

Marketing Agency Replaces Excel with ClickUp to Scale

See how a marketing agency scaled project management across dozens of clients by replacing Excel with ClickUp and prebuilt, repeatable templates.



L5 Team

May 16, 2024

Opportunity

A marketing agency needed help with project management due to the manual nature of its systems, relying heavily on Excel spreadsheets. It had dozens of active clients at any given time. Its work included digital ads, social media content, print advertising, video ads, and email campaigns. With new clients added regularly and existing clients sending work, the agency required constant communication to develop assets and gain approvals. Tracking budget approvals and invoicing clients added to the challenge. The agency needed a project management solution with pre-built templates to ensure consistent execution of work and transparent task progress.

Solution

The agency partnered with L5, ClickUp's strategic transformation partner, to implement ClickUp for project management. L5 built a customized workspace that entirely replaced the agency's manual processes with ClickUp. With ClickUp's pre-built templates, the agency could manage different types of requests, including marketing campaigns, ads, and more. In addition, the new workspace provided complete transparency into task progress, enabling effective tracking of budget approvals and efficient invoicing.

Results

The ClickUp implementation reshaped project management for the marketing agency. With a centralized workspace, the agency could manage work consistently across all clients, ensuring visibility into progress and budgets. The new project management process streamlined communication and collaboration, improving efficiency and reducing wasted time. With ClickUp's customized workspace, the agency was better equipped to manage its growing client base while meeting its unique project management requirements. As a result, the agency achieved greater transparency, accountability, and efficiency in its project management, improving client satisfaction and growing its business.