

Live in weeks, not whenever everyone gets round to it.

We stand ClickUp up from scratch, move the work into it, and stay until the team stops asking where things are.

A migration usually fails one of two ways. Either the old system is copied across faithfully, including everything that was wrong with it, or the new Workspace is immaculate and nobody moves in. We treat onboarding as a change of habit that happens to need some software configured.

Any tool

Asana, Monday, Trello, Jira, Notion, spreadsheets

With history

Comments, attachments, assignees and dates kept

Reconciled

Counts compared before the old tool is retired

Adopted

Measured by usage, not by the go-live date

WHAT ONBOARDING COVERS

01

Migration

The work moves, and its past comes too.

- Asana and Monday
- Trello and Jira
- Notion
- Spreadsheets
- Comment history

02

Setup

Configured for this business, not a demo.

- Hierarchy design
- Status sets
- Custom Fields
- Templates
- Permissions and guests

03

Enablement

People who know why, not only how.

- Role-based training
- Written conventions
- Recorded walkthroughs
- A named internal owner
- Office-hours window

04

Aftercare

Adoption checked rather than assumed.

- Usage review
- Field-hygiene pass
- A fix list
- Second-round training
- Extension coaching

WHAT COMES ACROSS AND WHAT DOES NOT

What we bring across

Open work, with its comments, attachments, assignees and dates. The history anyone is realistically going to look at again.

What we deliberately drop

Dead lists, abandoned fields and statuses nobody used. A migration is the one chance a business gets to leave the mess behind it.

What we insist on

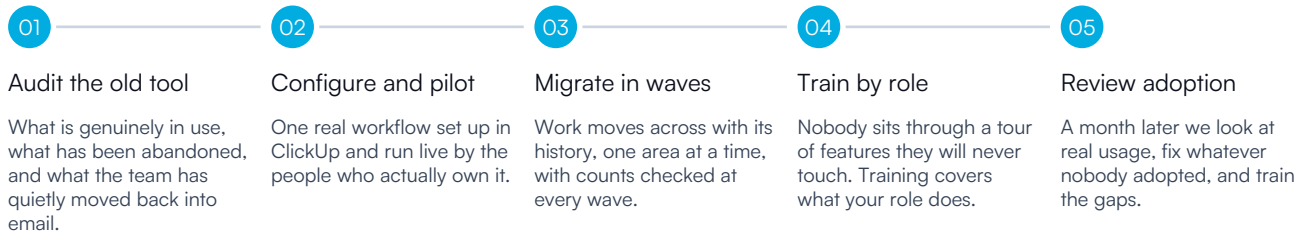
A named owner inside the business, and one real workflow running live before the whole team is moved in behind it.

YOU END UP WITH

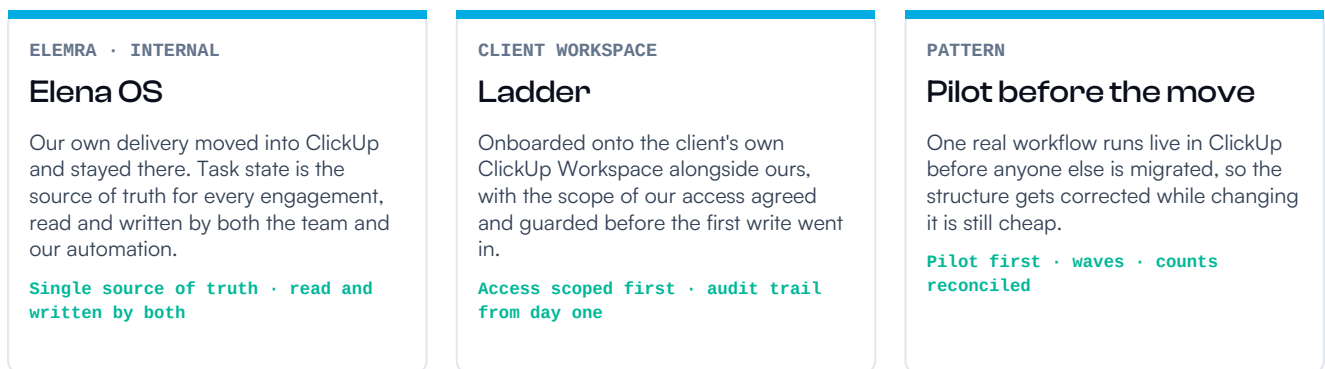
A configured Workspace · work migrated with its history · counts reconciled · written conventions · a trained internal owner

HOW WE DELIVER

Move one workflow in properly, then the rest.



IN PRODUCTION



WHAT WE NEED FROM YOU

- Admin on both tools
Export access on the system you are leaving, admin on the new Workspace.
- A named internal owner
One person who owns the conventions after we leave. The single biggest predictor of adoption.
- A pilot team
A small group willing to run one real workflow in ClickUp ahead of everyone else.

Set up, moved in,
actually used.

One conversation to scope the migration and the pilot.

Book a strategy call → elemra.com/consultation