STRETCHLEARN · WORKBOOK

ClickUp for Project & Task Management — Workbook

This workbook turns the course into one live ClickUp Workspace. Work through one section per module: design your Space, Folder, and List hierarchy, build tasks with custom statuses and Custom Fields, schedule the work with dates and dependencies on a Gantt chart, then automate the busywork, track your time, and stand up a weekly reporting habit. Fill the worksheets directly as you build in ClickUp, run each step on a real project, and by the end you will have a working Workspace, a scheduled project with dependencies, a reusable Automation set, and a status routine your stakeholders trust.

Foundations and the ClickUp Hierarchy

Decide whether ClickUp fits, then design and build a Workspace hierarchy of Spaces, Folders, and Lists that mirrors your team.

Exercise: Is ClickUp the Right Tool Here?

For one real project you are about to run, answer each prompt in a single line. If most answers point to ongoing work with owners, statuses, and shifting deadlines, ClickUp earns its place; if the work is a static list with no workflow, a spreadsheet is the better pick.

- In one sentence, what is this work, and does it move through stages on its way to done?
- How many people need to see the status of the work, and across how many projects does it span?
- Are there real deadlines that move, and would you ever want to see this work as a board, a calendar, and a timeline?
- Based on your answers, is ClickUp the right tool here, and what is the one factor that decided it?

Worksheet: Hierarchy Design Map

Translate your real teams and projects into ClickUp's five levels. Departments or major functions become Spaces; big initiatives or clients become Folders; individual projects or workflows become Lists. Use a Folder only when several Lists belong together and you would want to view them as a group.

Workspace name (usually one for the whole organization)

Space 1 name and what major area it represents

Space 2 name (if needed) and its area

Folder(s) inside a Space and the initiative or client each groups

Lists inside each Folder or Space (one per project or workflow)

Any Folderless Lists that do not need grouping

One sentence: how a teammate would know where to find a given piece of work

Checklist: Workspace Build Checklist

[ ] Create your first Space, give it an icon and colour, and set who can access it
[ ] Leave most ClickApps off for now; plan to enable Priorities, Custom Fields, and Time Tracking later
[ ] Add a Folder only where several Lists genuinely belong together
[ ] Create at least one List named for a real project or workflow
[ ] Define custom statuses on the List (e.g. To Do, In Progress, In Review, Complete)
[ ] Add 3 to 4 real tasks with verb-first titles to the List
[ ] Save the configured List as a template for the next similar project

Tasks, Statuses, and Custom Fields

Build well-structured tasks: design custom statuses that expose bottlenecks, add Custom Fields, and break work down cleanly.

Worksheet: Custom Status Workflow Designer

Design the status set that mirrors how work really flows. Name each status as a state the work is in, not a person or department. Split any status where a meaningful wait hides inside it, and decide whether to set these at the Space level for consistency or override one List.

Statuses in order, left to right (start with 3 to 5)

Which group each falls in (Not Started, Active, Done, Closed)

Any wait point worth its own status (e.g. Ready for Review)

Will you set these at the Space level or override one List? Why?

One sentence: how a task knows it has reached Complete (definition of done)

The status where you suspect work currently piles up (your likely bottleneck)

Worksheet: Custom Field Setup Sheet

Define the structured attributes a status cannot capture, then add them via the Custom Fields ClickApp. Keep the set small; four fields is plenty to start. Note which field you will filter or group by most.

Effort or Story Points field type and scale (e.g. Number: 1, 2, 3, 5, 8)

Client or Workstream Dropdown values (if one List serves several)

Risk flag Dropdown values, independent of status (e.g. On track, At risk, Blocked)

Budget or Value field (e.g. a Money field) if work has a dollar figure

The one saved filter and grouping you will use most (e.g. group by Assignee)

Which field will trigger an Automation later (e.g. Priority = High)

Exercise: Subtask vs Checklist Decision Drill

Take one substantial task you own and break it down deliberately. The rule: if a step needs its own owner or date, make it a subtask; if it is just a tick one person runs through, make it a checklist item. Answer each prompt for that task.

• What is the parent task, and what are its 3 to 5 biggest steps?

• Which of those steps need their own owner or due date, and so should be subtasks?

• Which steps are lightweight ticks for one person, and so belong in a checklist?

• What is your definition of done for this task, written as a reusable checklist?

Checklist: Task-Building Checklist

[ ] Every task has a short, verb-first title that reads like an action
[ ] Every task has exactly one primary owner via Assignee
[ ] The Priorities ClickApp is on and urgent work carries a flag
[ ] Custom Fields for Effort, Client, and a risk flag are added and populated
[ ] Substantial steps are subtasks (assigned and dated); light steps are checklist items
[ ] A definition-of-done checklist lives on each recurring task type
[ ] Tags use one consistent dimension (e.g. content type), not a jumble

Views, Dates, Dependencies, and Timelines

See the same work as Board, Calendar, and Gantt, add dates and dependencies, and lay the project on an editable timeline.

Worksheet: View Plan: Board, Calendar, Gantt

Decide which views you will add as tabs and what each is for, since all read from one dataset. Plan a Work In Progress limit for your busiest Board column. Every task needs dates to appear on Calendar and Gantt.

Views you will add as tabs (e.g. List, Board, Calendar, Gantt)

What the Board view is for and which column tends to overload

Board WIP limit for the busiest column and the headcount it is based on

What the Calendar view is for (e.g. editorial or campaign schedule)

What the Gantt view is for and who needs to see it

One alternative grouping you will use (e.g. Board grouped by Assignee)

Worksheet: Dependency and Critical-Path Map

List the must-happen-in-order tasks for one project and chain them with ClickUp's Waiting on or Blocking links. Then trace the longest chain to find the critical path, the tasks with no slack you must watch most closely.

Task A (and what it is waiting on, if anything)

Task B and its predecessor (waiting on)

Task C and its predecessor

Task D and its predecessor

The longest dependency chain, written in order (this is the critical path)

Which task, if it slips one day, slips the whole project

Blocker marker you will use and how you will name what is blocking it

Exercise: Gantt Re-Plan Drill

Add a Gantt view, confirm every task has a Start and Due date, then rehearse a what-if. Drag a bar to change dates and read what ClickUp shows. Answer each prompt from the Gantt view.

• Which person has two or more overlapping bars in the same week, and how will you rebalance it?

• If your earliest critical-path task slips three days, does the end date still hold? What did the Gantt show?

• Which task could move without affecting the end date (it has slack), giving you flexibility?

• After dragging one task, did ClickUp flag a dependency conflict, and how did you resolve it?

Checklist: Scheduling Readiness Checklist

[ ] Every task that must happen by a time has a Due date
[ ] Tasks that span more than a day have a Start date so they appear as a bar
[ ] The Dependencies ClickApp is on and true ordering links are set (Waiting on / Blocking)
[ ] Dependency warnings are enabled so you cannot close a task still waiting on another
[ ] The critical path is identified and its tasks are flagged for closer watching
[ ] A Gantt view shows the full project on one screen
[ ] You have rebalanced at least one case of one person being overloaded

Automation, Time Tracking, and Reporting

Automate repetitive moves, track where the hours go, build a Dashboard, and lock in a weekly status routine.

Worksheet: Automation Recipe Designer

Design four Automations using ClickUp's Trigger, Condition, Action structure. Favour the move you make many times a day. Mind the Free plan's cap of 100 executions per month. You will build these in the Automations menu on a List, Folder, or Space.

Automation 1 trigger (e.g. status changes to Complete)

Automation 1 condition and action(s) (e.g. clear assignee, add Shipped tag)

Automation 2 trigger (e.g. status changes to In Progress)

Automation 2 action(s) (e.g. set Due date to 3 days from now)

Automation 3 (e.g. task created in List -> assign List owner, set Priority Normal)

Automation 4 (a handoff, e.g. status to Review -> reassign reviewer, post comment)

Estimated monthly executions for the busiest Automation (watch the 100 cap)

Worksheet: Time Tracking and Estimates Log

Plan your time-tracking habit and capture estimate-versus-actual for a few tasks so future plans are grounded in evidence. Enable the Time Tracking ClickApp first, then estimate on creation and track as you work.

Task name and its time estimate (set when created)

Actual time tracked (timer or manual entry)

Gap between estimate and actual, and what it tells you

Is the time billable, and to which client or project?

One task type you consistently under-estimate (adjust future estimates)

Who needs a Workload or time view, and how often will you review it?

Worksheet: Weekly Status Template

Draft the fixed template you will post in the same place at the same time each week, sourced from your Dashboard and saved filters. Keep it to four short parts so people read it without a meeting.

Overall status (green, amber, or red) and one-line why

Done this week (from a Completed-since-last-week filter)

At risk or blocked (item, one-line reason, next action)

Next week's focus (top 2 to 3 items)

Link to the ClickUp Dashboard for detail

Day, time, and place (comment, Doc, or chat) you will post it every week

Checklist: Reporting and Workspace-Health Checklist

[ ] Build a Dashboard with cards for status count, tasks by assignee, and progress over time
[ ] Add a Time Tracking card totalling hours per person or project
[ ] Add a card filtered to At risk or Blocked tasks for the weekly review
[ ] Agree team norms: every task has an owner and Due date; status changes when state changes, not on Fridays
[ ] Run a standup walking the Board view right to left, finishing side first
[ ] Escalate any blocker that has not moved in two days
[ ] Confirm the Workspace reflects reality so it can replace the status meeting

Your Action Plan

1. Decide ClickUp is the right tool for one real project, and write down the factor that decided it.
2. Design your hierarchy, then build a Space with one Folder or Folderless List per project or workflow.
3. Define custom statuses on each List (3 to 5 to start), naming each as a state the work is in.
4. Add 4 to 6 real tasks, every one with a single owner, a verb-first title, and a Due date.
5. Turn on Priorities and Custom Fields, then add Effort, Client, and a risk-flag field and populate them.
6. Break one substantial task into subtasks and a definition-of-done checklist.
7. Set Start and Due dates and true dependencies, then identify the critical path on a Gantt view.
8. Lay the project on the Gantt, fix one case of overload, and rehearse a what-if by dragging a task.
9. Build four Automations starting with the move you make most often, and watch the 100-per-month cap on Free.
10. Enable Time Tracking, estimate and track a week of tasks, then stand up a Dashboard and post your fixed weekly status.