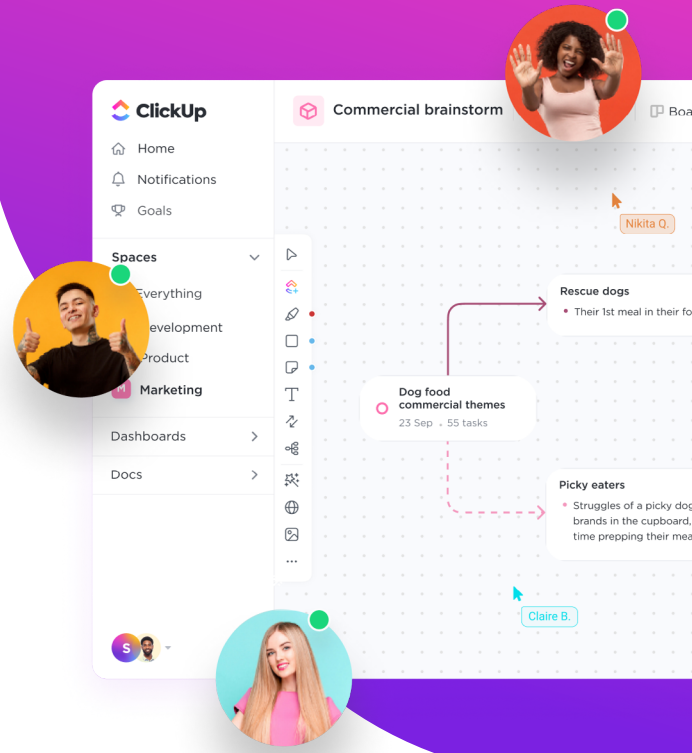









How Pharmacy Mentor consolidates tools, doubles productivity with ClickUp

[Pharmacy Mentor](#) is the ultimate pharmacy marketing and development solution. The platform is designed to help community pharmacies embrace the digital age. Through digital marketing services, transformational online courses, high-quality video modules, and building exceptional digital solutions, the company helps community pharmacies propel their businesses into the future.



-  **2x more productive using ClickUp**
-  **20% fewer content revisions on all client projects**
-  **80% of clients reply to info requests, up from 20%**
-  **100% of daily account meetings eliminated by ClickUp**
-  **100% of staff can communicate in any time zone**

01 The challenge: Email overload and inconsistent project management caused operational chaos

The primary role of Pharmacy Mentor’s Client Relations department is to ensure the agency’s customers are happy with the projects executed for them, such as marketing and website development.

“We serve as the go-between for delivery teams like Marketing and our clients. When a client asks for something, we create a strategy and figure out how to deliver it in the best way,” says Lewis Norwood, Head of Client Relations at Pharmacy Mentor.

The Client Relations department consisted of one person when Lewis started, but later grew to a team of three. However, with just three people serving 200 clients, the lack of a central platform for project management and collaboration caused operational chaos as the team continually jumped between apps and contexts..

For example, Pharmacy Mentor used Google Workspace to house folders for each client, which customers could access and upload documents to. This system had become unwieldy.

“The client folders were a mess,” Lewis says. “There was no format to them. No one knew who was responsible for what.”

It was also time-consuming to access the status of a client project at any given moment, which meant work was often duplicated. And Lewis’s team could not see project progress in real time so they were continually requesting update meetings with the account executives.

Internal operations were problematic, as well. Personal development plans and team goals were housed in email and Google Docs. This meant there was nowhere to formally recognize employees' personal goals, resulting in an excessive number of emails.

A disjointed client communication process also hindered operations. It was difficult for Pharmacy Mentor to get information from clients regarding their desired services. The process required customers to fill out a lengthy questionnaire, and only 20% of clients responded.

During an actual website build, the company's Web project managers would email clients directly. This caused problems once the website was launched, because customers continued to contact the Web project managers with questions instead of speaking to their designated account executives.



ClickUp has helped our business become much more productive—saving time, reducing the need for pointless meetings, and vastly increasing employee and client satisfaction.

LEWIS NORWOOD, HEAD OF CLIENT RELATIONS AT PHARMACY MENTOR

02

The solution: One central location for account collaboration, communication, and project management

During an online search, the company's CEO discovered ClickUp and was struck by its features. On further investigation, Pharmacy Mentor decided to consolidate its old customer relationship management (CRM) tool, Google Workspace, Google Docs, and Trello into one powerful platform: [ClickUp](#). The benefits have been plentiful.

2a

Improved collaboration and productivity with consolidated toolset

The company now uses ClickUp as its CRM and project management platform. Having a central location from which to manage client projects has eliminated the need for countless meetings and emails to gain visibility into siloed information. This has doubled Pharmacy Mentor's productivity.

"We work across a number of Marketing and Development divisions. ClickUp has helped us work more cohesively," Lewis says. "Each division has their own folder and each department has a space. For joint work, we have an operations space."

The company's different teams use [ClickUp Whiteboards](#) to collaborate visually on projects. They share information in ClickUp Docs, rather than in disparate Google Docs. This makes it easy to organize and grow client relationships.

2b

Better client management and customer experience

With ClickUp's robust CRM capabilities, Pharmacy Mentor no longer has to rely on inflexible CRM tools and messy Google Workspace folders, worry about confusion around responsibilities, or waste time performing redundant work. The client communication and delivery processes are much smoother thanks to [ClickUp Tasks](#) and [ClickUp Automations](#), which function together to send email updates that keep everyone in the loop and save time.

"We communicate inside ClickUp, and everyone who is part of a project is added as a Watcher from day one. We also have Master Client Cards, and if someone works on something for a client away from this card, they then make a note and backlink the activity so the account executives can see everything that goes on," Lewis says.

It's also easier to get information from customers using [ClickUp Forms](#), which have increased client responses from 20% to 80% and drastically reduced time spent on follow-up. In addition, client projects require 20% fewer revisions due to the ticket systems Pharmacy Mentor has built within ClickUp.

2c

Real-time visibility into individual, team, and company goal progress

Pharmacy Mentor's entire workforce, including the Client Relations, Web, Development, Marketing, Finance, and HR departments use ClickUp to set and track both their individual goals and their contribution toward company goals. This has eliminated repetitive conversations and email communications about objectives and results.

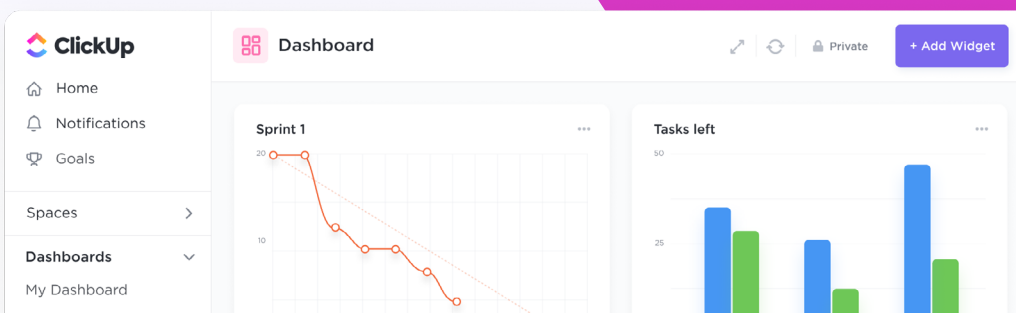
In addition, [ClickUp Dashboards](#) enable Pharmacy Mentor to visualize progress toward goals with real-time reporting. Daily account meetings are no longer needed.

"When I started as Head of Client Relations, I built a Dashboard to track the number of clients per account executive, give a quick view of upcoming projects, and see where clients were on their journey with us. It made a world of difference, seeing this information at a glance." Lewis says.



Now that we have ClickUp, we're not doing the same thing over and over, and we're not confused about who's responsible for which project. We can see who's leading it, break it down into sub-tasks, and everyone can see their responsibilities.

LEWIS NORWOOD, HEAD OF CLIENT RELATIONS AT PHARMACY MENTOR



03 The conclusion: Seamless client and project management


ClickUp has helped Pharmacy Mentor significantly improve client project delivery. Collaboration has soared, work has become more efficient, and real-time visibility into essential metrics has been enhanced. The team has fine-tuned its project schedules, and 100% of staff can now communicate effectively, regardless of time zone.

"We've streamlined the project management process, and it's much easier now. Everything's just so much more slick." Lewis says.

The results

 **2x more productive using ClickUp**

 **20% fewer content revisions on all client projects**

 **80% of clients reply to info requests, up from 20%**

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