

Nobody should have to remember to update the board.

We take the manual steps out of the work that already lives in ClickUp, so status, handoffs and follow-ups happen on their own.

Most teams keep a person in the loop for jobs that are pure mechanics. Chasing a status, moving a task to the next list, reminding someone a due date has passed, writing the same client update every Friday. Those steps are rules rather than judgement, and rules can be built.

Native first

ClickUp Automations before any external tool

Triggers

Status, assignee, due-date and field changes

Actions

Status, priority, tags, moves, reassignment

Then code

n8n or Trigger.dev only where native stops

WHAT WE AUTOMATE

01

Intake

Work arrives already filed.

- Email to task
- Form submissions
- Inbound webhooks
- List and assignee routing
- Duplicate checks

02

Movement

Tasks progress without chasing.

- Status transitions
- Stage-based handoffs
- Dependency unblocking
- Due-date escalation
- Overdue flags

03

Comms

People told without anyone telling them.

- Slack notifications
- Client status emails
- Comment mentions
- Weekly digests
- Approval requests

04

Records

Reporting fields stay true.

- Custom Field updates
- Time and cost rollups
- Document generation
- Scheduled tidy-ups
- Audit-trail comments

WHERE NATIVE STOPS AND CODE STARTS

ClickUp Automations

Single-workspace rules. A status change that reassigns, retags, moves a task or posts a comment. Quick to build, visible to your team, and nothing for us to maintain.

Automation with AI in it

Where the rule needs a read on the situation. Classifying an inbound request, drafting a reply in your voice, summarising a long thread before it reaches a person.

n8n or Trigger.dev

Sequences that span several systems, retries and error handling, anything on a schedule, and any step that has to reshape data on the way through.

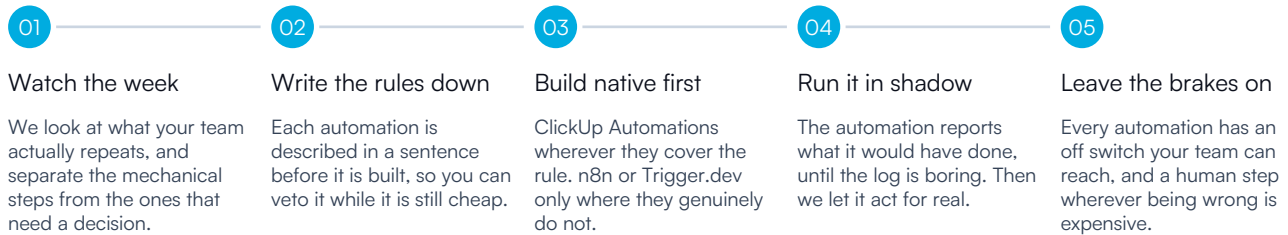
YOU END UP WITH

A written list of every rule • automations your own team can read • a fallback for when a step fails • a log of what fired • no black boxes



HOW WE DELIVER

Automate the rule, never the judgement.



IN PRODUCTION

ELEMRA · INTERNAL	CLIENT WORKSPACE	PATTERN
Elena OS Our own operations assistant runs unattended on ClickUp webhooks. A task reaching a given status starts a working session, which posts its own audit-trail comment and leaves the task for human review. <code>Webhook-triggered · never self-completes · review gate</code>	Ladder Automated writes into the client's own ClickUp Workspace pass through a scoped guard, so a rule can only ever touch the tasks that belong to the engagement. <code>Scoped writes · guarded · full audit trail</code>	Shadow mode A new automation logs the action it would have taken before it is allowed to take it, so a bad rule is caught in the log rather than in the client's workspace. <code>Shadow run · off switch · complete firing log</code>

WHAT WE NEED FROM YOU

- **Headroom in the quota**
Which plan the Workspace is on, since ClickUp sets Automation limits per plan.
- **A named owner per rule**
Someone who decides whether an automation may act on its own or must ask first.
- **Real activity to test against**
A couple of weeks of live work, so a rule can be shadow-run before it is switched on.

The mechanics handled, the judgement kept.

One conversation to find which of your repeated steps are rules.

Book a strategy call → elemra.com/consultation