

Vida Health Boosts Marketing Productivity by 50% with ClickUp

Vida Health is a virtual healthcare company that provides expert, personalized, on-demand health coaching and programs through a network of experienced healthcare providers — like dietitians, therapists, and health coaches — coupled with an easy-to-use app and award-winning content. By combining advanced technology with top-notch healthcare providers, Vida is breaking down the barriers that historically kept people from getting the best care. Vida is trusted by Fortune 1000 companies, major national payers, and large providers to enable their employees to live their healthiest lives.



50% increase in Marketing Operations productivity



1 hour per week saved searching for documents



8 hours reclaimed in meetings per week across all event stakeholders

01

The Challenge: Using Multiple Tools to Tackle Complex Projects Caused Inefficiencies

Vida Health is growing rapidly. When the company began ramping up its B2B and B2C marketing efforts, it quickly became clear that its existing productivity tools could no longer support the marketing team.

“The marketing projects we manage are incredibly complex,” says Jen Robinson, Content Strategist. “So much information needs to be included. There are so many people involved and so many moving parts.”

Work was further complicated because there was no standard project management process or tool in place. Vida Health was using Jira and Asana for project management, Airtable and Google Calendar for event marketing, Google Sheets for requests for proposals (RFPs), and Slack for internal communications. This created silos within the marketing team, made it difficult to find information, and resulted in poor cross-departmental visibility into project progress.

“I was working with several different tools, and the more I used Airtable, the less I liked it for project management,” says John Strang, Marketing Operations Manager. “Airtable wasn’t conducive to having multiple people use it on the same project, and it was difficult to collaborate with external stakeholders.”

Time Wasted on Meetings and Manual, Repetitive Work

Numerous project stakeholders and too many productivity tools meant Vida Health’s marketing team needed extra meetings to share information and bridge gaps between smaller teams. This was not an effective use of time.

“The amount of handholding and wrangling needed, whether for an event or for content creation, was very time-consuming,” Jen says. “We were spending at least two to three hours per week in meetings, and that doesn’t include unexpected one-off meetings.”

In addition, even more hours were being wasted on manual, repetitive work, such as re-creating the same types of tasks every time they needed to stand up a new campaign or project. Vida Health needed a new solution to streamline project and campaign management and save time.

02

The Solution: ClickUp’s Robust Platform Creates a Central Hub for Project Work

Vida Health needed a platform to replace disparate tools and increase efficiency. John suggested ClickUp because he was familiar with it from his own research.

“Adopting ClickUp has been a grassroots movement,” John says. “It started with me, and more people are becoming always interested in using the platform.”

Today, numerous teams within the company use ClickUp, including demand generation, marketing operations, content marketing, and event marketing—and adoption continues to increase, even among pen and paper enthusiasts. ClickUp’s Home and Notification Center, plus the platform’s Docs feature, make it a great home base for all upcoming projects and tasks.

“I used to live by my written notes, but after two days of evaluating ClickUp, I knew it was the solution for me,” says Alaina Maracotta, Event Marketing Manager.

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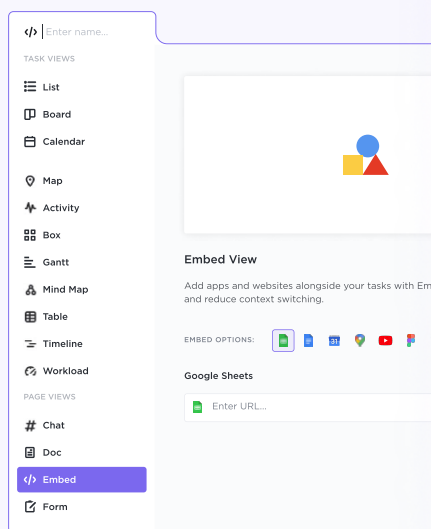
Build internal trust and goodwill through project transparency

Healthcare marketing will always be complex. But with ClickUp’s customizable Views and flexible sharing and permissions, Vida Health’s marketing team can now easily share information with external stakeholders. This makes it easy for key executives to get up to speed on event speakers and external vendors—without having to pause productive work to ask for project updates. They’re impressed by the level of visibility into project progress that the platform offers.

“ClickUp has given us a better way to showcase our successes to senior executives, and share the great work our team is doing,” Jen says. “It has also empowered me to be a better leader.”

In John’s view, the role of Operations is to take away roadblocks and friction.

“ClickUp allows me to do that,” he says.



Our previous approach to project management felt very fragmented. Many of the systems we had were overly complex, which resulted in a lot of back and forth in meetings to gain visibility into project progress.

JOHN STRANG, MARKETING OPERATIONS MANAGER, VIDA HEALTH

Reducing anxiety and stress doesn't fall into a hard KPI, but the result has felt very real for our team. We can manage an extraordinary volume of work with ease now.

JEN ROBINSON,
SR. MANAGER OF B2B GROWTH
MARKETING, VIDA HEALTH

2b

Optimize marketing and sales processes with one project management platform

Now, instead of using multiple tools, Vida Health relies on one powerful platform. The company uses ClickUp's Forms feature to manage the RFPs its sales team sends out, which has been a game changer.

"I used to spend at least a day or two cleaning up RFPs so I could present them," John says. "ClickUp saves me a lot of time creating RFP reports at the end of the quarter because I no longer have to use Google Sheets for this process. With ClickUp's Dashboards feature, I can bring all my work together in a high-level overview."

In addition, event marketing content creation and campaign management are a breeze with ClickUp. The demand generation team uses the Gantt Charts feature for campaign reporting, which has led to greater collaboration between teams as they share information related to event marketing project progress.

Thanks to ClickUp, the marketing team has experienced a 50% increase in productivity.

2c

Save time with platform flexibility and powerful automations

ClickUp's Recurring Tasks feature enables Vida Health to automate workflows and reduce manual processes. In addition, integrations with Google Chrome and Slack eliminate the need to switch between disparate tools, preventing work from slipping through the cracks. All of this functionality allows Vida Health's marketing team to onboard new team members easily and efficiently as the company grows.

"It's been phenomenal to see how much time we've saved in meetings since moving to ClickUp," Alaina says.

"What used to take us three hours per week for event planning and updates now takes us just over an hour. The teams involved now have more time to focus on more important marketing priorities."

ClickUp has given us a better way to manage up. It's allowed us to better showcase the great successes and work our team is doing.

JEN ROBINSON,
SR. MANAGER OF B2B GROWTH
MARKETING, VIDA HEALTH

03

The Results: 50% Boost in Marketing Productivity

As a growing virtual care company, Vida Health is no longer struggling with go-to-market execution. With ClickUp, the marketing team can now get campaigns and event programs out the door with ease and meet deadlines with less stress. With ClickUp, the team has seen a 50% boost in marketing operations productivity, saved 1 hour a week searching for documents, and reclaimed 8+ hours meetings per week across all event stakeholders.

The image shows a screenshot of the ClickUp software interface. At the top, there's a navigation bar with options like 'Release Project', '# Chat', 'Board', 'Box', and '+ Add view'. Below this, there's a 'Chat' section with a dropdown menu set to 'All' and 'Assigned'. The main workspace is divided into several panels. On the left, there's a sidebar with 'ClickUp' branding and navigation icons for Home, Notifications, and Goals. The central panel displays a '2022 Roadmap Doc' with a list of items, including 'Relationships', 'PAGE LINES', and 'EXCLUDED'. On the right, there's a 'Page Details' panel with options for Font, Font Size, and Page-Width. A circular profile picture of a woman is visible in the top right corner of the interface.