

Insurance Group Optimizes Workload Balance and Tracks Key Metrics for Success

How a large insurance group manages over 5,000 active tasks a week in ClickUp, balancing workload and tracking the metrics that matter.



L5 Team

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Opportunity

A marketing department within a large insurance group needed to effectively manage over 5,000 active tasks per week, maintain a balanced workload, and monitor various activities, including training, vacations, and non-billable work. It also sought to track billable time and generate monthly chargeback reports for the entities it supported.

Solution

L5, ClickUp's strategic partner, orchestrated the implementation. It constructed a workspace, devised a work hierarchy, and executed spaces, folders, lists, and views tailored to the marketing department's needs. L5 also crafted templates, forms, and automations to enable the team to operate exclusively within ClickUp. In addition, it designed workload and team views to provide valuable utilization metrics for all team members, facilitating easy creation of monthly billability and utilization reports.

Results

With L5's expert implementation, the marketing department achieved a well-balanced workload and improved resource management. The team could easily monitor training, vacations, billable and non-billable activities, enhancing efficiency and transparency. In addition, the customized monthly reports provided insights into performance, enabling better decision-making and resource allocation.

The insurance group's marketing department greatly benefited from L5's assistance implementing ClickUp. L5's tailored approach and in-depth understanding of the team's requirements led to a robust resource management solution, ensuring optimal workload balance and data-driven insights to drive the team's success.