



Contact

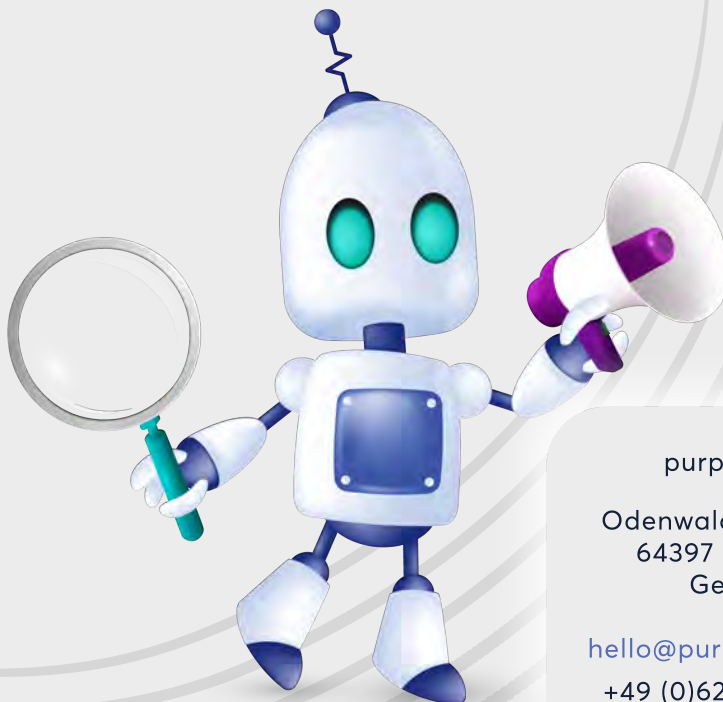
**Louisa Wilson**

Industry

**Market Research**

Solution

**ClickUp, Better Proposals, Make,  
Zapier, Xero, MailerLite**



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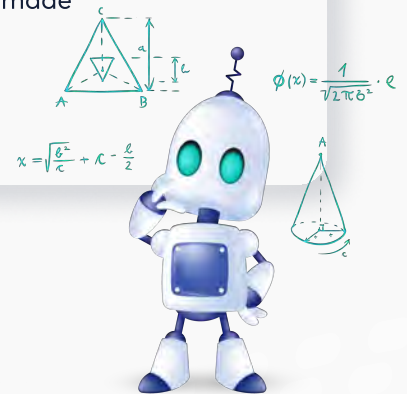
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## pain points

- Louisa was overwhelmed and struggling to handle a heavy workload, lacking a comprehensive overview of ongoing tasks.
- The lack of integration between tools resulted in unnecessary work when starting new projects.
- Due to time constraints, Louisa couldn't dedicate enough time to learn and implement **ClickUp** effectively, particularly with respect to proper hierarchy setup.
- The business lacked standardised processes.
- Busy periods left Louisa feeling overwhelmed.
- As the sole business owner, Louisa had numerous processes stored in her mind, making it challenging to delegate or involve others in projects.
- Certain tasks were burdened with excessive administrative work, hindering efficiency.
- The separation of **CRM**, client project management, and marketing plan made it difficult to prevent things from slipping through the cracks.
- Maintaining oversight across these different systems was impractical.



## the challenge

- The ability to effortlessly delegate tasks and involve others as needed.
- To establish streamlined systems within the business, and ensure seamless integration.
- To enhance the client experience by creating a customer portal and implementing a method to share project progress, providing clients with better visibility into their projects.



# the **solution**

Using a combination of dedicated applications and automation tools, we were able to provide the client with an end-to-end solution, allowing them to easily onboard new clients, work with them on a task-for-task basis in fully-configured projects, and then invoice them at milestone stages. All with minimim human intervention, saving time, and of course money, for everyone involved.



Harvests newsletter subscribers to MailerLite, from a form embedded on the website.



New leads captured from the website are sent directly to the ClickUp CRM.



Adds clients from the ClickUp CRM automatically into MailerLite.



Creates draft proposals in Better Proposals, based on information added to the ClickUp CRM.





Creates and approves invoices in Xero directly from the ClickUp CRM.



Sends invoices to clients, once approved in Xero.

In the ever-evolving landscape of digital productivity, harnessing the power of automation and integration has become paramount. Two standout platforms that have revolutionised the way individuals and businesses streamline their tasks and workflows are **Zapier** and **Make**. These innovative tools offer distinct yet complementary functionalities, enabling users to seamlessly connect and automate various apps, processes, and tasks, ultimately enhancing efficiency and productivity.



**Zapier**, a trailblazing integration platform, acts as a bridge between different web applications, allowing them to communicate and work together harmoniously. This intuitive platform empowers users to automate repetitive tasks, synchronise data, and trigger actions across diverse applications without any coding knowledge. From automating lead generation and customer relationship management to seamlessly sharing data between project management tools, **Zapier** empowers users to create custom workflows that save time and reduce manual effort.



**Make** provides a visual interface that allows users to design, build, and execute intricate automated processes without the need for extensive technical expertise. Users can drag and drop various actions and conditions, creating personalised workflows that suit their unique requirements. From sending email sequences based on user behaviour to automating complex data transformations, **Make** opens the door to limitless possibilities for automating tasks that once demanded significant time and attention.

Whether you're a small business owner, a marketer, or a seasoned developer, the synergy between **Zapier** and **Make** offers an unparalleled opportunity to unlock the true potential of automation and integration in today's fast-paced digital landscape.

# HQ

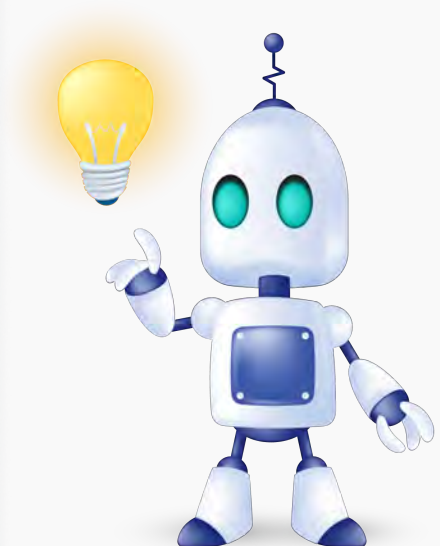
- Utilised ClickUp as a central hub for managing resources and storing essential business information.
- Thoroughly documented all processes and standard operating procedures (SOPs) within ClickUp.
- Established a dedicated storage and archive section in ClickUp for previous clients and templates, facilitating easy access and updates as required.

## operations

- Configured MailerLite, which involved segmenting subscribers into groups, setting up a monthly newsletter automation, and creating a website form to capture new subscribers.
- Established a streamlined process in ClickUp to effectively manage social media and marketing activities.

## projects/client work

- Developed a comprehensive process within ClickUp to efficiently manage participants involved in research projects, including recruitment, onboarding, and offboarding. This involved implementing automated email communication throughout the research project.
- Constructed personalised dashboards in ClickUp for Louise, her virtual assistant (VA), clients, and suppliers. These dashboards display essential data, project information, contact details, and relevant documentation links.
- Designed a project template in ClickUp that could be automatically generated and initiated from the CRM when acquiring a new client. Additionally, the template could be customised to meet different client requirements.



# CRM

- Developed an automated CRM system within ClickUp to effectively manage leads and clients, streamlining the onboarding and off-boarding processes. This included utilising a ClickUp form, embedded on the client's website, to capture project requirements.
- Implemented an automation to transfer individuals from ClickUp to MailerLite and assign them to the appropriate segment.
- Established a process within the CRM that triggers an automation in Xero to generate draft invoices. Upon approval, the invoices are sent to the respective clients. If a client was not present in Xero, the automation creates the contact in Xero and sends the invoice accordingly.
- Created an automation in ClickUp that dynamically generates relevant proposals in Better Proposals based on various triggers from the CRM.
- Established a comprehensive database within ClickUp to store information about current and past clients.



## the transformation

The client now has a comprehensive ClickUp system that consolidates various business components and incorporates workflows and automations, resulting in significant time savings. The new system provides a clear overview of all business operations, enabling Louisa to effortlessly identify daily and future priorities.

Louisa now has a much higher level of confidence in handling a heavier workload due to the streamlined processes facilitated by the ClickUp implementation. We have leveraged the framework to simplify process sharing and task delegation, as all pertinent information is centralised.

The revolutionary change in managing and communicating with research participants has already led to substantial time savings, using a clearly-defined business management system that offers immediate insights into any aspect of the business and client projects.

# let's work **together**

We are excited about the possibility of working with you and helping you achieve your business goals. At nebula, we offer a wide range of services that are designed to help businesses like yours grow, innovate, and succeed. Whether you are looking to streamline your operations, increase your revenue, or expand your reach, we have the expertise and experience to help you get there.

We believe that the key to success is building strong relationships with our clients. That's why we take the time to get to know you and your business, so we can understand your unique needs and goals. From there, we work collaboratively with you to develop customised solutions that address your specific challenges and opportunities.

If you're interested in learning more about our services, and how we can help you take your business to the next level, we encourage you to get in touch with us today. We would be happy to answer any questions you may have and discuss how we can work together to reach new heights.

LET'S TALK



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