zenpilot

THE ULTIMATE GUIDE

How to Use ClickUp

"Since becoming our first partner in 2018, ZenPilot has stood out as the go-to solution for agencies who want to get the most out of ClickUp.

Their commitment to truly solving for the customer and providing the best customer experience is perfectly aligned with our mission at ClickUp - and it shows up in their results and the feedback we consistently hear about ZenPilot."

Zeb Evans

Founder & CEO, ClickUp

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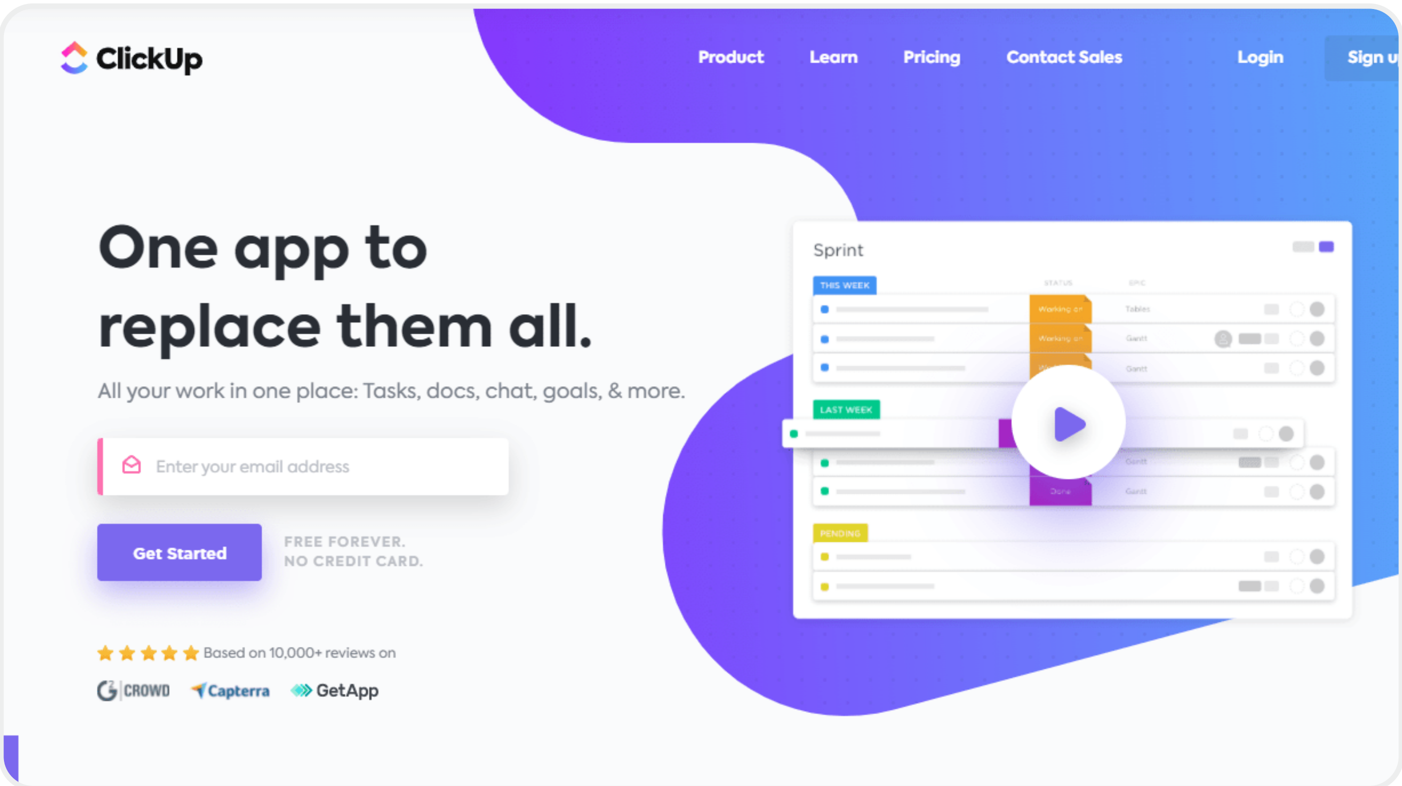
Introduction

ClickUp is rapidly becoming one of the most popular project management systems on the market. With flexible pricing plans, robust features, extreme customization options, and the power to combine multiple apps into one, it's no wonder companies are making the switch.

But although ClickUp is one of the most powerful work and project management solutions on the market, it can also be the most daunting for new users. **ClickUp comes as blank canvas and there's a million different ways to set it up.**



If you want to actually "save one day per week" and unlock the visibility you were looking for when you installed ClickUp, you'll need to set it up properly.

As ClickUp's first ever and highest-rated solutions partner, having helped close to 3,000 different teams implement the platform, we've put together our ultimate setup guide for teams trying to make the most out of their ClickUp *Workspace*. This guide will walk you through everything you need to know when you're getting ClickUp set up for your business.

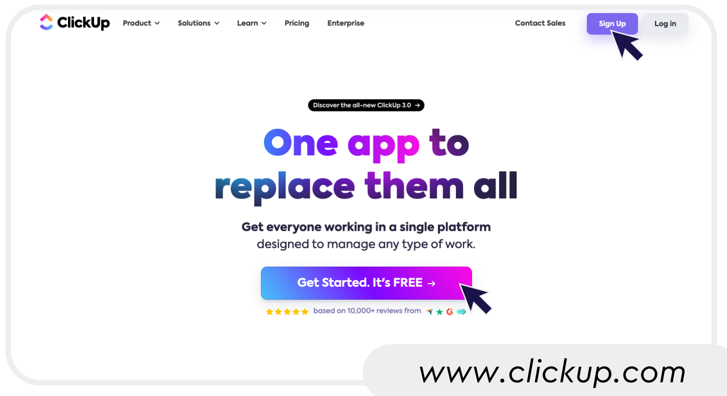
And if at any point you're ready to just hit the "Easy Button" and have ClickUp's highest-rated solutions partner lead you through this process, **book a call with my team here.**

Step 1: Creating a ClickUp Workspace

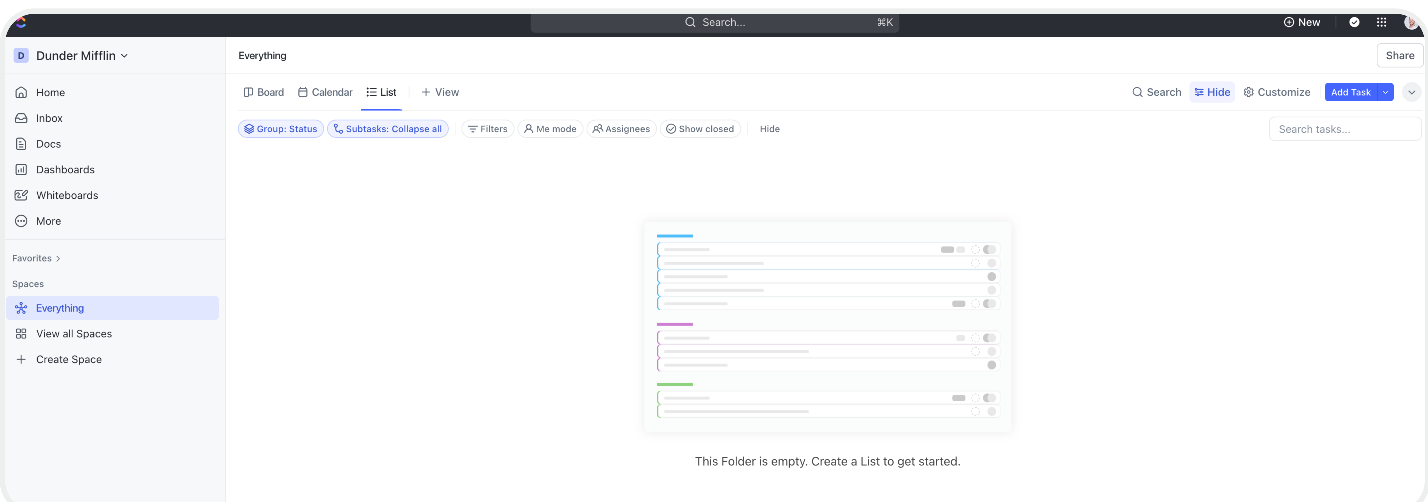
Getting a ClickUp *Workspace* is relatively straightforward – just head to their website and click "Get Started. It's FREE" or "Sign Up".

Yes, ClickUp can be free!

You can use their *Free Forever* plan as long as you want. Feel free to start with the *Free Forever* plan to configure a few things in your *Workspace* before upgrading later (though I don't recommend using this plan for very long because of it's limitations).



After you sign up, you'll land on the home screen of your fresh, new, and sadly, empty, ClickUp *Workspace*. This will be your blank canvas for you to craft and mold to your workflows and processes. So, be prepared to pull out your palette and put on your beret!



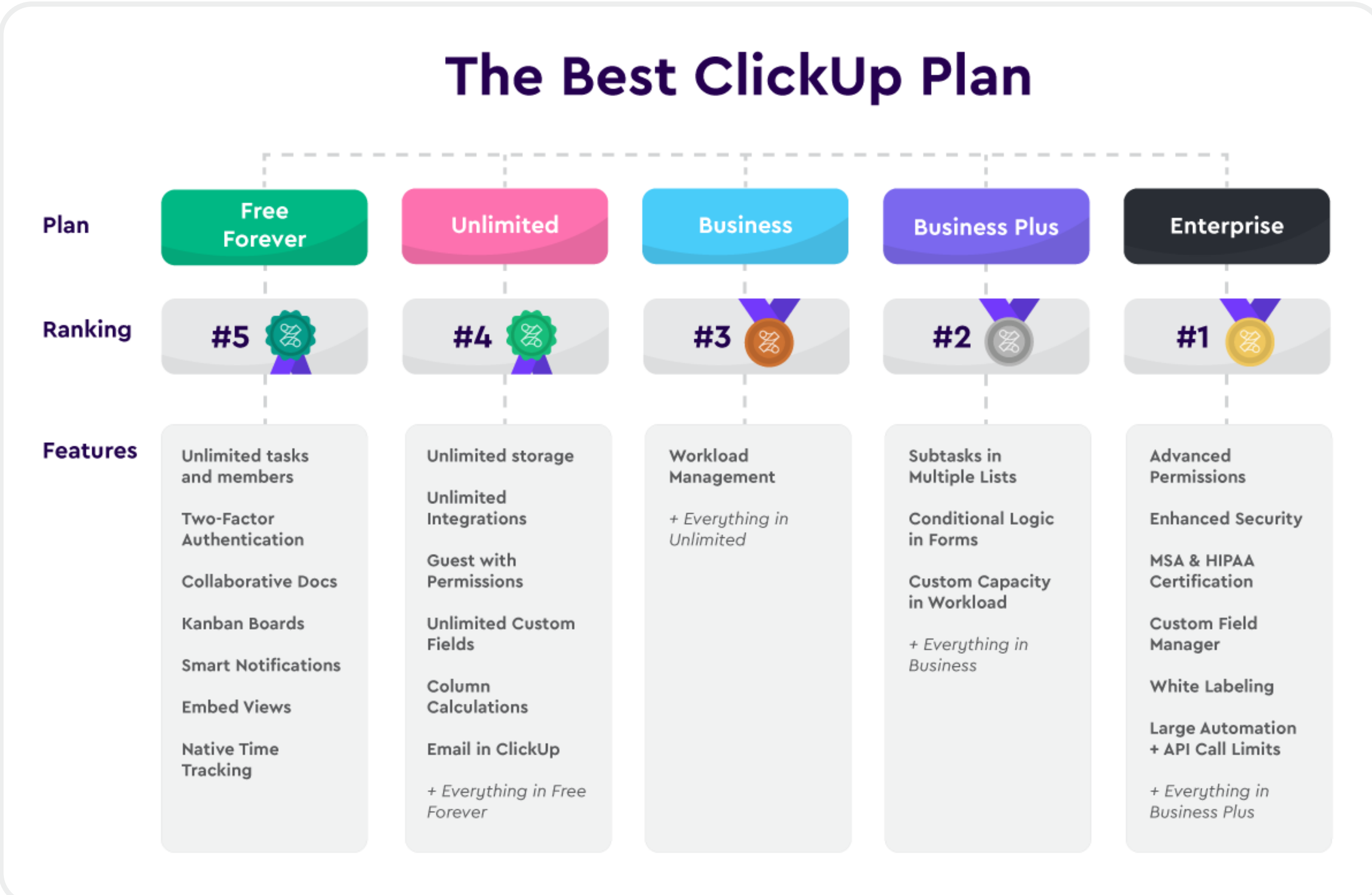
And as mentioned earlier, while the endless customization options are a huge pro for ClickUp, they can also get a bit overwhelming. But don't worry, you're reading this guide so that you don't get overwhelmed!

Let's walk through exactly what you need to do tailor ClickUp to your needs, prepare it for your team, and save one day per week!

Step 2: Choosing the Correct Pricing Plan

Before we get too far ahead, let's quickly discuss the different pricing plans available to help you make an informed decision on what you'll need.

ClickUp offers 5 unique pricing plans - *Free Forever*, *Unlimited*, *Business*, *Business Plus*, and *Enterprise*.



For most teams, we'd recommend you get your team on the *Business* plan at minimum. There's a lot of features missing in the *Unlimited* plan that can be extremely important for your business.

Yeah, I know, you'd think a plan labeled *Unlimited* wouldn't have any limitations, but unfortunately there are a few. Unless you're a mighty team of 1-5ish, you'll want to upgrade.

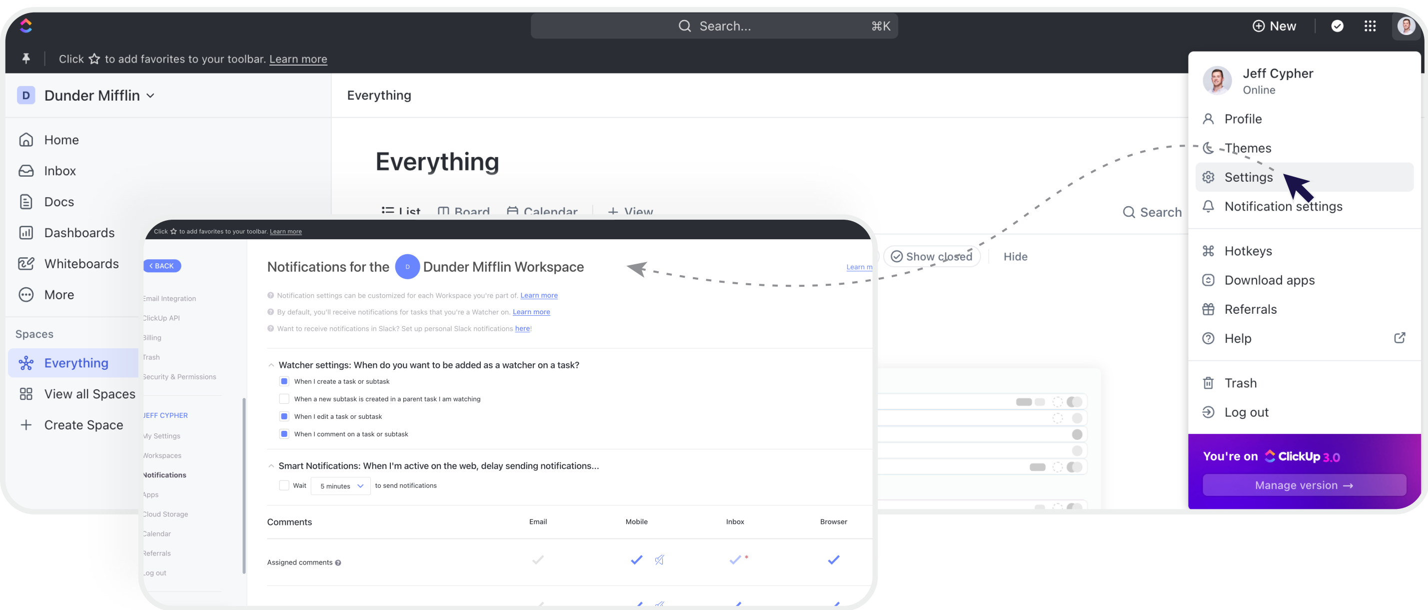
For a more thorough evaluation of which ClickUp pricing plan is right for you, we suggest you read our **"How to Choose the Right ClickUp Pricing Plan"** guide. This will walk you through every plan and discuss the major advantages to upgrading to the next tier.

Step 3: Adjusting Personal Settings

After you've determined which pricing plan is best for you (you can always upgrade later so don't stress if you haven't fully figured this out), it's time to adjust some personal settings in your ClickUp profile.

This is important for every new user to evaluate and customize (especially the *Notification Settings*) to ensure ClickUp is set up the way you want it.

Click on your *Profile* Icon in the top right corner and head to *Settings* first.



Under your My Settings, go through the sections like:

- **Preferences:** Choose light/dark mode, enable/disable hotkeys
- **Notifications:** Disable unnecessary email notifications (unless you want 1,000 emails from ClickUp a day, this is important!)
- **Customization:** Change colors, profile pic, etc

Spend some time in notifications especially. By default, your inbox will get bombarded with emails as activity happens. I'd disable almost all the email options since you'll get notifications inside of your ClickUp *Inbox* already.

The key is preventing notification overload early, or team members will get frustrated. You can always tweak notifications later.

Step 4: Inviting Your Implementation Team

When it comes to project management software, it can be best to wait until your system is set up and ready-to-go before inviting your team.

Oftentimes, these kinds of systems can take months to implement, and inviting your team a wee-bit early can lead to stress, confusion, and even a failed project management implementation (hence why 3,000 teams have hired us to lead them through this process - it's not as easy as it seems).

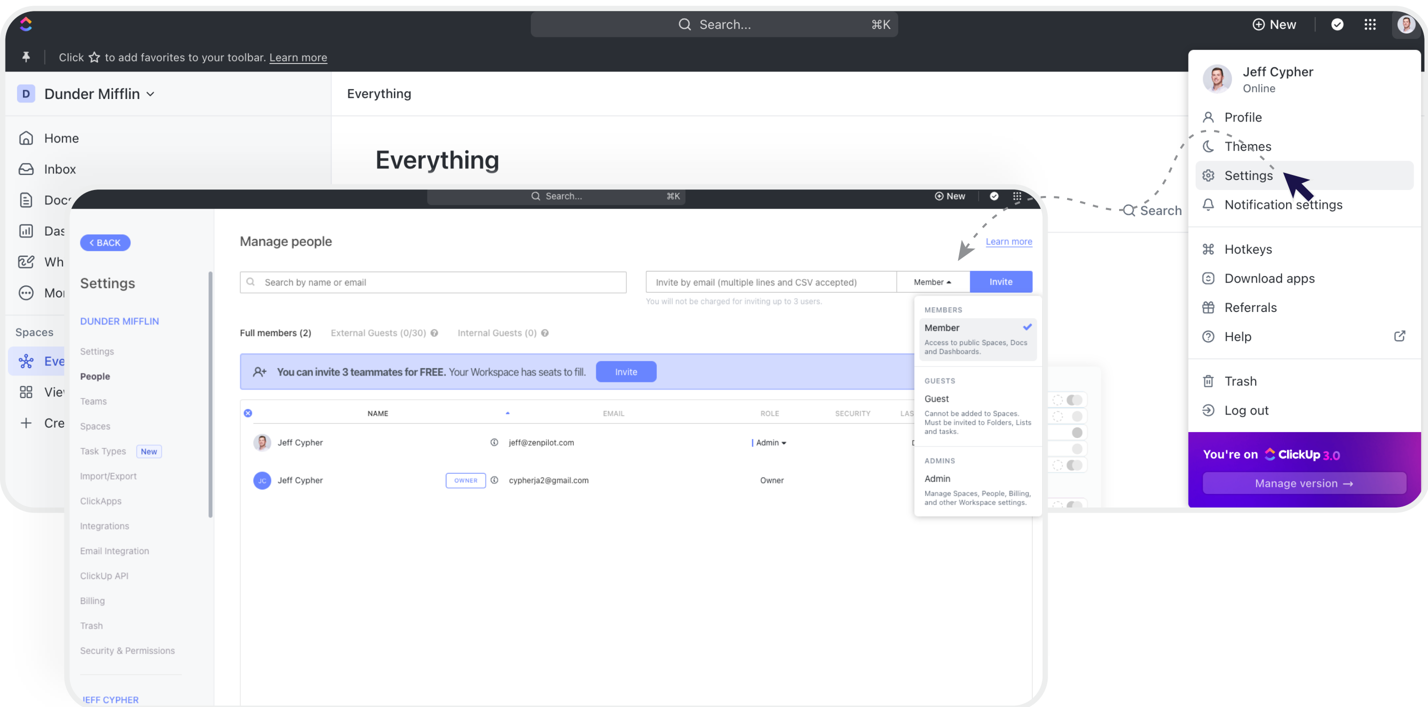
We'd recommend that you invite your implementation team to start. This may be your leadership team, project managers, and/or process experts that will be with you as you get ClickUp ready to go for the larger team.

If you have questions about who should be on your implementation team, **book a call** with one of our experts to help set you up for success.

Trust me, the tech is great, but if you want ClickUp to work for you and your team, you'll need to make sure you get everything set up correctly, build *Templates*, and properly train your team on the software AND the expectations. **The key to a success is combining the right tools, with the right processes, and the right habits.**

Anyways, I'm getting off of my soap box now, here's how to invite your team to ClickUp:

- **Step 1:** Navigate to your *Workspace Settings* and click the *People* tab.
- **Step 2:** Under the *People* tab, you'll see a nice big rectangle in the top right that'll allow you to enter the emails for your team members. You can write down all the emails for those that you want to invite and click *Invite*.
- **Step 3:** Decide who should be a *Guest*, *Member*, or *Admin*.
  - I'd reserve your *Guest* seats for contractors, freelancers, or clients.
  - *Admin* seats should be your leadership team or some assistants that would need access to billing settings or inviting other members.
  - *Member* seats are for everyone else!



Again, begin by inviting your implementation team to start. Depending on your plan, you'll start paying for every member as you add them to the *Workspace*. Software costs can add up over time. You can save a few extra dollars by only inviting certain team members at the start.

And as everyone get's in, make sure they understand their *Permissions* to prevent confusion about what they can/can't access.

You'll always want to provide onboarding tasks and courses to help the team understand what's happening in ClickUp. Like I said earlier, ClickUp is great, but can be daunting for new team members. **Clarity = kindness. The more clarity you can provide the better.** This is one of the biggest project management lessons we've learned across our 3,000 different implementations.

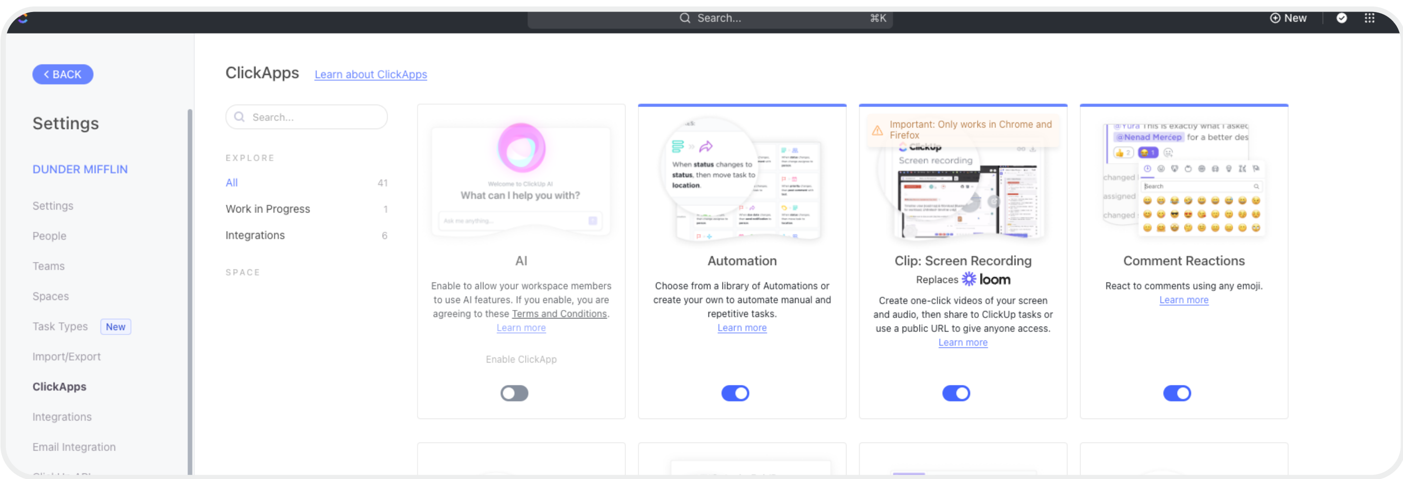
Step 5: Turning On Helpful ClickApps

Now that you're ready to roll, let's dive in to some more technical instructions. We'll begin with *ClickApps*!

Though you'll be prompted to decide on which *ClickApps* you'll want to turn on when you start building your *Spaces* in ClickUp, it's important to understand what they are and what's available.

ClickApps add functionality to your ClickUp *Workspace*, so they're invaluable for customizing to your use case. These can be turned on or off at your *Workspace* level, or within certain *Spaces* (but more on that when we talk about ClickUp's *Hierarchy*).

To see what's available and turn *ClickApps* on or off, navigate to you *Settings* (yet again), select *ClickApps*, and scroll through your options.



Some examples of ClickApps are:

1. **Time Tracking:** You can track time directly in ClickUp!
2. **Time Estimates:** The perfect pair to *Time Tracking*. This is also important for workload visibility.
3. **Email:** You can actually send emails directly from ClickUp *Tasks* to centralize communication.
4. **Pulse:** How long was someone logged in to ClickUp today? Pulse will tell you.
5. **Giphy:** I only communicate with Gifs so this is 100% necessary and should be turned on in all *Workspaces*.
6. **Custom Fields:** You'll need to have these turned on to customize your *Workspace* and create killer *Views* (or even build a CRM in ClickUp!)

ClickApps help add some modularity to ClickUp. And as you and your team get more familiar with ClickUp, you can turn more on, or leave them off depending on your preferences.

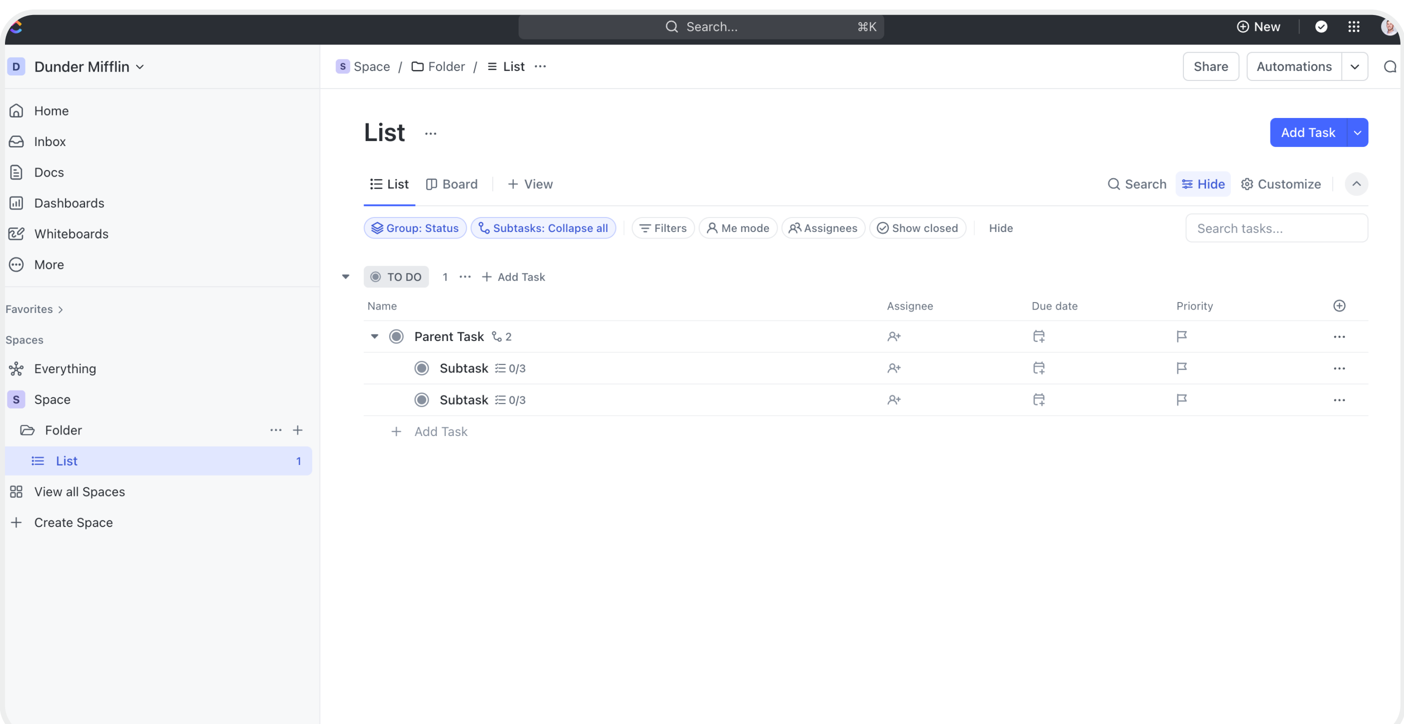
My biggest piece of advice - don't go overboard by adding too many *ClickApps* yet. Focus on the must-have basics first. And though it sounds enticing, you may be able to just turn ClickUp *Automations* off entirely for now. We've seen too many teams get too wrapped up in all of the cool features before learning and understanding the basics. **The result? A whole lotta complexity, confusion, and fires.**

I'm not saying that'll happen to everyone, but sometimes K.I.S.S or keep it simple, stupid, is a great way to live. You'll find it much easier to start simple, gain traction, build momentum, and take it one feature at a time.

Step 6: Building Your ClickUp Hierarchy

Now, here comes the exciting part! Let's actually start building stuff in ClickUp.

The ClickUp *Hierarchy* is my favorite part of ClickUp. It's built in a way that serves every member of your organization. When built correctly, your *Hierarchy* will play beautifully with *Views* to help your individual contributors, project managers, account managers, directors, C-suite, and clients see exactly what they need to see (but more on that later).



Why Does ClickUp's Hierarchy Matter?

Okay, I need to be real here again (another soapbox, sorry!). You should never, ever, ever, implement a new software system without a strategy. This seems to be forgotten about with project management systems. Business owners or leaders go and get a new project management system hoping that the tech will solve all of their pains - it doesn't.

Ask yourself this - what are we trying to solve?

Some teams may be looking for some productivity improvements, but others may be focused on just getting visibility in to profitability or project progress.

Your current challenges and goals will impact the way you construct your ClickUp *Workspace* (especially the *Hierarchy*). The way you set it up will either provide you or restrict you from seeing profitability, team utilization, contract statuses, project progress, etc.

This is exactly why we start every ClickUp implementation with a **Project Management Blueprint**. We capture your goals, survey your team, understand your current challenges, and build you the exact ClickUp structure you'll need to set yourself up for success.

"Now that we have the system [ClickUp] in place, my leadership team is able to make decisions on data and facts vs. what we think is happening. Additionally, now we have one system that tells us where we stand on any piece of work. "

Kim Garmon Hummel

Chief Growth Guide, Sauce Agency

It may seem like it's not worth it now, but in a year from now, you'll potentially be lacking some critical visibility in to your business and you'll wish you set everything up right the first time. Anyways, off the soapbox...

An Overview of ClickUp's Hierarchy

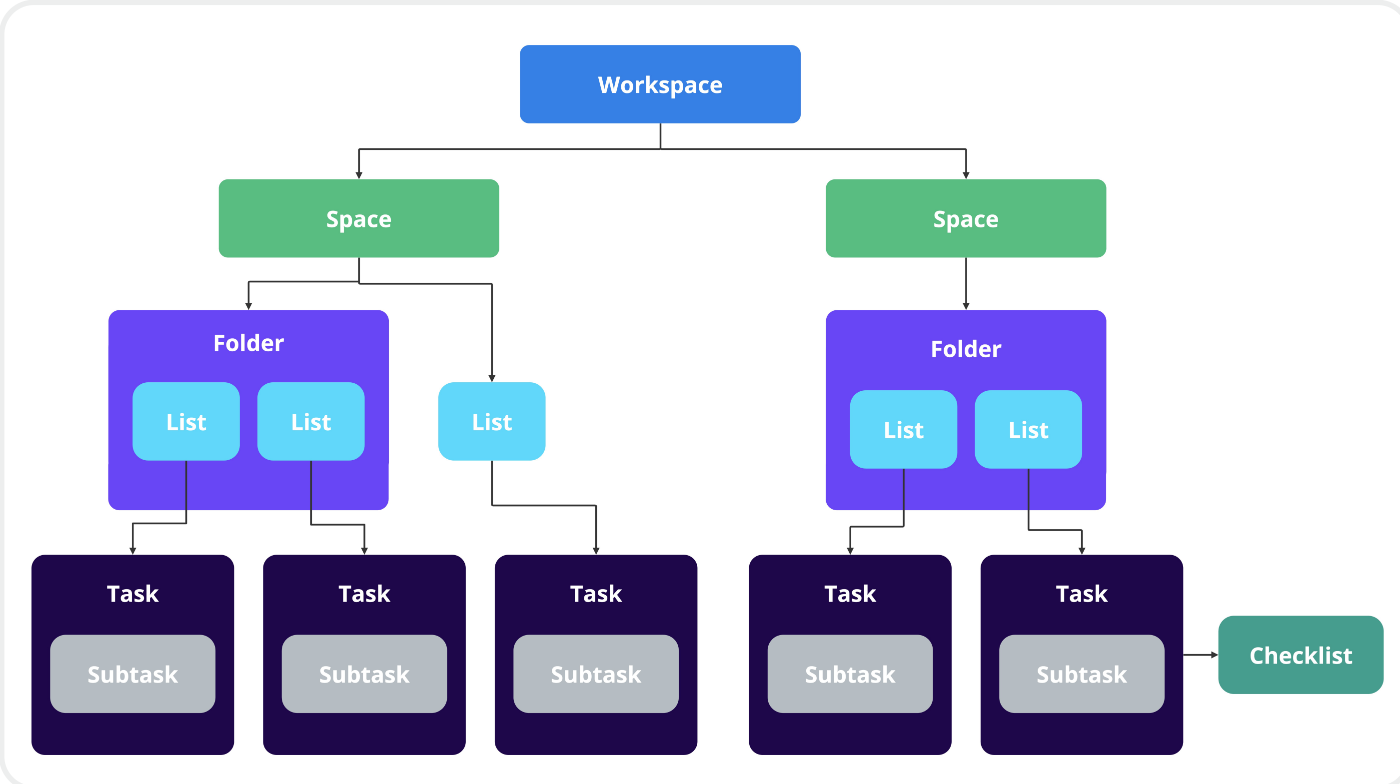
Again, understanding the ClickUp *Hierarchy* is crucial both for setting up your *Workspace* properly as well as taking full advantage of features like *Views*, *Custom Fields*, and *Automations* later on.

So let's take you on a tour of the *Hierarchy* to make sure you understand it completely.

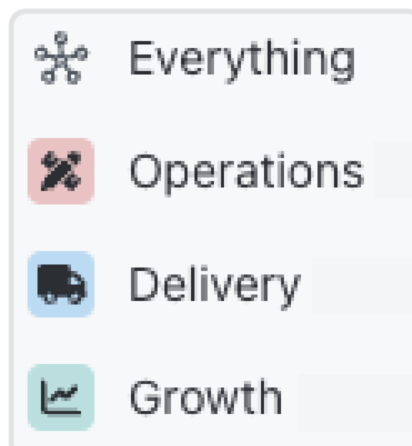
Here are the main layers of organization within ClickUp:

- **Workspace:** When you join ClickUp, you create a user account and a *Workspace*. The *Workspace* is the highest level in ClickUp's *Hierarchy* and is typically named after your business. All work is organized within this *Workspace*.
- **Space:** *Spaces* are the next level in the *Hierarchy* and represent different departments or teams within an organization. Users can create multiple *Spaces* to keep their work organized.
- **Folder:** *Folders* can be created within *Spaces* to group together lists and tasks. While not necessary, *Folders* can be very helpful in organizing similar work. These often represent service categories, smaller department categories, or in the client services use case, a client.
- **List:** *Lists* are where the work lives. Lists can be used to represent work categories, service lines, or in the client services use case, a contract.
- **Parent Task:** *Tasks* are the actual work in your ClickUp *Workspace*. In most cases, *Parent Tasks* are best when they represent a deliverable or project phase/milestone, but they can also live on their own without *Subtasks*.
- **Subtask:** *Subtasks* are tasks that fall underneath your *Parent Tasks*. *Subtasks* can best be used to represent actionable steps or tasks that need to be taken to complete the *Parent Task* (a deliverable or project phase/milestone).
- **Checklist:** *Checklists* are the final level in the *Hierarchy* and can be added to any *Task*. They are best used when they serve as reminders for someone. They'll help ensure your team follows your process when completing a *Task*.

By using multiple layers in the *Hierarchy*, you'll keep your *Workspace* much more structured and organized - which will pay dividends in the long run.



A Quick Hierarchy Example



To give you visual of what this may look like, here's a quick example...

Most client servicing teams - whether a marketing or creative agency, consultancy, financial services, or accounting firm - all have **three main departments within their organization:**

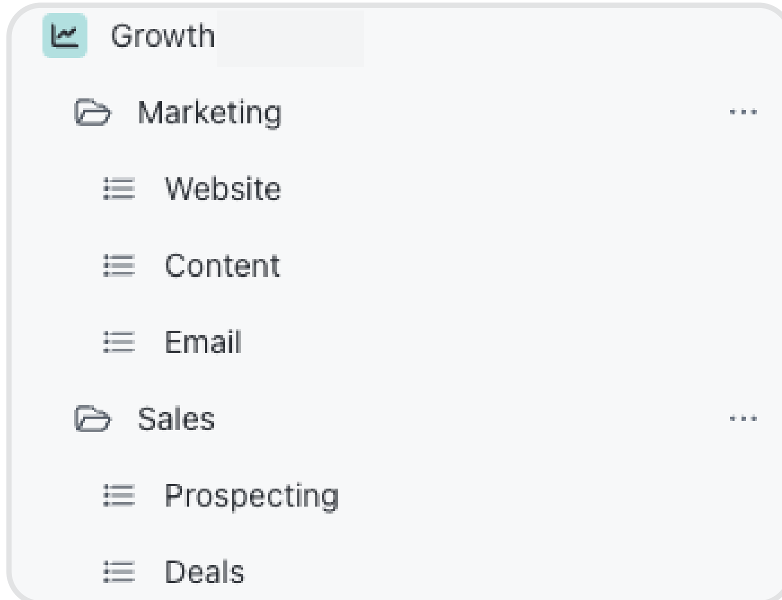
- **Growth:** Growth is where they grow their business - marketing, sales, partnerships, etc. This is where they make their promise.
- **Delivery:** Delivery is where they serve their clients. This is where they keep their promise.
- **Operations:** Operations is the biggest junk drawer in business. This is where their people, culture, HR, finance, legal, etc. work lives. Everything that doesn't end up in growth or delivery, ends up here.

The way that the ClickUp *Hierarchy* is then built to reflect this bucketing of work would be simple. You'll have a *Space* for Growth, a *Space* for Delivery, and a *Space* for Operations.

Now beneath those *Spaces* we have our *Folders* and *Lists*.

The Growth Space would look like this:

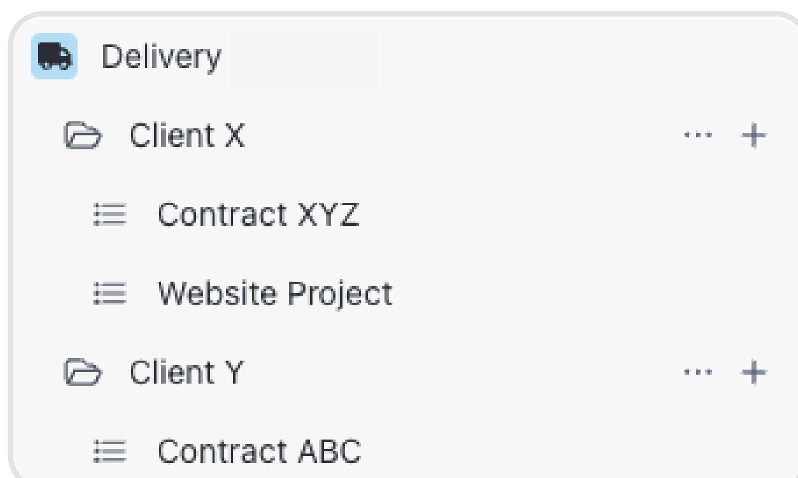
- Space - Growth
  - Folder #1 - Sales
    - List #1 - Prospecting
    - List #2 - Deals
  - Folder #2 - Marketing
    - List #1 - Website
    - List #2 - Content
    - List #3 - Email



Work is grouped together by department/team, broken into sub-departments, and then further broken up in to work categories.

The Delivery Space would be slightly different, but it would look like this:

- Space - Delivery
  - Folder #1 - Client X
    - List #1 - Contract XYZ
    - List #2 - Website Project
  - Folder #2 - Client Y
    - List #1 - Contract ABC

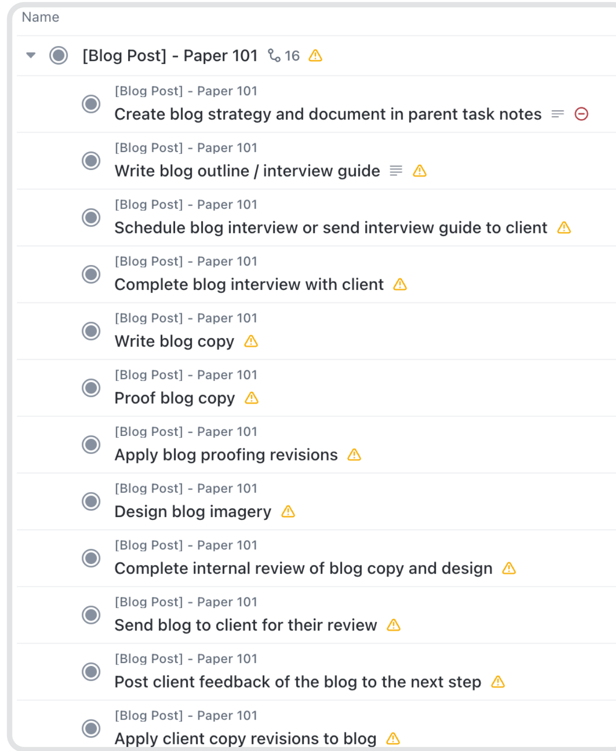


You can also leverage a Client Management *List* in this Delivery *Space* that will be the home for some onboarding *Tasks* and *Tasks* that are Delivery related, but not related to a specific client.

Just make sure that every *Task* has a home to live. *Task* locations are important! Especially if you're tracking time and want to know where your team is spending their time, or how profitable a certain or service is. Placing *Tasks* in random *Lists* (or even private *Lists*!) is the worst thing you can do. You'll lose a lot of visbility and insights for your business.

Lastly, the Parent Tasks and Subtasks would look like this:

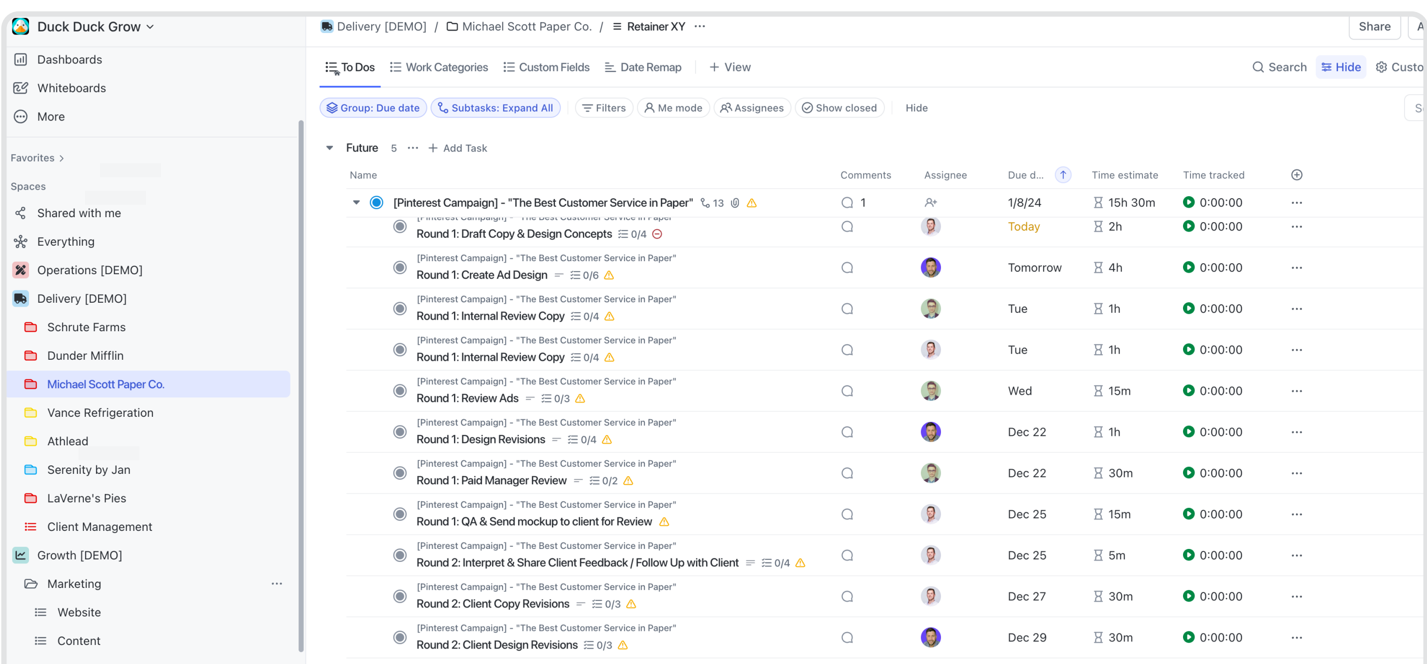
- **Parent Task** - Blog Post
    - **Subtask #1** - Create Blog Post Strategy
    - **Subtask #2** - Review Strategy and Outline Blog
    - **Subtask #3** - Approve Blog Outline
    - **Subtask #4** - Write Blog Copy
    - **Subtask #5** - Review Blog Copy
    - **Subtask #6** - Apply Blog Proofing Revisions
    - **Subtask #7** - Design Blog Images
    - **Subtask #8** - ....



This structure will help pass work back and forth, while also providing good visibility in to how far along the deliverable or project actually is.

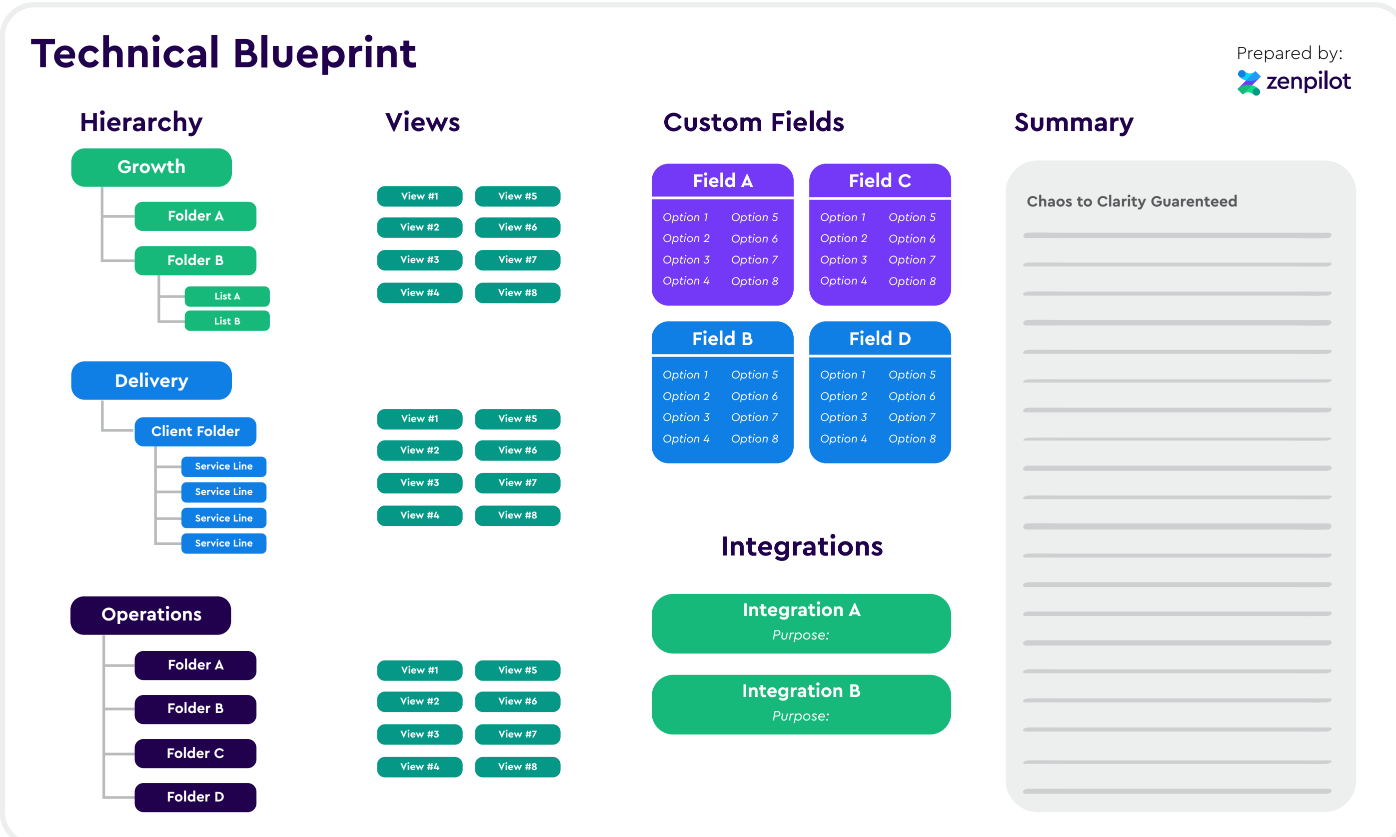
The biggest mistake teams make in ClickUp is creating one *Parent Task*, assigning it to multiple people, and hoping the team will just magically pass work back and forth in the one task without anything slipping through the cracks. News flash - this doesn't work!

For more ClickUp mistakes that you should avoid, read our article, **"The Biggest Mistakes Made in ClickUp (And How to Avoid Them)"**.



Setting Up Your ClickUp Spaces, Folders, and Lists

Remember to take the time to categorize and understand how your work should be structured in ClickUp before you actually jump in to ClickUp.

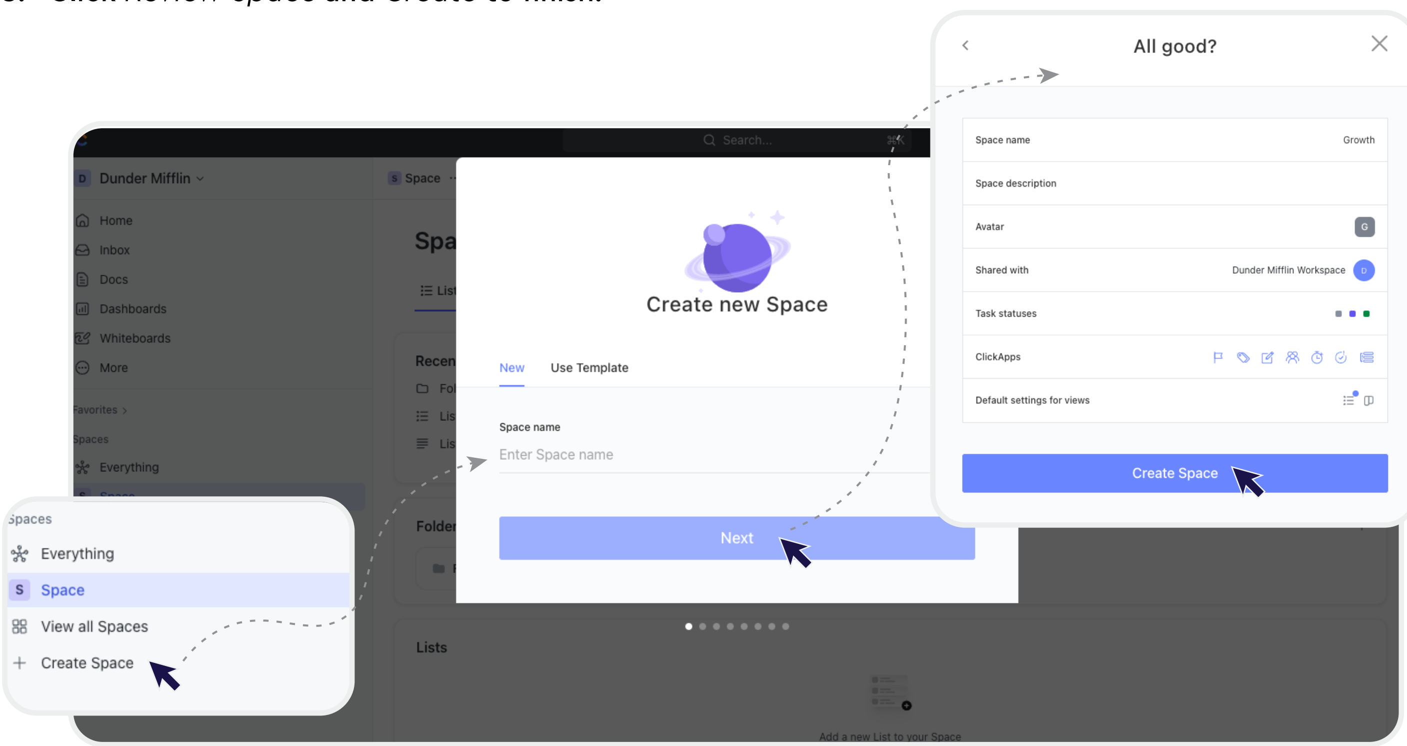


We'd recommend drawing this out in a Miro Board or Lucid Chart first. This will help with planning and visualizing it before you go crazy in ClickUp. And remember, if you'd like ClickUp's highest-rated solutions partner to build your ClickUp Blueprint for you, **book a call with my team** and we'll build one for you in less than 3 weeks.

> **"There is very little guessing work once you've set up the recommended hierarchy that ZenPilot customizes for you during the Blueprint process. 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. 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."**
>
> **Rebecca Nash**
> *Director of Operations, Beam Content*

After you have this figured out, start by building your first *Space*. **The workflow is fairly straightforward:**

1. Hover over the "+" icon next to *Spaces* and select *Create Space*.
2. Enter your desired *Space* name and description (you can also use a *Template*, but that's still to come).
3. Adjust the *Space* color and avatar.
4. Choose whether to make it private or public to your whole team. I'd recommend just keeping this public for now. You can change it later if necessary.
5. Select your preferred *Statuses*. We recommend keeping it simple at first with "Open", "In Progress", and "Closed". You can create a *Status Template* if you'd like, but keep these simple!
6. Toggle on important *ClickApps* like *Time Tracking* or *Time Estimates*.
7. Add in any required *Views*. You can just stick with the options they give you for now. These can always be edited and customized later on.
8. Click *Review Space* and *Create* to finish.



Repeat these steps to create multiple organizational *Spaces* in your *Workspace*.

Or, you can save this as a *ClickUp Template* and deploy it a few times to save you time. Feel free to fast forward to the *Templates* section in this guide if you'd like to do that.

A Brief Thought on Statuses

Status complexity is another mistake I see teams make in ClickUp. Again, this is why standardization and having a strategy before you jump in to ClickUp is important.

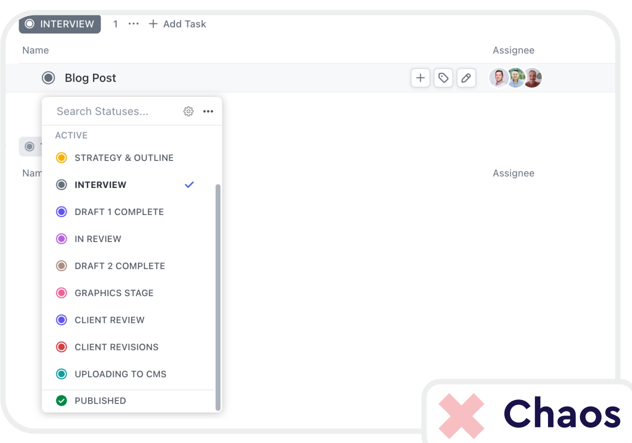
Most Teams Make Two Big Mistakes With ClickUp Statuses

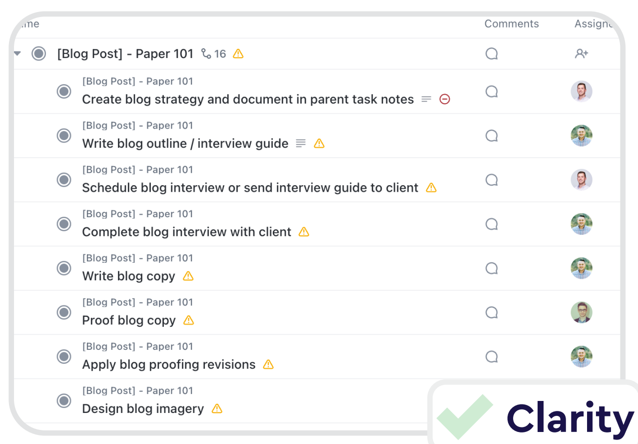
❌ Statuses become the source of truth for what step a project is on

Earlier, I recommended a *Parent Task* and *Subtask* structure that will pass work back and forth. Additionally, that structure will show and tell everyone that we just completed the first draft of our blog post or we sent the blog to our client.

But in reality, most teams build one *Parent Task*, assign a few people to it, and use the *Status* to show what stage or what step a project or deliverable is in. This will make work slip through the cracks, you'll lose workload visibility, and nobody will know who is in charge of what.

We'd recommend that 99% of the time, a status is either *To-Do* or *Complete*. Again, keep it simple. Your team will thank you for it. And you'll thank yourself for it.





❌ Statuses are different for every department, team, and work category

Secondly, inconsistent or different Statuses will become a nightmare when you create *Dashboards* or *Views*.

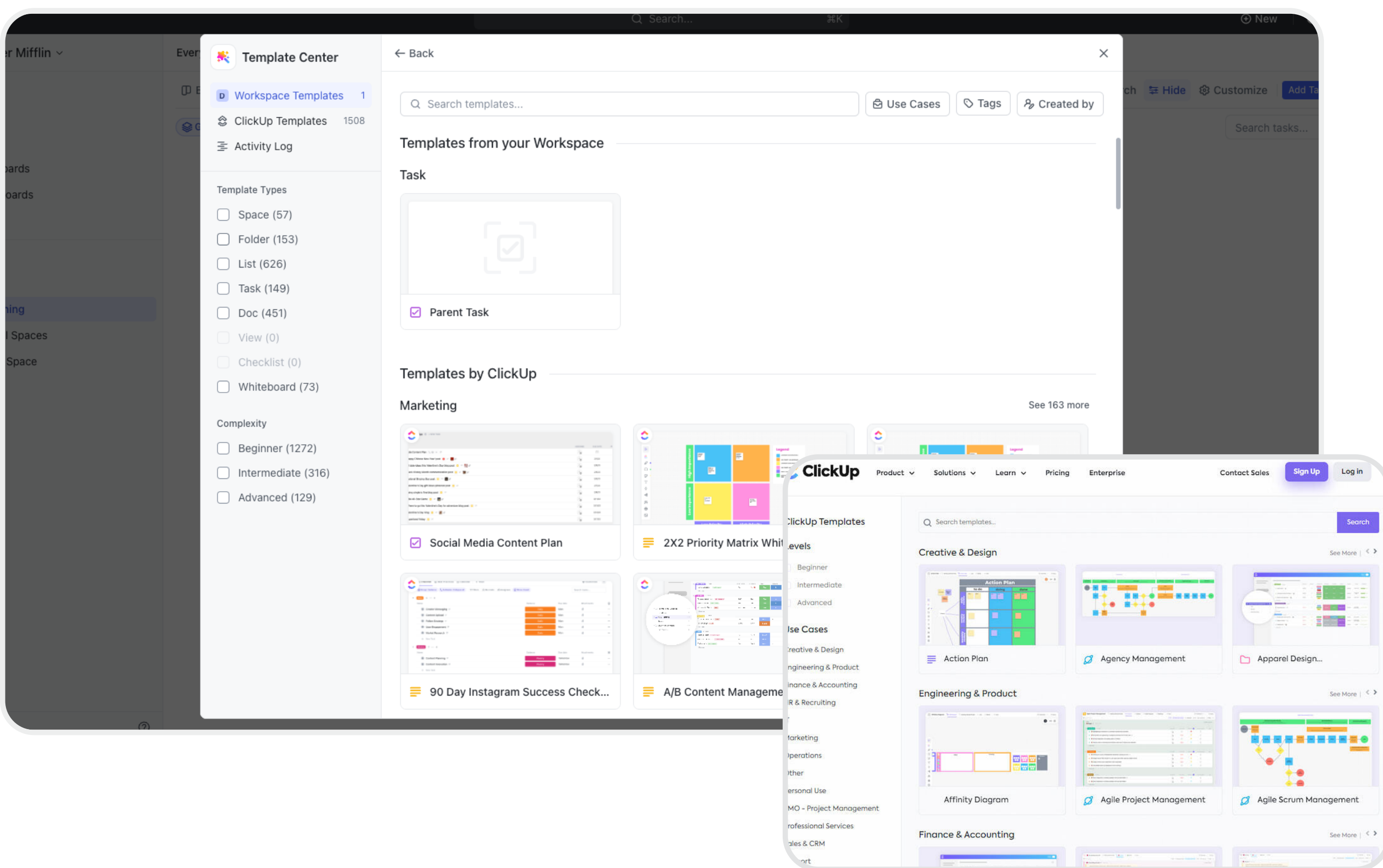
It's hard to fully explain this right now, but feel free to experiment by creating different *Statuses* at every *Space* or *Folder*. Now, navigate to the *Everything* or *Workspace* level, create a *View*, and try to *Filter* or *Group* by *Status*. It's not easy... Don't do it. Keep it simple. You'll thank me later.

Step 7: Building Your ClickUp Templates

As much as I want to skip ahead to discussing *Views* and *Custom Fields*, I think it's important that you understand how the ClickUp *Template Center* works.

ClickUp *Templates* are where you really start to unlock productivity and efficiency gains inside of the system. *Templates* help you standardize your work, connect your SOPs to tasks, and provide clarity for everyone.

You could go and start adding tasks to your workspace all willy nilly, but leveraging ClickUp *Templates* is the way to go, trust me.

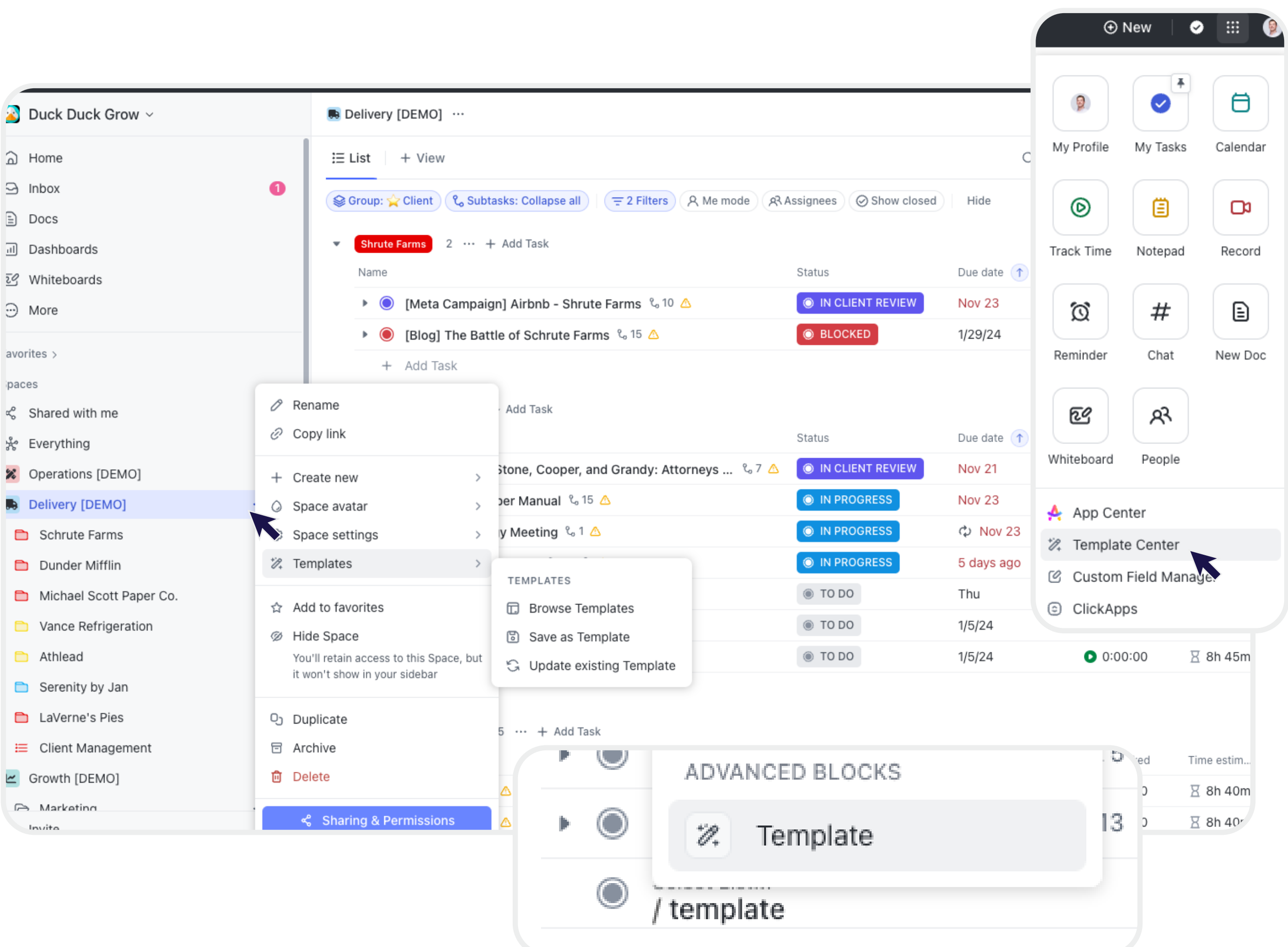


Not saying you can't ever add an ad hoc task to your ClickUp *Workspace*, but if you can leverage ClickUp *Templates* for 85-90% of your task creation, you'll get way more out of ClickUp and build a much more productive and profitable business.

Where Can You Find the ClickUp Template Center?

Thankfully, finding the ClickUp *Template Center* is relatively easy. You can find the *Template Center* multiple ways:

1. Navigate to your *Sidebar Menu* on the left. Hover over any *Space*, *Folder*, or *List*, and click on the ellipsis that shows. Click on *Templates* and then click *Browse Templates*.
2. You can also leverage *Slash Commands*. Type "/Template" anywhere you can type in ClickUp and you'll be able to pull up the *Template Center*.
3. Lastly, you can find the *Template Center* in your *Quick Action Menu* in the top right of your screen. Click on your *Quick Action Menu* (represented by 9 dots) and select the *Template Center* icon.



The ClickUp *Template Center* will be populated with ClickUp *Templates*. You can get started with some of these if you'd like, but be aware that all of them come with different *Statuses* and *Custom Fields* which could lead to complexities in your *Workspace*.

What Can You Save as a Template in ClickUp?

As I discussed earlier, the beauty of ClickUp is the *Hierarchy*. Well, the even more beautiful part is that you can create a *Template* at just about any level of the *Hierarchy*.

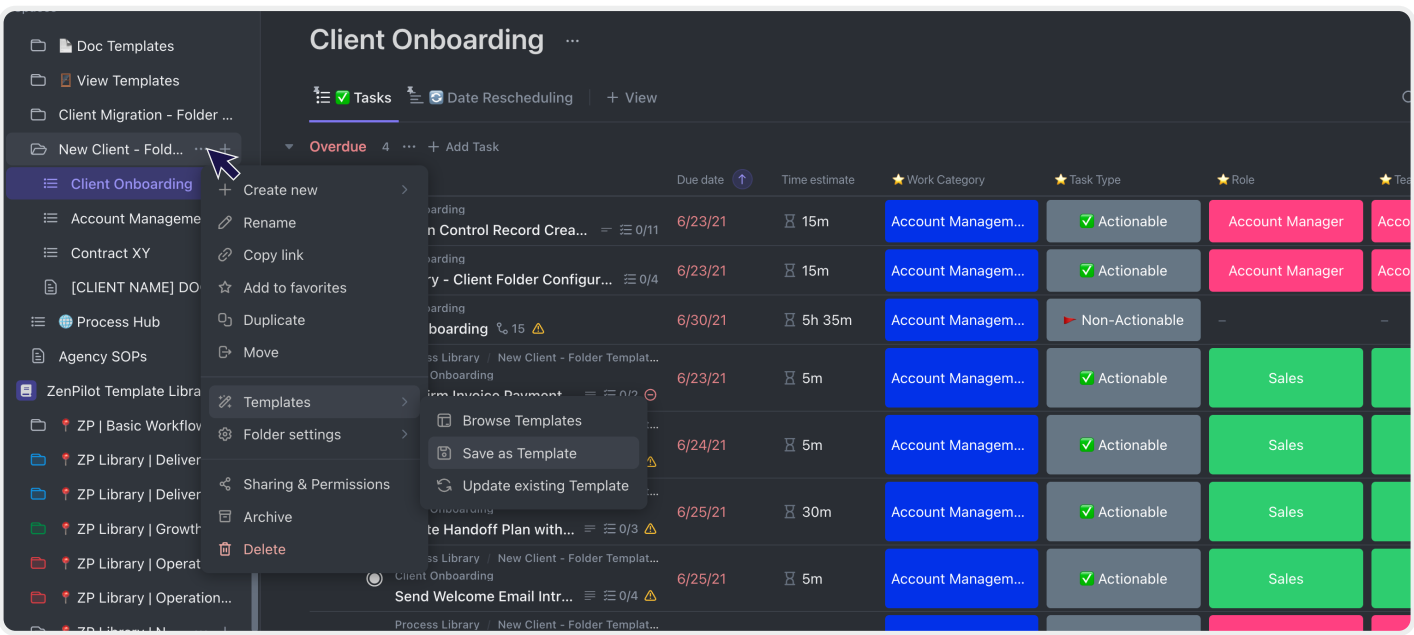
You can create *Space Templates*, *Folder Templates*, *List Templates*, *Task Templates*, *Checklist Templates*, *View Templates*, *Doc Templates*, and *Whiteboard Templates*!

How Do You Save a Template?

Saving *Templates* will follow a fairly similar process to finding the ClickUp *Template Center*.

Navigate to your *Sidebar Menu* on the left. Hover over any *Space*, *Folder*, or *List*, and click on the ellipsis that shows. Click on the *Templates* icon and then click *Save as Template*.

You can also navigate to any *Task*, *Doc*, *View*, *Checklist*, or *Whiteboard* and follow the same process.



You'll also see an *Update Existing Template* icon. And yes, this does exactly what it sounds like. You can save *Templates*, and update them.

But now, you're probably wondering, "how do I manage all of my *Templates* and update them?". And given that there a lot of types of *Templates* that can be leveraged, how should we use them? And how the heck do we manage them (from building, to updates, etc.)?

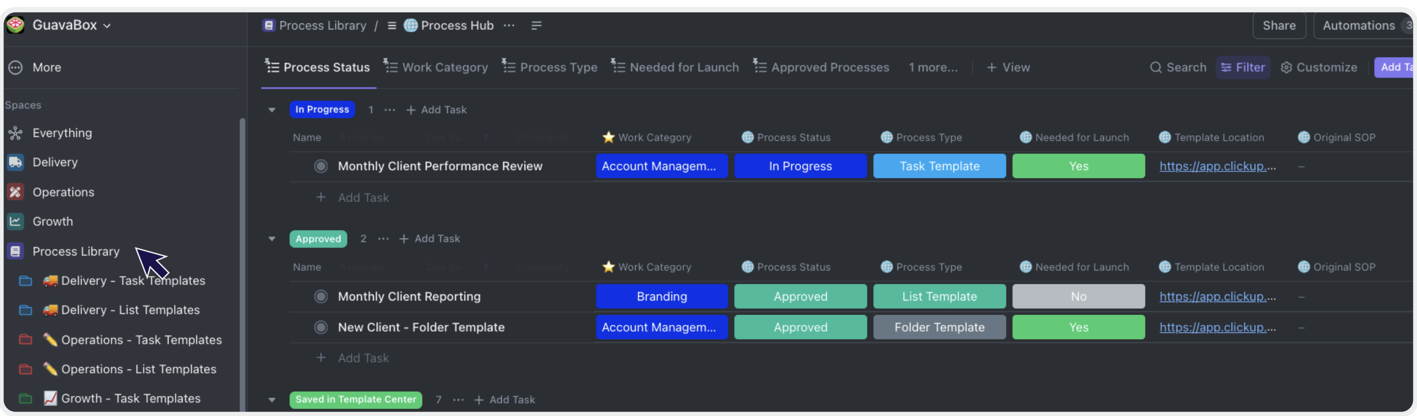
ClickUp Template Best Practices

If you want to make the most out of the ClickUp *Template Center*, and get a more thorough deep dive into the best practices and template building process, I recommend you read our article (+ video tutorial), **"How to 10x Productivity With ClickUp Templates"**. That article will explain to you everything you need to know about ClickUp *Templates*. But anyways, while you're here, I'll give you a few pieces of advice.

1. Build a "Process Library" Space

If you could take one thing away from this guide it would be this - your project management system is almost useless without process templates. It seems harsh, but it's true. Documenting your processes and saving them as templates is one of the most important steps every business will and needs to take. **Chaos will exist without processes.**

So to do this best, I recommend you build one of the most powerful assets your company could ever have - your "Process Library". Your "Process Library" will be a separate *Space* in your ClickUp *Workspace* solely dedicated to building and storing your process templates.



Why Should You Create a ClickUp Process Library?

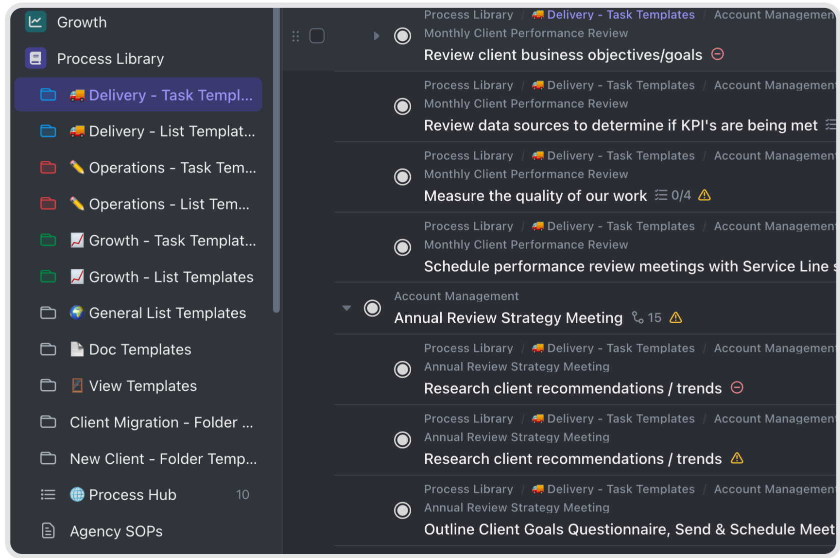
I'll be honest, the biggest limitation to the ClickUp *Template Center* is the inability to edit templates directly in the *Template Center*. Once a *Template* is saved, you cannot edit it unless you have the source file for that template built somewhere in ClickUp - hence the reason for the "Process Library". Having these *Template* source files on hand makes updating and maintaining *Templates* easy.

Your *Templates* should never be static. You'll be updating regularly. If you're brand new to ClickUp, or just new to using *Templates*, this might not mean much right now, but when you have 20, 50, or 100+ *Templates*, you'll realize why I'm telling you to build this out now. Overall, invest time upfront to build your dedicated "Process Library".

How Should Your Process Library Be Structured?

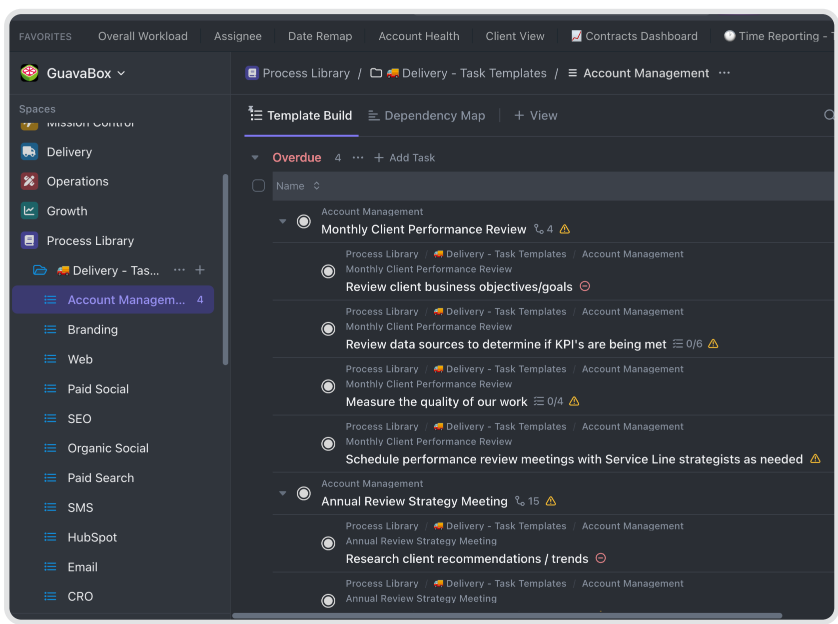
Your "Process Library" should contain a logical *Folder* structure to organize your process *Templates*. We suggest your *Templates* are organized by department, work category, and *Template* type (similar to how your ClickUp *Hierarchy* is organized):

- **Space:** Process Library
  - **Folder:** Delivery *Task Templates*
  - **Folder:** Delivery *List Templates*
  - **Folder:** Growth *Task Templates*
  - **Folder:** Growth *List Templates*
  - **Folder:** Operations *Task Templates*
  - **Folder:** Operations *List Templates*
  - **Folder:** New Client *Folder Template*
  - **Folder:** *View Templates*
  - **Folder:** *Document Templates*



Then within those high level *Folders*, create additional organization based on work categories or service lines for your delivery focused *Templates*. It could be structured like this:

- **Folder:** Delivery *Task Templates*
  - **List:** SEO
  - **List:** ABM
  - **List:** Email
  - **List:** Account Management



Each one of these *Lists* would then host all of the deliverables related to that work category or service line. It could be structured like this:

- **List:** Email
  - **Parent Task:** Newsletter
  - **Parent Task:** Drip Campaign
  - **Parent Task:** Promotional Email

Each of these would contain the *Subtasks* needed to complete that deliverable.

2. Prioritize Your Processes First

Again, before you even jump in to ClickUp, I would spend some time prioritizing what processes you actually need to build. You can't build everything at once, so you'll need to prioritize what get's built first, and then build that in ClickUp.

If you're a marketing agency, you'll probably need a process for client onboarding, writing blog posts, building website, sending emails, etc. Additionally, you'll need processes for employee onboarding, recruiting, payroll, taxes, financial planning, etc.

We've walked over 3,000 teams through this process. And to do that, we leverage a **Process Prioritization Worksheet** which helps teams brain dump and prioritize all of the processes they need to build out in ClickUp.

DELIVERABLES & PROJECTS	PROCESS TYPE	SERVICE LINE	POINT PERSON	FREQUENCY	DOCUMENTATION NEEDS	PAIN	SCORE
Facebook Ad Campaign Audit	Deliverable	Paid Social	Karen	5	4	5	14
Create Client Brand Style Guide	Deliverable	Branding	Bob	5	5	4	14
Complete Monthly ClickUp Analysis	Deliverable	Internal Operations	Bob	4	5	4	13
Blog Post	Deliverable	Inbound Content	Scott	3	5	5	13
Run Weekly NPS Enrollment Maintenance	Deliverable	Internal Operations	Mike	2	5	5	12
Content Offer	Deliverable	Inbound Content	Mike	5	3	4	12
Funnel Audit	Deliverable	Inbound Content	Karen	3	4	5	12
SEO Audit	Deliverable	SEO	Mike	4	3	5	12
Build & Launch Initial Campaigns	Deliverable	Paid Social	Mike	5	5	2	12
Monthly Reporting Setup	Deliverable	Review & Strategy*	Mike	2	5	4	11
Complete Monthly Strategy Meeting	Deliverable	Review & Strategy*	Bob	5	3	3	11
Webinar	Deliverable	Inbound Content	Mike	4	4	3	11
Website Design	Project	Web	Mike	4	4	2	10
Storybrand	Project	Branding	Bob	4	4	2	10
Complete Pre-Launch Audits & Planning	Deliverable	Paid Search	Mike	1	4	5	10
Complete Weekly Review & Strategy Call	Deliverable	Review & Strategy*	Karen	2	4	3	9
Campaign Strategy	Deliverable	Review & Strategy*	Mike	3	4	2	9
Complete Weekly ClickUp Roundup	Deliverable	Internal Operations	Karen	2	5	2	9

Overall, the process of prioritizing process building is relatively easy.

Gather your leadership team in a room (or virtual call for my virtual teams!), brain dump everything you do as a business, and then prioitize those processes based on how often it's performed, how little documentation you currently have on that process, and how painful it currently is without a documented process. You'll then rank all of those processes and determine which one(s) are needed to build now and who is in charge of building it!

3. Use Folder, List, and Task Templates for Your Processes

After you've prioritized your processes, you can now start to build these in ClickUp. You'll be using your new "Process Library" *Space* for this!

Folder, *List*, and *Task Templates* are the most common ClickUp *Templates* that you'll use. Yes, you can use a *Space Template* if you want to (especially in the very beginning), but *Folder*, *List*, and *Task Templates* will be leveraged the most.

Here's how they'll work:

- *Task Templates* will be used for deliverables - blog posts, meetings, financial reports, audits, etc.
- *List Templates* will be used for projects - website builds, implementations, etc.
- *Folder Templates* will be used mostly for client service teams because they can be leveraged to templatize your client folder structures (as discussed in our *Hierarchy* conversation).

Follow the *Parent Task* and *Subtask* structure we discussed earlier.

Name	Due date	Time estimate	Task Type	Delivery Role	Work Category
Client Onboarding 15	6/30/21	5h 35m	Non-Action...	–	Account Manage
Client Onboarding Close Client Deal in CRM & Announce Client in Slack 0/3	6/24/21	5m	Actionable ...	Sales	Account Manage
Client Onboarding Create Handoff Plan with Head of Client Service 0/3	6/25/21	30m	Actionable ...	Sales	Account Manage
Client Onboarding Send Welcome Email Introducing Client to Strategist 0/4	6/25/21	5m	Actionable ...	Sales	Account Manage
Client Onboarding Reply to Welcome Email & Send Intake Form 0/6	6/25/21	5m	Actionable ...	Strategist	Account Manage
Client Onboarding Create shared Google Drive and add internal and external contacts 0/3	6/25/21	15m	Actionable ...	Strategist	Account Manage
Client Onboarding Send New Client Handwritten Welcome Note 0/3	6/26/21	10m	Actionable ...	Strategist	Account Manage
Client Onboarding Create Internal Slack Channel and Add Team Members 0/4	6/25/21	5m	Actionable ...	Strategist	Account Manage
Client Onboarding Double-Check Onboarding Details & Kickoff Call Confirmation 0/8	6/27/21	5m	Actionable ...	Admin	Account Manage
Client Onboarding Add Client Contacts to Retently 0/5	6/28/21	5m	Actionable ...	Strategist	Account Manage
Client Onboarding Confirm Login Credentials & Access to Client Platforms 0/3	6/28/21	5m	Actionable ...	Strategist	Account Manage
Client Onboarding Run Kickoff Call 0/4	6/29/21	1h	Meeting	Strategist	Account Manage
Client Onboarding Attend Kickoff Call 0/4	6/29/21	1h	Meeting	Admin	Account Manage
Client Onboarding Attend Kickoff Call 0/4	6/29/21	1h	Meeting	Sales	Account Manage

Each *Parent Task* should represent a deliverable or project phases and all the *Subtasks* will represent the steps needed to complete that deliverable or project phase.

Task Template Example

Task Templates will be the most used *Template* for 95% of teams. *Task Templates* will be like "tools in your toolbox". You'll use these *Templates* over and over and over again.

Let's walk through building out a polished *Task Template* using a common example - blog posts.

Inside your "Process Library" *Space*, within the "Delivery - Task Templates" *Folder* and "Inbound" *List*, we'll create a *Parent Task* called "Blog Post" with *Subtasks*, *Due Dates*, *Time Estimates*, and *Custom Fields* (which we'll discuss in more detail later):

- **Subtasks:** As we discussed, these represent the actionable *Tasks* that are needed to complete a blog post - create blog strategy, write blog, proof blog, send blog to client, receive feedback + make adjustments, publish blog, etc.
- **Due Dates:** *Due Dates* in your *Templates* represent a date map. You should only care about the distance between each of the dates - not the actual date itself. Pick a date for your first *Task* and then work from there. You can remap these due dates when you deploy the *Template*.
- **Time Estimates:** *Time Estimates* are what they sound like. How long do you think each task should take? We recommend that each of your *Tasks* is broken up in to *Tasks* that take no longer than 4 hours. This will help you get a much more accurate *Workload View* in ClickUp.
- **Dependencies:** Link your *Tasks* together in the *Gantt View* for easy date remapping in the future.
- **Checklists:** Add *Checklists* to your *Subtasks* to provide reminders for your team to ensure they don't forget to do certain things related to a *Task*.
- **Additional Custom Fields:** Add in *Custom Fields* that you want included in your *Templates* (we will discuss this later).

Overall, your *Templates* should be built with the mindset that each *Task* will be assigned to one person. Additionally, for best results, each *Task* should be able to be completed by that one person in one sitting and *Due Dates* should be "Do" dates (what day the *Task* should be started and completed on).

When your *Tasks* are broken up in to smaller "bite-sized" pieces, you'll provide more clarity for your team, get a better view in to project progress, get better time tracking data, and make it much easier to see workload.

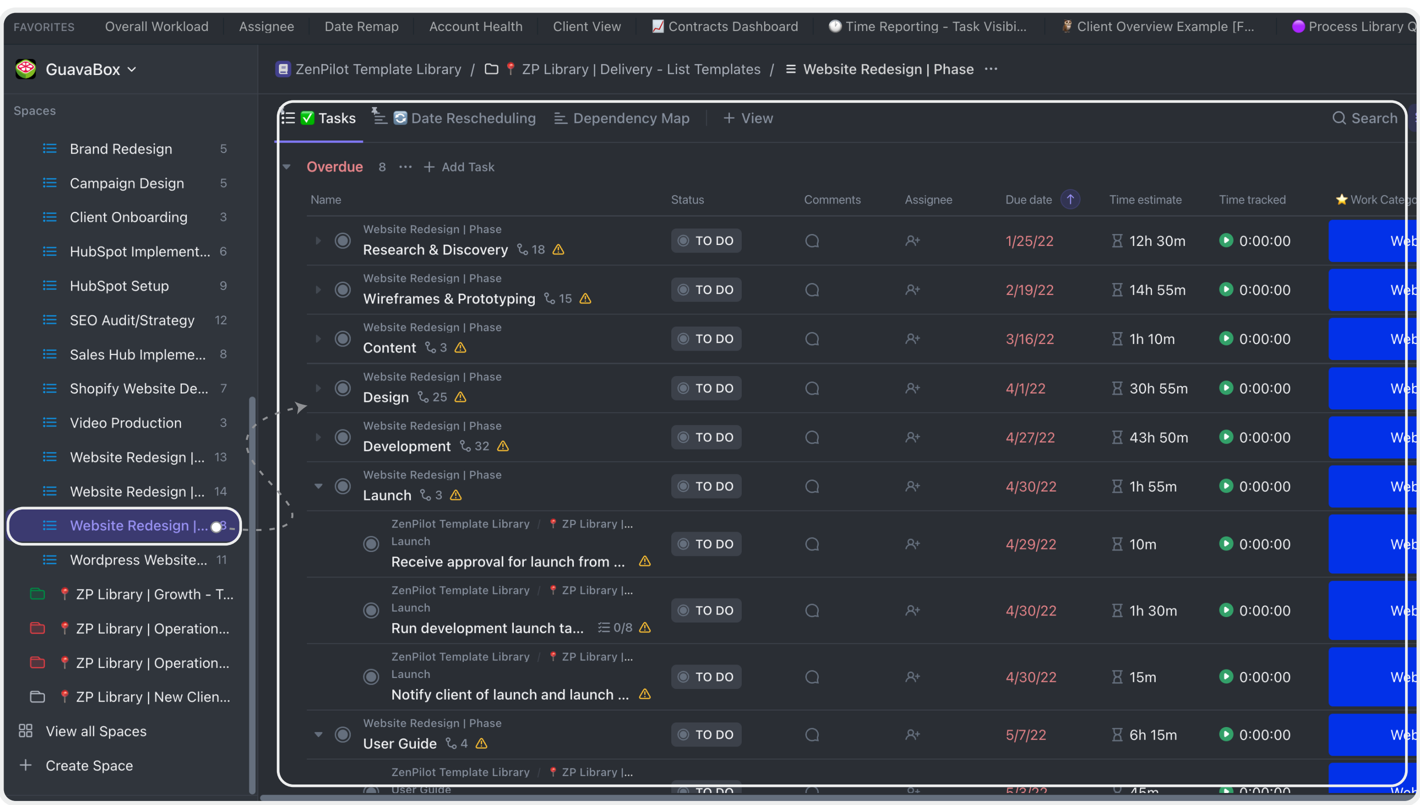
List Template Example

List Templates will be the second most used *Template* for teams in Clickup. *List Templates* make it much easier for project managers to set up and assign out larger projects like website redesigns, client onboardings, implementations, etc.

In this example, let's build out a multi-phase website redesign *List Template*. Your *List Templates* will act slightly different than your *Task Templates*. For starters, *Parent Tasks* will operate slightly different. In a *List Template*, *Parent Tasks* represent milestones or phases within a project, instead of a single deliverable.

You'd build this *Template* in your "Process Library" *Space*, within the "Delivery - List Templates" *Folder*.

Within a website redesign, your *Parent Tasks* may be “Research & Discovery”, “Wireframes & Protyping”, “Content”, “Design”, “Deverlopment”, “Launch”, “Post Launch”. Within each of the *Parent Tasks* will live more granular *Subtasks* like “Conducting Customer Interview”, “Writing Website Copy”, “Presenting Design Concepts”, “Migrating Custom Functions”, etc. (just like your *Task Templates*).



Additionally, your *List Template* can include additional *List Settings* that an ordinary *Task Template* does not bring with it. This will include things like *Views*, *Automations*, and *Documents*!

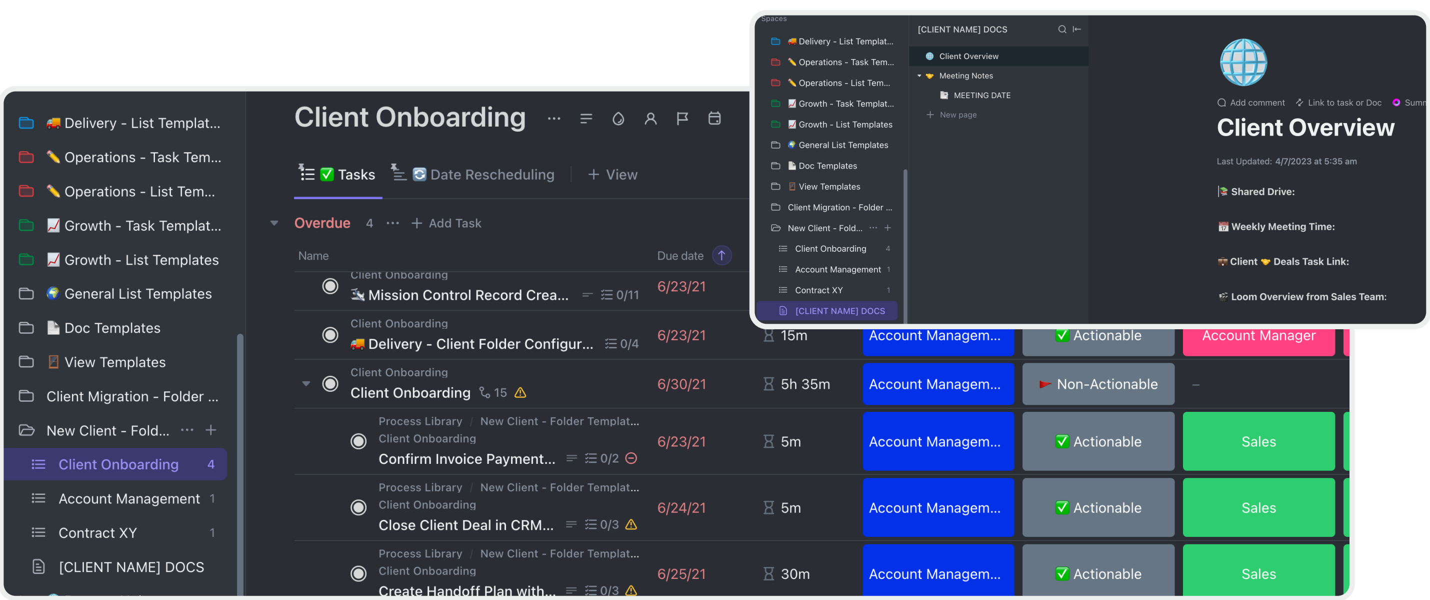
Folder Template Example

Folder Templates are the homes where your *List* and *Task Templates* (at least for client service businesses) will actually be deployed in and live.

Folder Templates help streamline client onboarding, improve team ClickUp usage, and help you centralize client data. If you're both a ClickUp and HubSpot user, you'll want to check out our article (+ video tutorial), **"How to Streamline Client Onboarding With the ClickUp + HubSpot Integration"**.

Overall, setting up *Folder Templates* will be less about the *Tasks*, and more about the structure of your *Folders*. **Here's how you'll set it up:**

- **Client Folder Template [Folder]:** You'll begin with the client *Folder*. This *Folder* will have a few *Views* and *Documents*.
    - **Onboarding [List]:** You'll build your client onboarding process directly in to your *Folder Template*. This will be a *List* with all of the *Tasks* needed to onboard a new client. When a client is onboarded, this *List* can be archived.
    - **Contract XY List [List]:** You'll build an empty *List* that will serve as a home for all of your *Tasks*. This *List* will be renamed to reflect the name of your contract with the client. All work for this contract will live in this *List* for easy time tracking and updates. You'll also leverage similar *Views* to those at the *Folder* level and build them in to this *List*.
    - **Account Management [List]:** You can build an empty *List* that will serve as a home for all of your account management related *Tasks*. These can be *Tasks* associated with the client, but not a particular contract or project. Similar to the Contract *List*, you'll leverage similar *Views* to those at the *Folder* level and build them in to this list.

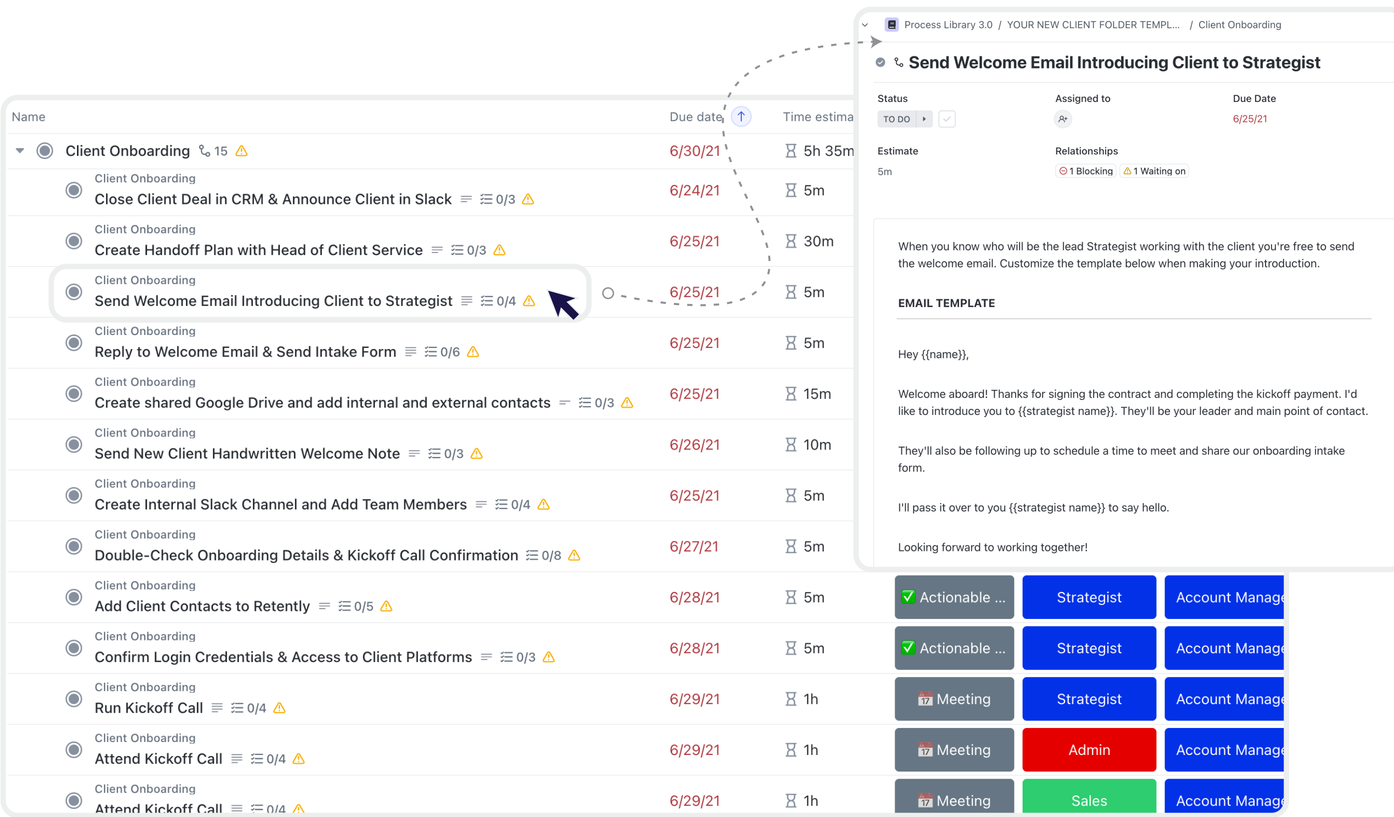


4. Make the Process Live Where the Work Get's Done

After you've built a few *Templates* in ClickUp, it's time to take these to the next level.

You can start by building your ClickUp *Templates* with the *Task Names*, *Due Dates*, *Time Estimates*, and *Dependencies*, but you'll unlock even more productivity gains when you combine your processes with those tasks.

If you've created SOPs or have any documentation on how your business does things, use the *Task Description* feature to link out to that SOP document, video tutorial, or template. Or, you can use the *Task Description* to write out instructions for how to complete that specific *Task*.



When your processes are combined with the *Tasks*, your teams compliance rate for actually following that process will go through the roof.

I'd even recommend you build an Internal Wiki or Knowledgebase directly in ClickUp. This can store all of your SOPs and process documentation - keeping everything in one system. For a detail tutorial on how to build this in ClickUp, check out our article and video, "**How to Create an Internal Wiki in ClickUp**".

5. Leverage View Templates for Standardization

Views can be included within your *List*, *Folder*, and *Space Templates*, but they can also be saved on their own.

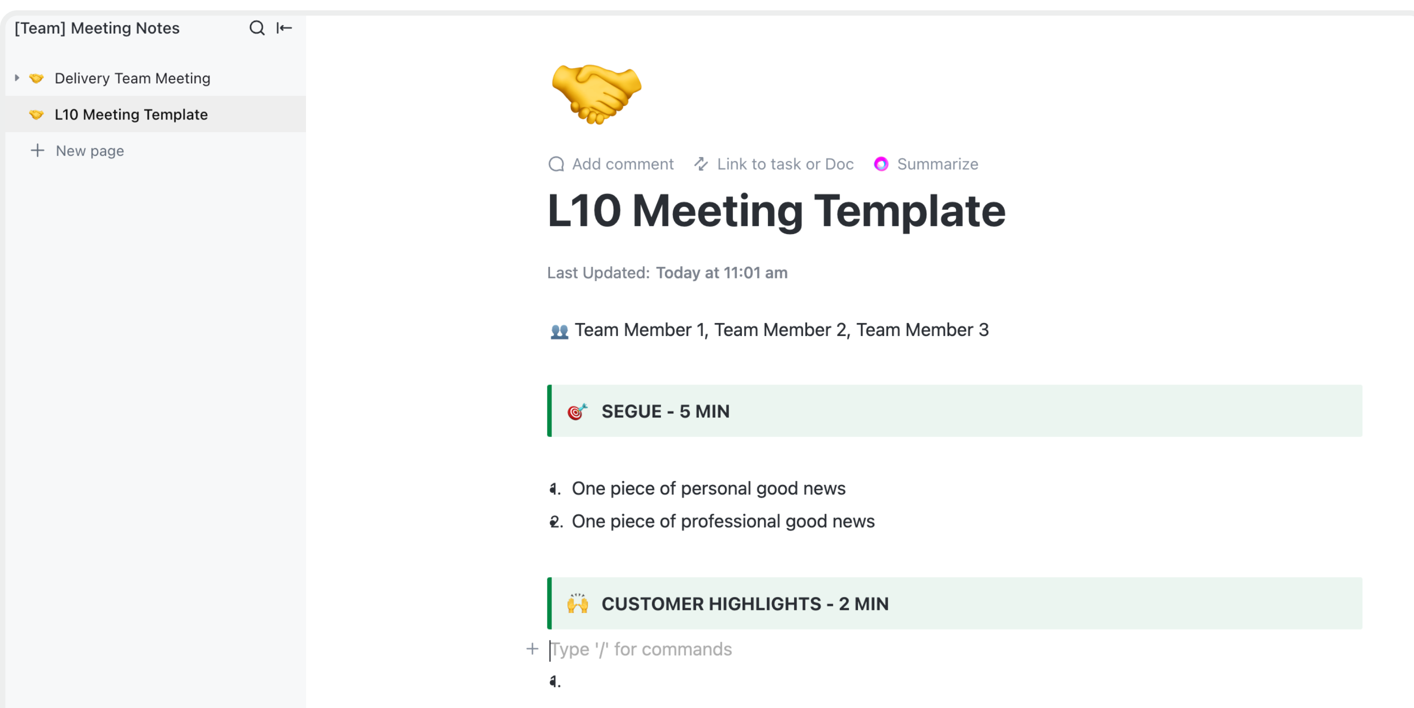
And though we haven't yet discussed *Views* (that's coming soon), you'll want to leverage *View Templates* to help you standardize *Views* in your *Workspace* to make it easier for your team to navigate and understand ClickUp. *Views* are powerful, but can be difficult to comprehend. Leveraging *View Templates* to standardize is extremely helpful to make your *Workspace* a tad bit simpler.

6. Leverage Doc Templates for Meeting Agendas

Last but not least are *Doc Templates*. *Doc Templates* can also be saved with *Space*, *Folder*, or *List Templates*, but they can also be saved on their own in ClickUp.

We use them primarily for meeting agendas. ClickUp can be used to run your meetings, save all of your notes, and create *Tasks* directly from your notes (which is amazing - just highlight text in a *Doc* and click "+ Task")

For example, If you're a business that runs on EOS (the Entrepreneurial Operating System®), you can run your Level 10 Meetings™ directly in ClickUp - and you'll leverage a ClickUp *Doc Template* to deploy the agenda every week!



The Power of ClickUp Templates

ClickUp *Templates* can bring as much or as little detail as you want. As you saw in my recommendations, you can bring *Task Descriptions*, *Checklists*, *Time Estimates*, *Due Dates*, *Custom Fields*, *Dependencies*, *Views*, and more with *Templates*.

Obviously your *Templates* don't need to be perfect to start, but as you add in more and more detail, you'll be creating extremely powerful assets to help you plan out projects without having to build them from scratch.

If you have all of the details, especially those *Task Descriptions* built out, you'll be able to include the "How To" instructions to every task that's deployed - making it 10x easier to bring on a new employee and scale your business.

"Our team is more efficient, productive, and healthier. I was always wary of how much of our work could be put into processes, but this has completely changed my mind. If you want to take your business to the next level, ZenPilot is a must!"

Kyle Harms

CEO, Hot Sauce

There's a ton of power in ClickUp *Templates*. Create them. Save them. Deploy them into your live work environment. And reap the benefits.

"The framework for setting up our processes and executing them was phenomenal. This was the missing piece. Yes, ClickUp provided the technology, but we had never sat down and written out our processes step-by-step. The process that ZenPilot provided for process building was a game changer for us."

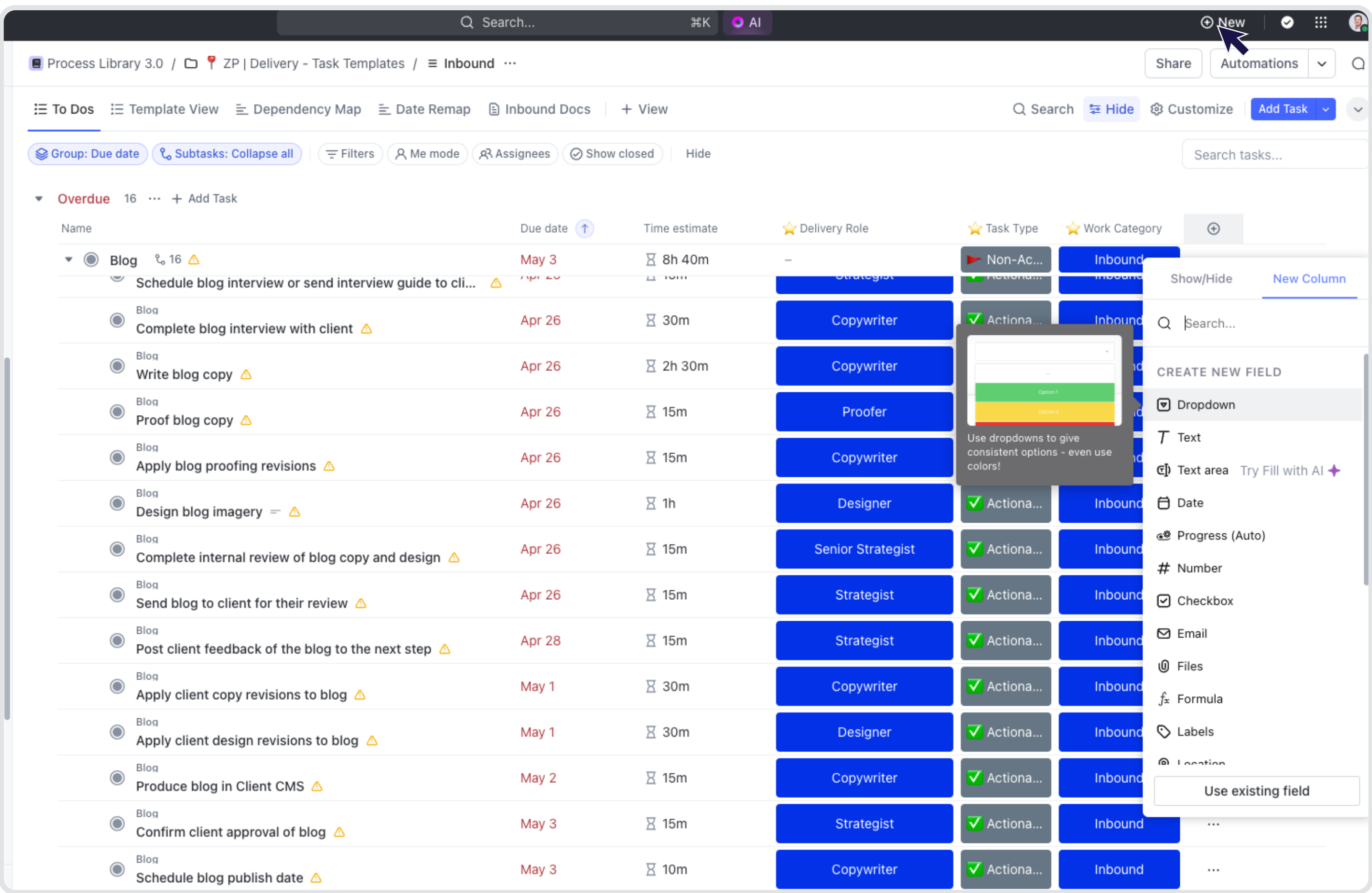
Matt Guevara

Founder, Venn Digital Marketing

Step 8: Leveraging Custom Fields

Custom Fields can be dangerous in ClickUp. Depending on your personality type, you may go and create hundreds of different *Custom Fields* because you'll think you'll need them. But the reality is, you probably don't.

Creating hundreds of different *Custom Fields* in your ClickUp *Workspace* (without understanding how they work and where they live) can lead to some nightmares down the road. This *Custom Field* craziness will make it much harder to create *Dashboards* and *Views*. Plus, your team may get confused to which *Custom Fields* they should and shouldn't be using.



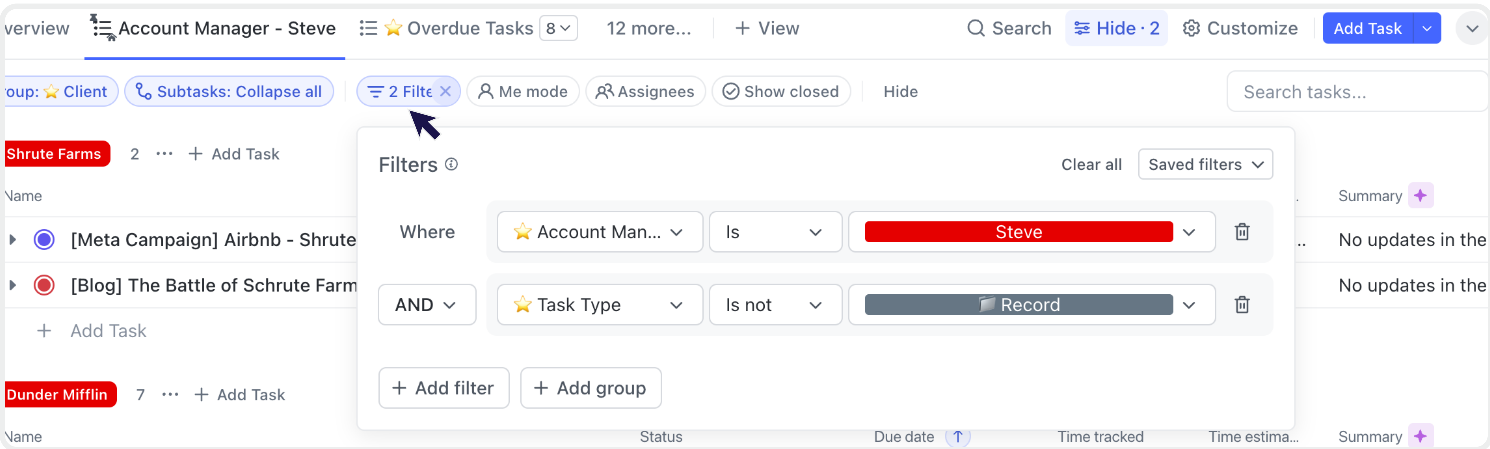
Yes, *Custom Fields* are powerful, but you need to build them with a purpose. This is another reason for having a strategy before going in to your ClickUp implementation.

You'll want to have your *Custom Fields* listed out with how they'll be used before you jump in to ClickUp. This doesn't mean you can't create additional *Fields* later on, but get the basics created first. In a few pages, I'll be sharing a few *Custom Fields* we recommend you create right away.

What Are ClickUp Custom Fields?

Simply put, *Custom Fields* in ClickUp are ways of adding different types of data or unique identifiers on to your ClickUp *Tasks* to customize and personlize your *Workspace*.

1. They allow you to segment data for *Views* and *Dashboards*
2. They allow you to add more information to your *Tasks*
3. And they provide you with *Automation* capabilities (mainly because they can act as triggers!)



Where Are Custom Fields Located?

This is important. *Custom Fields* can live at any level of your ClickUp *Hierarchy*.

To add a *Custom Field*, you can either navigate to your *Custom Field Manager*, which you'll find in your *Quick Actions Menu* in the top right corner of your screen. Or you can go to any *View* in your *Workspace* and click on the "+/Add a Column" button that'll you'll see on the right side of your *View*.

Be careful. If you click "+/Add a Column" at your *Everything/Workspace* level, you will be adding a *Custom Field* to your entire *Workspace* - meaning that every *Task* in your ClickUp *Workspace* will now have that *Custom Field* applied to it.

You don't typically want this. It may not mean as much to you right now, but as you build more advanced solutions in ClickUp (like a CRM), you don't want *Custom Fields* you're using for your Growth team to live on those records living in your CRM.

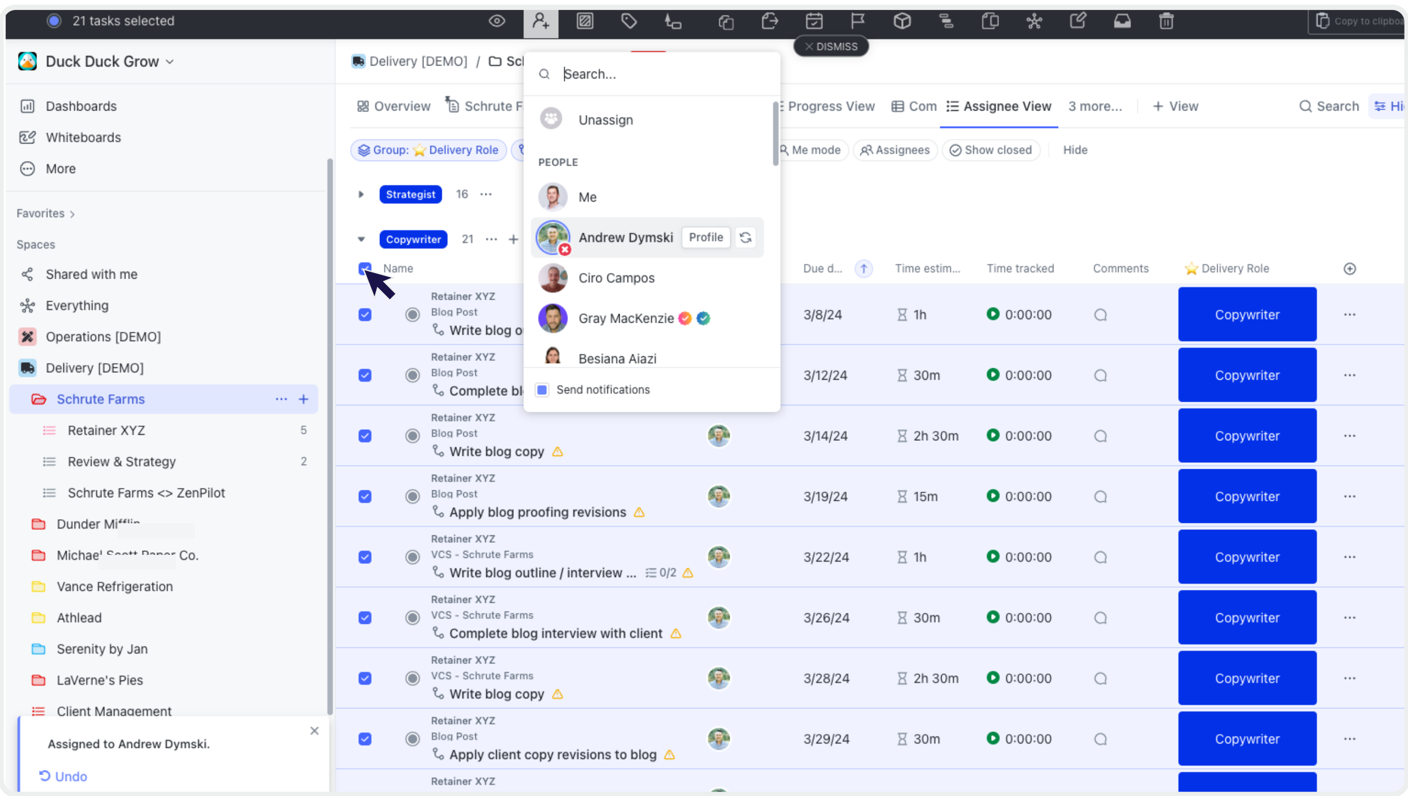
Keep your *Custom Fields* located no higher than your *Spaces*. If you want to add a *Custom Field* to a *Space*, just navigate to that *Space*, pull up a *View*, press the "+/Add a Column" button and add a new *Field* here. This will allow you to use the *Custom Field* on every task in that *Space*.

Why Do Custom Fields Matter?

Custom Fields are what will unlock future custom *Views* and *Dashboards* in the future.

For example, we use a "Role" *Dropdown Custom Field*. This is built in to our *Templates* in the "Process Library" *Space*. This field will be populated with different roles that our team has - copywriter, admin, proofer, strategist, account manager, designer, engineer, etc.

Every *Task* in our ClickUp *Templates* will then get this *Custom Field* applied to it. When the *Template* is deployed, we can group all of the *Tasks* that have the "Copywriter" role applied to it, and assign those *Tasks* in bulk (using the *Bulk Action Toolbar*).



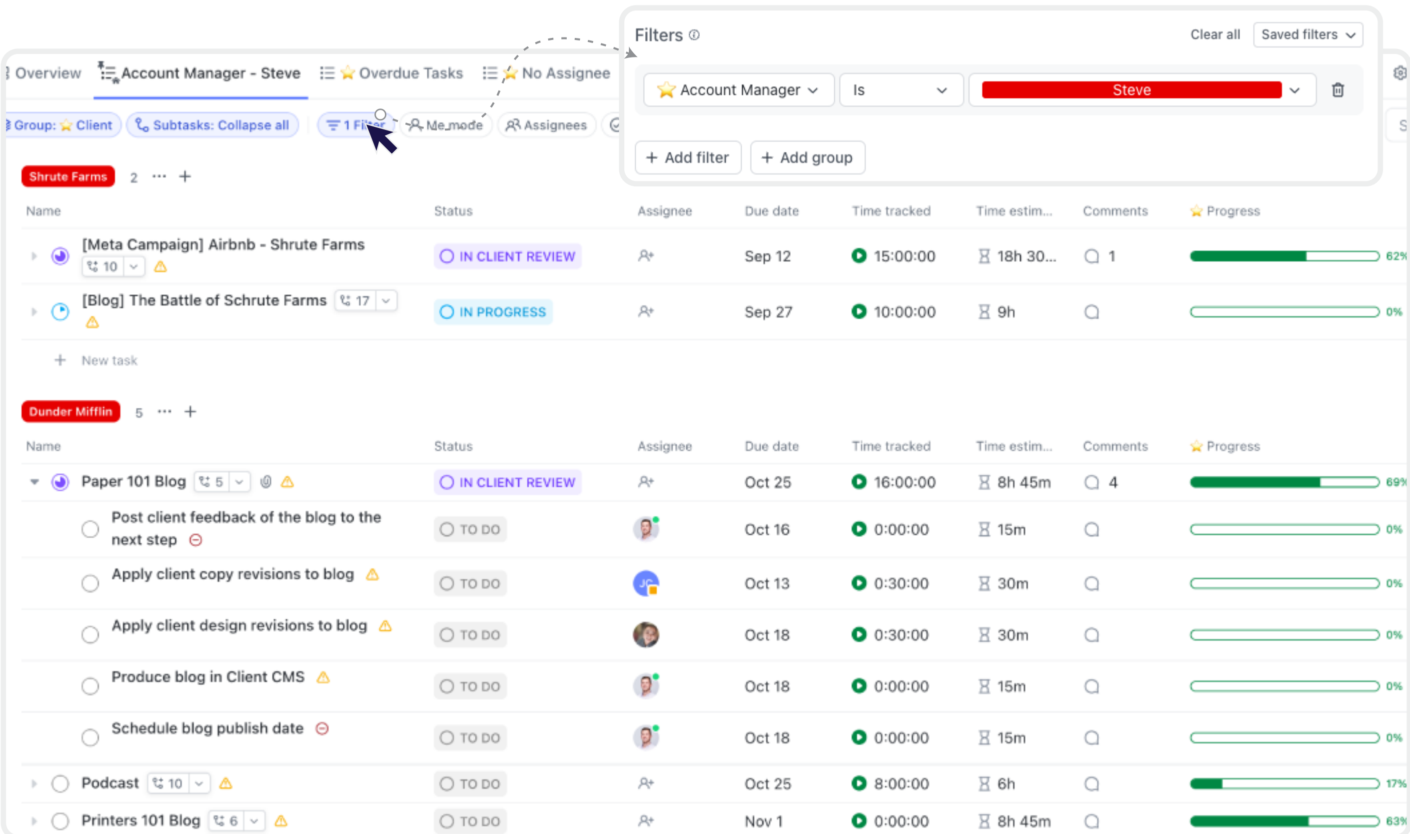
This process saves us a few minutes on the *Task* deployment process. And as you scale, this can save days, if not weeks, of admin time per year!

For an overview of how this process works, watch our video tutorial, **"The Fastest Way to Assign Work in ClickUp"**.

Secondly, we also leverage an "Account Manager" *Dropdown Custom Field*.

This *Field* can be applied to every task that falls within that account manager's book of business. An account manager may have 10 different clients. Within each of these clients, they have 4-5 different deliverables being worked on, and each client has a team of 5 people.

If an account manager wants to see all of the work across those 10 different clients in one place, you can create a *View* that shows all *Tasks* that have that *Custom Field* applied to it. Instead of that account manager having to navigate through a bunch of folders and lists in ClickUp, they'll have one *View* where all of this is showing.



This is why your Clickup *Hierarchy* is so important. The way you design your *Hierarchy* in ClickUp will either enable or limit your ability to create *Views* or *Dashboards* just like this.

And aside from the *Hierarchy*, this is why I'd limit your *Custom Field* usage. When you have too many *Custom Fields* in your *Workspace* it becomes difficult to manage and keep organized for *Views*. Keep it simple so that you and your team don't get overwhelmed.

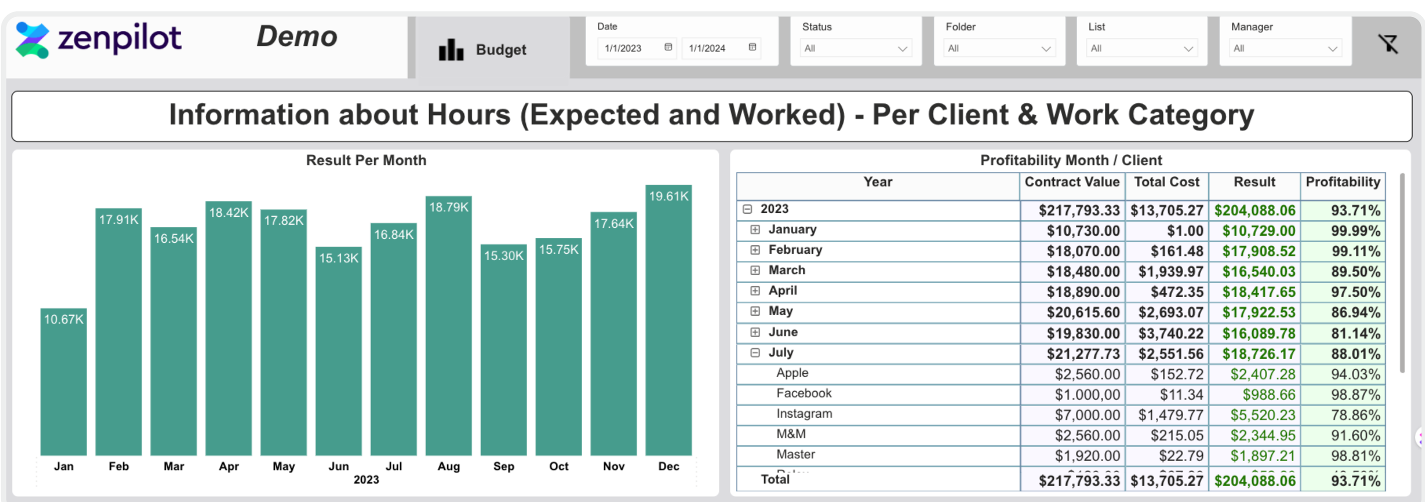
Custom Field Recommendations

I'd recommend you have at least three different *Custom Fields* to start, and then don't create any more until you're ready:

1. **Role (or Delivery Role):** This is a *Dropdown Custom Field* that is used to assign work and make hiring decisions. Populate this *Field* with roles your business has. Every task should have a "Role" *Custom Field* applied to it.
2. **Work Category:** This is another *Dropdown Custom Field* that is used to label work categories across your business. This is great for future reporting to see which services are most profitable for your business, or where you're spending the most time.
3. **Task Type:** This is another *Dropdown Custom Field* that helps you label your *Task Types* in ClickUp. Not every *Task* is a traditional *Task*. You may have some records, non-actionable tasks, meeting tasks, etc. that you'll want to have properly labeled. And yes, I do understand that ClickUp now has a native *Task Type* option, but at the moment this has some *API* and *Automation* limitations.

These are the most basic *Fields* that can be recommended to basically any business using ClickUp. The "Account Manager" *Dropdown Custom Field* I mentioned earlier is a great addition, but even that is a bit advanced for your beginning ClickUp implementation.

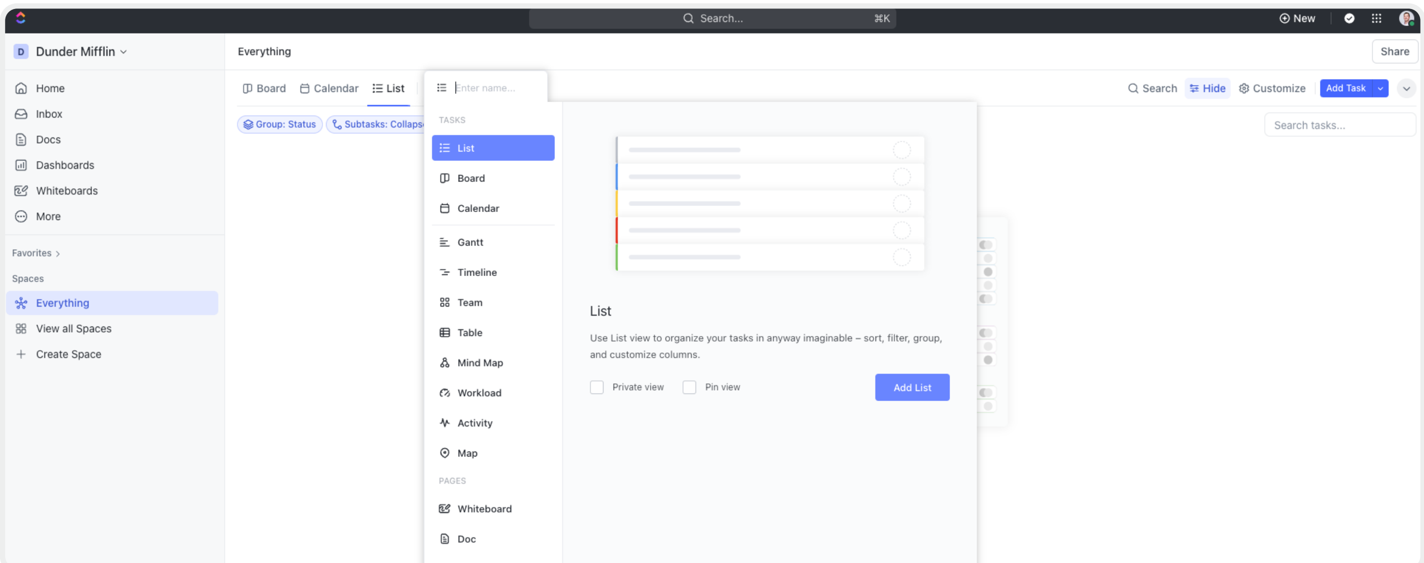
Again, always go in with a strategy before using ClickUp. You'll want to know your *Hierarchy*, but you'll also want to have an idea for *Custom Fields* that you can apply to your *Tasks* to unlock visibility and reporting capabilities in the future. For example, you can use *Custom Fields* I recommended to create dashboards like this (screenshot below) that can track profitability and utilization.



And if you're unsure about what *Custom Fields* you should create and leverage, or you want help creating dashboards like the one pictured above, **book a call with my team.**

Step 9: Leveraging ClickUp Views

ClickUp *Views* could be discussed directly after the ClickUp *Hierarchy*. They are one of the most important features within ClickUp. However, it's important that you understand the ClickUp *Hierarchy*, *Custom Fields*, and *Templates* first (mainly because now you know that you can turn your *Views* in to *Templates*).



Most teams will start by setting up a bunch of random *Views* in their *Workspace*. This is fine, but as you build and build and build in ClickUp, an overabundance of *Views* with no distinct purpose can overcrowd your *Workspace* and lead to confusion across your team (trust me, I've seen it 100 times).

And confusion isn't going to help get your team bought in to the platform. This is a big reason why teams fail to successfully implement ClickUp.

We'd recommend only building the *Views* you need, and standardizing them across your *Workspace*. This is exactly why you need to know about *View Templates*. Plus, you can build *Views* in to your *Space*, *Folder*, and *List Templates*. This will save you hours (maybe months) of hard work and headaches if you get your desired *Views* built in to your *Templates*. That way you don't have to go and set up every *View* from scratch!

If you're looking for a more thorough guide on *Views*, I recommend you read our article (+ video tutorial), **"Everything You Need to Know About ClickUp Views"**. But since you're here and reading this guide, let me give you a few pointers...

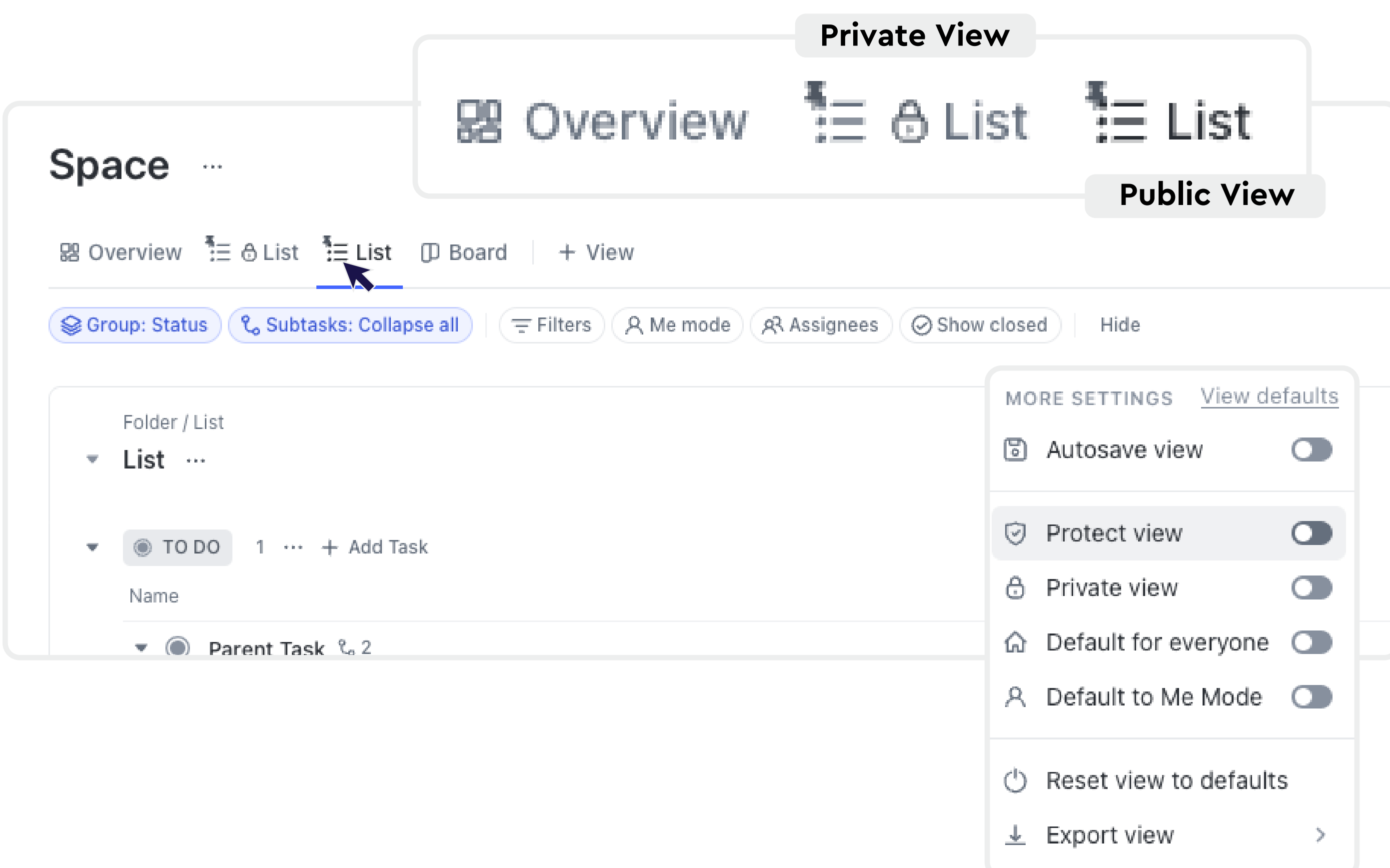
Tip #1 - Public vs. Private Views

This may not be a tip as much as it is a warning. When *Views* are created, they'll be set as public, unless you choose to make them private (or if you have the *Default Private Views ClickApp* turned on then just disregard that).

If a *View* is public, this means that everyone in your ClickUp *Workspace* will see this *View*, and can make changes to this *View*. If a change is made to the *View*, everyone will see the changes. This isn't a huge deal unless you have a bunch of brand new ClickUppers who have no idea how *Views* work.

If you do have a bunch of brand new ClickUppers and want to restrict people from changing or editing a *View*, you can click on that *View*, select *More settings* and toggle on *Protect view*. This will restrict anyone from editing your beautiful *Views* you created and keep your *Workspace* in check.

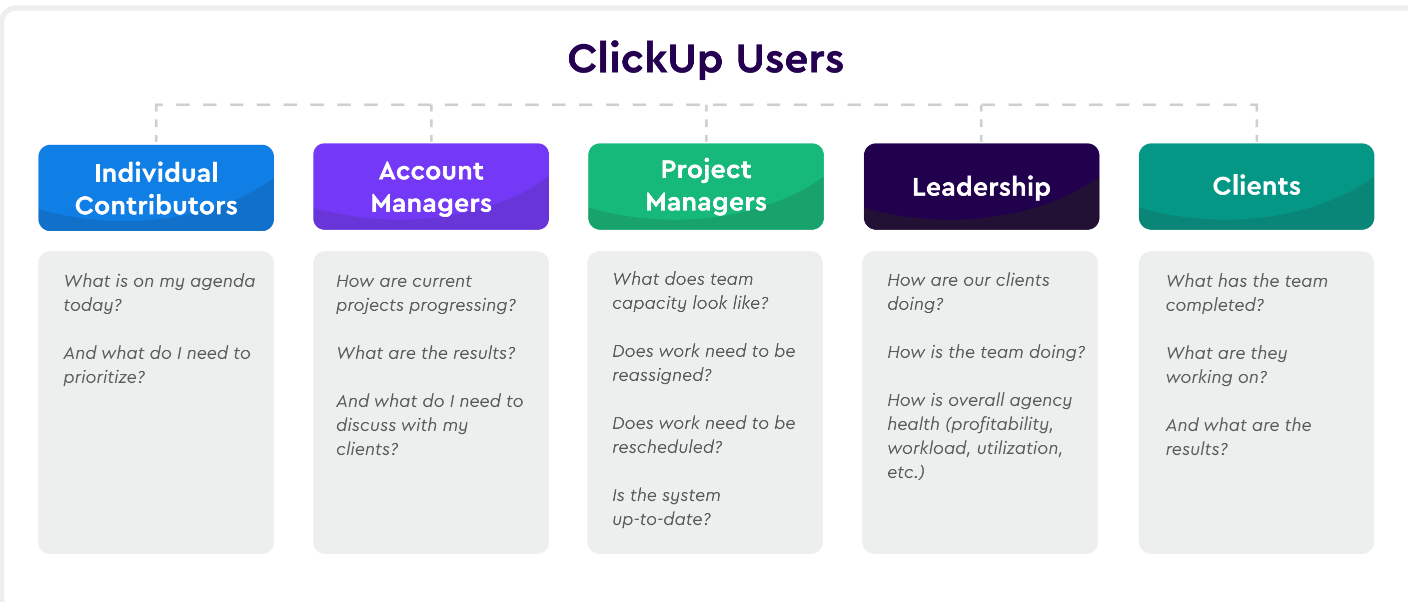
If a *View* is private, this means that only you can see it. You'll know it's a private *View* when it has a little "Lock icon" next to the *View*. You can edit, change, and adjust this *View* without anyone else seeing the changes.



Tip #2 - Identify Roles Before Creating Views

When you're creating *Views*, you need to go in with some sort of strategy (I know I've said this 1 million times). Think about the main roles within your business. This will vary by business type and size, **but for most businesses this will include 5 main roles:**

1. **Individual Contributors**: Need to know what's on their agenda and what they need to prioritize.
2. **Account Managers (or Team Leads):** Need to see how their clients projects are progressing, how the contract is pacing, what the results are, and what they need to discuss at their meetings.
3. **Project Managers:** Need to see team workload (with ClickUp's *Workload View*) and be able to easily reassign and remap due dates if necessary, while also keeping ClickUp up-to-date.
4. **Leadership:** Need visibility into client health, team health, and overall agency health (profitability, workload, utilization, etc.)
5. **Clients:** Need to know what's happening, what's completed, and what the results are.



When you identify these roles before creating *Views*, you'll be able to ask your team sitting in those roles, "what do you need to see and why?". You can then build *Views* around those answers and create specific *Views* for specific people.

Plus, when you start thinking about how you can create those *Views*, you'll begin to think about how it relates to your ClickUp *Hierarchy*, and you'll start identifying *Custom Fields* that can be used to segment certain *Tasks* to give your roles a *View* that shows them only what they need to see. The strategy will help bring it all together so that everything you create has a purpose!

Tip #3 - Use "Default for everyone" On Important Views

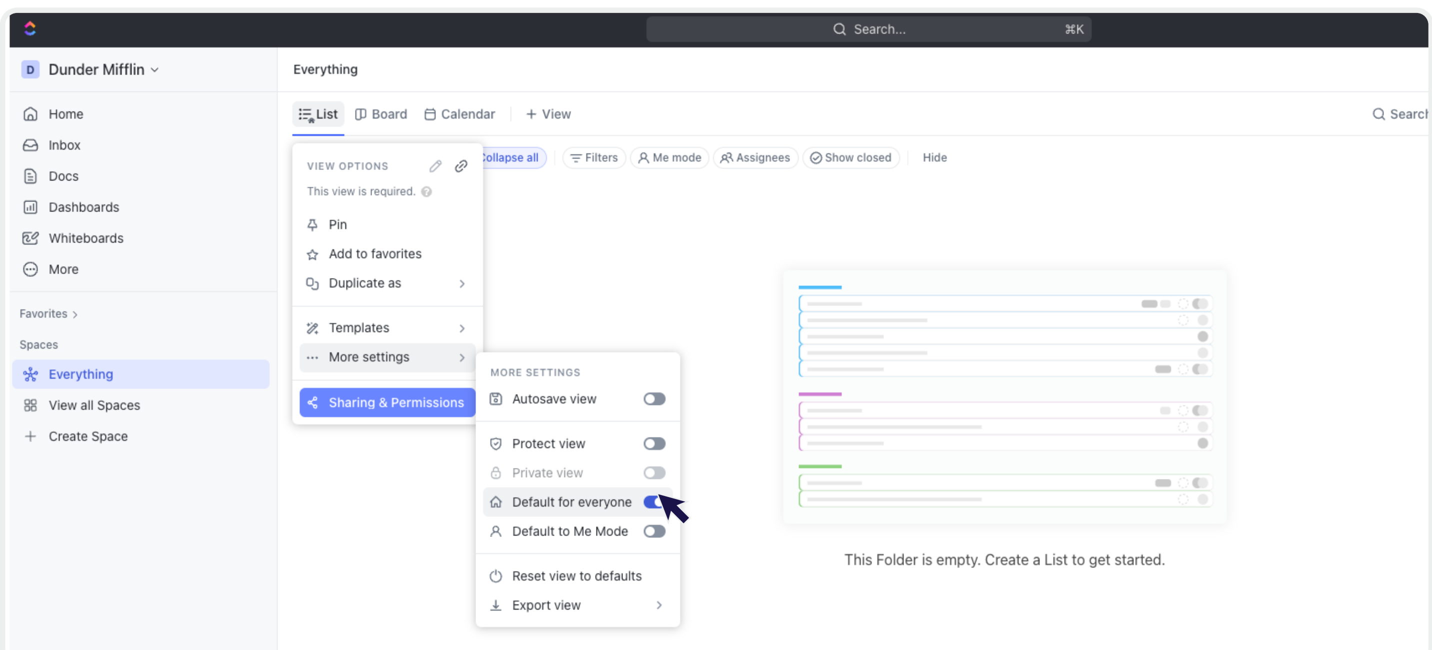
So, yes, it's important to keep your *Views* standardized and strategic, but, as you add more and more *Views* to your *Workspace*, it'll get a bit daunting and confusing. Each location can have 20+ *Views*!

Additionally, if a user goes to a certain location, there's no guarantee that they will see the *View* they were expecting to see. Someone on your team may navigate to one of your *Spaces* expecting to see something, but they may see something completely different! They may think they're in the wrong spot or some *Tasks* have dissapeared, but in reality its just because they are looking at a different *View*.

This can be troublesome for new users who aren't super familiar with the way ClickUp *Views* work. There are thousands of different combinations of *View Types*, *Filters*, *Groupings*, *Columns*, *Settings*, etc. that you can use to view information differently in ClickUp.

To help minimize some of this stress and ensure new users understands don't tink they're going crazy, you can use the *Default for everyone* feature in ClickUp. If there is one particular *View* that you want everyone to see when they click on to a *Space*, *Folder*, *or List*, the *Default for everyone* setting will force everyone to see a particular View when they navigate to that location.

To set this up, navigate to your *View Options*, select *More Settings*, and toggle on *Default for everyone.*



You also have the option to *Pin Views* which won't force everyone to look at that *View*, but it will push it to the front on your *View Menu*.

Tip #4 - Four ClickUp Views You Absolutely Need

Now that we've gone through a few different tips on setting up *Views*, I want to provide you with a few *Views* that are non-negotiable. This list could obviously be a bit longer, but I'll narrow this down to four of my favorite (and most used) *Views* in ClickUp.

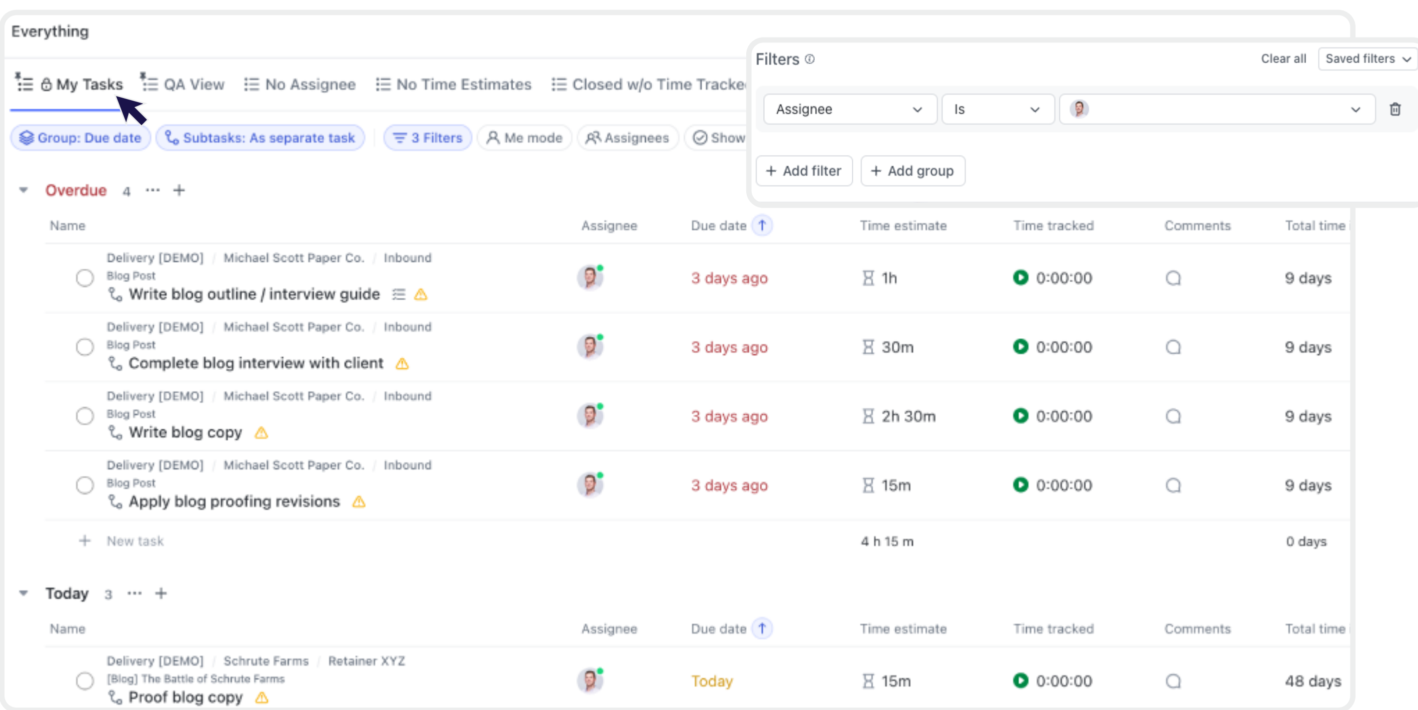
1. "My Tasks" View

This is the most absolutely necessary *View* in all of ClickUp. This *View* should be built and customized for every person in your *Workspace*.

The "My Tasks" *View* is designed to create a single view of someones tasks. Everyone should start and end their day in this *View*. They shouldn't look anywhere else for their work. Everything will be funneled in to their "My Tasks" *View*. This *View* can be customized to everyones liking and be turned in to a Private *View* so only they can see it and access it.

Here's how to build the "My Tasks" View:

1. Navigate to the *Everything* level.
2. Create a new *List View.*
3. *Group* the *Tasks* by *Due Date.*
4. *Subtasks* should be shown as separate *Tasks.*
5. *Filters* should be set to only show *Tasks* assigned to you.
6. And you can add columns like *Time Estimate*, *Time Tracked*, *Comments*, *Priority*, and *Due Date!*



2. "Assignee" View

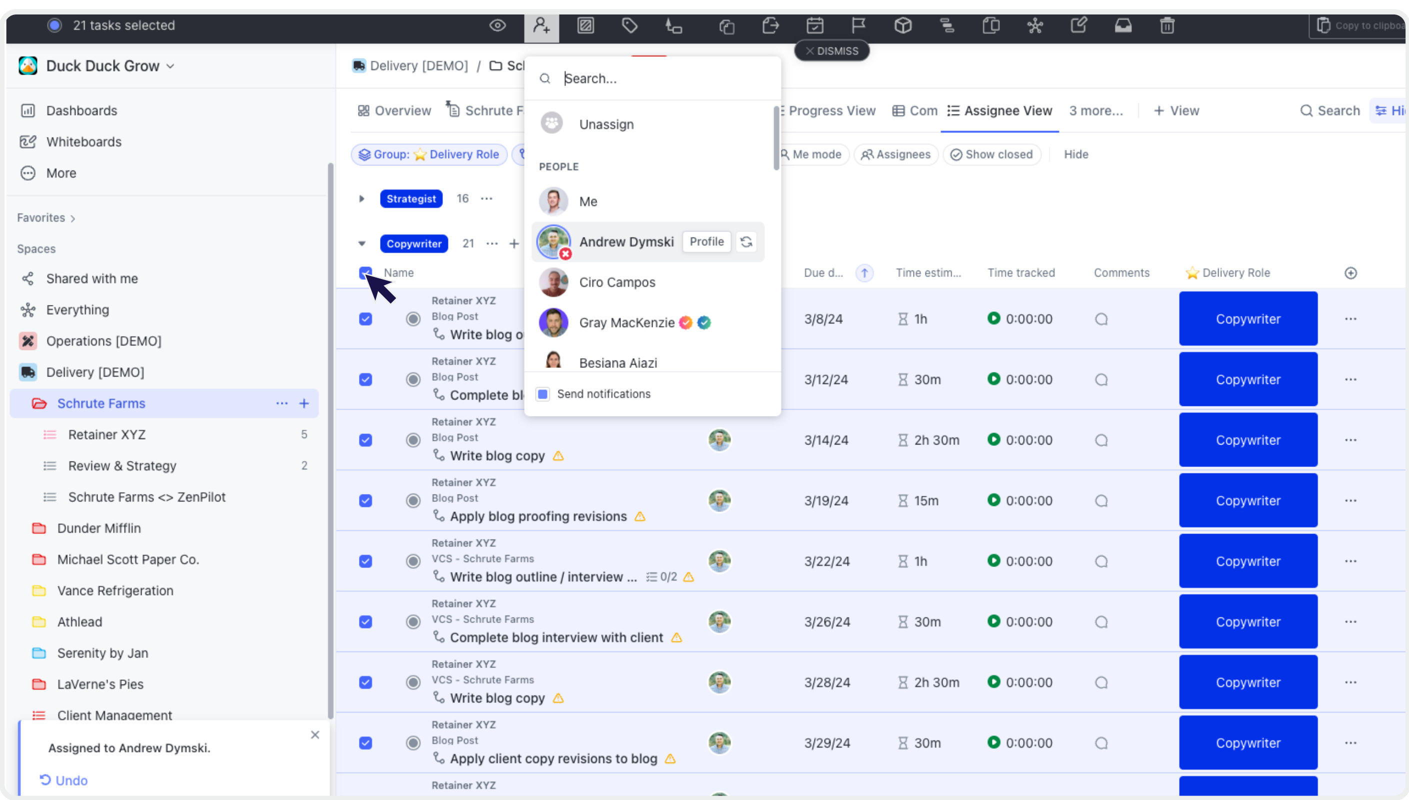
This *View* relies heavily on the "Role" or "Delivery Role" (shown below) *Dropdown Custom Field* we discussed earlier.

If you leverage *ClickUp Templates* and add a "Role" *Dropdown Custom Field* to every *Task*, you'll be able to easily assign those *Tasks* with this *View*.

Here's how to build the "Assignee" View:

1. Navigate to either a *Folder* or *List* (you can do either, but *Folders* will let you assign more work at one time!
2. Add a new *List View*.
3. *Group* the tasks by your "Role" *Custom Field*.
4. *Subtasks* should be shown as separate *Tasks*.
5. You can use the *ClickUp Bulk Action Toolbar* to select all *Tasks* for a specific "Role" and assign them to your team with a few clicks.

This *View* is perfect when you're beginning a project and need to assign a bunch of *Tasks* all at once!



3. "Date Remap" View

This *View* is actually a *Gantt View*. So for those who are *Gantt* lovers, this one is for you!

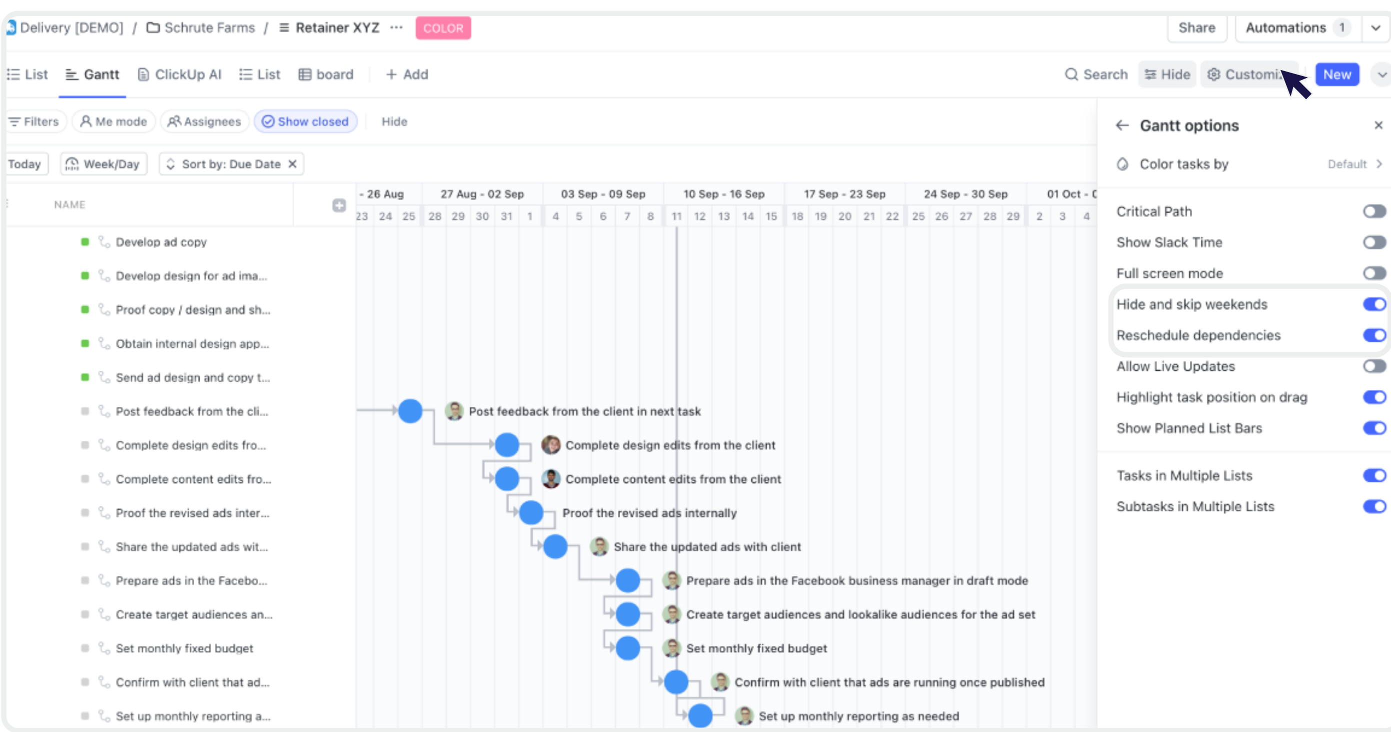
When you have a larger workflow built in ClickUp, you can leverage the *Gantt View* to remap a whole project or deliverable all at once. You'll leverage ClickUp *Dependencies* to make this happen.

Again, this is why *Templates* are super important. If you build you processes and save them as *Templates* in ClickUp, you can build *Dependencies* in to your *Tasks*, making it 10x easier to leverage this *View*.

Here's how to the "Date Remap" View:

1. Navigate to either a *Folder* or *List*.
2. Add a new *Gantt View*.
3. Click on the *Customize* button (located in the far right).
4. Select *Gantt options*.
5. Toggle on *Hide and skip weekends* and *Reschedule dependencies*.

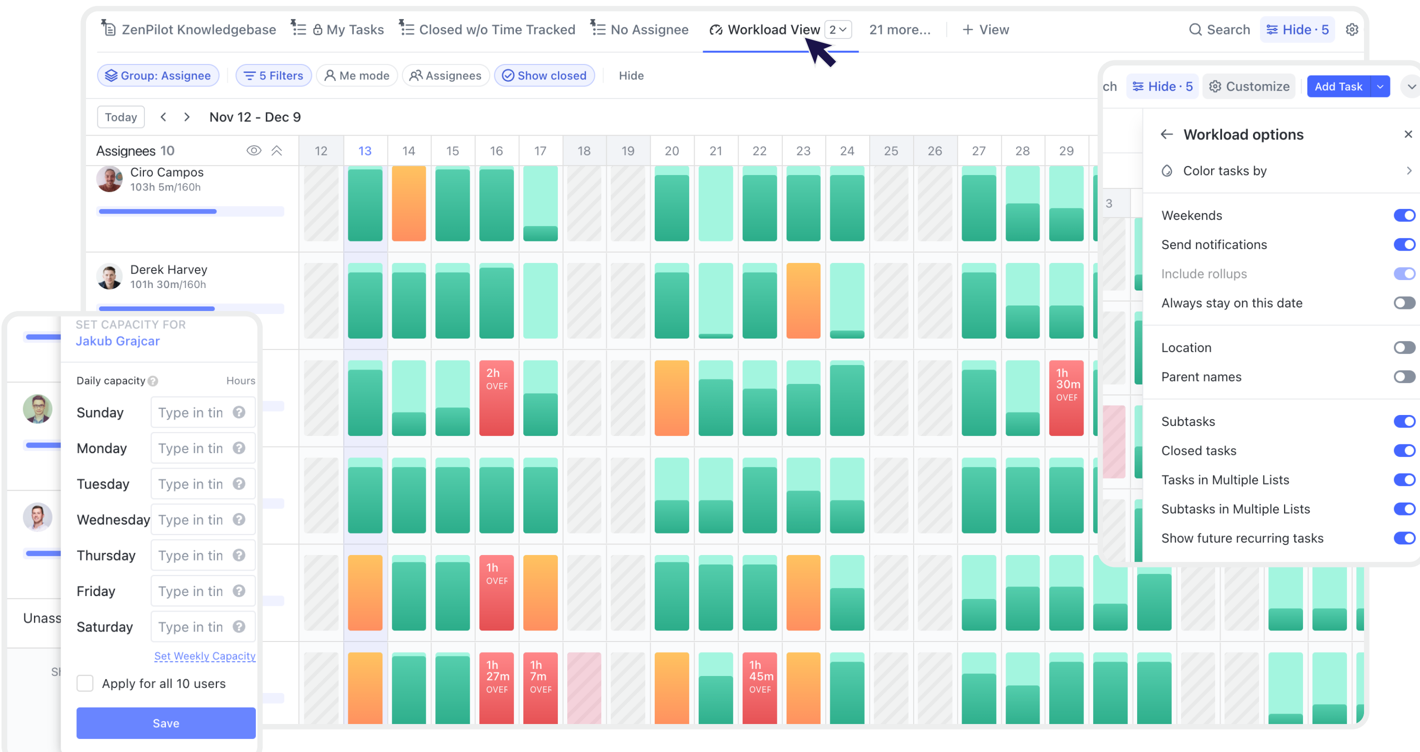
Now, when you have the *Task* structure I mentioned earlier in our *Hierarchy* and *Templates* conversations, you can leverage the *Dependencies* to grab one *Task*, drag it in this *Gantt View* to change the *Due Date*, and your whole workflow with move with it!



4. Workload View

The worst thing you can do as a business owner, leader, or manager is burn your team out. Burn out comes from both over OR underworking employees. To help with this, you need to create a *Workload View* at the *Everything* level in your ClickUp *Workspace*.

Creating a *Workload View* is relatively easy, but making it accurate isn't as easy. As mentioned, you'll want to build this at the *Everything* level to capture all work in your ClickUp *Workspace*. You'll also want to make sure *Subtasks* and *Weekends* are shown. To do this, just navigate to *Customize* and *Workload Options* and you can toggle them on (shown below).



To make your Workload View more accurate you'll want to follow a few basic principles:

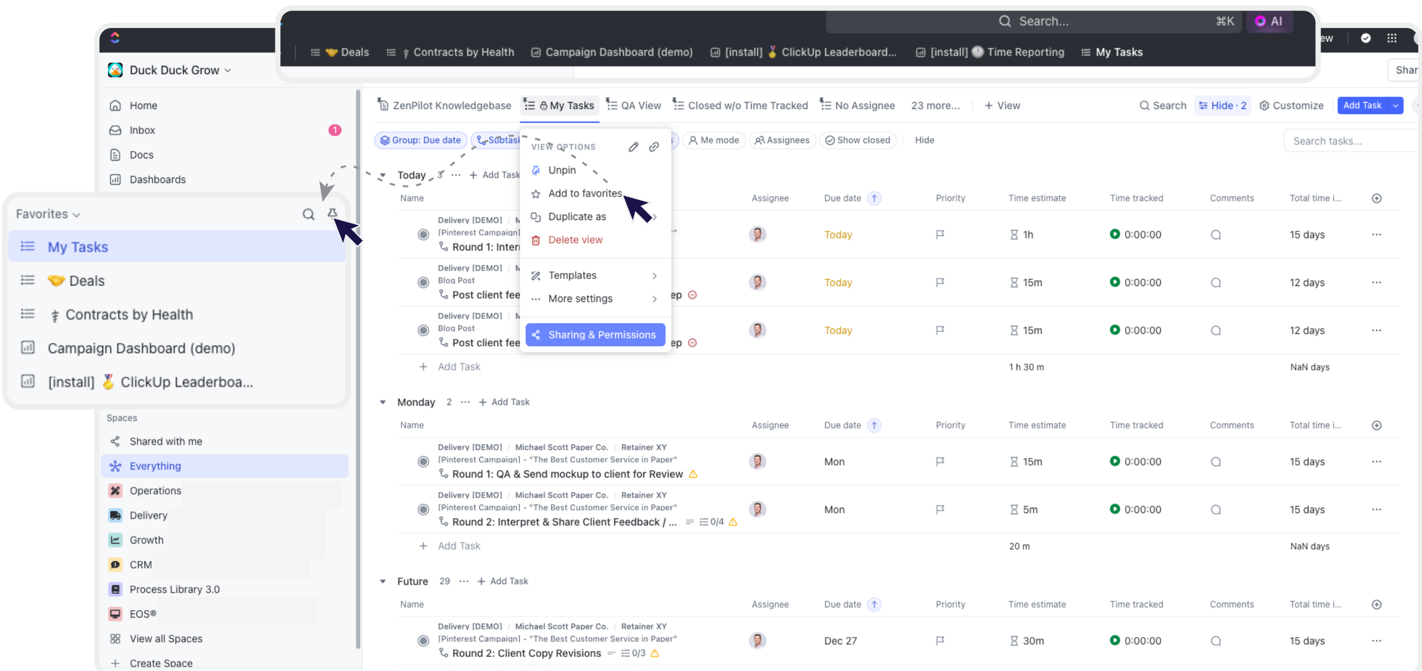
1. Every *Task* must have a *Due Date, Time Estimate*, and *Assignee*. Your *Workload View* is built on these three ingredients.
2. Break down larger *Tasks* in to smaller "bite-sized" pieces.
3. *Due Dates* should be the "Do" date.
4. Assign only one person to a *Task*.
5. Always remap *Overdue Tasks*.
6. Build your processes and save them as ClickUp *Templates*.
7. "If it's not in ClickUp, it didn't happen". Get every *Task* in ClickUp!

For more information and a thorough break down of these principles, read our guide (+ video tutorial), **"6 Steps to Accurate Workload & Capacity Visibility in ClickUp"**.

Tip #5 - "Favorite" Your Favorite Views

Lastly, you will most likely have a few *Views* that you use on a regular basis. For me, that's obviously my "My Tasks" *View*. This is where I start and end my day.

In ClickUp, you can *Favorite Views*. This allows you to pin them to the top of your screen like a bookmark so that you can easily find them no matter where you are in your ClickUp *Workspace*.



Here's how to Favorite Views:

1. Navigate to the *View* you'd like to favorite and click on it.
2. Click on the *Add to favorites* button.
3. Find your *Favorites* in the *Sidebar Menu* above your *Spaces*.
4. Hover over the *Favorites section* and click on the *Pin to favorites* button.

You'll now be able to easily navigate from *View* to *View* with only a few clicks! Plus, if you're a avid ClickUp *Dashboard* user, you can also *Favorite Dashboards* and they'll show up right next to your *Favorite Views*!

Step 10: Training Your Team & Launching

This is key part of the ClickUp implementation process that most teams miss.

After you've carefully designed out your ClickUp *Workspace* with the proper *Hierarchy*, *Views*, and *Custom Fields*, and you've built all of your processes and saved them as ClickUp *Templates*, you're ready to invite your full team to ClickUp!

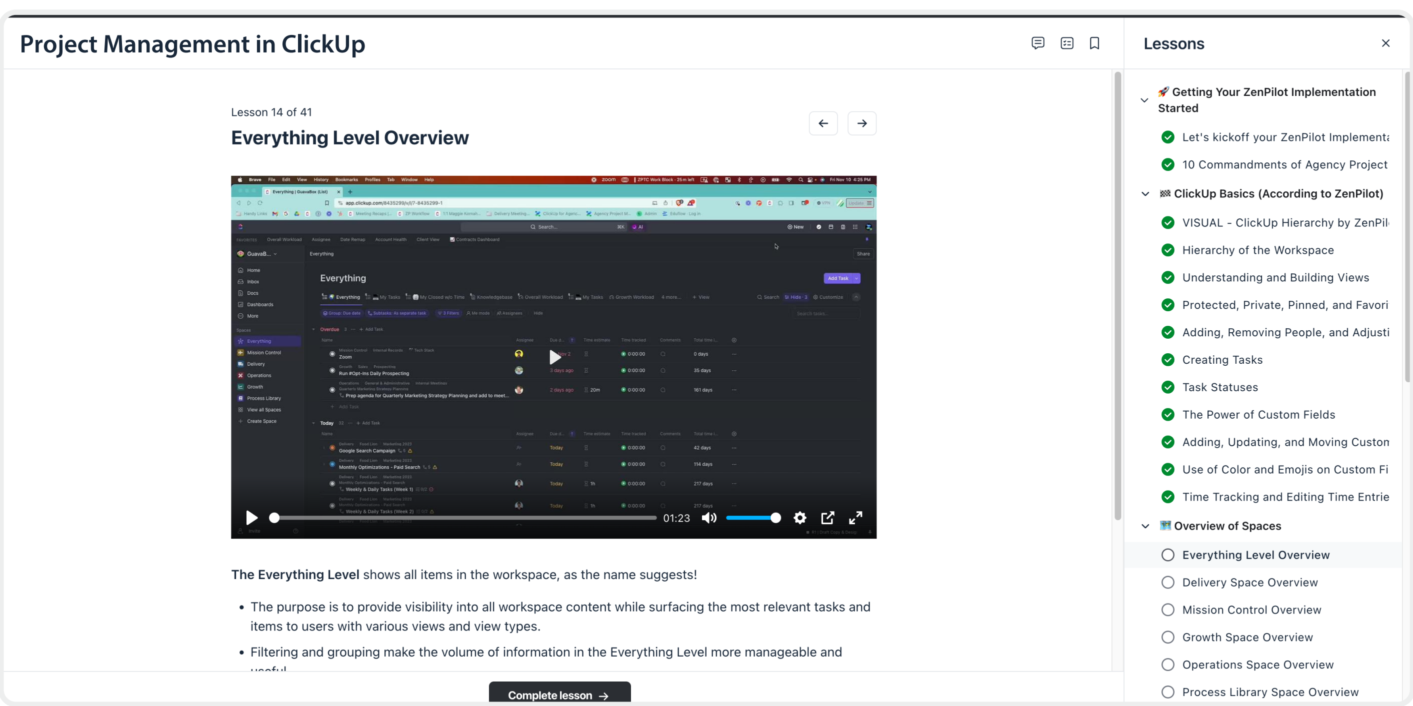
If you've already invited your team, that's fine, but I'd highly recommend you wait to get everything set up correctly first. You don't want your team jumping in, getting confused, and losing momentum right off the bat.

But beyond the right framework and setup, setting your business up for success while using ClickUp boils down to also having clear rules of engagement, educating everyone on why and how to follow those rules, and then disciplined accountability in your execution.

When you train your team, your training should revolve around 2 types of education:

1. Your expectations and ground rules around project management as a whole.
2. Orientation to ClickUp itself, your tool, and how to use it.

For example, we put everyone that works with us through a **Project Management in ClickUp Certification program.**



"ZenPilot came in with a framework, implementation, and training resources to move our agency through a lot of change in the way our 30 member team does things....change management that is super hard like task and time tracking!

They really know ClickUp, and we do some crazy complicated things in there. If you need help scaling and measuring operational performance in your agency, ZenPilot is a great partner to get it done."

Ben Labay

CEO, Speero

The first thing anyone learns in our training is the 10 Commandments. These basic expectations are detailed and applied to real-world situations.

Commandment #1 is –> If it's not in ClickUp, it didn't happen.

There's little value in doing things halfway. If you want the ability to accurately forecast workload, follow a trail to figure out where things went off track for a project, or reward team members who deliver the best work, you need that work to be centralized in ClickUp.

Explain that expectation and show your team what that looks like. If you're not working with us, build your own list of expectations and turn it into a training product for new hires.

Add in detailed walkthroughs of how you want the tool to be used and the daily habits each team member needs to adopt.

Then keep that training up to date.

You will have better data to improve your decision making and your team will be more productive, aligned, and grateful.

Step 11: Working in ClickUp

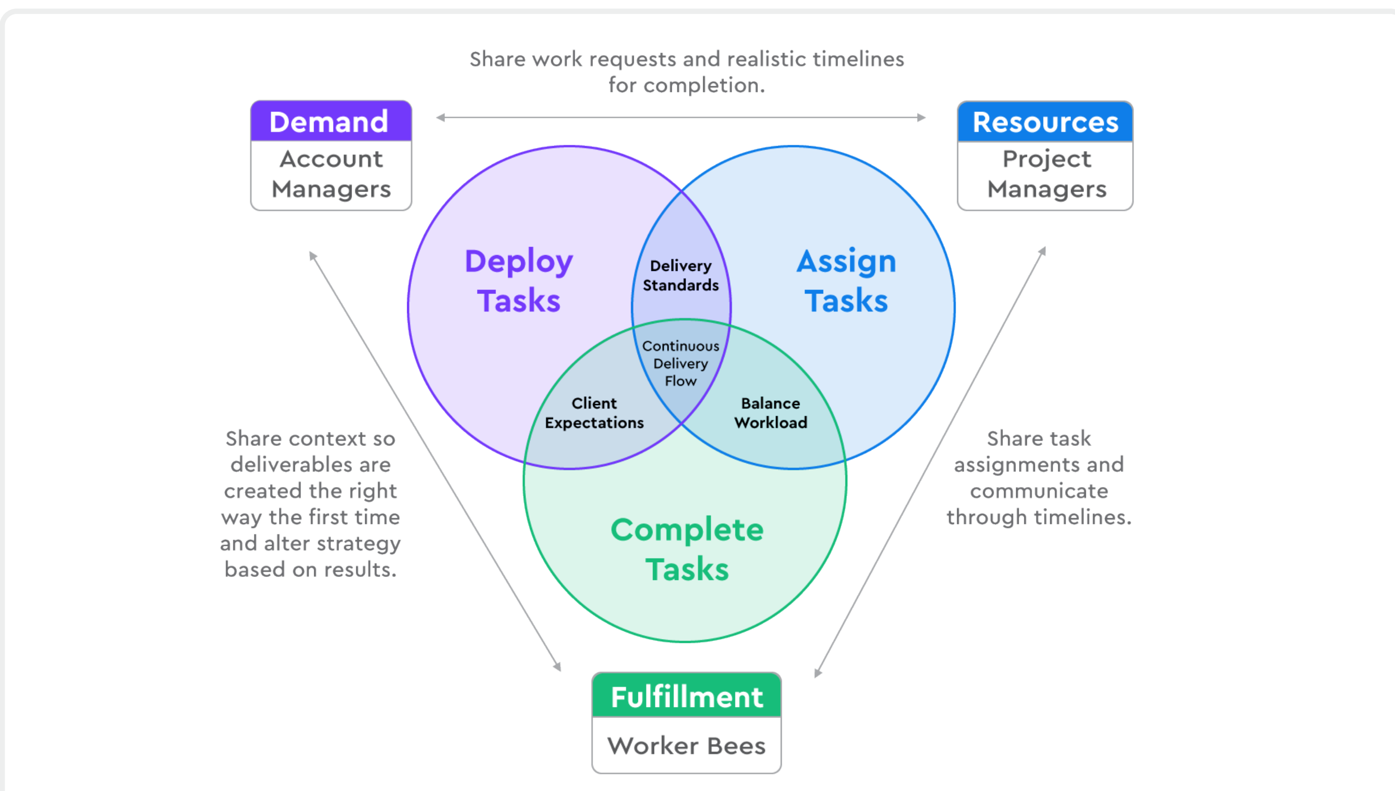
After your team is invited and working in ClickUp, what are the best ways for everyone to collaborate, communicate, and complete their work? For starters, everyone should have their *Notifications* and *My Settings* all set up correctly. After that, they should have their "My Tasks" *View* set up and ready to go.

But beyond the basics, let's walk through a few principles to follow when working as a team in ClickUp.

Creating Work

Creating work is fairly straightforward in ClickUp. Well, to be honest, it's only straightforward if you've built your *Hierarchy* correctly and are leveraging *Templates*. A proper *Hierarchy* provides a clear home for every *Task*. Additionally, *Templates* will help you set up *Tasks*, assign them out, and bring necessary information as well (*Dependencies, Custom Fields, Time Estimates,...*).

I'd recommend you have certain people on your team that are in charge of deploying and assigning work. At ZenPilot, we leverage our **"Workload-Driven Project Management Methodology"** which clearly defines roles across our team for creating, deploying, assigning, and remapping work in ClickUp. Most often, account managers are the ones deploying work and project managers are assigning work, but that may vary team to team.



And yes, obviously not every *Task* will be created from a *Template*. You can create adhoc *Tasks* in your *Workspace*, just make sure they are put in to the right location and they have the proper information on them.

And as a reminder, if you want accurate workload visibility in ClickUp, every *Task* needs to have a *Time Estimate*, *Due Date*, and *Assignee*.

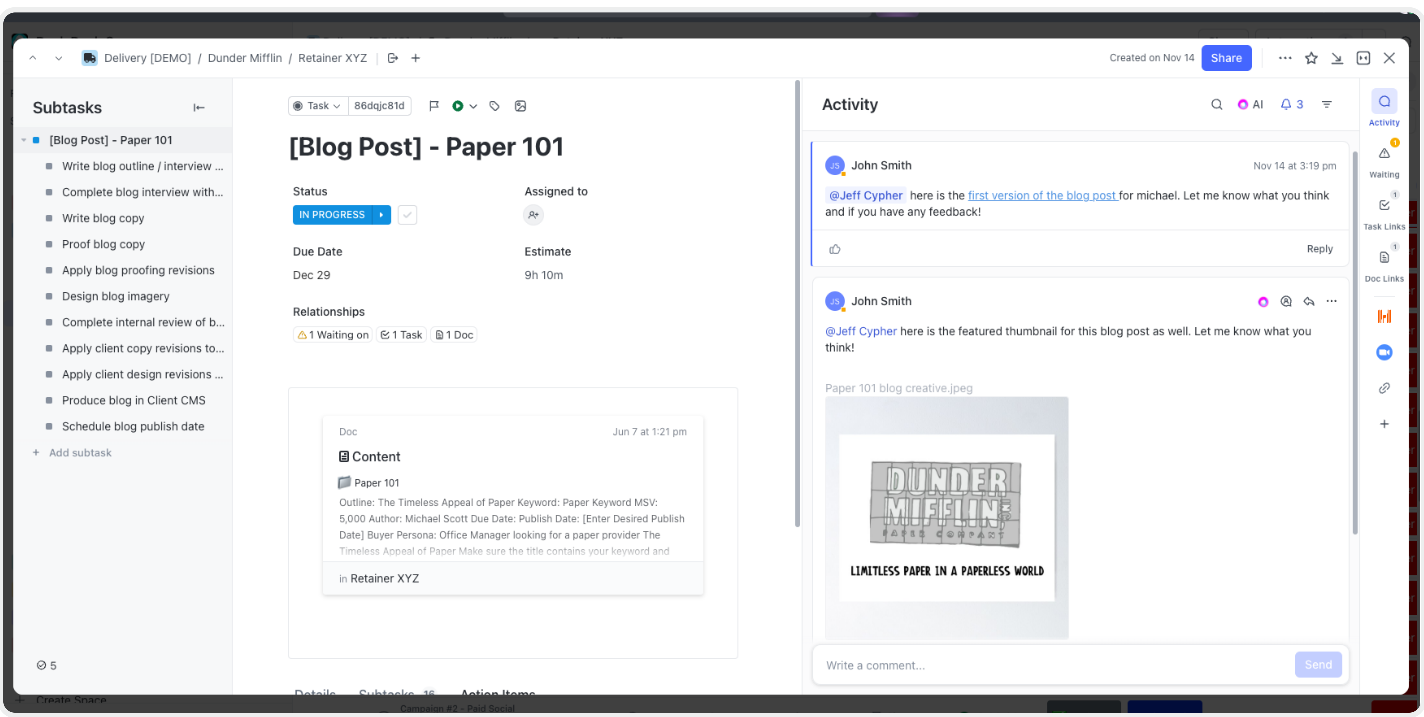
Completing Work and Communicating

After work is deployed and everyone has work assigned to them, they can start working on their *Tasks*. Again, everyone should live out of their "My Tasks" *View*. This is where they will find their work, complete their work, track their time, and communicate.

Your Parent Tasks Should Be Communication Hubs

The *Parent Task* and *Subtask* structure I recommended earlier will serve you well here. Each person will be assigned to *Subtasks*. The *Parent Task* will NOT be assigned (unless it's a *Parent Task* with no *Subtasks* underneath it).

The *Parent Task* will serve as your communication hub for that specific deliverable. All communication needs to live in that *Parent Task*. Additionally, all drafts for that deliverable - document, image, video, or whatever it is - needs to live in the *Parent Task*. This is your source of truth for that deliverable. If you follow this framework, your team will have a much easier time getting all the context they need when completing their work.



Your Team Should Aim For "ClickUp Inbox Zero"

The other pro to centralizing communication in ClickUp is that your ClickUp *Inbox* will be clean and have everything that everyone needs to get their work done! Everyone on your team needs to live in their ClickUp *Inbox* and "My Tasks" *View*. This will provide them with their work, and any additional context they need to get their work done correctly. And if you "make the process live where the work gets done" and your SOPs are connected and living in your *Task Descriptions*, you'll also provide your team with needed *Task* instructions and directions.

All of this is a recipe for huge productivity gains!

> **"Thanks to ZenPilot's methodology, we've increased our overall productivity by 400% and revenue acquisition by 25%. The team strictly adheres to timelines and the budget, but internal stakeholders are particularly impressed with their knowledge and workforce methodology."**
>
> **Shayla Pearson**
>
> *Director of Rev Ops, Seaworthy Strategy*

Adjusting Due Dates in ClickUp

Sadly, work doesn't always get done on time. Things may fall behind because priorities have shifted, someone went on PTO, or the team just fell behind. If work does fall behind, you'll want to have your project managers use your "Date Remap" *Gantt View* to remap *Due Dates*. This will keep all of the dates in your workflow together.

If you just adjust a *Due Date* in your "My Tasks" *View*, this won't adjust any of the other *Tasks* (unless you have the *Reschedule Dependencies ClickApp* turned on, which can be a nightmare so be careful with this). The *Gantt View* allows you to leverage your *Dependencies* for remapping work, while also skipping weekends!

Additionally, you want to make sure that your team is always leaving a paper trail. If they do fall behind and have to move a *Due Date*, they should leave a comment on that *Task*, @ mentioning stakeholders to let them know and provide a reason. Communicating like this will help your team build healthy habits and keep everyone aware, aligned, and accountable.

Healthy project management is all about the tools, processes, AND habits. These healthy habits are extremely important! Don't skip over them.

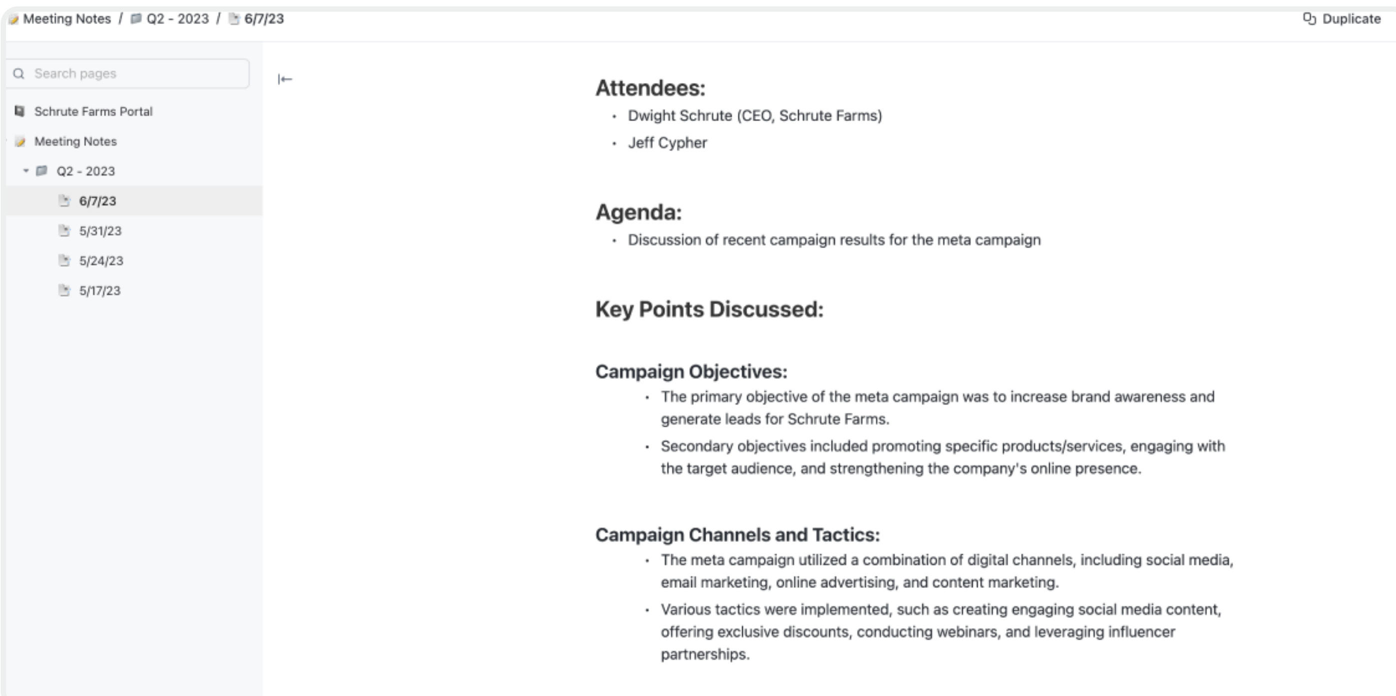
"We're significantly less distracted (especially in Slack). We are commenting where the work is being done and everything lives in ClickUp. The team was amazed at the paper trail and context they had on their tasks. It's a game changer!"

Matthew McIver

CEO/Founder, Commence Studio

Running Meetings in ClickUp

Additionally, you can and should run all of your meetings in ClickUp. You can run both client meetings and internal meetings inside of ClickUp.



Leverage ClickUp *Docs* to help you build agendas, store notes, and assign work out to your team. This will help store all of your information in one system and help you keep a nice running log of everything you've talked about in your meetings.

For more best practices and insights on how to best communicate, collaborate, and work inside of ClickUp, check out our article (+ video tutorial), **"How to Communicate Inside of ClickUp"**.

Step 12: Optimizing, Optimizing, Optimizing

Once you've launched and your team has started working in ClickUp, there are a handful of specific things you should do to help your team get up to speed quickly and then hold everyone accountable to the standards you've set.

Specifically, within the first 2 weeks, you should set up a 1-on-1 meeting with each team member to assess their usage and spot any issues as early as possible.

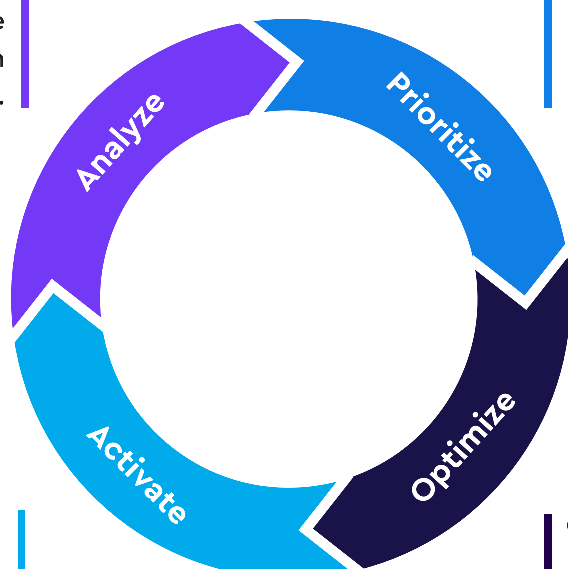
Look at obvious things like their time tracked and time estimated totals, overdue tasks, completed tasks, and profile set up.

We recommend you follow this Four Step Accountability Process:

1. **Analyze Performance:** Monitor, record, and analyze *Workspace*, *Task*, and team member performance.
2. **Prioritize Issues:** Prioritize which issues have the greatest impact on workflow.
3. **Optimize Your System:** Design and implement new solutions to solve workflow issues.
4. **Team Activation:** Train the team on new solutions to help them be more efficient.

Analyze Performance
Monitor, record and analyze *Workspace*, *Task* and team member analysis.

Prioritize Issues
Prioritize which issues have the greatest and impact on workflow.



Team Activation
Train the team on new solutions to help them be more efficient.

Optimize Your System
Design and implement new solutions to solve workflow issues.

Assign a ClickUp Champion

Additionally, to help optimize your ClickUp *Workspace*, we recommend you assign someone internally to act as your ClickUp Champion. This person will execute the consistent checks, address minor issues, escalate major issues as needed, and surface insights and aggregated data to the management team. To build healthy habits across your team, you should be following clear cadences for accountability, analysis, and improvement.

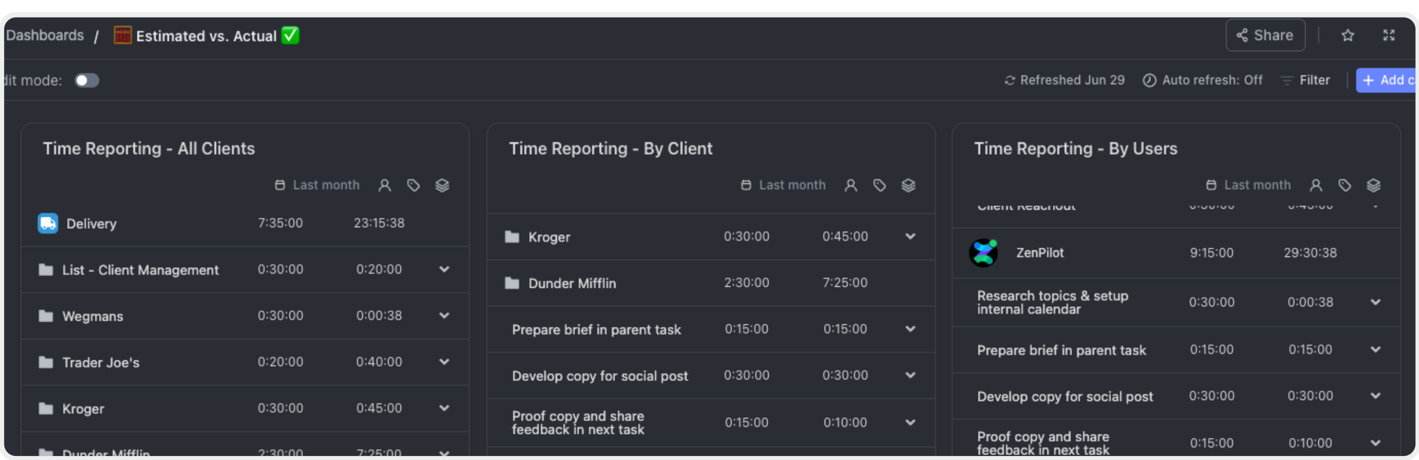
What Does Your ClickUp Champion Do?

The ClickUp Champion is responsible for the following tasks:

1. **The Daily Spot Check:** a 10-30 minute (depending on firm size) audit at the end of each work day
2. **The Weekly Roundup:** a slightly deeper dive on a weekly basis that leads to a short aggregated report to management
3. **The Monthly Review:** a monthly review that pulls data for management that should impact resource allocation, project scoping, pricing, etc.
4. **The Quarterly Analysis:** a comprehensive analysis that impacts time estimates, project planning, recruiting and hiring, client relationships, etc.

Ensure that you prioritize these tasks. Develop a comprehensive and well-documented process and assign it to a team member who will follow the process. This will enable them to provide valuable insights and maintain accountability, maximizing your investment in process development and ClickUp.

You can create ClickUp *Dashboards* to help your ClickUp Champion perform their duties. I'd recommend you build out a Time Reporting and ClickUp Leaderboard *Dashboard* to track this. For more ClickUp *Dashboard* ideas and setup instructions, check out our article (+ video tutorial), **"6 ClickUp Dashboard Examples"**.



Create Advanced Views, Dashboards, and Automations

As you continue to grow in ClickUp and your team gains momentum, you can start to look in to more advanced features (like *Automations*) in the platform or build out some pretty rad solutions. Part 2 of this guide, will walk you through all of the advanced solutions you can build out inside of ClickUp, but for now I'll leave you with a few additional articles and videos so that you can choose where you want to go next!

Here's a few advanced solutions I'd recommend:

1. **Internal Wiki:** Create an internal wiki or knowledgebase in ClickUp to keep your processes and tasks in one system.
2. **EOS®:** Run EOS (Entrepreneurial Operating System®) in ClickUp.
3. **HubSpot Integration:** Leverage the HubSpot to ClickUp integration to streamline onboarding.
4. **CRM:** Build a CRM directly in ClickUp.
5. **Client Portals:** Build client portals for your clients in ClickUp or communicate with clients directly in ClickUp.
6. **Forms:** Start leveraging ClickUp forms.
7. **Client Tracker:** Build a client tracker to start tracking client health, NPS scores, and contract data directly in ClickUp.
8. **Project Management Ratio Reporting:** Start tracking compliance, completed, and velocity ratios in ClickUp to improve project planning and execution.
9. **Agile in ClickUp:** Implement an Agile framework for your team in ClickUp.

Start simple, gain momentum, and then explore what else is out there. Or just hire a Verified ClickUp Consultant like ZenPilot, to help you make the most out of your ClickUp investment 😄.

"After ZenPilot and ClickUp helped us gain full visibility into our production resources, we've been able to increase utilization by 29% which has been a huge win for our team."

Nate End
COO, Trinity Insight

Looking for an 'Easy Button'?

At this point, you've hopefully successfully self-implemented ClickUp and are experiencing a much healthier, productive and profitable team. If you did and are, let us know! We'd love to hear about your success story.

However, If you need some guidance on taking the chaos out of project management and getting ClickUp implemented for your team, please reach out.

→ We've helped business owners increase productivity by 400%, completely remove themselves from operations, and sell their business.

→ We've helped businesses grow profits by $1.2 million in year 1, triple headcount seamlessly, and improve client retention.

→ We've helped lead complete culture resets, increased employee satisfaction, and slashed team turnover.

SCHEDULE MY FREE STRATEGY OPS CALL →

"Taking your operations seriously will change your life. And we want you to experience this life-changing impact. We've helped 3,000 different teams streamline their operations in ClickUp.

So, if you're ready to stop switching pm tools and finally experience the power of world-class operations, book a free stategy call with us."

Jeff Cypher
Head of Marketing, ZenPilot

ZenPilot helps you put an end to chaotic project management so that you can stop switching tools, frustrating your team, and wasting thousands of dollars in lost productivity every month.

We are the largest and highest-rated solutions partner for ClickUp, and we've helped over 2,700 different teams deliver better client services without all the chaos. For more information, *visit www.zenpilot.com*.