A Workspace your team opens without being told to.

We design the ClickUp structure around how a business actually delivers, so the board reflects reality rather than a tidy idea of it.

Plenty of teams buy ClickUp, build a hierarchy in the first week and quietly go back to email. Usually the structure was designed around the tool rather than the work, the statuses do not match how jobs really move, and the fields nobody fills in are the ones the reports depend on.

Hierarchy

Spaces, Folders and Lists mapped to delivery

Statuses

A set people will actually move work through

Fields

Designed backwards from the report

Dashboards

Readable without training

WHAT WE DESIGN

01

Structure

One shape for the whole business.

- Space and Folder model
- List conventions
- Naming standards
- Task types
- Templates

02

Flow

How work moves, agreed up front.

- Status sets
- Dependencies
- Handoff rules
- Recurring delivery
- Approval gates

03

Data

Fields that earn their place.

- Custom Field design
- Required at stage
- Estimate hygiene
- Tags with a purpose
- Archiving policy

04

Reporting

Answers without a weekly export.

- Dashboards
- Workload views
- Client-facing views
- Portfolio rollups
- Saved filters

WHAT WE CHANGE AND WHAT WE LEAVE ALONE

We change the shape

Hierarchy, statuses, fields and templates, wherever the current structure is the reason adoption stalled rather than a preference someone holds.

We keep what works

If a team already has a habit that works, the Workspace bends to it. Adoption beats elegance, and a structure nobody uses is worth nothing.

We migrate carefully

Existing tasks move with their history, comments and attachments intact, and counts are reconciled before the old structure is retired.

YOU END UP WITH

A documented Workspace model · statuses and fields with a reason each · dashboards that answer real questions · a team trained to extend it

HOW WE DELIVER

Design backwards from the report.

01 Watch a real delivery

We follow one job end to end as it runs today, including the parts that live in email and spreadsheets.

02 Name the questions

What the owner needs to know each week. Those questions decide which fields are allowed to exist.

03 Build the shape

Hierarchy, statuses, fields, dependencies and templates, assembled in a sandbox Workspace first.

04 Migrate and reconcile

Existing work moves across with its history, and we compare counts before anything is retired.

05 Train and hand over

Your team runs it, extends it, and has the model written down for whoever joins next.

IN PRODUCTION

ELEMRA · INTERNAL

Elena OS

Every Elemra engagement is tracked in one ClickUp Workspace on a status set of five, with a convention that a closing comment must stand as an audit trail on its own.

`Five statuses · audit-trail comments · one convention`

CLIENT WORKSPACE

Ladder

We work across two Workspaces at once, the client's and our own, with a documented topology so it is never ambiguous which one holds the source of truth.

`Cross-workspace · documented topology`

PATTERN

Sandbox first

New structures are built and tested in a sandbox Workspace, so a team never has to work inside a half-finished hierarchy while it is being designed.

`Sandbox build · reconciled migration · trained handover`

WHAT WE NEED FROM YOU

- **Admin on the Workspace**
  Enough access to change hierarchy, statuses and Custom Fields.
- **One real delivery to follow**
  A live job we can watch end to end, rather than a description of how it is supposed to go.
- **Agreement on the questions**
  The handful of things the owner needs to know weekly. Everything else follows from those.

Structure people actually use.

One conversation to find why the current Workspace stalled.

Book a strategy call → elemra.com/consultation