

Boosting Collaboration and Efficiency with ClickUp: A Marketing Agency Success Story

A marketing agency pulled requests from email, Slack, and web forms into one ClickUp intake workflow. Approvals moved faster and every request got an owner.



L5 Team

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Opportunity

A marketing agency that frequently worked with a state organization had a significant challenge with project intake and approval processes. With multiple departments sending requests via different channels, such as email, Slack, and website forms, the agency needed help managing requests efficiently.

It also experienced back-and-forth communication with teams to understand the vision, develop assets, and secure approvals. Managing budgets and estimating efforts added to its challenges, and it was vital for it to shorten the turnaround time from request receipt to project scheduling.

Solution

The agency sought help from L5, ClickUp's strategic transformation partner, to implement ClickUp. L5 built a robust request management workflow, approval workflow, and forms and automations to enable the agency to work entirely out of ClickUp. With ClickUp, it eliminated the need for email, chat, and Excel sheets, reducing inefficiencies and time wastage.

Results

The ClickUp implementation helped the agency and state organization improve collaboration and efficiency. The team could easily track incoming requests, manage approvals, and estimate effort to pass on projects to the creative team.

ClickUp improved communication and collaboration, cutting down the turnaround time significantly. The agency could work entirely out of ClickUp, streamlining project intake and approvals, resulting in better communication, faster turnaround time, and improved efficiency.