



# How ZenPilot Helps Gravity Global Complete 99% of Tasks On-Schedule and Create the Operational Certainty to Scale

## CASE STUDY



“ZenPilot has got us all rowing in the same direction. It’s very clear that our operations are much more efficient now.

Thanks to ZenPilot, we’re headed in a much stronger direction than we were before.”

**Allison Gibbs,**

Integrator & VP of Operations, Gravity Global

Gravity Global is a full-service marketing communications agency. It helps leading global B2B businesses transform using a strategic lens of ‘fame, admiration and belief.’

## Highlights

### Challenges

- Lacking high-level visibility into how the agency was performing and what needed to be improved
- Struggling to identify problems before they became client fires
- Self-implementing ClickUp, only to waste 1.5 frustrating years trying to optimize it

# Challenges

## No high-level visibility into what was really happening with client projects

Business was booming for Gravity Global, but a big problem was bubbling under the surface. While its clients were happy, and work was getting out of the door on time, a lack of high-level project visibility was affecting the agency’s efficiency and productivity.

Gravity Global had tried virtually every project management tool out there, before deciding to give ClickUp a try. Unfortunately, they weren’t using ClickUp to its full capabilities, so they still lacked a single source of truth to show what was really happening with client projects.

*“We knew that the work was getting done. But we were just kind of skating along, because clients were happy,” explains Allison Gibbs, Integrator & VP of Operations, Gravity Global. “I started to realize it was a huge pain point for us that we didn’t have any insight into how work was getting done or if any problems were brewing.”*

Having no visibility into how they were servicing their clients—and how projects were progressing—brought significant operational risk. In particular:

- Account managers couldn’t answer client questions quickly
- Issues weren’t being identified before they became potential client fires
- Teams weren’t consistently held accountable for the work they were doing due to disconnected processes
- If projects spun off track, it took significant time and resources to find the source of the failure
- It was difficult to see which teams had capacity and which were overstretched
- Leadership didn’t have a high-level view into day-to-day operations

## Solution

**Gravity Global** partnered with **ZenPilot** who:

- Benchmarked their current situation and developed a strategy to streamline production and client-facing activities
- Restructured how Gravity Global organizes its tasks, so they are better visualized and managed
- Developed and deployed the new system
- Trained and certified Gravity Global's team
- Developed dashboards to provide insights on performance, issues, and capacity
- Provided Elite Support to adapt systems as business needs evolve

## Results

- Projects completed faster and with fewer issues
- Efficiency and productivity improved agency-wide
- 87% of clients self-describe as “fully satisfied with no issues”
- Management decisions driven by data
- PM systems are easily scalable—and designed to make Gravity Global more profitable and successful

With low-quality data, Gravity Global couldn't make informed management decisions. The more Gravity Global scaled, the more unsustainable the situation became.

The agency urgently needed to streamline its day-to-day operations, have better visibility into the activities of its teams, and be able to identify and measure critical KPIs.

## Unlocking the power of ClickUp

While ClickUp had the potential to be the all-in-one project management tool they needed—and unlock high-level insights on team performance—Gravity Global wasn't getting anywhere near its full potential.

Like 90% of ClickUp customers, the business had self-implemented the platform.

*“We felt we had the expertise to roll-out ClickUp, build the dashboards we needed, and train up our teams to use it,” explains Allison.*

But the reality was tougher than they imagined. After a year and a half of frustration, they still didn't have the visibility and metrics they needed to scale with confidence.

Every day that passed was costing Gravity Global money due to inefficiencies and lack of visibility. It was time to find a proven expert to get them on track.

*“We'd never hired an outside firm for anything like this before, but we decided we needed a proven expert to get us to a spot with ClickUp that was going to make our operations stronger,” says Allison.*

That's when Gravity Global discovered ZenPilot.



**"We knew that the work was getting done...but we didn't have any insight into how it was getting done or if any problems were brewing."**

## Solution

### ZenPilot builds robust processes, upskills Gravity Global's team, and unlocks powerful organizational data

From day one working with ZenPilot, Allison was impressed with their technical expertise and wealth of knowledge about agency processes. Gravity Global was also reassured by knowing that ZenPilot had helped 2,600+ agencies fully optimize ClickUp and use the platform to its fullest capability.

ZenPilot followed a proven playbook that made Gravity Global more productive within just a few months.

#### Stage 1: Blueprint

First, ZenPilot worked with Gravity Global to benchmark their current situation, clarify their goals, and develop a customized strategy to streamline production and client-facing activities.

*Allison explains: "Because ZenPilot works almost exclusively with marketing agencies, they're experts in figuring out what the actual problem is for your business, and then providing a blueprint to actually put it into place."*

#### Stage 2: Implementation

To make it easy for Gravity Global to manage, track and monitor workflow, ZenPilot totally restructured how they organize their tasks.

ZenPilot provided a clear framework for segmenting tasks into relevant categories. Then they provided

hands-on training to Gravity Global's team, so they could be self-sufficient in creating task templates that ensured teams stayed on track and maximized productivity.

ZenPilot also built out dashboards that provide visibility and insight into how teams are performing—and pick up any issues before they spiral into bigger problems.

**Now, Gravity Global was ready to deploy the improved systems and processes across the agency.**

ZenPilot took the load off Gravity Global's owners and leadership team during implementation.

Its technical experts independently built out the new system they'd designed and integrated it within ClickUp.

Next, they delivered a program of retraining—called Agency PM Certification—to Gravity Global's team.

The team training focused on getting employees up to speed with ClickUp and ensuring they followed new processes to the letter. Importantly, it also trained all team members on the new rules of engagement for agency operations.

ZenPilot assigned an internal ClickUp Champion and gave them specific training on how to hold the team accountable—and consistently improve agency performance.

*"The Certification gave everybody an excellent overview of how everything is structured and what's required of them, and ZenPilot took care of all of that," says Allison. "It was great to get everybody on the same page."*

Within days of the training being completed, Gravity Global saw efficiency and productivity improve agency-wide.

Suddenly, individual account managers could:

- Better visualize and manage the tasks at hand more effectively
- Monitor progress across their teams
- Get work out the door on time with consistently high quality

*Allison says: "Everybody knows exactly what they're supposed to do now and the pieces that need to be there in order for it to be done. "More importantly, those of us who need to can do a quality assurance check to make sure that everybody's doing what they should be."*

For senior leaders like Allison, they finally have the high-level visibility they'd been missing.

Using dashboards built by ZenPilot, they can:

- Draw insights into how their production and client service teams are performing
- Identify problems in the pipeline and make things better
- Understand team capacity and workload, and know when to relocate work or make new hires

*Alison says: "With such deep insights, I can raise any red flags with a client before they become unhappy, which improves client relationships and retention."*

### Stage 3: Elite Support

Gravity Global signed up for Elite Support, which means they have weekly support and guidance from ZenPilot to continuously improve how they measure and manage their systems.

So far, ZenPilot has refined Gravity Global's dashboards and improved the structure of several data streams to provide even more granular detail into how teams are performing, based on feedback from the system.

ZenPilot even provides important technical support to the team on ClickUp. Whatever the issue, ZenPilot offers answers quickly, so Gravity Global can get back to work and maintain business velocity.

*"ZenPilot is super-responsive," says Allison. "We probably send them emails and Slacks 14 times a day and they always respond. They provide layer upon layer of support and have an answer for all our needs."*



**"With such deep insights, I can raise any red flags with a client before they become unhappy, which improves client relationships and retention."**

# Results

## A more productive, profitable, and healthy agency

Allison regrets not bringing ZenPilot onboard from day one of using ClickUp. She says that self-implementation was self-sabotage.

*"If I went back and put actual dollar signs to it, I guarantee we lost more money by trying to save money and do self-implementation than if we'd used ZenPilot from the very beginning," she says.*

With ClickUp working to its fullest capabilities, Gravity Global has clear data-driven insights, which enable better management decisions on everything from scheduling to resourcing.

*"With so much visibility into our production and client-service teams, I have quality data we can trust to act on," she says.*

*"I can predict when we're running into resourcing issues, and bring in additional support. I can see if we're not consistently meeting clients' demands and fix that issue. I get so much useful operational insight that I couldn't get before."*

Working with ZenPilot has dramatically improved efficiency and productivity across the agency.

*"ZenPilot has got us all rowing in the same direction and it's very clear that our operations are much smoother now and we're able to get through things much quicker," says Allison.*

**"ZenPilot has alleviated a lot of confusion and stress for the team, improved our communication and collaboration, and ensured people have fewer questions and do the job faster."**

*"We're headed in a much stronger direction than we were before."*

Client satisfaction and retention have also increased since working with ZenPilot.

*"We recently ran a client satisfaction survey. Before ZenPilot, the majority of our clients were what we would consider to be at risk, due to the nature of not having any visibility. **Now, 87% are fully satisfied and have no issues,**" she says.*

Allison recommends ZenPilot to any agency looking to get the big picture on projects and implement efficient workflows that are easy to scale.

*"Your project management system is the lifeblood of delivering services for your clients," says Allison. "If you don't have that in tip-top shape, you are going to have a very difficult time scaling in the future. Now, we have the right systems in place to scale our agency and become more profitable. And that's thanks to ZenPilot."*



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for managing projects that drives  
accountability and productivity?**

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