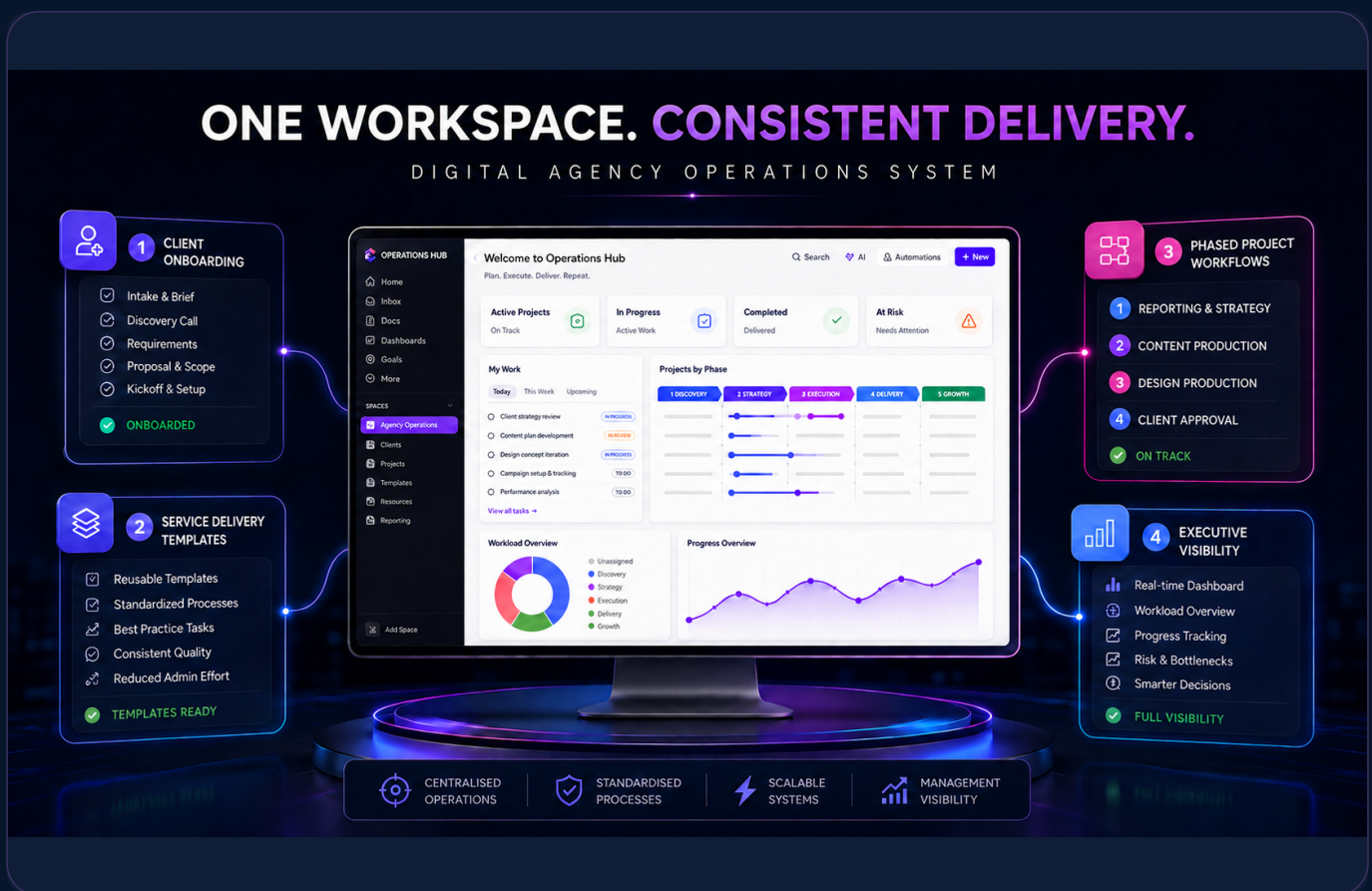


AGENCY OPERATIONS / CLICKUP IMPLEMENTATION

One workspace. Consistent delivery.

A scalable ClickUp operating system for client onboarding, team tasks and project delivery.



01

Client onboarding

02

Delivery templates

03

Phased workflows

04

Executive visibility

The operational transformation

From fragmented tools to a centralised agency operating structure.

THE CHALLENGE

Project information was spread across multiple tools

The agency used a separate CRM and multiple Google Sheets, with other project-management tools used at different stages. The agency needed a more centralised way to manage client onboarding, team tasks and project delivery.

THE SOLUTION

A scalable ClickUp architecture for the entire agency

I designed and implemented a comprehensive ClickUp workspace that centralised the agency's operational work. The architecture brought client management, administration, service teams and reusable templates into a clearer, more navigable structure.

The build included structured onboarding, phased service-delivery workflows, reusable task templates, custom statuses, automations, dashboards and a central knowledge base for SOPs and internal documentation. I also created onboarding resources and continue to support team adoption through targeted training.

THE OUTCOME

A central operating foundation that can scale

- ✓ Centralised project and task management.
- ✓ Standardised service-delivery workflows.
- ✓ Reusable onboarding and project templates.
- ✓ Improved management visibility and reporting.
- ✓ Reduced repetitive administration through automation.
- ✓ Documentation and training supporting consistent adoption.

SYSTEMS USED ClickUp | Automations | Dashboards | SOPs | Team training

What the system contains

A client-safe representation of the operational architecture. Live workspace data is not reproduced.



01 CLIENT ONBOARDING

Reusable intake, discovery and kickoff structures.

02 DELIVERY TEMPLATES

Repeatable service processes and best-practice tasks.

03 PHASED WORKFLOWS

Reporting, content, design and client-approval stages.

04 MANAGEMENT VISIBILITY

Dashboards for workload, progress and operational risk.

PRIVACY NOTE Client, employee and live operational data have been excluded from this public case study.