ClickUp | shopmonkey

# How Shopmonkey reduced time to complete marketing approvals by 50% with ClickUp

Shopmonkey is a cloud-based, all-in-one auto repair shop management platform that allows shop owners to streamline their workflows and better understand their business. The software is designed to modernize the entire auto repair shop process, from customer service, to parts inventory, to workflow management, and more. Shopmonkey is used across the full spectrum of auto repair service specialities, including general auto, tire, and wrap and detail.
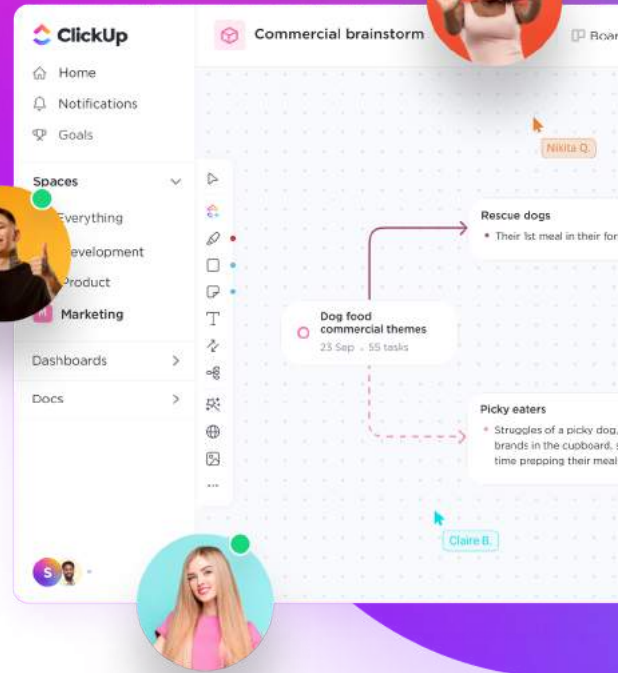
50% reduction in time to complete marketing leadership reviews and approvals

33% reduction in time to complete design requests

2 months to onboard team, thanks to ClickUp's user-friendly software

01 The challenge: Lack of project visibility stalls marketing team's project execution

As Shopmonkey's growing marketing team brought new employees on board, the company knew it was time to dedicate someone to drive the adoption of ClickUp, the powerful productivity platform Shopmonkey had recently purchased but hadn't yet been able to take advantage of.

At the time, Shopmonkey's marketing team was fielding requests from other departments within the company via multiple communication platforms. This caused information to become siloed and led to a lack of overall project visibility.

"Different people on the team were being approached to take on projects around our product launches and thought-leadership content, and there was a lot of key information missing from those asking us to do the work," says Rachel Gilstrap, Marketing Project Manager at Shopmonkey.

Collaboration within the marketing team itself was also minimal. Many employees were working on projects separately, and information was being housed in a variety of places like Notion, Google Docs, Slack messages, and even personal notes. This stalled effective communication and collaboration, and it was a challenge to get approvals in a timely manner. It also led to miscommunications about responsibilities, and tasks fell through the cracks.

"There was no clear way to see a project's status or each team member's capacity at any given time," Rachel says.

> *An important ideal of Shopmonkey is to help every shop thrive. With ClickUp, our marketing team has been able to build out dynamic thought-leadership marketing content to do exactly that.*

RACHEL GILSTRAP, MARKETING PROJECT MANAGER AT SHOPMONKEY

02 The Solution: ClickUp's work hub fuels the Shopmonkey marketing operations engine

When Rachel's boss asked her to implement ClickUp, Rachel wanted to make sure she was knowledgeable about the platform and could lead her marketing colleagues to efficiency. So she became ClickUp certified at three different levels. She's now a Verified Ambassador for ClickUp, too, which enables her to be part of conversations about how to improve the software.

"After I learned how to use ClickUp, I knew it would be incredibly important to build out our marketing workspace in a way that would fit us as a team. Since our team was newer, I wanted to see how they worked before imposing my own ideas," Rachel says. "This helped lessen the chaos of transitioning from many platforms to one."

2a Streamlined marketing request process accelerates intake

To streamline incoming requests from other departments, Shopmonkey's marketing team harnessed the power of ClickUp's [Forms](#) to create a process that was easy for cross-departmental stakeholders to follow.

Using forms for project requests enables the marketing team to identify issues and ask questions about projects early, reducing back-and-forth conversations. Rachel became the main point of contact for project requests, which keeps the flow of information organized and frees up her team's time.

"This has helped me keep an eye on projects and the team's capacity, and gain an understanding of top company priorities that marketing can support," she says.
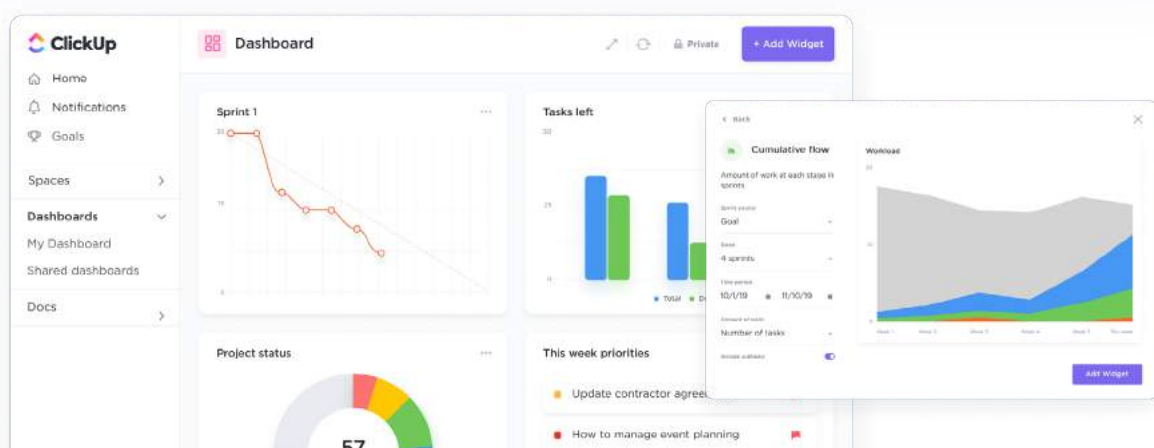
2b Automated workflows streamline handoff between marketing teammates

ClickUp's Automations have also been a game changer for Shopmonkey.

"Taking away an element of human error and relying on automations to inform us of next steps has made our team confident that they aren't missing important project milestones," Rachel says.

Leveraging automation to handle busywork has helped Shopmonkey drastically decrease project miscommunications and forgotten tasks, resulting in a smoother project management process and allowing the team to focus on what matters.

2c Highly customizable views create holistic marketing project visibility

Using ClickUp's customizable views to create color-coded labels and columns, and personalize the user experience, has helped Rachel get her colleagues invested in adopting the software.

"Our art director was passionate about the colors of the statuses and what they represented," Rachel says. *"We were able to have good conversations and whiteboarding sessions about it using ClickUp, which helped him to feel like he was part of what we were bringing to the team."*

With ClickUp's 15-plus customizable views, Shopmonkey's employees can now visualize tasks, projects, and workflows in the way that works best for them.

In addition, Shopmonkey's Marketing Scorecard, built within ClickUp, provides senior leadership with real-time visibility into projects. It also offers a high-level overview of marketing initiative progress without requiring a deep dive into tasks or lists.

"ClickUp helps us keep an eye on projects, the team's capacity, and provides us with an understanding of the company's top priorities that Marketing can support," says Rachel.

2d A new way to brainstorm and document processes for better decision making

To facilitate discussions about major projects and tasks, Shopmonkey takes advantage of ClickUp's Whiteboards. Whiteboards have helped the marketing team organize their thoughts and encourage greater collaboration in a space where they can quickly reference ideas within different project folders and lists.

"It's not always easy to get a team invested in new software. What helps me is integrating ClickUp into the simple things," Rachel says. *"In meetings, for example, I just share my ClickUp whiteboard on Zoom. Colleagues see the platform in action, and this passive learning helps people feel like ClickUp is where our team is living."*

Now that they can create simple whiteboards from team brainstorms or to document processes, Shopmonkey's marketing team is no longer inundated with information or overwhelmed by it. The team makes numerous split-second decisions in the course of a day, so the main goal is to have simple spaces for easy visual overview without any extra clutter.

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> *We were able to fully onboard the team and start using ClickUp in just two months. After I learned the product and brought it to the team, we built out the workspace together and got everyone using it.*

RACHEL GILSTRAP, MARKETING PROJECT MANAGER AT SHOPMONKEY

> "
> *ClickUp has been a great platform for my team to break projects down to the basics. It has helped us progress and made our marketing machine more effective.*

RACHEL GILSTRAP, MARKETING PROJECT MANAGER AT SHOPMONKEY

The Results

- **50% reduction in time to complete marketing leadership reviews and approvals**

- **33% reduction in time to complete design requests**

- **2 months to onboard team, thanks to ClickUp's user-friendly software**

03 The conclusion: Getting work out the door faster, saving time

Since implementing ClickUp, Shopmonkey's marketing team has completed over 230 tasks on the platform within five months, including creating 404 new advertisements, 46 new email campaigns, and nine events. They've also released three different products in under three months. Today, the team is leveraging 16 forms, 16 automations, 12 whiteboards, and 11 templates to simplify work and get more done.

"Our email form automation, in particular, has saved a tremendous amount of time," Rachel says.

In the future, Shopmonkey plans to start using ClickUp's Sprints more, and in conjunction with it, the Dashboards.

"I feel confident that we're going to be able to adapt to that process quickly and once again level up our ClickUp usage," Rachel says. "Healthy work–life balance is important to Shopmonkey, so using Dashboards to set capacity limits and see how much work people are doing in a week is something I'm super excited about."

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