ScrollDown

SELF-SERVICE
CLICKUP ONBOARDING

CONFIGURATION & ENABLEMENT

Created & run by

JUSTIN SMITH

Ex-ClickUp Product Manager & Trainer
and world-leading ClickUp Solution Designer.

Introduction

You're about to make the leap and get the dominant work management tool in the market. This is probably because you've been frustrated with your current state of work management.

It's all too easy for work to become a mess, with unclear responsibilities, things getting lost in the hustle and key deliverables or deadlines being missed. Often things are so mixed together that it's impossible for managers to get a clear picture of what is going on, and what the problems are.

You're here to change that.
To get clear on what is happening, where the inefficiencies are and see simple high-level overviews.

Projects need to be held to schedule, budgets and capacity need to be clear. Do we need to hire, or can we take on extra work?

ClickUp is a big part of the answer. It has the key features needed to create this clarity and structured workflows.

It also requires setup. This can be daunting. There are a lot of powerful features, and infinite ways of setting it up, and only a clear, quality setup will get the results you're looking for.

Having an expert do it for you is effective, but costly and still leaves your team needing to be upskilled. It can be tricky to know how to maintain or adapt someone else's creation.

This document is to provide a solution, to get you and/or your power users empowered to build a highly effective work management system in ClickUp that:

Is fully customized to your work, business & people

Creates the reporting you need

You fully understand; can change, adapt & add to without worry

You can easily maintain yourselves

01   02   03   04

ScrollDown's Self-Service ClickUp Onboarding will help you do this by upskilling you and/or your power users to build it yourselves, with self-paced and fully-explained design steps, combined with optional direct 1-1 support in your Workspace from one of our team.

Key Deliverables

The 8 Step Process
to configure & build your ClickUp workflows.

A Building-Block System of foundational templates
that fast-tracks the setup of any vertical or use case.

Training for each step
Step-by-step guidance, showing you how and giving you the underlying understanding with helpful resources.

ClickUp Core Product Training
Self-paced, 2¼h training content, distributable to your entire team.

Written & Video Guides to the 12 'Workflow Archetypes'
To build understanding and act as a quick reference manual for your building block template library.

Cheat Sheets for quick-start and easy reference
Not sure what the questions to ask when building a new view are? We've got you covered.

Notification Setting Templates
To cut the noise & ensure your people get key updates.

Lifetime Access
Onboard and enable future power users.

Option to add consulting hours.
Support directly in your ClickUp from a ScrollDown Expert.

> **"** ...absolutely revolutionized our ClickUp. We went from a mess of overdue tasks and unreadable information, to a succinct, three folder workspace which catches all our clients' requirements and outputs easy to read views that we can take effective action on. Can't thank you enough for both the course itself and your personal call to help us implement everything, absolute gamechangers. **"**
>
> **EMILIO VON ZIEGLER,**
> The Call Center Doctors, COO

What You Can Expect

This is what you will end up with:

- A clear scope of what you want managed on ClickUp
- A well-structured custom Hierarchy
- Clear workflows for each section of your work / department
- Simple, effective processes in place for your people to follow
- Your entire team trained in how to use ClickUp
- A customized rollout plan
- ClickUp fully configured & working
- Increased productivity!

PLUS

- Dashboards with the reporting & visibility you need
- A continuous improvement workflow
- A library of Workflow Building Blocks to spin up almost any workflow in 30 min
- The skills & knowledge to adjust, maintain, improve & add workflows yourselves

WILL I GET THE RESULT I WANT?

Yes. Setting up ClickUp isn't truly 'hard', it's just confusing. It's a blank slate and there are a lot of options. With the right guidance it becomes straight-forward.

HOW LONG WILL IT TAKE?

We expect most proactive clients will take 1-4 weeks, depending on size, to go through the process and configure their Workspace.

WHAT IF SOMETHING GOES WRONG?

No problem. If you get stuck or run into trouble, add some time with one of our experts. We'll work with you or your team, right in your ClickUp and solve it in no time flat.

The Steps:

Step	Results
Foundations	✓ Clear & specific aims ✓ Customized Hierarchy built
The Building Blocks	✓ Ability to instantly spin up a workflow of the correct type & structure to match any type of work
Workflow Customization	✓ Your workflows complete, effective and custom designed to your business
Setting Configuration	✓ Data migrated to ClickUp ✓ Account & feature settings correctly configured
Team Process Design	✓ ClickUp simple & fast for your people ✓ Processes created & documented ✓ Effective views created
Building-In Productivity Maximisers	✓ Workflows tweaked to promote productivity & wellbeing ✓ Common effectiveness/ communication blockers removed
Rollout & Launch	✓ A custom Training & Rollout Plan ✓ Core Product Training Videos (provided) + specific workflow walk-through videos to upskill existing staff & onboard new staff ✓ New hierarchy & workflows LIVE!
Maintenance & Continuous Improvement	✓ Maintenance set up as recurring tasks ✓ Workflow in place for continual adjustments & improvements to ensure your implementation stays cutting edge

Ensuring a Successful Launch

Who?

Since this is self-serve, you'll need one or several people who are going to go through the onboarding and implement it.

This can be yourself, or not. It can also be one person or a group who will become the power users. (It can be great to have one power user in each department, if achievable.)

The Time Commitment?

- ✓ 2 hours of Core Product Training
- ✓ 7 ½ hours training & guidance for the implementation
- ✓ Implementation time

Implementation time estimate:

9½h watch time +

1-6 users:	4 hours
7-15 users:	8 hours
16-25 users:	15 hours
25-50 users:	25 hours
50-100 users:	40 hours
100-250 users:	60 hours
Upskill only:	-

Implementation time can be divided between multiple implementers, and spread out over 1 week - 3 months.

Will we be able to do it?

With excellent guidance, even people with very little affinity to building structure and systems can set up their ClickUp well.

And if you run into trouble or know you'll need help, add on some consulting hours. We'll walk you through any struggles. It really can be simple.

Meet The Creator

JUSTIN SMITH

Creator of ScrollDown

An ex-ClickUp Trainer & Product Manager and one of the most experienced ClickUp solutions experts in the world.

Creator of many of ClickUp's webinars and other training: https://clickup.com/webinars.

And the mind behind Workload & Timeline views.

FAQs

01 Will it work for me/my industry?

This onboarding works for all verticals, industries and business models. You'll be given the underlying building-block workflows and then shown how to customize them to your specifics.

If you're concerned that your workflow is extremely unique, grab a couple of additional consulting hours, and we'll help adapt it for your particular case.

02 Is there a money-back guarantee?

Yes. We're about helping. If it doesn't help, we have a 100% Money Back Guarantee. Just let us know within the first 30 days and we'll give you a full refund and remove access.

03 Is it worth the cost?

When starting with ClickUp 3 things need to be accomplished:

1. Create effective workflows
2. Upskill your power users to a high level of comptetence
3. Create understanding of the system, so maintenance and adaptation are possible

Self-Service Onboarding accomplishes all 3 by using the time you'd have to spend training anyway, plus a bit extra, to design your workflows from the ground up.

The end result is effective, customised workflows, plus highly-empowered power users, plus inside knowledge of the setup allowing your team to easily adapt your workflows as needed... **at a fraction of the cost of most other options.**

SUMMARY

Self-Service Onboarding with ScrollDown:

Guides you through each step to achieving an effective work management solution...

so you get

ClickUp fully configured with all the workflows you need, rolled out and being used by staff to manage work efficiently...

and

The reporting, dashboards & visibility you need...

while

Empowering you and your staff with the knowledge, skills & understanding to be fully in control, now and in the future.

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