

The
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Kind.

ClickUp Consulting & Implementation

A phased engagement for clarity, execution & scale.

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Introduction

Running work through ClickUp should create clarity and momentum, not friction.

I work with founders, agencies and growing teams who want more clarity and consistency in how work runs, using ClickUp to reduce scattered workflows and unclear ownership.

My approach is structured and intentional. Clients typically begin with a ClickUp consultation and continue into implementation once clarity and alignment are established.

This document outlines how that engagement works.

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How I Work

ClickUp projects are led directly by me, from strategy through implementation.

I focus on:

- Understanding how your business actually operates
- Designing systems that support real decision-making
- Reducing manual effort and follow-ups
- Creating workflows your team can rely on without constant follow-ups or fixes.

Project coordination, documentation and support are delivered through The Refined Kind, ensuring work is implemented thoughtfully and built to last.

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Who This Is For

This engagement is a good fit if you are:

- A service business or agency managing multiple clients or projects
- A founder stepping out of day-to-day task coordination
- A distributed team needing clearer ownership and visibility
- Already using ClickUp, but finding it busy or unreliable

If you're looking for a quick template or surface-level setup, this may not be the right fit. My work is designed for teams who want systems that hold up under real use.

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Phase 1 ClickUp Consultation

Purpose: Establish clarity before building anything

This phase focuses on understanding your current way of working, what's effective, what creates friction and what needs to change before ClickUp is introduced or refined.

Whether you're new to ClickUp or already using it, this stage ensures the system is designed around your business requirements rather than assumptions.

This includes:

- Review of your existing ClickUp workspace or current workflows and processes
- Identification of gaps, friction points and operational risks
- Clarification of priorities, roles and operating requirements
- A clear implementation roadmap, including:
 - ClickUp hierarchy design (Spaces, Folders and Lists)
 - ClickUp company-level settings configuration

Timeline: Typically 1 week

Investment: Fixed fee (\$199)

This phase forms the foundation for all implementation work and ensures the system is intentional, aligned and built to scale.

Phase 2

ClickUp Implementation

Purpose: Build a ClickUp system that supports execution, visibility and accountability.

Implementation translates the outcomes of the consultation phase into a working ClickUp system, designed around your processes, team structure and reporting needs.

This phase focuses on building clarity into day-to-day operations while ensuring leadership has visibility without micromanagement.

This includes:

- Detailed requirement gathering based on approved workflows
- Process mapping to translate how work moves across teams
- ClickUp implementation aligned to each process, including relevant dashboards
- Automation setup to reduce manual work and follow-ups
- Internal and external integrations where required
- A management dashboard for reporting and performance visibility
- Team-level dashboards for workload, priorities and delivery tracking
- SOPs documenting all implemented processes
- Team training to support adoption and confident usage
- A two-week hypercare period to stabilise the system post-launch

Timeline: Typically 4–8 weeks, depending on scope and complexity

Investment: Scoped based on number of processes, integrations and reporting requirements

This phase ensures the system is not only built correctly, but adopted smoothly and ready for real-world use.

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Phase 3

Optimisation & Support (Optional)

Purpose: Ensure adoption, reliability and long-term effectiveness.

This phase supports teams once the ClickUp system is live, focusing on stabilisation, refinement and confident day-to-day usage. It allows the system to evolve based on real usage without disrupting core workflows. Optimisation is not about rebuilding, it's about strengthening what's already in place.

This may include:

- Refinements based on real-world usage and feedback
- Adjustments to workflows, dashboards and automations as needed
- Clarification and updates to SOPs where required
- Support during the transition period as teams settle into new ways of working
- Ongoing advisory input for system-level decisions

Structure: Scoped or monthly support, depending on needs

Investment: Defined monthly or project-based range

This phase helps ensure the system remains clear, usable and dependable as the business grows without creating reliance or unnecessary complexity.

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What Happens Next

After reviewing this overview, the next steps are simple:

- Confirm whether this approach feels aligned
- Proceed with the consultation phase - Complete the consultation form [here](#)
- Move into implementation based on agreed scope

Looking forward to learning more about your workflow and supporting you with this!

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Contact

The Refined Kind

A systems and operations studio helping businesses choose clarity over chaos.

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