

ClickUp for Marketing Success Story

A ClickUp marketing success story: an agency moved contractor onboarding from dozens of spreadsheets into one workspace, 10-12 hires a month.



L5 Team

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How L5 Streamlined Manual Processes and Contractor Onboarding for a Growing Agency

The Opportunity

A marketing agency that frequently hired contractors for creative projects faced challenges in onboarding them. The manual process involved adding the contractors to HR, payroll, and IT systems, providing them with creative software licenses and assets, and collecting their bios and portfolios. The process was time-consuming, relying on dozens of Excel spreadsheets. Onboarding 10 to 12 contractors per month from various locations with different skill sets added to the challenge. Once approved, contractors also needed to be trained on the agency's processes and policies.

L5's Solution

The agency turned to L5, ClickUp's strategic transformation partner, to implement ClickUp for contractor onboarding. L5 built a customized workspace, replacing the manual processes entirely with ClickUp. The new workspace streamlined the onboarding process, eliminating the need for spreadsheets and centralizing all contractor information in one place. With ClickUp's customizable forms, the agency could efficiently collect contractor bios and portfolios. The platform also enabled provisioning and tracking of software licenses, asset access, and training materials.

Results

The ClickUp implementation reshaped contractor onboarding for the marketing agency. With a centralized workspace, the agency could onboard contractors efficiently and consistently across different locations and skill sets. The new onboarding process was more organized, faster, and less prone to errors, reducing time lost and increasing accuracy. The platform also enabled accessible contractor information and progress tracking, enabling better performance management. With ClickUp's customized workspace, the agency could now focus on delivering high-quality creative work with the best talent, improving client satisfaction, and growing its business.