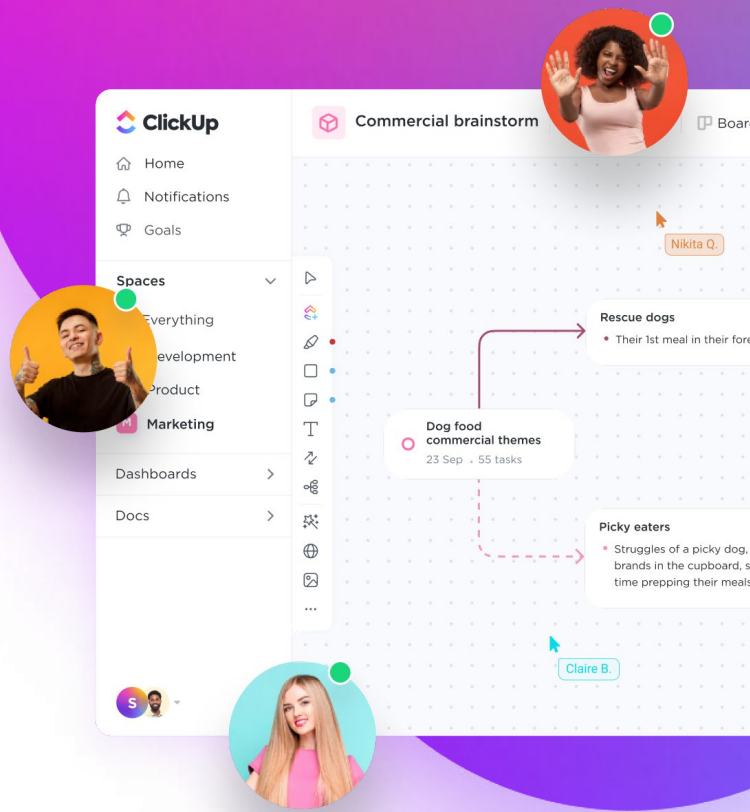


How RevPartners Delivers Client Projects 64% Faster Using ClickUp

RevPartners designs and executes revenue engines to supercharge its customers' growth. The company orchestrates, optimizes, and reports on its clients' marketing, sales, and operations processes through automation and tools. RevPartners' mission is to democratize [Revenue Operations as a Service](#) empowering the 99% to experience the benefit of RevOps.



64% faster client project delivery



83% decrease in project planning time



50% cost savings



36% more efficient status meetings

01

The Challenge: Difficulty Scaling Business Operations to Keep Up with Growth

As a growing professional services company with a remote workforce, RevPartners' existing project management tools were hindering the company's ability to streamline business operations. RevPartners needed to continue to support client project delivery and internal processes as its client roster and staff headcount increased. However, streamlining operations effectively posed a challenge for Cofounder Matt Bolian and his team.

"Because we're operating remotely, I didn't want people working in Notion and Trello and Asana," says Matt Bolian, Cofounder of RevPartners. "Working in disparate tools complicates processes and inhibits growth."

After using Asana, Teamwork, Airtable, Wrike, and Monday to manage teams in other organizations, and Todoist, Google Tasks, Trello, and OmniFocus for his own tasks, Matt found that none of these tools met his needs completely.

When Matt started RevPartners, the company used Coda.io for the first several months. Shortly after that, he embarked on a journey to find a project management system to meet his needs and keep up with RevPartners' rapid growth. "I loved it until we had 10-plus clients and 10 full-time employees," he says. "Then it imploded."

The situation became especially problematic when Matt had to start manually coding automation functionality and troubleshooting issues that were difficult to resolve. He knew he needed a powerful productivity platform to be able to integrate with other solutions.

"I didn't think I would find anything I liked. Then I found ClickUp," he says. "ClickUp changed my life and how I run my business."

With ClickUp, we can access all the functionality we need in one place, which is huge for us. We're all about adoption, and without a really easy-to-use platform that can enable it, it would be impossible to drive adoption by all teams and clients.

DANE DUSTHIMER, TRAFFIC PARTNER, REVPARTNERS

02

The Solution: Business Operations Streamlined by One Scalable Work Productivity Platform

ClickUp combines the best of all project management worlds for RevPartners. The platform offers prebuilt customizable automation and workflows for project management, as well as a knowledge base similar to the likes of Coda.io and Notion.

RevPartners now manages everything through ClickUp, from operations to human resources to marketing to client project delivery and more. The company is focused on continuous process improvement, and ClickUp plays an essential role in achieving this objective.

2a

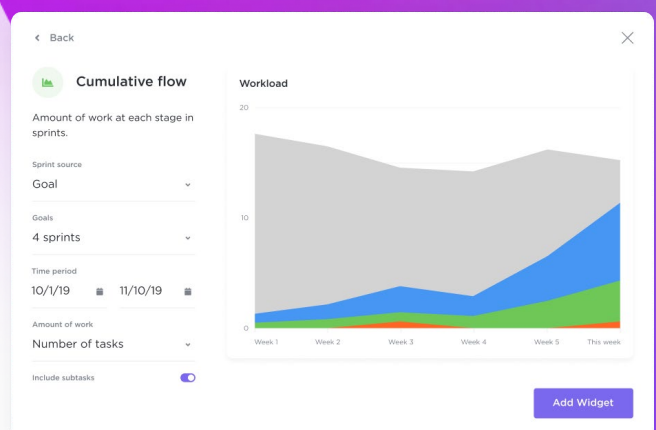
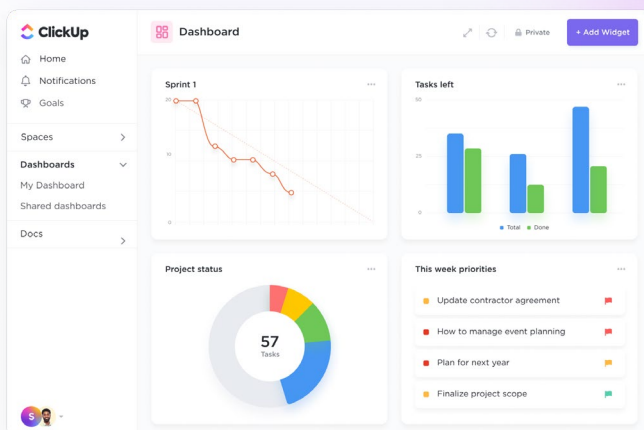
Optimized client implementation and delivery

Three or four team members work on each client account at RevPartners. The company calls these small teams pods. ClickUp [Docs](#) has been instrumental in helping RevPartners document pod processes. The company also uses ClickUp [Dashboards](#) to customize dashboards that are relevant to the objectives of different pods. These features have helped provide transparency and align pods, both contributing to RevPartners' ability to scale client project operations and drive growth.

RevPartners uses the Agile project management methodology along with ClickUp [Sprints](#) and [Workflows](#) to improve capacity planning, including the way the company manages its growing project pipeline. This has sped up delivery of services by 64%.

"If an objective for one particular client project normally takes 20 sprint points to complete, my job is to figure out a way to make it 10 sprint points so there's no delay in our ability to deliver for other clients," Dane says. "ClickUp helps me do that."

ClickUp also helps RevPartners improve client collaboration. Previous tools the company used didn't offer functionality that easily integrated the client, the way ClickUp does. "I can share a particular view, configure what I want the client to see, and show them what they can do very quickly, and that is the wow factor for clients," Dane says.



2b

Structured approach for continuous improvement initiatives

As RevPartners grows, the company is focused on continuous process improvement. ClickUp has enabled RevPartners to become more efficient by giving the organization visibility into key metrics, among other benefits. This has enabled RevPartners to streamline growth.

“Without ClickUp, we wouldn’t be able to quickly see gaps in work and process. Being able to see tasks without due dates, tasks overdue, tasks without sprint points, and tasks without assignees helps me keep the forward momentum among teams and projects,” Dane says. “These metrics aren’t available in most project management software options.”

One area of RevPartners’ business operations that has significantly improved, thanks to ClickUp, is the company’s internal playbook system, essentially the standardized process for handling each type of client engagement. What once required a four-step process with a painfully messy middle (project plan build) has now been optimized as a three-step process that no longer includes building a project plan at all—RevPartners simply duplicates the playbook using ClickUp [Templates](#). This has led to an 83% decrease in project plan deployment time.

2c

Simplified app landscape, consolidating project management and knowledge-base tools

ClickUp has enabled RevPartners to reduce the large number of apps required for the company’s client delivery and operational playbooks by fully adopting ClickUp for project management and process documentation. Teams can now access all relevant materials around a client project and get to work faster without switching tools.

With ClickUp as their all-in-one productivity platform, streamlining project creation through repurposed templates for docs and task types has been a big win for the team. Templates have decreased the processing time on client project plans and reduced the margin of error by ensuring key components of the project scope aren’t missed.

In addition, ClickUp has helped RevPartners save both time and money. It’s much more cost effective compared to all of the other tools the company would need to purchase to match ClickUp’s capabilities.

“ClickUp makes my job easier because I can communicate with clients directly through the platform without leaving it.”

DANE DUSTHIMER, TRAFFIC PARTNER, REVPARTNERS

“I love project management tools. They’re critical to an organization’s entire lifecycle. If I had to choose out of all three platforms I’ve had experience with, I would choose ClickUp, again and again.”

DANE DUSTHIMER, TRAFFIC PARTNER, REVPARTNERS

03 The Conclusion: A New Era in Productivity for RevPartners

Growing professional services company RevPartners needed to streamline business operations to scale both client delivery and internal processes. After trying countless project management tools, the company found ClickUp. RevPartners Cofounder Matt Bolian says “it changed my life.” ClickUp has enabled the company to increase transparency and communication around client delivery, streamline internal work, and save time and money by consolidating multiple tools into one powerful work productivity platform.

RESULTS



83% decrease in project planning time (from 30 minutes to 5 minutes), which helped make RevPartners the fastest tiering Elite HubSpot Solutions Partner in history



36% more efficient status meetings thanks to increased transparency and communication around client delivery



50% cost savings through tool consolidation: 3 tools in 1 powerful platform for half the price (and better features!)



64% faster service delivery with client delivery playbooks built with ClickUp Templates, leading to reduced time spent organizing and operationalizing work

The screenshot displays the ClickUp interface with several key components:

- Team Workload:** A dashboard showing workload for team members. It includes a bar chart and individual progress indicators for Brendan (23 Not done, 6 Done, 50%), Amy (12 Not done, 3 Done, 50%), and William (58 Not done, 14 Done, 25%).
- Client Accounts:** A section with a list view showing tasks like 'Vendor Info', 'Budget Proposal', and 'FinOps Review' with columns for Tracked, Assignee, Due Date, Stage, and Priority.
- Release Project:** A Kanban board with columns for 'Ready' (3), 'In Progress' (4), and 'Review' (1). Tasks include 'Release Project > Stage 1' and 'Update crucial key objectives'.
- Issues Found:** A list of issues with stages like 'INITIATION', 'ANALYSIS', and 'EXECUTION'.