

ClickUp Implementation: Marketing Automation for Real Estate

A real estate firm runs marketing automation in ClickUp, processing 3x more leads with zero lost follow-ups, live in three weeks.



L5 Team

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The Challenge

A real estate firm's marketing team needed a streamlined process for receiving intake requests to produce marketing materials for its agents. Facing a tight three-week deadline to go live, the team engaged L5 for a rapid ClickUp implementation during an organizational refresh, aiming to establish a more efficient request intake system for its predominantly remote workforce.

L5's Solution

L5 integrated the client's comprehensive Jotform intake forms with ClickUp, allowing for the automatic application of project management templates, task assignments, and the creation of notifications and alerts. This rapid implementation facilitated a seamless training process for the remote team, enabling them to quickly adopt the new operational approach as part of the organizational refresh.

The Results

This success story highlights how a professional services organization like this real estate firm can streamline marketing project management. By refining the request intake process with **L5 and ClickUp**, the marketing team now meets agent requests through a single intake process.