ClickUp | WAKE FOREST UNIVERSITY
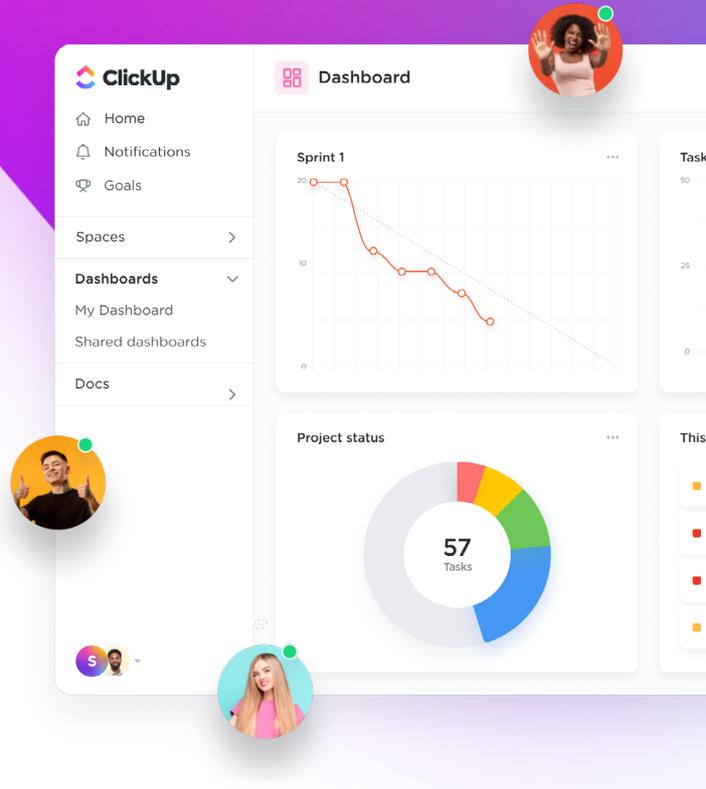
How the ADS Department at Wake Forest University Improved Data Reporting and Team Alignment with ClickUp Dashboards

Wake Forest University is a private, coeducational university located in Winston-Salem, North Carolina. Behind the university's success are multiple departments working together to create meaningful experiences for their students. Alumni and Donor Services (ADS), which manages fundraising campaigns, alumni relationships, brand identity, and publications within the Wake Forest community, comprises many teams, including Reporting, Funds and Direct Marketing, Donor Experience, Advance Informational Technology (AIT), and Projects.

With multiple teams involved and projects running simultaneously, the Director of ADS Projects, Morey Graham, and the Associate Vice President of ADS were eager to find a long-term solution to bring all the teams into one workspace and improve team alignment.

01   The Mission

Morey realized they needed a flexible work management solution with real-time data reporting and customizable capabilities to unify teams.

02   The Challenges

Before ClickUp, ADS and the other departments within University Advancement were scattered across different platforms. Each team had different workflow styles and preferences, forcing them to implement multiple work tools, which led to additional issues, such as work efficiencies and inaccurate data reports.

2a   Wasted time across different tools

Teams were scattered across Jira, Workfront, Asana, Trello, Google Docs, and Notion to satisfy each department's needs and preferences, but this only created friction in their workflow and perhaps even led to counterproductivity.

Since there were several apps involved, teams were constantly switching between apps to input data, locate documents and reports, and get task updates on ongoing initiatives, wasting valuable time that could have been spent on other opportunities.

Additionally, data management became a nightmare. As teams worked in multiple software applications, it was unclear to other teams when, where, and how data was uploaded, resulting in a disconnect among teams, duplicate work, and data entry errors.

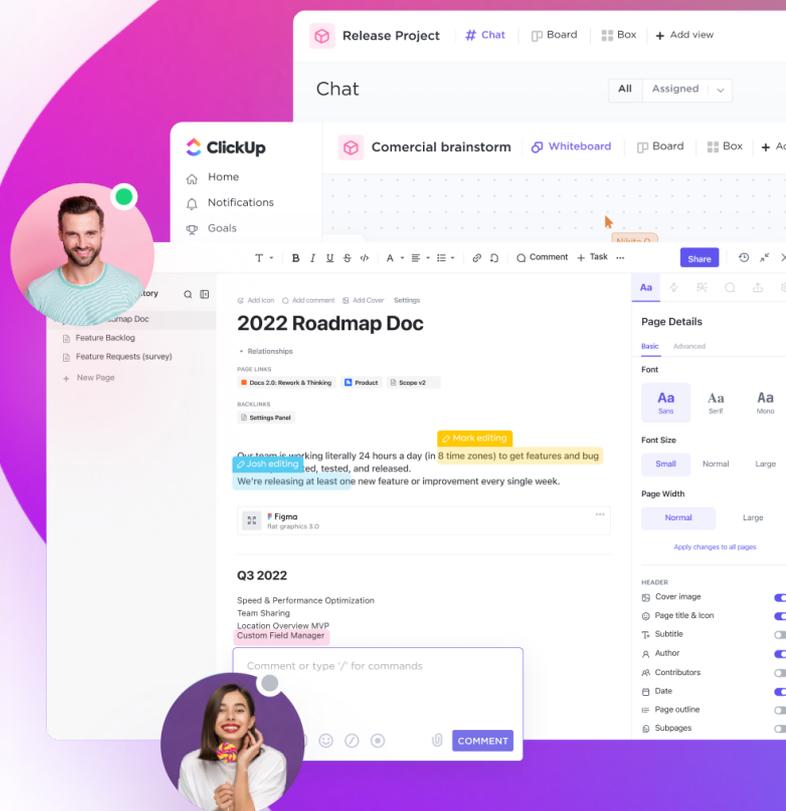**2b** Poor team alignment & work silos

Working across different platforms and with a limited tool for data reporting and collaboration decreased team cohesiveness—the ADS team and Morey felt disconnected from one another and from the organization's overarching goals.

As a result, teams and leadership were unable to evaluate tasks, projects, and data accurately. This led to frustration, unaligned priorities, and issues with workload distribution.

Situations worsened when teams were directed to work remotely due to COVID-19.

"Due to the pandemic, certain team members have received increased responsibilities, and working remotely added to the magnitude of our work management and team alignment issues. Team leaders needed a way to see if team members are over-assigned with tasks in order to readjust expectations and assignments, but the lack of reporting tools made this difficult for us."

"Because teams worked on separate platforms, it created work silos and made it challenging to communicate task updates and progress effectively. As for data reporting, our leaders struggled to find accurate reports they needed to make strong business decisions for our organization. The most frustrating part was we wasted duplicating work efforts due to the lack of project visibility across teams."
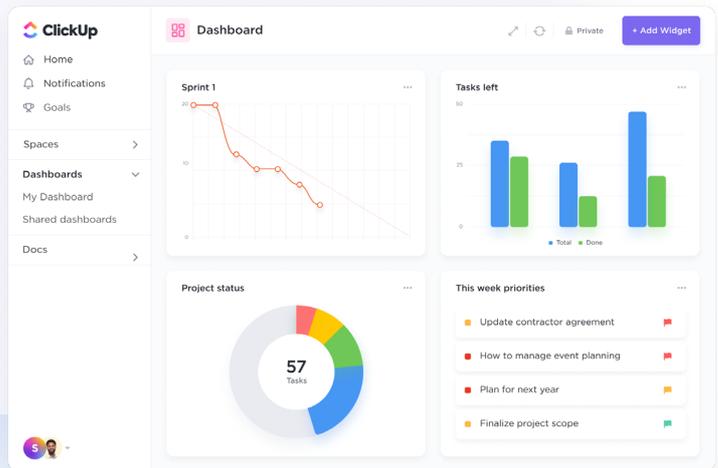
ClickUp

03 The Solution

Morey, ADS, and other University Advancement groups did extensive research and found ClickUp to be the best solution with its ability to adapt to any workflow preference, along with its powerful data reporting abilities.
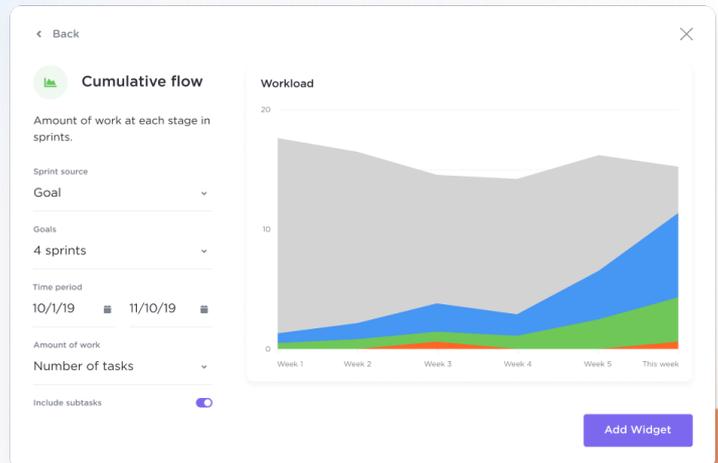
3a Reliable data reporting & reduced update meetings

Dashboards in ClickUp have provided Morey's teams with valuable, reliable, and real-time data reports. Their Dashboard widgets now provide accurate and valuable information about their projects, including active and pending tasks, completion percentage, time usage, milestones, and more. Moreover, leaders now can view each team member's workload, helping them identify workload and capacity issues more efficiently.

Teams no longer have to switch between apps to find information, worry about double data entry, or schedule update meetings—Dashboards in ClickUp have become their go-to for all important details.

> "We can now collaborate within one system and have visibility into critical data. This allows our various teams to report progress, identify workload and capacity issues, and plan in a more accurate way."

3b Improved cross-departmental alignment

Since ClickUp Dashboards are fully customizable, teams can manage, track, and organize their work the way they prefer and make sense with their workflow. This type of flexibility has encouraged teams to work in one platform, and in turn, they're able to communicate and update each other more efficiently.

With ClickUp Dashboards, teams and leadership now have the level of visibility needed to keep track of the progress of all their joint and individual projects, share KPIs, and much more.

> "We used to have trouble staying on top of all these initiatives, but now we're able to monitor them easily because every team member can see how their individual efforts contribute towards meeting larger goals!"

ClickUp

The Conclusion

With ClickUp Dashboards, Morey and the ADS department at Wake Forest University have gone from silos to working together as a cohesive team.

Dashboards provide a visual representation of their work, enabling teams and leadership to make better data-driven decisions. This level of transparency, visibility, and real-time data reports was exactly what they needed to stay aligned and work towards the same goals.

> **"** *The new ClickUp system allows us to drive our entire work process, rather than just tracking it.* **"**

The ClickUp Difference

Feature Benefit: Project Visibility.

Dashboards in ClickUp highlight important project information, provide teams with a high-level overview of their work, display KPIs, and keep everyone in the loop about project status, updates, and more. This level of data reporting enabled Morey and the ADS department to stay updated and aligned on goals.

What I Love Most: Email in ClickUp.

Morey uses the Email ClickApp to integrate her work email communication into ClickUp seamlessly. She can send and receive emails directly within ClickUp tasks, attach documents to email threads, and manage conversations alongside relevant work without ever having to tab again.

Pro Tip: ClickUp Integrations.

ClickUp's integration capabilities allow Morey and the ADS department to consolidate their work and optimize the ClickUp platform. Connect ClickUp to 1,000+ work tools, including your most-used apps, to streamline all your work in one centralized place, avoid double entries, and improve your team's work efficiency!