THE SMALL-AGENCY WORKSPACE AUDIT

You built your ClickUp for 3 clients.

Now you've got 15.

10 things that break as you grow — and how to fix each one.

THE PRODUCTIVE DAD

The *five-layer* dig

THE PROBLEM

You open a project and the actual work is buried. A parent "task" that's really a folder, holding subtasks, holding sub-subtasks, four or five levels down. You know where everything is because you built it. Everyone else has to go digging.

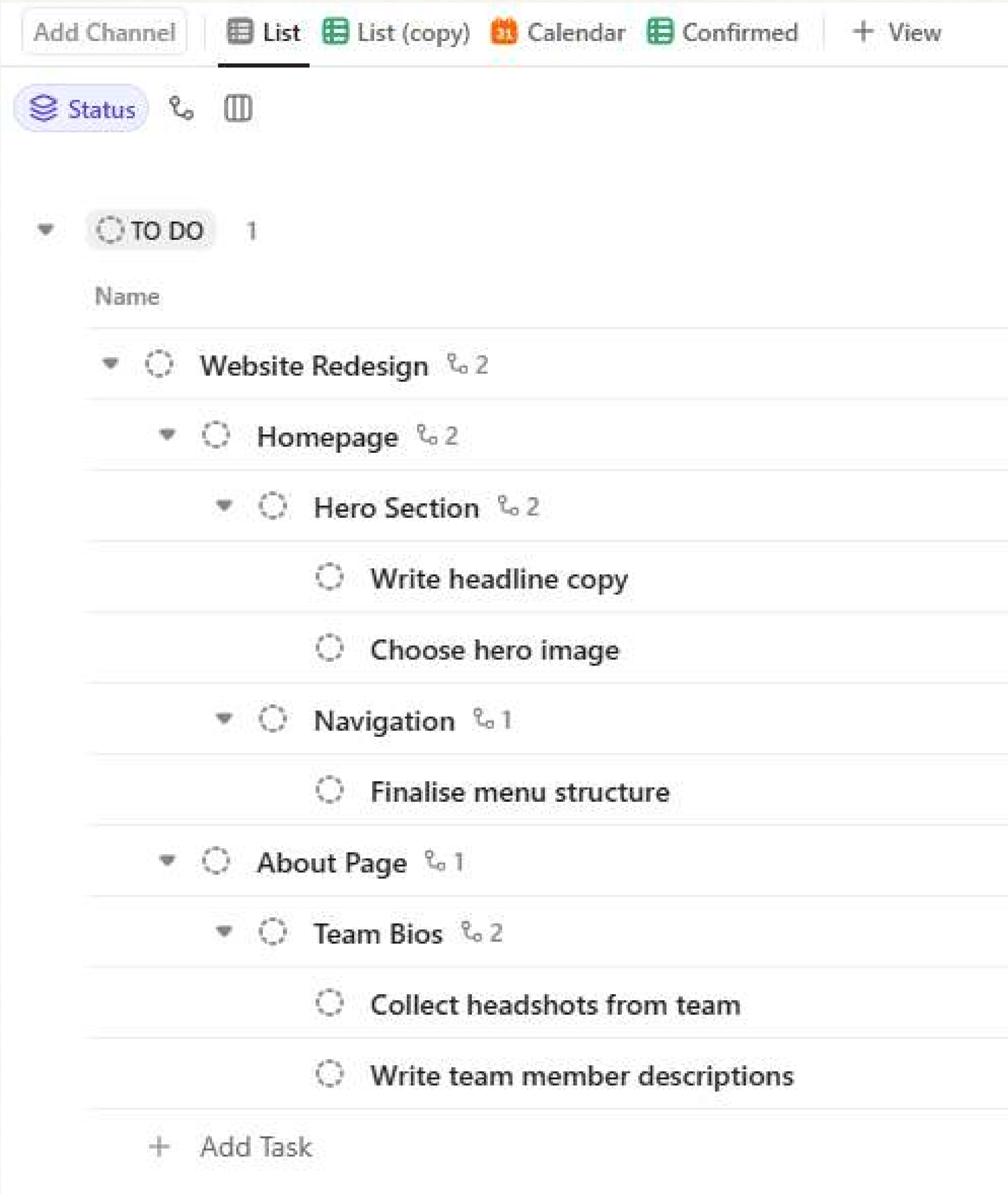
WHY IT HAPPENS

Usually it's old-school project-management instinct. Everything nests, parent dates roll up from the children, the whole thing mirrors a two-year plan you've got in your head. ClickUp lets you nest that deep, so you do. The cost doesn't land on you. It lands on whoever joins next and can't find anything.

THE FIX

Flatten it. My rule: if a task is going to take more than about half a day of real work, break it into subtasks and stop there. The moment you're going three or four levels deep, the structure is doing a job the hierarchy should be doing. Push that weight outward into folders and lists, not downward into nested tasks. Space, folder, list, task, subtask. That's the whole ladder, and it's shallow on purpose. Build it that way and a new hire finds anything in two clicks instead of five.

PROBLEM 01


Add Channel
List
List (copy)
Calendar
Confirmed
+ View
Status
TO DO 1
Name
Website Redesign 2
Homepage 2
Hero Section 2
Write headline copy
Choose hero image
Navigation 1
Finalise menu structure
About Page 1
Team Bios 2
Collect headshots from team
Write team member descriptions
+ Add Task

Lists doing *two jobs* at once

THE PROBLEM

One list holds your actionable tasks *and* your reference material. Meeting notes, background docs, a client's details, archived calls, all sitting in the same place. New people can't tell what they're meant to *do* from what's just there to *read*.

WHY IT HAPPENS

ClickUp will store anything, so a list quietly turns into a filing cabinet as well as a to-do list. Feels efficient. It isn't.

THE FIX

Draw a hard line between actionable and informational. Actionable things: "respond to the client," "gather the requirements". These are tasks, with an owner and a status. Informational things: project background, contact details, the context an AI can read later. Go in a Doc, or a separate list that's clearly labelled as such. Here's the test for you. If a task could never honestly be marked complete because nobody ever *does* it, it isn't a task. Get it out of the list.

Custom fields *everywhere*

THE PROBLEM

You click into a task and there are ten, fifteen custom fields staring back at you, most of them empty. Phone number, deal value, lead source. None of it has anything to do with the task in front of you. Do that across every task and the whole workspace feels heavy.

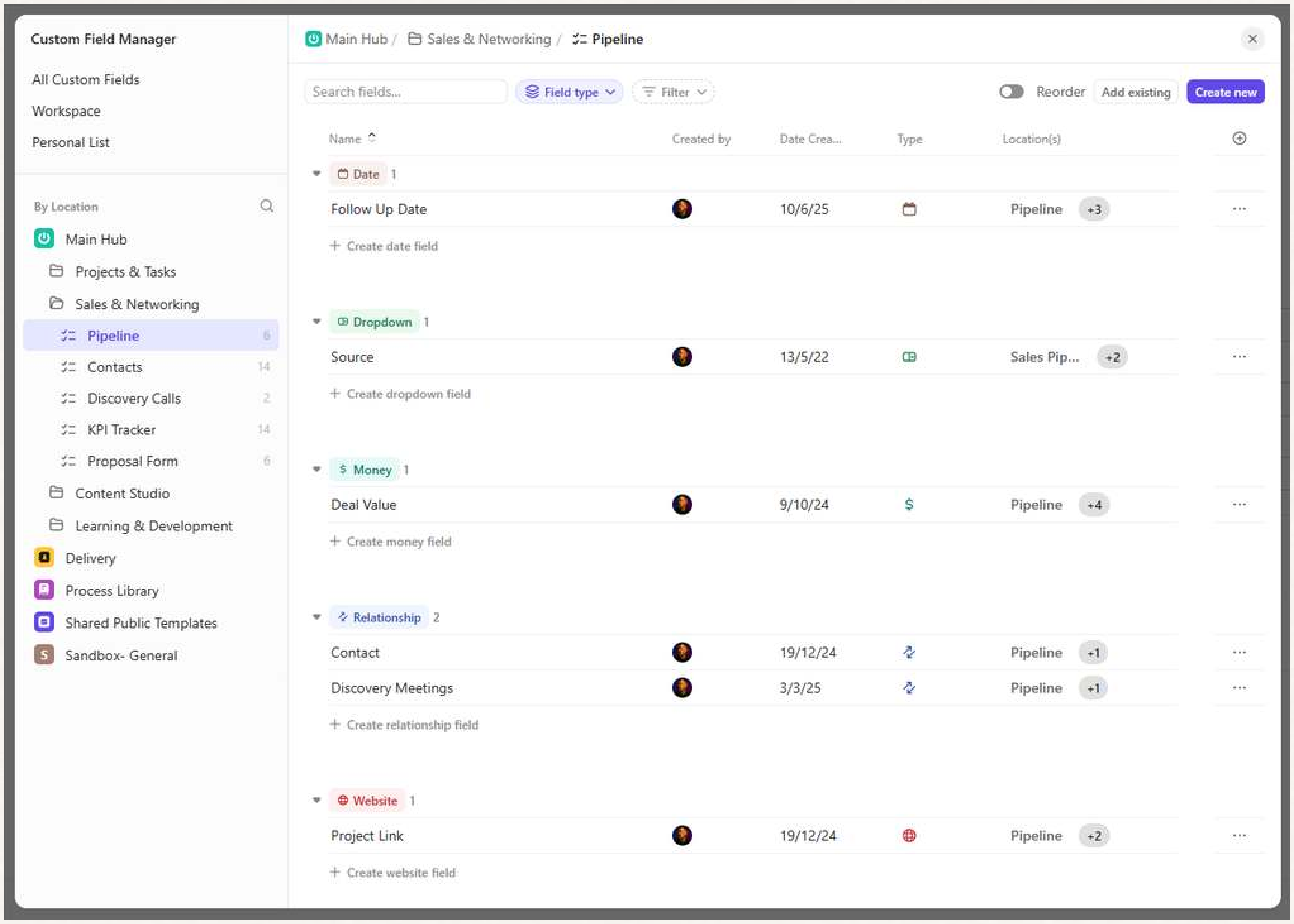
WHY IT HAPPENS

This is the most common one I see, and it's nearly always a hierarchy mistake. Custom fields flow *downward*. Set a field at the Space level and it shows up on every task in every folder and list underneath it. Set it in the wrong place and it haunts everything below.

THE FIX

Learn the trade-off and use it on purpose. Setting a field high up is exactly right when you want it everywhere. Do it once at the Space level. It's wrong when the field only belongs to one workflow. Open the Custom Field Manager (Settings → Custom Field Manager), find where each field actually lives, and pull the specific ones down to the list or folder they belong to. And watch out for forms. They tend to dump every question straight onto the task, so a one-off intake question ends up riding on tasks that have nothing to do with it.

PROBLEM 03


Custom Field Manager
All Custom Fields
Workspace
Personal List
By Location
Main Hub
Projects & Tasks
Sales & Networking
Pipeline
Contacts
Discovery Calls
KPI Tracker
Proposal Form
Content Studio
Learning & Development
Delivery
Process Library
Shared Public Templates
Sandbox- General
Main Hub / Sales & Networking / Pipeline
Search fields...
Field type
Filter
Reorder
Add existing
Create new
Name
Created by
Date Crea...
Type
Location(s)
Date 1
Follow Up Date
10/6/25
Pipeline +3
Create date field
Dropdown 1
Source
13/5/22
Sales Pip... +2
Create dropdown field
Money 1
Deal Value
9/10/24
Pipeline +4
Create money field
Relationship 2
Contact
19/12/24
Pipeline +1
Discovery Meetings
3/3/25
Pipeline +1
Create relationship field
Website 1
Project Link
19/12/24
Pipeline +2
Create website field

Status sprawl

THE PROBLEM

A single list with a dozen statuses: New, Intake, Gathering Requirements, Responded to Customer, Escalated, In Progress, Review, Testing, Done. A task crawls through all of them and nobody can tell at a glance what actually needs doing right now.

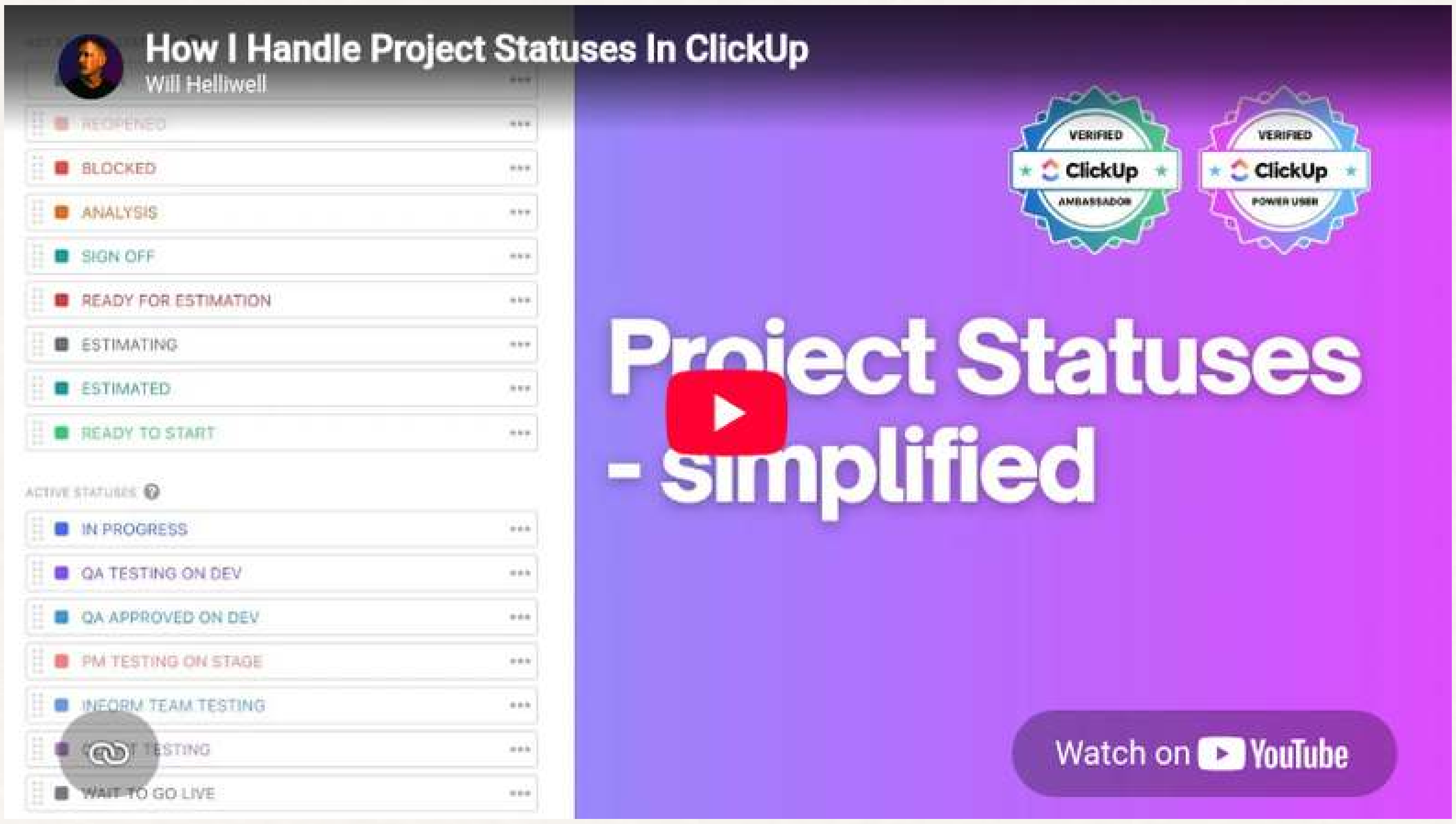
WHY IT HAPPENS

It's easy to turn every *step of work* into a *status*. "Gather requirements" feels like a stage, so it becomes a status. Do that a few times and your workflow is an obstacle course.

THE FIX

This is the one I'll die on, so here it is plainly: statuses answer "where is this?", not "what step are we on?" To do, in progress, done, maybe a testing column. Keep them simple and standardise them so a new list inherits the right set from the folder instead of you rebuilding it every time. The steps you were modelling as statuses are usually *tasks*. "Gather requirements" is a thing someone does, so make it a task you can assign, date, and tick off. Workflow steps are subtasks with owners, not more statuses. (One exception: if a list mirrors a system a developer already works in like Azure DevOps, match their world rather than forcing yours on them.)

I made a full video on exactly this. How to think about statuses in ClickUp and why fewer is almost always better.



Folder or list?

THE PROBLEM

You start a client in a single list. Works fine until you need a private side to draft the email the client shouldn't see, or a second project for the same client, or a clean space you can actually invite them into. One list won't stretch that far.

WHY IT HAPPENS

A list is the quickest thing to spin up, so that's where everyone starts. The limits only show up once the relationship grows, which, for your clients, it always does.

THE FIX

For client work, default to a **folder per client**, with lists inside it. One list is your private working space. One is the client-facing list you actually invite them to. Because a task can live in more than one list at once, you keep the messy work-in-progress private and surface only the finished, client-ready tasks into their view. A "Show Client" checkbox with an automation behind it does this in one click. Same client comes back for a second project? Fresh list, same folder. Clean start, shared home.

One thing worth knowing before you commit: past roughly 20 active client folders, upkeep gets real. A field you want everywhere has to be added with care. That's exactly where the hierarchy trick from Problem 3 pays you back. Set it once, high up.

Duplicating data instead of the view

THE PROBLEM

Different people need to see the same work differently. The person delivering wants fees and contract status; marketing only wants the confirmed jobs and key dates. So you build *separate lists*, and now the same information lives in three places and drifts out of sync.

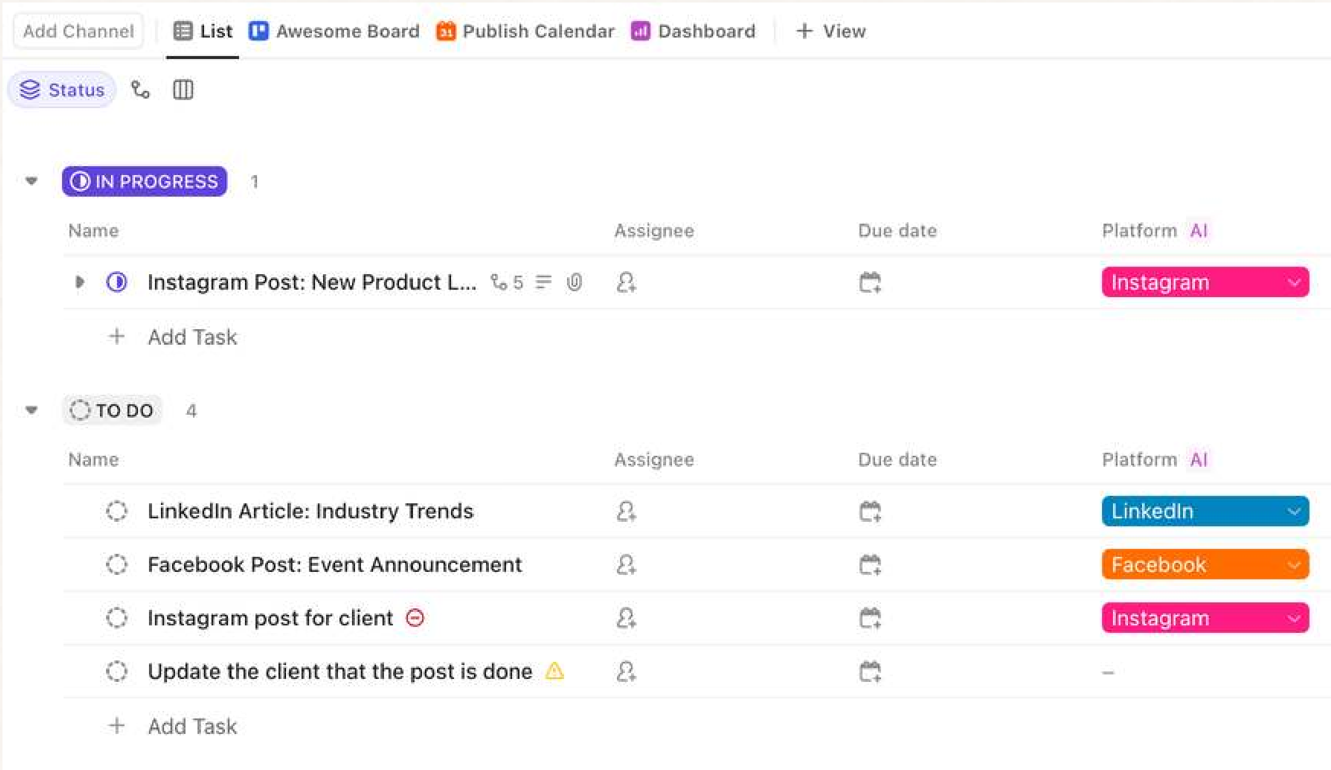
WHY IT HAPPENS

"They need a different layout" sounds like "they need a different list." It almost never is.

THE FIX

One list, many **views**. Same underlying data, filtered and arranged for each audience. Marketing gets a view filtered to confirmed-only with just the columns they care about. Delivery gets the full table. Finance gets one filtered to contract status. Nobody's maintaining a copy and everyone sees their slice. The part to drill into your team: these views are *not copies*. Delete a task from one and it's gone from all of them, because there was only ever one task.

PROBLEM 06


Add Channel
List
Awesome Board
Publish Calendar
Dashboard
View
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IN PROGRESS 1
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Platform AI
Instagram Post: New Product L...
5
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TO DO 4
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Assignee
Due date
Platform AI
LinkedIn Article: Industry Trends
LinkedIn
Facebook Post: Event Announcement
Facebook
Instagram post for client
Instagram
Update the client that the post is done
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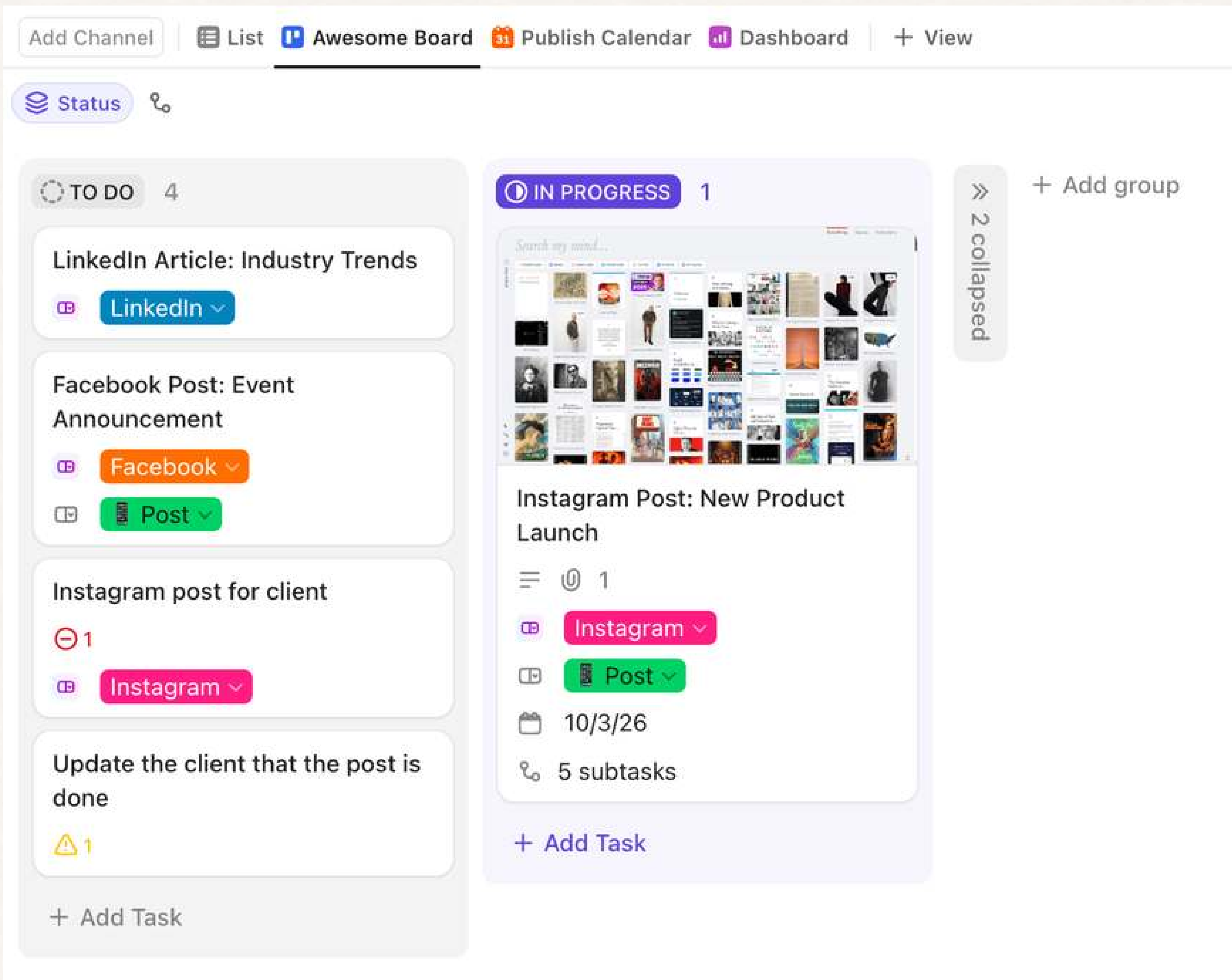
Add Task


Add Channel
List
Awesome Board
Publish Calendar
Dashboard
View
Status
TO DO 4
LinkedIn Article: Industry Trends
LinkedIn
Facebook Post: Event Announcement
Facebook
Post
Instagram post for client
1
Instagram
Update the client that the post is done
1
Add Task
IN PROGRESS 1
Instagram Post: New Product Launch
1
Instagram
Post
10/3/26
5 subtasks
Add Task
2 collapsed
Add group

The onboarding cliff

PROBLEM 07

THE PROBLEM

A new hire opens ClickUp and can't find their work. Tasks are assigned but buried. They don't know whether to start in the Inbox or a project view. They're staring at archived projects and closed work that has nothing to do with them. The lag is real delivery time you're losing.

WHY IT HAPPENS

You built the workspace organically, for the one person who already knows where everything is, you. Nobody ever designed the first day.

THE FIX

Build a single front door. A central hub or master onboarding Doc that says: here's how the business is laid out, here's how to start your day, and here's how to ask the AI when you're stuck. Back it with a sensible start-of-day view. A dashboard per-person or per-project, so people land on their priorities instead of hunting for them. And trim what new people can even see. Archived and closed work doesn't need to be visible to everyone; ClickUp's Teams feature lets you scope an admin-only space so newcomers aren't seeing clutter that was never theirs.

Due-date-only thinking

THE PROBLEM

Every task has a due date and nothing else, so the due date quietly becomes "the day I'll start it." Everything bunches up at the deadline, there's no sense of pacing, and a slipped date just sits there because nobody's tending the list.

WHY IT HAPPENS

The due date is the obvious field, so it ends up doing every job. Hard deadline, gentle nudge, vague intention, all at once.

THE FIX

Rethink what the due date is for. It's not the deadline, it's the do-date. The day you're actually going to work on the task. That one shift is what lets you schedule properly instead of staring at a wall of work all stamped with the same date. For longer work, the parent task carries the real span: a start date and a due date marking the block of time it lives in. The subtasks underneath each get a single due date, the day that piece actually gets done. Now your list reads like a plan instead of a pile. One more thing: someone has to own the grooming. A quick daily pass to nudge what's slipped.

Automating the mess

THE PROBLEM

Someone discovers automations and AI agents and wires up a dozen of them on a workflow that isn't stable yet. Now when something behaves strangely, nobody can tell if it's a person, an automation, or some Make webhook firing in the background.

WHY IT HAPPENS

Automation is the fun part. It's tempting to jump straight there, especially now AI can draft updates, estimate durations, and summarise a week's work on a schedule.

THE FIX

Run the process by hand first, until it's boring and predictable. *Then* automate the boring, predictable thing. This holds on every single job I do. Get a human running it cleanly, work the kinks out, and only then hand it over. Two rules keep it from biting you later. **One:** document every automation. Future you will thank you. I've asked ClickUp's AI to tell me what was firing in a workspace, and only the documented ones gave a straight answer, third-party Make and Zapier flows included. **Two:** don't drown a non-technical team. Ship the working version, let them settle into it, then add automation one piece at a time.

Migrating the old tool's bad habits

THE PROBLEM

You move to ClickUp from a spreadsheet, Basecamp, Notion... and you faithfully rebuild the *limitations* of the old tool. The grid stays a rigid grid. The fixed framework stays fixed. You've swapped tools without touching the structure that was holding you back.

WHY IT HAPPENS

The old layout is familiar and the team already trusts it, so "just make it look like the sheet" feels safe. Sometimes that's the right first step for getting people on board. But if you stop there, you've paid for a more expensive spreadsheet.

THE FIX

Honour the familiar layout to get people through the door — then use the things a spreadsheet *can't* do. A master grid becomes a CRM list with relationship fields, each row linked to a proper database of clients or contacts. Roll-up fields pull the related details into view without a click. The same data flexes into a table for one team and a calendar for another. The old tool's "one way to do it" becomes the right view for each person. The migration isn't finished when it *looks* like the old thing. It's finished when it does what the old thing couldn't.

Now point this at your ClickUp

You've read what breaks. Here's how to find out which of it is happening in your workspace — without me in the room.

Open Brain^2, point it at one busy client or delivery Space, and paste this in:

Act as a ClickUp consultant doing a quick health-check on this Space. I run a small agency and I set this up myself — be honest but plain-English, no jargon.
Look at how this Space is actually built and tell me:

If a new team member joined tomorrow, where would they get confused or lost?
Are there lists trying to do two jobs at once — real tasks mixed in with notes, records, or reference stuff?
Are tasks buried too deep to find easily?
Have my statuses grown into a maze, or are they clean?
Is the same information living in more than one place, drifting out of sync?

Then give me the bottom line: the two or three things most worth fixing first, in priority order, and what you'd change.

So — that's the audit.

If you noted three or four issues that sound like your workspace, you're in good company. Almost every one I open looks like that.

Here's what I'd actually do. Hit reply and tell me the one that hit home the most. Just the number's fine. I read every reply myself, and I'll tell you how I'd approach fixing it. No pitch, no catch.

That's the whole ask. One reply.

Will

P.S. If you already know it's beyond a quick fix and you'd rather just have someone sort the foundation, that's the work I do. My calendar's at cal.com/theproductivedad/discovery-chat. But start with the reply.