



Beam Content Increases Annual Contract Value by 42% with ZenPilot and ClickUp

CASE STUDY



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Rebecca Nash,

Co-Founder & Director of Operations, Beam Content

BEAM.

Beam Content helps SaaS companies engage their smart B2B audiences with expert-driven content

Highlights

Key Results

- A system for time tracking and visibility into profitability
- 42% increase in ACV from improved systemization
- 63% increase in revenue
- Essentially no documentation to ~80% of the business documented
- Improved team health through "Flex Fridays"
- The ability for the founders to take a vacation

Overview

Beam Content was founded in 2022 to help B2B SaaS companies create original authority content so that brands can build a more enjoyable buying process and build trust with their audiences.

The three co-founders of Beam - Rebecca, Brooklin, and Sam - were inspired to start the agency based on their experiences as freelancers. With over 5 years of creating content for SaaS companies under their belts, they recognized the need to establish a business that could not only support fellow freelancers, but also offer them engaging and fulfilling projects.

"After being freelancers for so long, we saw what not to do as a client, and thought we could try something new," explains Rebecca Nash, Co-Founder & Director of Operations, Beam Content.

"We're motivated to challenge ourselves and learn. Building a business that lives up to our values seemed like the ultimate lesson."

And since their inception, Beam Content has successfully achieved this goal. In just one year, they expanded their team from 3 founders to 5 full-time employees and 12 freelancers.



The Challenge

A lack of standardized processes resulted in inconsistent quality, misaligned expectations, and management challenges

The agency's growth was steady, and clients were pleased with their work. However, as the agency expanded and continued adding new team members, work started slipping through the cracks.

"Once we delegated tasks we used to handle ourselves, things began to slip through the cracks," says Rebecca. "We trusted ourselves to do the work, but managing others requires much more oversight and visibility."

Additionally, their time and attention was focused on onboarding new team members and managing freelancers. Though this was important, it left documenting their processes on the back burner.

Rebecca explains: "We had launched our business less than a year ago and had no processes clearly established or documented. We were just learning how to bring on new team members and how to manage freelancers."

To help manage their team, provide visibility, and prevent work from slipping through the cracks, Rebecca and the team self-implemented their project management system, ClickUp.

And similar to most agencies, the Beam team came to find out that a project management system solves nothing on its own.

"We had implemented ClickUp, but had little clarity on how we wanted to use it," explains Rebecca. "There wasn't much intention in our setup since we didn't know what we were doing. We focused on what allowed us to work day-to-day rather than planning for sustainable growth."

And so, despite having the necessary technology to effectively handle freelancers and projects, Rebecca and the team still faced challenges:

- Confusion surrounding timelines and quality expectations arose from inconsistent communication practices with clients.
- The absence of processes and standardization resulted in inconsistent quality of deliverables.
- Managing freelancers was disjointed and time-consuming.
- Invoicing became a significant source of frustration.
- There was a lack of comprehensive visibility into projects at a high level.

"The lack of visibility and clarity into our team's work were the most pressing pain points," says Rebecca. "This ranged from communication and follow-up on individual projects to time tracking and proper invoicing."

After several months of feeling like they were treading water, Rebecca realized her team urgently needed to standardize their processes and bring in an expert to optimize their ClickUp setup.

"We knew the next step in our business's development would be to develop processes that would keep things organized so that we could grow without headaches and stress," explains Rebecca. "We also knew we needed data to make better decisions."

That's when Rebecca discovered ZenPilot.

The Solution

A carefully designed ClickUp hierarchy, well-defined processes, and a cadence for analysis and workflow optimizations

Rebecca found ZenPilot through a referral, and they were impressed by their high ratings. ZenPilot's proven track record in optimizing ClickUp for agency operations made them a clear choice for Beam Content.

"Before working with ZenPilot, it was a classic case of 'you don't know what you don't know'," explains Rebecca. "We had ClickUp, but little clarity on how to use it effectively."

Beam Content had three key objectives for ZenPilot:

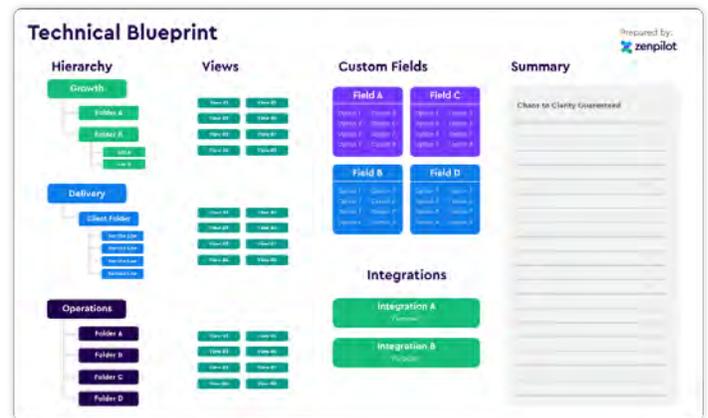
- Reorganize the entire ClickUp hierarchy to support the agency.
- Build systems and workflows within ClickUp that promote efficiency and clarity.
- Create a way for the team and clients to communicate in ClickUp about the status of projects without letting things fall through the cracks.

ZenPilot led the agency through their proven 3-step playbook to put an end to their agency woes.

Stage 1: Blueprint

Phase one involved conducting an audit of Beam's existing operational processes, identifying the gaps, and developing recommendations for a future-proof structure in ClickUp.

ZenPilot took a deep dive into Beam's workflows, bottlenecks, and communication patterns, carefully noting areas for improvement.



At the end of the Blueprint phase, ZenPilot had produced a thorough report outlining the weaknesses in Beam's current structure and how they could be addressed.

They also provided a technical blueprint for a future structure designed to enhance efficiency, improve team-client communication, and prevent project details from falling through the cracks. Beam was then given the opportunity to self-implement their Blueprint or continue working with ZenPilot to coach and guide them through the implementation process.

"After going through the Blueprint process, we thought having a coach in the 'done with you' model would be the most effective," explained Rebecca. "And we thought the idea of getting our hierarchy and templates built out in a matter of months was incredible. We didn't actually believe it would get done!"

Stage 2: Implementation

With the Blueprint in hand, ZenPilot moved into the second phase of the project - implementation. This involved putting the Blueprint recommendations into action.

Firstly, ZenPilot overhauled Beam Content's existing ClickUp hierarchy. They restructured the hierarchy to create a more efficient, user-friendly, and organized system that would better support the Beam team.

And after restructuring the hierarchy, the Beam team received a dedicated coach to lead them through the process of streamlining their operations in ClickUp.

An integral part of this phase was documenting their processes and developing templates. ZenPilot worked closely with Rebecca and their subject matter experts to create a library of templates that would help standardize their projects, delegate work, streamline task creation, and provide workload visibility.

"We went from essentially no documentation to ~80% of our business documented and systematized," says Rebecca.

Throughout the implementation phase, ZenPilot provided pre-built templates, training courses, and weekly coaching sessions. This helped to foster a strong understanding of the new processes and tools, empowered the team to create their own process templates, and ensured a healthy transition to the new ClickUp structure.

"The training courses that ZenPilot provides are a great foundation, but building out an excellent system is highly detailed work. It was helpful to have a coach guide us with the little details and keep us accountable to our timeline," explains Rebecca. "The ZenPilot team is amazing. They modeled what we were supposed to do, were available to answer my many questions, provided feedback, completely supported us, and were emotionally there for us when the roll out proved a bit bumpy."

After about two months, the Beam team started working in the new ClickUp structure. They closed tasks, tracked time, communicated efficiently, and followed the process.

"Implementation was beautiful—our hierarchy was perfectly set-up, our necessary templates were set in place, and I felt confident building out and using our ClickUp setup," says Rebecca.

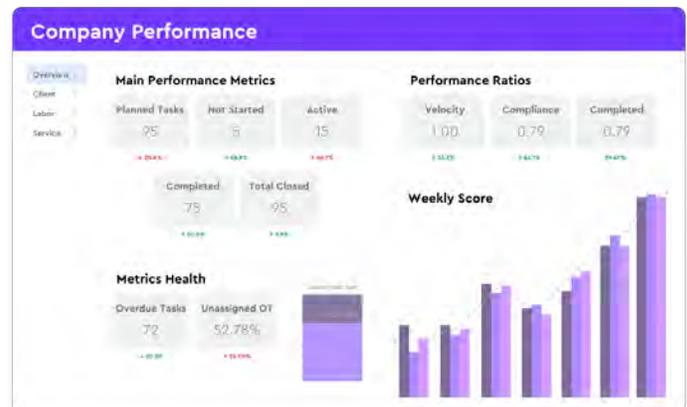
After a successful launch, Rebecca decided to continue with ZenPilot's support by bringing them on as a fractional project management champion.

Rebecca explains: "When it came to deciding on continuing into ZenPilot's Optimize program, I realized the beautiful setup I had poured months of my attention to could easily fall apart without additional support. 'What if I wanted time away, who would train my partner coming back from maternity leave, what about training new employees and freelancers?' **It seemed very valuable to me to have access to the training, and to have support for my team.**"

Stage 3: Optimize

The final stage of the ZenPilot approach involved ongoing support.

Recognizing that the transformation of a company's operations isn't a one-time event, ZenPilot committed to being Beam Content's 'ClickUp Champion'—providing continuous support and guidance.



"I'm really grateful for ZenPilot. **They've helped us develop new solutions, like our client feedback forms, integrations between Slack and ClickUp, and more,**" explains Rebecca. "And if our team members need new views to see the information they need or are struggling with following the standard way of doing things, ZenPilot helps them. They also keep us accountable to the ZenPilot framework."

In this capacity, ZenPilot offered a highly specialized team member who integrated into Beam Content's workspace as a member of their team. This individual serves as a constant source of expertise, helping Beam maintain the newly implemented processes and build new ones.

Additionally, ZenPilot provides:

- Continued training and coaching.
- Reporting and insights into project planning and team performance.
- Advanced workflow improvements and optimizations to ramp up productivity.

"It's extremely helpful to have eyes on how the team is doing, and data to show us how we're performing and where we can improve," says Rebecca. "As a small team, it would be difficult to continue building out new templates, dashboards, and even new spaces, while making sure the framework is properly followed, while doing our 'business-as-usual' work."

This approach allowed Beam Content to continuously adapt and evolve their operations, ensuring the ongoing value of their investment.

The Results

A more productive, profitable, and healthy agency

Beam's investment in their operational structure has helped them create the agency they had envisioned from the beginning.

Since starting their collaboration with ZenPilot, Rebecca has seen tremendous improvements in their business operations and team culture.

On the operations side, they went from having essentially no documentation to having around 80% of their business documented and systematized in just 4 months. They also gained a system for time tracking, which enables them to understand their profitability in much greater detail.

These process improvements have directly contributed to business growth. Their average contract value has increased by 42% since deploying the new ClickUp workspace created with ZenPilot. And in the past year, their overall revenue has grown by 63% year-over-year.

"We're about a year out from starting the implementation process and our revenue has increased 63% YoY during the same time period. Though this is anecdotal, I'd say our ability to implement better growth strategies, bring on new clients efficiently, create a renewal system, and retain clients has been in large part due to the work we did with ZenPilot," explains Rebecca.

On the culture side, their team members have praised the increased organization and structure. New employees coming from other agencies have described their workflow as "pretty special" compared to the "wild west" environments they experienced previously.

One member of the Beam team comments "Beam is such a special agency with a great culture/team/working environment. I love how Brooklin & Rebecca run the company with so much intention and care. We've got great clients who believe in the process and a team of internal people and freelancers that all work towards shared goals."

The biggest win is that this structure has enabled Rebecca and her husband to take their first real vacation in years this past summer while traveling in Europe with their children. With processes in place, they were able to trust their team and support them mostly asynchronously across time zones. Their team stepped up and continued working productively in their absence.

Additionally, they've been able to implement "Flex Fridays" where work is completely optional on Fridays. This is a major quality of life win for their team. The streamlined task tracking they have in place is essential for making Flex Fridays feasible.

Rebecca explains: "My desire is that by having excellent processes and channels of communication in place, our team is more free to think creatively, deliver excellent work, and overall maintain a happy, balanced rhythm in their work and personal lives."

*Rebecca concludes: "**There is very little guessing work once you've set up the recommended hierarchy that ZP customizes for you during the blueprint process.** What I mean by that is that you open your computer, you know what you're supposed to work on that day, how much time it will take, and what your team is working on. Less energy is spent on trying to remember little details or wondering what tasks should take priority.*

***We've shifted from reactive to fairly proactive,** in my opinion. I have confidence in my team's ability to get work done, and if I have any doubt, I have full visibility. It allows for a lot of peace and open space to think deeply."*



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