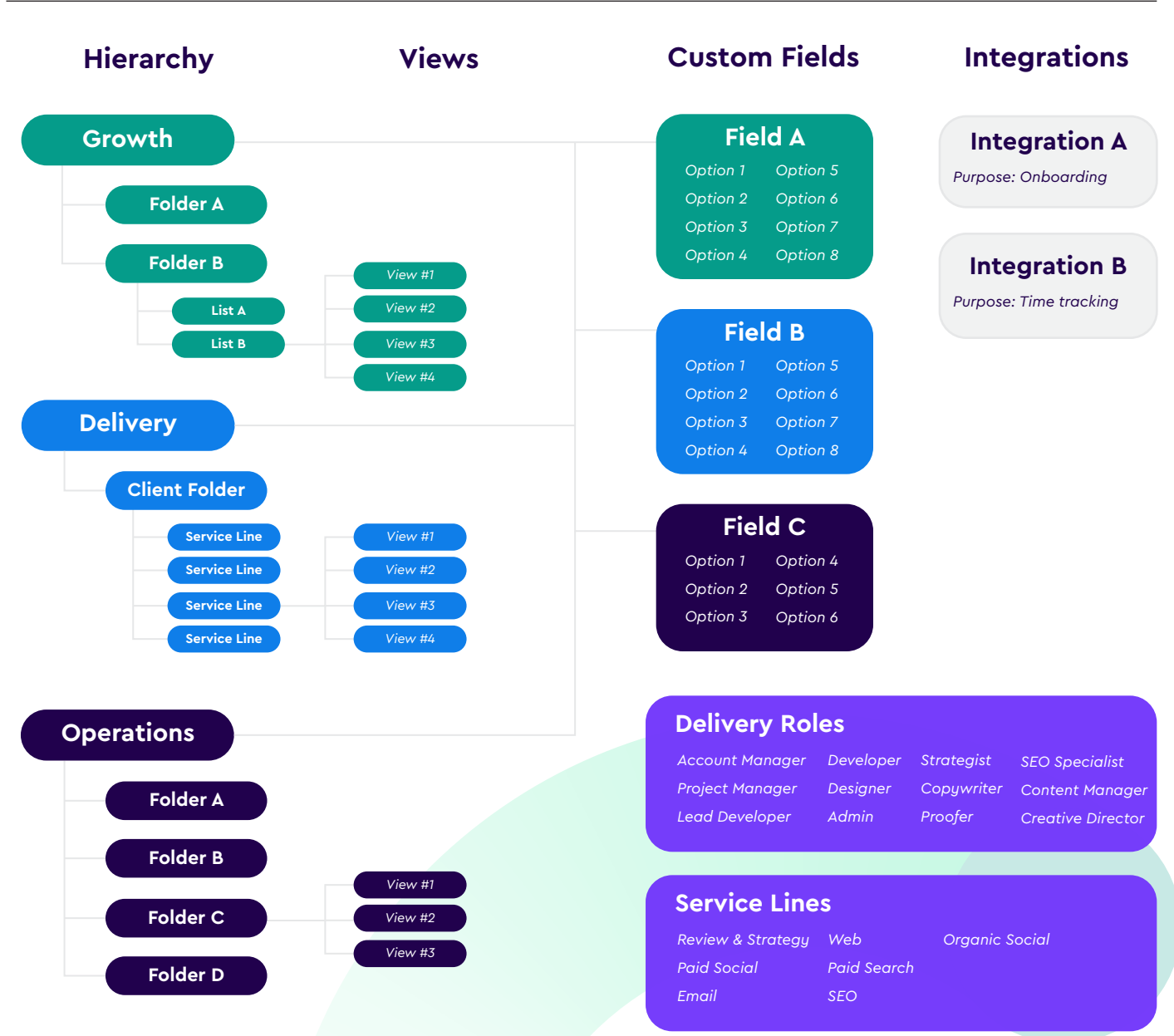
Systems Design

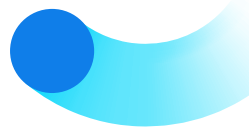
The Finished Product

Lastly, before jumping into ClickUp, you need to sketch out your blueprint.

Your blueprint is a detailed map of your ClickUp Hierarchy, Views, Custom Fields and Integrations. For help on this, re-read the "Understanding ClickUp" section of this guide to see our recommendations. We recommend drawing this out in Miro 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 your Client Folders. Make sure you document the Service Lines and Delivery Roles for your agency.



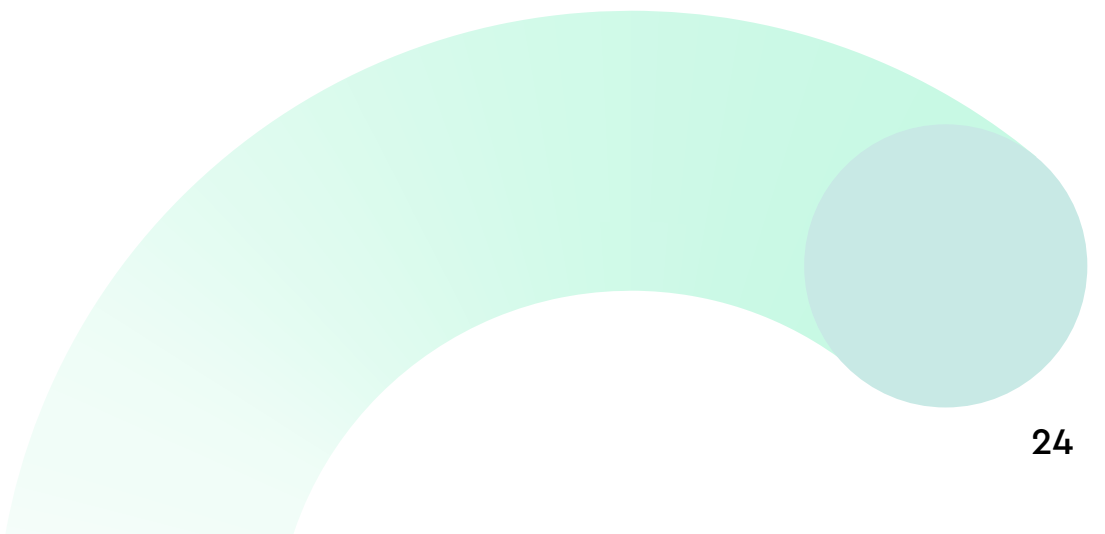


Checkpoint

Systems 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

Process Development





Process Development

Build Your Processes, Then Save as Templates

One of the most important steps in any PM platform implementation is building out your processes in the tool. Most agencies want to skip towards the end and just get their team in the tool. Don't. A project management platform 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.

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 a Process Library in ClickUp.

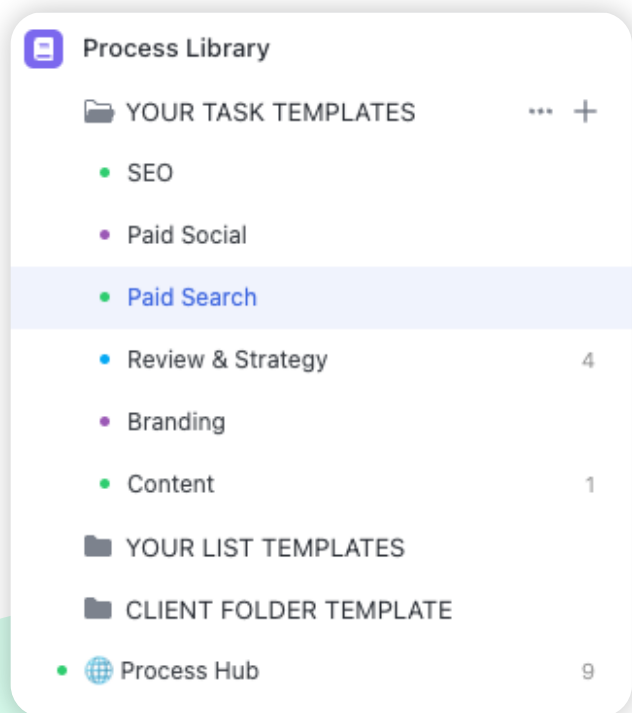
Creating a Process Library

Create a separate space called **Process Library**. *This is where you will build and store all of your agency process templates.*

In this space, begin by building out Folders for different template types (Task, List & Folder templates).

Secondly, build out Lists for each service line or phase of the client relationship (especially helpful if services tend to be very productized).

Inside those Lists, you'll create Tasks for each deliverable associated with that service line or stage of the client journey, then add Subtasks for the specific components required to deliver the parent task.



How to Build a Process Template in ClickUp

Within your Process Library, you'll utilize both Task and List templates to build out your agencies deliverables and projects.

- **Task Template** → Represents a smaller deliverable or a process that is often reused multiple times for a client. Task templates are referred to as tools in your toolbox (i.e. Blog Post, Google Ad Daily Optimization, Podcast Episode).
- **List Template** → Represents a larger project that happens once with a clear start and end date (i.e. Website Redesign, HubSpot Implementation, Video Production).

Set Up Your Parent and Subtasks

Now that your Folders and Lists are in order, set up your Tasks as your deliverables and use Subtasks for each individually-owned task in the process.

Let's take a blog post as an example. The blog post itself will be your Task (call it "Blog Post: {{Post Name}}").

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

- **Write the Blog Post** → This is the task (Subtask in ClickUp parlance) for the copywriter.
- **Edit the Blog Post** → This is the task for the editor.
- **Get Client Approval for the Blog Post** → This is the task for the project manager.
- **Schedule the Blog Post for Publishing** → This is the task for the PM or implementor.

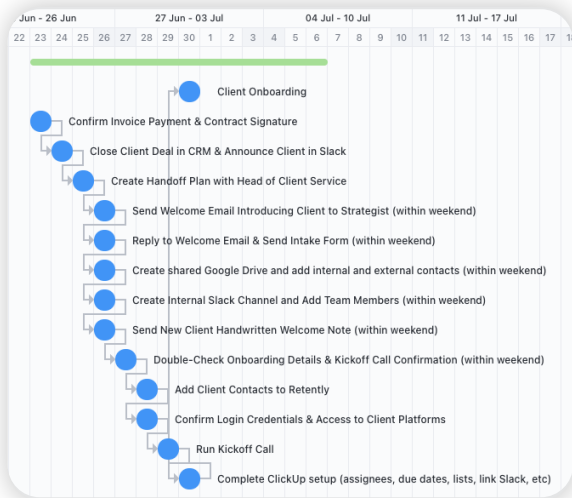
For best results, each actionable task should be completed by one user, in one sitting (not exceeding a 4 hour time estimate). This will help facilitate work amongst the team, provide visibility to management and ensure that nothing slips through the cracks. Yes, you may get pushback from some of the team on this, but trust us, this is important.

Set Up Your Task Processes

Inside each Subtask, we'll use ClickUp's awesome checklists and task description feature to document the step-by-step process to complete these tasks.

We can pair this with videos, images, or additional resources linked up in the task descriptions to make sure that we're making process live where work gets done and enabling team members to do their best work.

The screenshot displays the ClickUp interface for a 'Client Onboarding' project. On the left, a list of 13 tasks is shown with progress indicators. The main view shows a task titled 'Send Welcome Email Introducing Client to Strategist' with a due date of Aug 1 and a time estimate of 3h 35m. A checklist is visible with items like 'Customize the template included in the description', 'CC the lead strategist', 'Track the email in the CRM', and 'Send!'. Below the checklist is an email template with placeholders for client and strategist names.



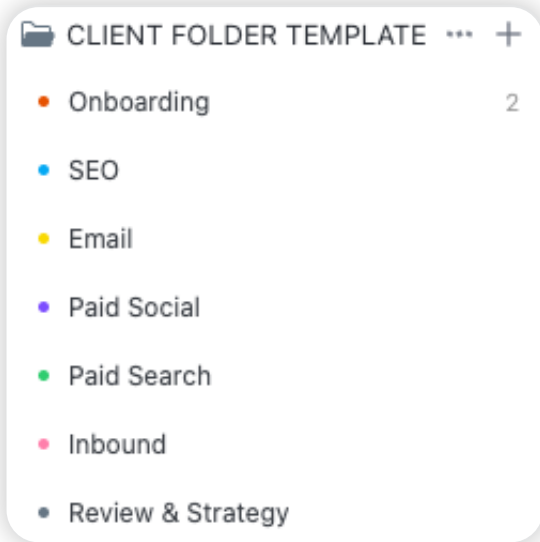
Add Custom Fields and Dependencies

After you've built out your Tasks, Checklists and Descriptions, make sure you also add in any necessary Custom Fields.

As mentioned earlier, adding a Delivery Role field will be the most important. We'd also recommend to add in a Service Line custom field and a Task Type field to distinguish between different types of tasks – actionable, non-actionable, meetings, records, etc.

Lastly, make sure you head to the Gantt view and set dependencies up between your tasks. Dependencies add the ability to easily remap due dates in the future (and skip weekends!).

→ If you'd like an example of a well-built process template in ClickUp, [Click here](#) to get our pre-built Client Onboarding template directly added into your agency's ClickUp portal.



Set Up Your Client Folder Template

After you've built out all of your processes, it's important that you focus on creating a standard Client Folder structure inside of your Process Library. This folder should have standard views, lists, docs and automations so that each client has a consistent and easy-to-follow structure.

For the initial migration you should create a Migration Folder Template (client folder without onboarding), but for the future, you should have a New Client Folder Template (client folder with onboarding).

Save Your Templates in the ClickUp Template Library

After you've built your task, list and folder templates, it's time to save them into the ClickUp Template Center. At this point, you've created your source files, but they aren't yet ClickUp templates. This is important so that you have an organized place to edit and update your processes in the future!

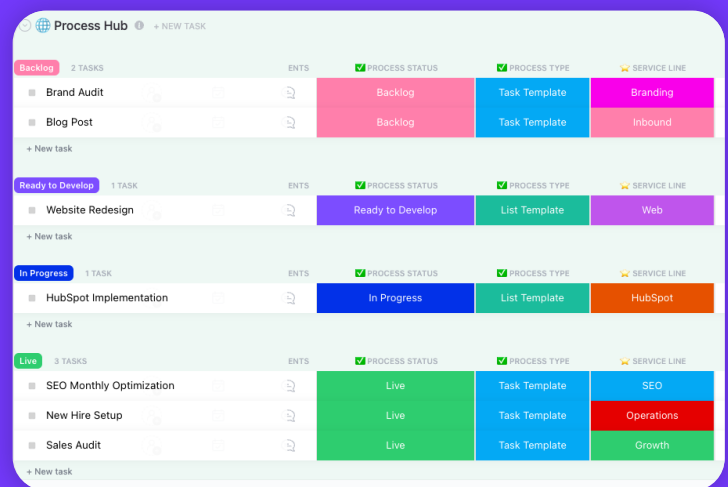
Once all of your templates are saved, you're ready to start building out your launch plan! 🚀

💡 Pro Tip

Create a Process Inventory List

Go in and set up a "Process Hub" list inside of your Process Library. The tasks in this list will be the names of all of your deliverables and projects. This should mimic the Process Prioritization worksheet that was set up earlier.

This is a great place to manage all of your templates (i.e. status, process type, service line, etc.).



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 done (i.e. "Write Blog Post"). Parent Task names should be nouns (i.e. "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 dates based on the Task Due Date when you deploy your templates.
- Custom Field(s)** → Every Subtask should have a preset value for a 'Delivery Role' Custom Field. *The Parent Task will not need a 'Delivery Role' when it's a non-actionable task (i.e. "Client Onboarding").*
- Dependencies** → Dependencies should be baked into your templates.
- Consistency** → Your naming structure and format should be consistent.

Checkpoint

Process Development

At this point in your implementation, you should have:

- Process Library** → A 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 into the ClickUp Template Center. All templates should have tasks, due dates, time estimates, delivery roles, dependencies and any other additional Custom Fields.
- List Templates** → All "needed for launch" List templates/projects have been built and saved into the ClickUp Template Center. All templates should have tasks, due dates, time estimates, delivery roles, dependencies, views, project specific docs and any other additional Custom Fields.
- Folder Template** → A client folder template has been created and saved in the template center. This Folder template should have views, lists, docs and anything else you want apart of your client folders.

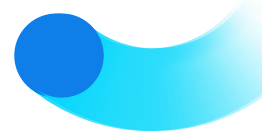
The screenshot displays the ClickUp interface for a workspace named 'Process Library'. The main view is 'TASK TEMPLATES / Inbound', showing a list of tasks. The left sidebar contains a 'Process Library' section with various templates like 'ABM', 'Amazon Advertising', 'Branding & Design', etc. The main task list is filtered by 'Overdue' and shows tasks with columns for Name, Due date, Time estimate, Delivery Role, Task Type, and Work Category. The tasks are organized into a hierarchy, with 'Case Study' as a parent category containing several sub-tasks.

Name	Due date	Time estimate	Delivery Role	Task Type	Work Category
Blog	5/14/22	8h 40m	-	Non-Actionable	Inbound
Podcast	5/15/22	6h	-	Non-Actionable	Inbound
Case Study	5/18/22	8h 55m	-	Non-Actionable	Inbound
Case Study	5/2/22	30m	Strategist	Actionable Task	Inbound
Case Study	5/3/22	15m	Strategist	Actionable Task	Inbound
Case Study	5/3/22	1h	Copywriter	Actionable Task	Inbound
Case Study	5/5/22	2h 30m	Copywriter	Actionable Task	Inbound
Case Study	5/5/22	30m	Account Manager	Actionable Task	Inbound
Case Study	5/6/22	15m	Proofreader	Actionable Task	Inbound
Case Study	5/7/22	15m	Copywriter	Actionable Task	Inbound
Case Study	5/8/22	1h	Designer	Actionable Task	Inbound
Case Study	5/9/22	15m	Account Manager	Actionable Task	Inbound



Phase 3

Implementation & Integration



Implementation & Integration

Construct Your ClickUp Workspace

Now that you've designed the system and documented all of your processes inside of ClickUp, it's time for the fun part. Let's begin to get everything set up inside of your workspace.

If you haven't already, make sure all of your spaces are set up – Growth, Delivery & Operations. Refer back to pages 8 – 18 for helpful instructions.

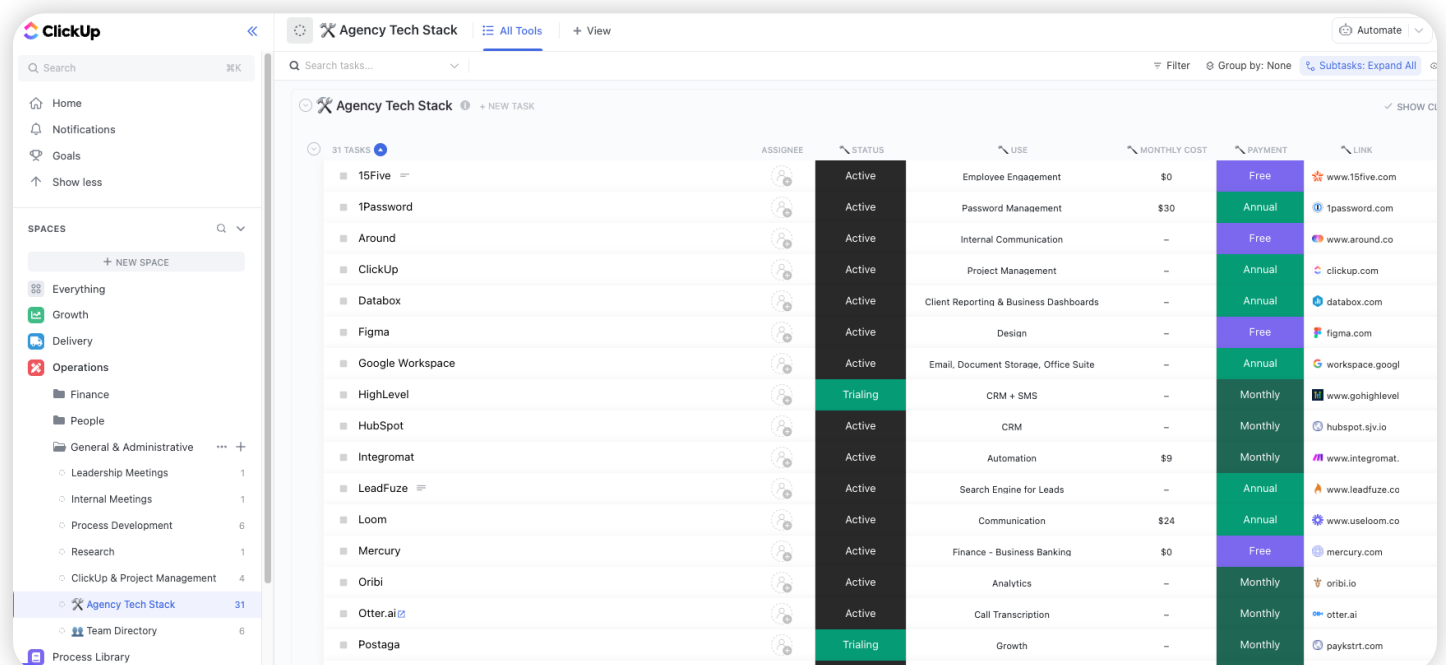
Next, make sure your folder, lists and views are all set up correctly. You don't need to add all the tasks yet, but the structure needs to be set so that you and the team will know where every task should live.

Remember, **your work in all three areas of your business should be reflected in your PM tool.**

You'll also want to investigate ClickUp's ClickApps to see what you want to include and what you don't want to turn on.

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

Get these integrated with ClickUp before launch to make sure the team is trained and ready to go on day 1.





Pro Tip

Keep It Simple and Don't Use Every Feature Immediately

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 little 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
- LineUp
- Milestones
- 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.



Implementation & Integration

Pick a Launch Date and Create a Migration Plan

One place agency teams often trip up when implementing ClickUp is with their migration plan. Part of the team migrates over as early adopters. A few client projects get moved. One client project is getting maintained in two separate systems.

Suddenly somebody can't find something they need and finally realize it's in the other system. Things get messy, people get frustrated, and the migration project momentum stalls out.

Instead, pick a clear launch date (no less than 2 weeks out, no more than 6–8 weeks out) for migrating to ClickUp. Build the launch plan and share it with your team.

Before launch, you need to:

- Set up your structure correctly.
- Build out your processes and templates. (*Deliverables, Projects and Client Folder*)
- Train your entire team on the unified way you'll use the software.
- Figure out whether you're using ClickUp's native time tracking or a 3rd-party tool.
- Set up any other needed integrations.
- Migrate your active work and configure in ClickUp.
- Run your launch party. 🚀

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

Checkpoint

Implementation & Integration

At this point in your implementation, you should have:

- Spaces** → All spaces – Growth, Delivery and Operations – have been set up with needed ClickApps turned on.
- Task Statuses** → Task status structure has been built and is universal across the workspace.
- Folders** → All needed folders (outside of Delivery) have been set up with views.
- Lists** → All needed lists have been created and added to folders.
- Custom Fields** → All needed custom fields have been created and added to the necessary spaces. *We do not recommend you have workspace Custom Fields. Keep them organized in spaces.*
- 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.*
- Integrations** → All tools that need to be integrated into ClickUp have been connected. *This is especially important if you are utilizing a third-party time tracking tool (i.e. Harvest, Everhour, etc.).*



Phase 4

Expectations & Empowerment



Expectations & Empowerment

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 in ClickUp 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 in 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.

Expectations & Empowerment

Migrate and Launch in ClickUp

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.

Additionally, It's important that you don't take the easy route and migrate work over with a CSV fil import. You created process templates for a reason. Use them!

- **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.*
- **Views & Docs** → After the folder is deployed, make sure the docs and Views are all set up how you want them.
- **Deliverables** → Find the appropriate service line List and begin deploying your Task templates. *ClickUp allows you to remap due dates when deploying templates.*
- **Projects** → Projects (saved as List templates) will be deployed as seperate Lists in the client Folder. Go to the client Folder settings and deploy the appropriate List template. *ClickUp allows you to remap due dates when deploying List templates.*
- **Mark Completed Tasks** → Match your deliverables and projects up with where the work is in your old system. If there are any tasks in your new process that you just deployed that are complete, mark them as complete in ClickUp!
- **One-Off Tasks** → If there are any random tasks that aren't in a template, add them in as one-off tasks in the system. Make sure they have an assignee, a due date and a time estimate.
- **Assign Work** → After all projects have been deployed into a client's Folder, use your *Delivery Roles* to assign work out!
- **Finalize & Repeat** → Double check to make sure 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 your Growth and Operations.

Checkpoint

Expectations & Empowerment

At this point in your implementation, you should have:

- Team Training** → The team has been given a ClickUp orientation and have been trained on your project management ground rules. *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.
- Launched!** 🚀 → All client Folders have been set up, 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 PM 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

Accountability & Improvement



Accountability & Improvement

Hold Everyone Accountable

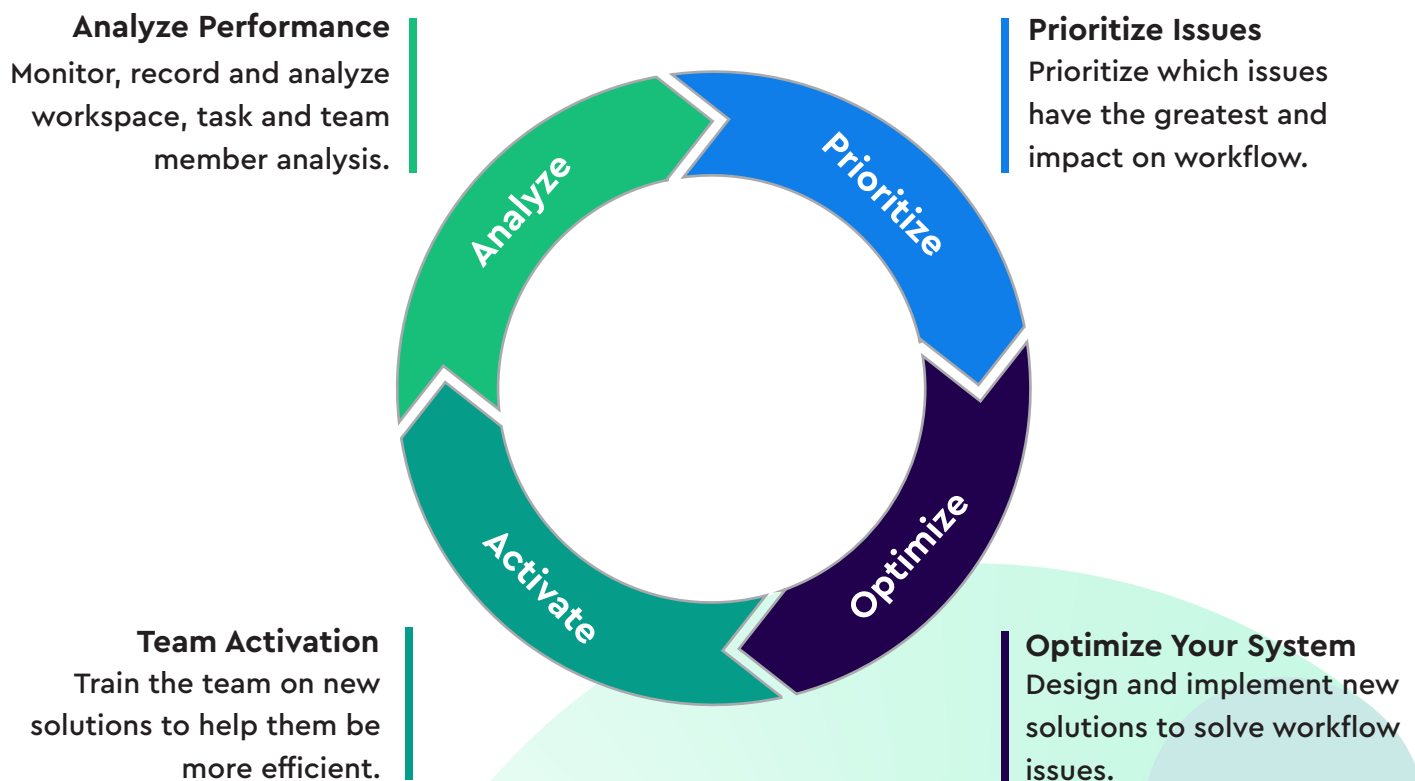
Once you've launched ClickUp at your agency, there are a handful of specific things you should do to help your team get up to speed quickly and then hold everyone accountable to the standards you've set.

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 set up.

Equally helpful, look at the views they have configured, if they're using features like Favorites, Hotkeys, and the Tray, and whether they have the apps downloaded and in use.

Four Step Accountability Process





Accountability & Improvement

Assign a ClickUp Champion

Crucially, the agency owner can NOT be the person monitoring ClickUp usage and spotting issues.

In a very small firm and for a very small time period, that may be excused, but it never ends well. Instead, assign someone internally to act as your ClickUp Champion.

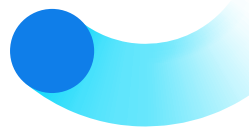
This person will execute the consistent checks, address minor issues, escalate major issues as needed, and surface insights and aggregated data to the management team.

To build healthy habits in your team, you should be following clear cadences for accountability, analysis, and improvement. Let's dig into those next.

ClickUp Champion Responsibilities

- **The Daily Spot Check** → a 10–30 minute (depending on firm size) audit at the end of each work day.
- **The Weekly Roundup** → a slightly deeper dive on a weekly basis that leads to a short aggregated report to management.
- **The Monthly Review** → a monthly review that pulls data for management that should impact resource allocation, project scoping, pricing, etc.
- **The Quarterly Analysis** → a comprehensive analysis that impacts time estimates, project planning, recruiting and hiring, client relationships, etc.

Don't skip these tasks. Build out a well-documented process and hand it off to a detailed-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.

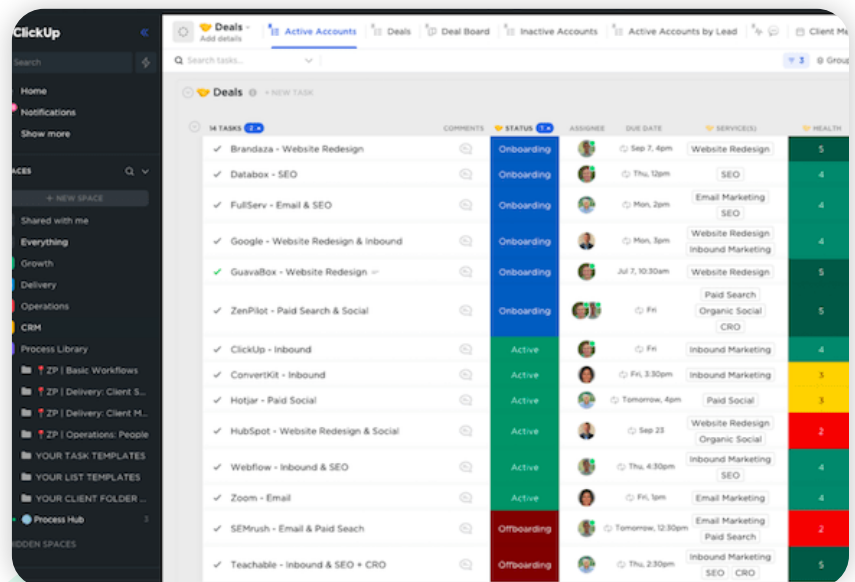


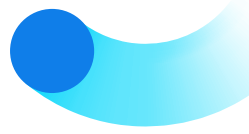
Accountability & Improvement

Advanced Use Cases & 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!

- **Account Dashboard** → How to repurpose a List to create an amazing dashboard of your clients, client health, billing, staffing, etc.
- **Docs (internal wiki)** → Leveraging ClickUp's Docs feature to build an internal wiki, team handbook, and more.
- **Client Overviews** → Where you should standardize client information, links, brand guidelines, etc.
- **Public sharing** → How to get the benefits of sharing access with clients, without most of the pitfalls.
- **Embedded views** → Which tools to seamlessly integrate into ClickUp for increased productivity (shout out to Databox).
- **Agile** → How agile teams can leverage ClickUp to replace multiple tools (and automate parts of the process).
- **Automations** → The best of the best in agency automation use cases (built natively into ClickUp).





Checkpoint

Accountability & Improvement

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.
- Dashboards and Views** → Create views and dashboards to help with reporting and QA. Look at workspace, space, folder and team member health. *We'd recommend setting up views to track tasks with no due dates, assignees, and overdue work.*
- 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.



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 agency, please reach out.

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

→ We've helped agencies 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.

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

If you're ready to experience the power of world-class operations, schedule your free ops strategy call [here](#).

Process Template

Free client onboarding template, pre-built in ClickUp.

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Ops Strategy Call

Free strategy call to design your gold-standard playbook.

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