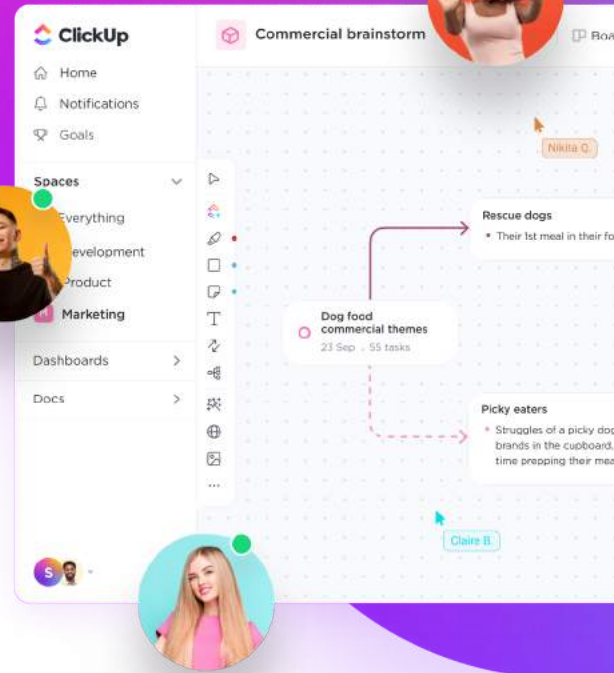


How Trinetix transforms design operations and cuts meetings by 50% with ClickUp

As a globally trusted digital partner to its clients, information technology company [Trinetix](#) solves real business challenges with technology solutions to unlock a new world of opportunity. Trinetix helps customers move from vision to impact with its experience design, mobile app development, intelligent automation, and digital assistant services.



50% reduction
in needless chats
and meetings



83% decrease
in planning time
on projects



20% increase
in design team
satisfaction



5+ tools
consolidated
with ClickUp

01

The challenge: Wrong tool for the job weighed down growing design team

Trinetix provides full-cycle design and development solutions for enterprise companies like Coca-Cola, McDonald's, and Procter & Gamble. With its impressive client roster and busy project queue, seamless project execution is crucial—however, this was a challenge for Trinetix without the right productivity platform.

The company's Design Operations team was struggling to get new designers onboarded and work-ready. At the same time, long-time design team members were finding it difficult to use an excess of existing project management tools effectively, including Jira, Confluence, Google Spreadsheets, and Google Docs.

"We were cobbling together multiple tools for internal learning and development purposes," Kateryna says. "This resulted in information loss and less focus on the goals set for each designer's role."

At the time, Trinetix was using Jira—however, the tool was complicated. Working with it properly was difficult and time consuming, both from a functionality perspective and because it required the team to have numerous meetings to get work done.

"Too much context switching between the Jira and Confluence tools, coupled with task repetition across hundreds of client projects, was bogging us down," Kateryna says.

Scaling with Jira and Confluence was also cost-prohibitive, as it would require two separate subscriptions in addition to paid plugins that would need to be paid for per user. So Trinetix began the search for an easy-to-use,

cost-effective solution that would suit its team of nontechnical designers and meet internal process needs.

"We asked our team about the toolset and found out that the fewer tools they had to use for operations, the less frustration and uncertainty they would have," Kateryna says. "We needed a central platform for work that could also improve collaboration with our development team, so we could execute on client projects seamlessly."



We didn't want to adopt a new tool for one function and a different tool for another function. We wanted to have projects, internal operations, and goals all in one place. ClickUp has all of the functionality we wanted.

KATERYNA SIPAKOVA, PORTFOLIO LEAD AT TRINETIX

02

The Solution: A single platform to scale design team operations and project execution

The DesignOps team conducted research to find the most suitable task- and time-tracking tool for their needs. They compared various tools based on their features, agility, adaptability for different project types, and pricing model. A key requirement for the team was to find a tool that could consolidate multiple necessary features, such as documentation, table view, Gantt charts, and integrations, into one platform. Some members of the design team had already considered ClickUp to be a potentially perfect tool, so they suggested that the team take a closer look at it. And it was a strong "yes" from the very first interaction. Today, Trinetix uses ClickUp to run its high-performing Design Operations team along with Product Development, Marketing, and Business Development teams. From improving efficiency and output to creating a culture of knowledge sharing and accountability, ClickUp offers four key benefits to Trinetix, all while keeping the team motivated and satisfied.

2a

A flexible platform to streamline and surface top priorities

Prior to implementing ClickUp, personal development plans for Trinetix's employees were housed in many different places, including Gmail, Google Calendar, Google Documents, and Google Spreadsheets. Now, these plans live entirely in ClickUp.

"Our previous approach had disadvantages for management because it was hard to find anything. That's why we came up with the idea of the Personal Development Space in ClickUp," Kateryna says.

Now, Trinetix leverages ClickUp [Gantt Charts](#) and [Boards](#) to create powerful visual plans that enable each designer to have a highly personalized career path. Each plan contains tasks, timelines, goals, and milestones specific to an individual designer.

2b

Automated workflows that keep client projects moving

ClickUp [Automations](#) also help Trinetix save time by automating routine work such as optimizing communications from designers to let project managers know certain tasks have been completed.

“Any task that goes from ‘in progress’ to ‘review’ triggers a notification to the design lead who needs to review the task after the designer has completed it. After that, the task is auto-assigned to the business analyst on the project,” says Kateryna.

Once an automation is created, the new process is set from then on—optimizing Trinetix’s workflow, relieving employees of communication overwhelm, and reducing the chance of tasks being missed or forgotten.

2c

A centralized and consistent knowledge base for all project documentation

Centralizing project documentation with ClickUp [Docs](#) in the form of standardized ClickUp Templates has been a game changer for Trinetix. All of the information on any given project is collected in one place, and it only takes 15 seconds to create a template.

“Everyone filling out a template uses the same approach,” Kateryna says. “Because of that, people from other teams, such as our development team, can find the same kind of information about different projects in the same place, even if they’re unfamiliar with the documentation.”

2d

Increased transparency and ownership around Objectives and Key Results (OKRs)

Trinetix also leverages ClickUp to set OKRs for each member of the design team. Defining the OKRs was a collaborative process that involved the entire team; each designer chose the targets they wanted to work toward.

The company uses ClickUp to set yearly OKRs as well as sub OKRs. For example, an annual OKR related to boosting the team’s growth and satisfaction contains sub OKRs such as creating individual growth plans. It also contains targets (actions that are required in order to achieve a goal) and tasks that are related to the targets, and employees can assign themselves to any component of an OKR.

“This approach allows everyone to take ownership of OKRs, not just the design leads,” Kateryna says. “It’s really important for the team to make their own decisions and make an impact, because when one person decides everything for the team, it stifles creativity.”





ClickUp has been pivotal to scaling our design operations. New designers are ramping up quicker than before, and our management team has a new level of insight into our workload and goals.

KATERYNA SIPAKOVA, PORTFOLIO LEAD AT TRINETIX

The Results

 **50% reduction in needless chats and meetings**

 **83% decrease in planning time on projects**

 **20% increase in design team satisfaction**

 **5+ tools consolidated with ClickUp**

03

The conclusion: A highly efficient, happy design operations team

Onboarding, project management, and learning and development are now a breeze with ClickUp. Information is templated and centralized in one place, improving focus for the designers—as well as their ability to work toward their personal goals and company OKRs.

The team is no longer bogged down by complicated tools and context switching between tools. Instead, they're now thriving with a user-friendly and cost-effective solution that enables them to execute seamlessly on client projects.

