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Venn Digital Marketing
Sees Profitability Soar After Making a Pivotal Business Decision

CASE STUDY

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Matt Guevara,
Founder, Venn Digital Marketing

Highlights

Key Results

- A significant reduction in time wasted

- 2x in employee count (*3 FTEs → 6 FTEs*)

- Soaring profitability after pivotal business adjustment

- Full visiblity and clarity into client and service profitability

- Signifcant improvement in profit margins after dropping unprofitable clients

- Improved team alignment

Overview

Venn Digital Marketing is a 2-year old marketing agency providing email marketing, PPC, and SEO services to a variety of small businesses in the legal, coaching, consulting, and SaaS spaces.

As a HubSpot partner, Venn Digital helps small businesses design, develop, and streamline a full customer lifecycle program to drive revenue growth.

Despite their success and continued growth, the agency was dealing with a chaotic project management system that lacked standardization, processes, and scalability - leading to missed deadlines, a lack of visibility, and a dip in client satisfaction.

> *"Even with a small number of employees, we had a project management system that we struggled to formalize and get buy-in for adoption.*
>
> *As a result, repeated tasks had to be constantly recreated and projects fell behind, leading to a dip in project execution and client satisfaction,"* says Matt Guevara, Founder of Venn Digital

Up to this point, they had built their business on a specific niche. They thought these clients were the best in the world.

They had great connections, plenty of business, and healthy relationships, but they would soon find out some surprising news...

The Challenge

Disjointed systems led to missed deadlines and looming profitability issues

As a young, fast-growing digital marketing agency, Venn Digital was struggling to scale up efficiently. With little to no standardized processes or clarity into projects and profitability, work was often dropped or repeated and important tasks fell through the cracks because they weren't properly documented.

And aside from standardization, the project management system they were using, Basecamp, didn't provide the structure or scalability a growing agency needed.

> *"We tried to build a system in Basecamp that would work for us, but it just wasn't working. We needed an agency solution.* ***We needed to be able to see the impact of our work on each other, on our clients, and our profitability - we were missing all of this****," explains Matt.*

Without a centralized system to track work, Venn Digital experienced:

- Poor execution on client work. Tasks were missed frequently, leading to mistakes and quality issues.
- Repeated tasks and wasted time. Lack of documentation meant work was often duplicated.
- Client satisfaction issues. Missed deadlines and unmet expectations strained client relationships.
- No visibility into profitability. With no time tracking or task management, there was no data on client costs versus revenue.

Venn Digital knew they needed to find a new solution to fix their project management woes. And According to Matt, the turning point came when a coach gave him eye-opening feedback about the current state of his agency.

> *Matt explains: "We had hired a marketing/operations coach and walked them through how we do things. And their response to us was, 'you're not an agency. You're simply three guys doing marketing who get paid for it. An agency has clear positioning and a proven process to execute strategy, which brings results to their clients'.*
>
> *After hearing this I realized we needed to grow up.* ***If we really want to grow and be a real agency, we need to change how we do things****."*

This was a an eye-opening moment. Matt founded Venn Digital a few years back after acquiring more clients he could handle in his freelance work, but to become a legit agency and scale successfully, Venn Digital had to get strategic about their operations.

Venn Digital began searching for the best tool for the job. After discovering ClickUp, and loving it's promise for helping them achieve the visibility and productivity that they needed, they later realized that although ClickUp was the right tool for the job, they needed a partner to help them take full advantage of the platform.

Venn Digital searched for an expert that knew the platform, understood agency processes, and offered the training to help their team build healthy habits in the system.

After having a brief conversation with ZenPilot, Matt and the team decided it was a no-brainer to make the investment and work with ZenPilot to lead them through their ClickUp implementation.

> Matt explains: "After talking with ZenPilot, it was a no-brainer to us. **We knew we would easily save as much as we were putting into working with ZenPilot**. Just having ZenPilot set up our initial framework - hierarchy, custom fields, templates, etc. - in ClickUp, was well worth the price of admission."

The Solution

A carefully designed ClickUp hierarchy, well-defined processes, and a cadence for reporting

From day one working with ZenPilot, Matt was extremely impressed with ZenPilot's process.

> "Right off the bat, we learned a ton from ZenPilot's onboarding process. It was crystal clear. We knew exactly what we bought, what we needed to do, where we could get our questions answered, and where the communication tough points would be. There was no ambiguity at all.
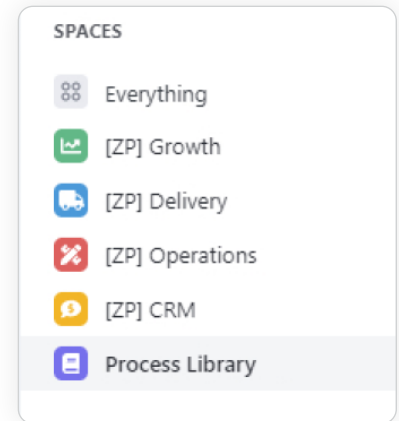>
> Right after onboarding was over, our whole team looked at each other and knew we were about to learn a lot. We had an extremely informal onboarding process compared to ZenPilot. And there was a lot in ZenPilot's process for us to replicate for our agency," explains Matt.

ZenPilot began by building out VennDigital's ClickUp hierarchy - spaces, folders, lists, custom fields, and views - to get them started.

This fast forwarded their time-to-value and provided the structure they needed to track and understand work across their clients and agency departments.

Additionally, Venn Digital received:

- A pre-built process library - providing them with the tools and resources they needed to customize their own process templates.
- Custom dashboards for visibility into client work, time tracked, timelines, and team performance.
- Pre-configured views for different agency roles - leadership, account management, project management, and individual contributors.
- An internal knowledge base to centralize their SOPs and agency information.
- A CRM space to track client health and relationships.
- A training course to guide them through the implementation process.
- And a project management certification to onboard and certify their team in ClickUp.

From here, VennDigital spent the next few weeks building out their processes and turning their "3 guys who do marketing" into a top-notch marketing agency.

Matt comments: "Every week, we'd block off our calendars and designate it as 'ClickUp time'. We'd all gather in a room and spend 2+ hours writing out our processes. Yeah, they weren't perfect right out of the gate, but we built everything we needed to get ClickUp launched."

After Venn Digital documented their processes, ZenPilot assisted the team through the launch process.

*Matt adds: "Having the courses, and seeing the real thing in ClickUp was powerful, but **having ZenPilot to answer questions about specific use-cases was amazing**. They answered our questions extremely quick and we never felt like we were a bother. Plus, they sent us over custom video tutorials to walk us through our unique situations and solutions, while also helping us build this in ClickUp."*

The Venn Digital team spent a few days migrating active client work from Basecamp in to ClickUp. This involved:

- Deploying new folder templates into their Delivery space to host client work. These folder templates were armed with standardized lists, views, and documents.
- Deploying new process templates into their client folders, adjusting timelines, and assigning work out to the team.
- Training their team on the software and the expectations.
- And hosting a launch party to celebrate their hard work.

After launching, Venn Digital assigned an internal ClickUp Champion to help manage the system, be their internal ClickUp expert, and hold everyone accountable - encouraging the team to build healthy habits in ClickUp.

> Jeff Cypher, Productivity Professor at ZenPilot explains: "You never want to forget about assigning a ClickUp Champion. They are the glue that holds this all together. You need someone to make sure the team is tracking time, developing healthy communication habits, and closing their tasks. This is what provides you with the data you need to run a healthy and profitable business."

Venn Digital followed ZenPilot's proven framework to pair the right tool, with the right processes, and the right habits. With these three elements in place, they were able to take the chaos out of their project management environment.

> "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," says Matt.

The Results

Eye opening visibility, soaring profitability, and a significant increase in head count

Shortly after Venn Digital launched the brand new system, they started experiencing improvements in productivity, team adoption, and eye-opening visibility. All of this helped expand their business and double in size.

> *"All of these improvements and visibility stems from getting everything into ClickUp. Create the tasks, track the time, and evaluate results on a monthly cadence," says Matt.*

Shortly after launch day, the Venn Digital leadership team established a healthy rhythm for evaluating their new ClickUp dashboards to see which clients were the healthiest and most profitable.

After a few months of analysis, the leadership team slowly realized they connected themselves to a niche that wasn't profitable. In fact, in some situations, they had clients outside of their main niche that were 400% more profitable.

> *Matt comments: "**After using ClickUp optimally and consistently we realized that our least profitable clients came from our main niche**. This niche was actually hurting our business and we realized we had connected ourselves to a niche that wasn't profitable. We'd be much better off if we made a switch."*

Guess what happened next? **Venn Digital made the switch and saw their profitability soar.**

> *"**This new level of visibility led to a pivotal moment in our business. Because of the switch [in clientele] we made, our profitability soared.** Without this adjustment, we would never have been able to expand in the way that we did. And that's thanks to ZenPilot and ClickUp," explains Matt.*

With ZenPilot's help, VennDigital now has the systems and visibility needed to profitably scale their agency as they continue growing.

In addition, they have also seen:
- A significant reduction in wasted time and confusion.
- A team that uses their project management system consistently, and is bought in.
- Improved team alignment.
- 2x in employee count - from 3 FTEs to 6 FTEs.
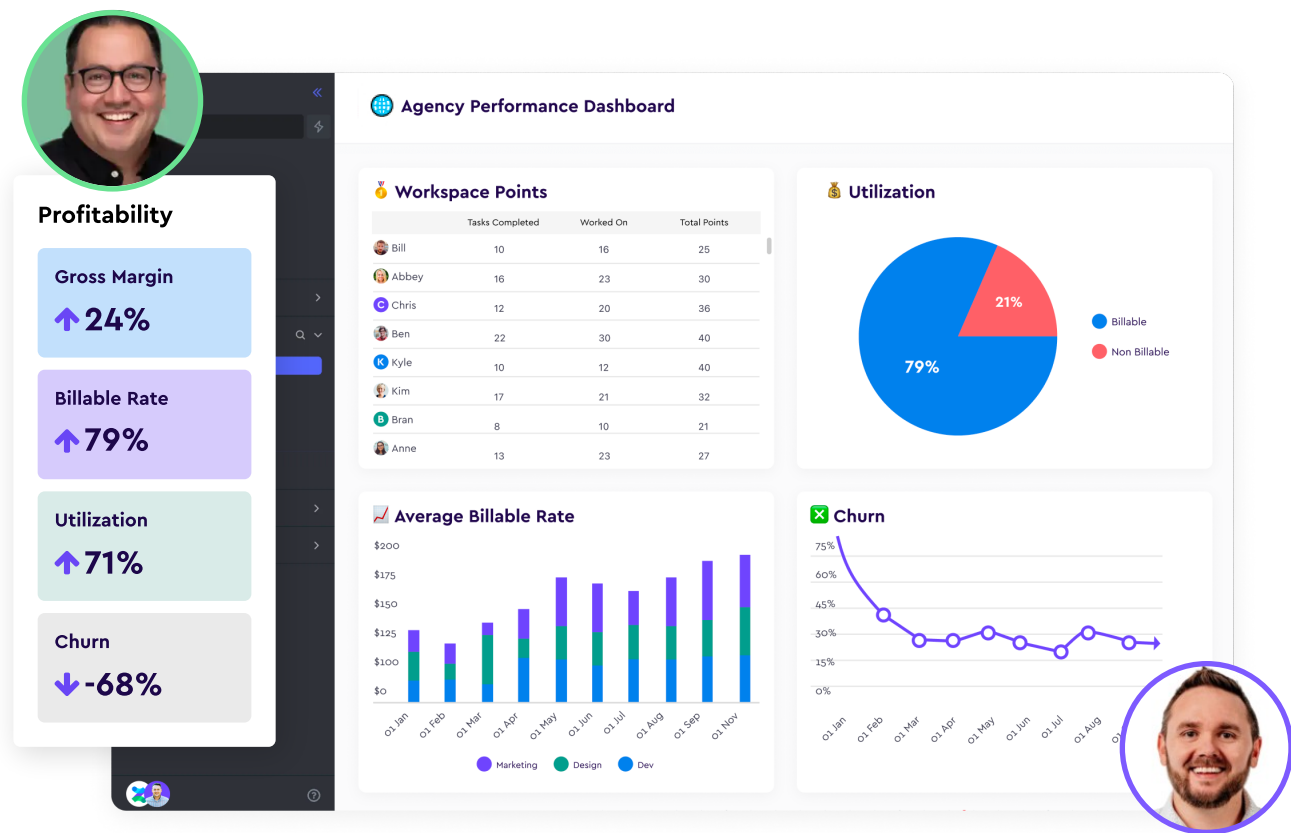- And significantly increased profit margins after dropping unprofitable clients.

The team is now experiencing a much more profitable, productive, and healthy team after streamlining their operations in ClickUp.

"Had we gone into ClickUp without ZenPilot's help, we would not be where we are today. And that's not even a stretch," says Matt.

And for any agency looking to scale up efficiently, Matt suggests making operational processes a priority.

Matt comments: "If you're an agency owner and you have not taken the time to solidify your processes and understand how to set up a proper project management system, doing that on your own is foolish.

Save the time and frustration and work with someone who that's all they do everyday. For us, this was a no-brainer, and ended up making a really big impact on profitability."

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