How IT Visionists Helped QuantiFire Make Effective Use of Clickup

About IT Visionists

We are a UK-based company with more than 15 years of experience in providing high-quality, dependable, and affordable solutions around making technology work for you, instead of you working for technology. Our experts can translate any customer's business needs into workable solutions involving automation, implementing new processes, and deploying more efficient tools for project management and sales development. We handle every little detail until everything is ready to be used.

About QuantiFire!

QuantiFire analyses the needs and interests of investor communities, as data, at scale. They generate Feedback Intelligence and the insight that companies need to win confidence in the capital markets.
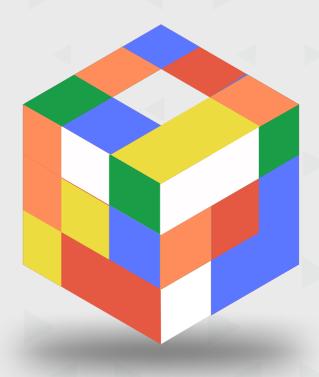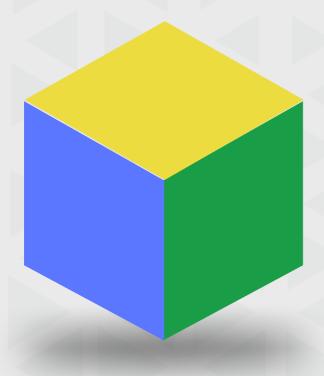
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The Challenge

The main challenge was to implement the complex business solution in ClickUp following the best practices and automations to the extent possible. QuantiFire team was tech savvy and already using Podio and wanted to move to ClickUp.

Training the team in the effective use of a new project management tool was also desired so that the team members should be able to use it effectively. Leadership also wanted insights into Team Capacity to take on new projects.

The Solution

IT Visionists dedicated a coach to work directly with the QuantiFire team in understanding the business needs. We planned a solution that should cater all the simple to complex scenarios involved in the day-to-day business activities. Set up ClickUp based on agreed workflow with automations, views, dependencies, and tasks assignments. Provided training to the team to ensure companywide learning of ClickUp. Integrated ClickUp with Slack for important Notifications.

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The Results

- Project Managers can kick off the project smoothly with minimal manual effort.

- An increased level of collaboration.

- Team understands what needs to be delivered.

- Improved overall project visibility.

- A better understanding of setbacks and bottlenecks.

- More transparent and clear communication.

- The QuanitiFire team can independently add on projects and new workflows as the business grows.

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"We were new to ClickUp, trying to find a solution for our consultancy which has a project based business. Due to the fact that we used a project management tool before we had a firm vision of what we needed to achieve to drive efficiencies and allow the set up to grow with us. Hina (at IT Visionists) was able to quickly understand our complex business set up and was able to assist us with solutions that worked for us. She helped us not just understand the options we have but also set up extensive project templates which are broken into little tasks with dependencies and automations in place. What used to take us hours, is now a matter of minutes! She further investigated individual working practice to come up with a reporting and notification system that is user-friendly and adaptable to everyone's needs. She provided excellent training and was always keen to investigate to find a workable solution."

Project Manager
Quantifire

Why not bring your entire operations to a new level of efficiency?

If you want to push efficiency into your business operations and rely on an expert's help to streamline your process with the right tools and tactics, IT Visionists is the right place to get started.

Talk to An Expert Now!

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