



# Revolutionizing Marketing Operations in Insurance

An insurance group rebuilt marketing intake, planning, and project management in ClickUp with L5. Scattered requests became one pipeline with clear status.



**L5 Team**

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## The Challenge

A marketing team required a robust solution for managing various marketing activities, including digital content creation, procuring merchandise, printing, and event management. In addition, the team needed strong project management, resource management, and time tracking capabilities to bill marketing projects effectively to relevant entities.

## L5's Solution

L5, ClickUp's strategic partner, implemented ClickUp using the ACT Methodology. It built marketing request intake, planning and forecasting, project management with automated templates for different project types, resource and workload management, billing/invoicing, and comprehensive reports and dashboards. L5 also provided extensive training and onboarding to drive enablement and adoption among marketing teams.

## The Results

The marketing team gained better control over projects, resources, and billing, resulting in optimized operations and increased efficiency. Also, comprehensive reports and dashboards provided valuable performance and resource allocation insights, enabling data-driven decision-making. Thanks to L5's rapid implementation of ClickUp, the team experienced a marked improvement in managing diverse marketing activities.

L5 reshaped the insurance group's marketing operations by implementing ClickUp. Its tailored approach, expertise, and dedicated training ensured a smooth transition, rapid adoption, and successful utilization of ClickUp's capabilities.

The marketing team achieved higher efficiency and organization across all its marketing activities with L5's support.