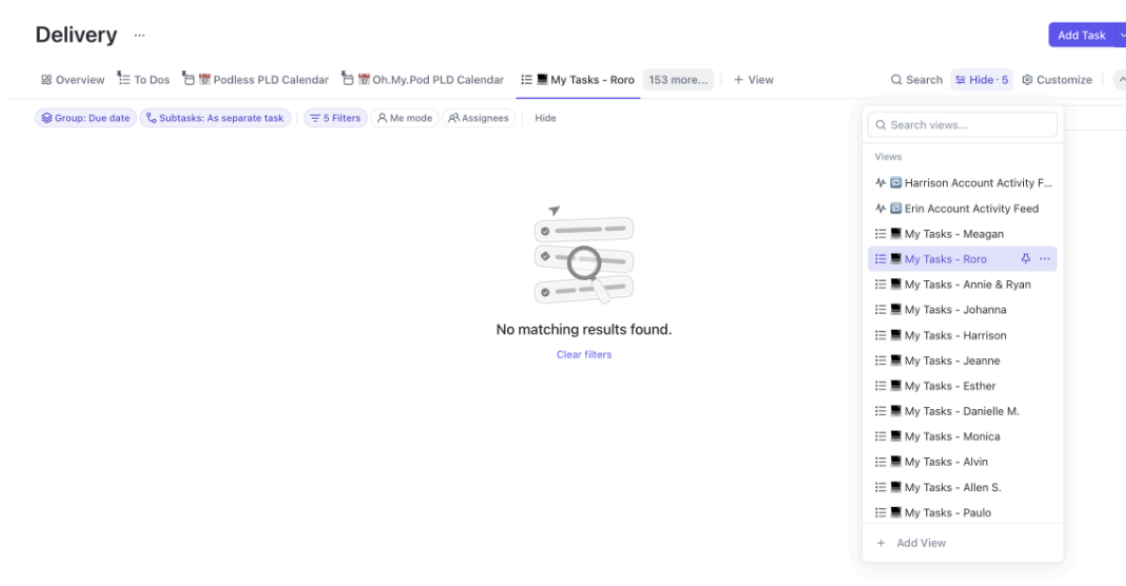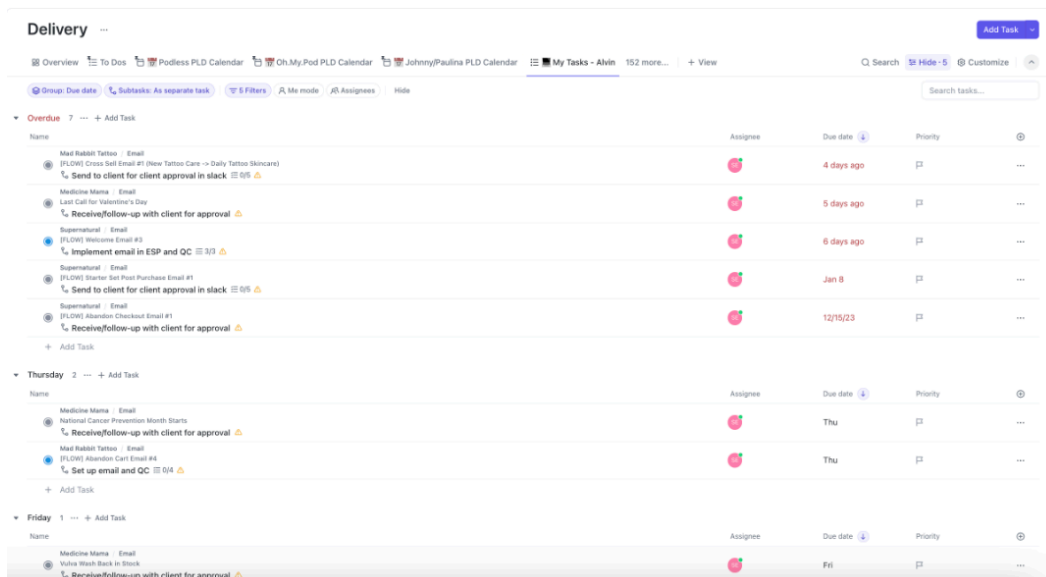# Checking and monitoring resources through ClickUp

1. Go to the Delivery => Tasks List of the member of your team.
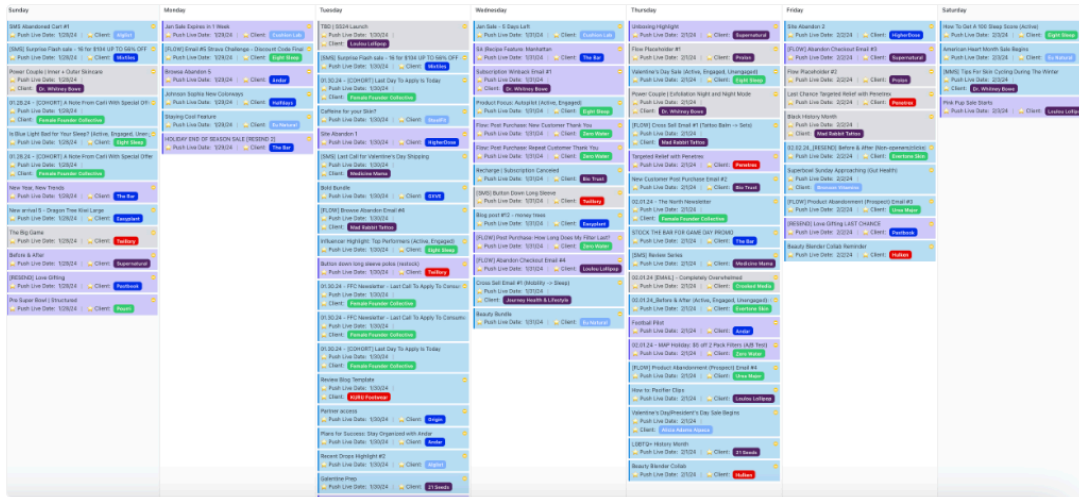

2. Look at their overdue, due today, due tomorrow.

If it is overdue:

- Click on the task and identify if it was backlogged based on the history of the card.
- Find where the marketing specialist is falling through the cracks
- Find extra support or make sure that everything catches up and moves ahead (use the PLD calendar to find any lags with scheduling)

Anything that is not scheduled 3 days in advance is considered behind (unless there are client issues)

Anything that is not scheduled through the weekend on Thursday is considered behind

If it is next up for the week:

- Go over the due tasks by week with the marketing specialist to make sure they are on track
- If there is fore site of issues with bottlenecks or technical issues, push it to the squads for support and call out that there is extra needed help to the Retention Strategist

If it is client-specific:

- Look at other trends with the client and escalate to the AM, retention strategist, and director responsible for the account

2. Looking at bandwidth by week

All time is tracked in ClickUp and all members of the team are responsible for tracking their time per task.

Checking and monitoring the tech squad

1. Slack monitoring: There are 2 areas where the tech squad lives. One is in Slack, which holds SOS and fires. Whenever there is a request that comes in to this Slack, it needs to be looked at that day to make sure one of the tech squad members picks it up.

1. Tech Squad Ticket Board

[The tech squad ticket board lives here.](#)

- Check for any new tickets that have not been assigned
- Assign them to the tech squad team member that has the most experience and tag them
- Gather any technical insights (if needed) to support what needs to be done
- Monitor for late or overdue tasks and make sure there aren't any blockers

2. Checking and monitoring the OOO, MIA, substitutes

1. Take OOO requests ahead of time and either check the task board to make sure the team is ahead with all implementation or check for a substitute (usually needed with 2+ more days OOO).
    - The OOO has a rally-around system where marketing specialists who are on time or ahead of their tasks can rally around another marketing specialist to substitute for them. This can also be done with a substitute from the tech squad
        - Find the tasks per week by marketing specialist
        - 2 or less tasks per day on the other persons' OOO means they are available to rally around
        - Make sure they are added to the tasks as well as to the Klaviyo boards for efficiency
        - Always reward with Bonusly. 🙂
2. MIA
- If someone is missing for 2+ days, start a DM with leadership to identify what has happened
- Temporarily assign tasks with the same rally around process. Usually assign for 1 week in advance to make sure there is coverage

Making sure that tech fires are taken out of the mix

This includes:

- Last minute, off-hour implementation + QC

- o Setting up slices
- o Setting up flows
- o Setting up any data points
- o Setting up segmentation and campaigns
- o Reviewing internally + with the client