The Definitive Guide

How to Implement ManyRequests for Creative Services

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Introduction

Foreword

The task of of implementing a new project management tool can be daunting, I've been there! This guide provides you a simple framework to succesfully implement ManyRequests for your creative agency.

What you'll learn in this guide

This guide will cover 3 areas:

1. ManyRequests overview – This chapter will give you an overview of what is ManyRequests and its key features and why creative agencies use it.

2. Foundations: Understanding ManyRequests – The second chapter gives you an overview how ManyRequests features work. Understanding the key features, admin/team/client views, and settings and permissions.

3. Implementation – With a good understanding of the key features, it's time for implementation. We'll look into 4 crucial areas: Setting up and customizing your portal, managing service delivery effectively, managing team members, and onboarding clients.

What is ManyRequests?

ManyRequests a client-facing project management for creative services.

Key Features

Note: We'll cover each feature into details in the next chapter (Foundations)

It comes with the following key features:

Checkout and Billing

One thing you'll love about ManyRequests it's that it's built for your business and pain points. We're not a generic project management tool with features you don't need. We wanted a simple solution to help you sell more creative services, manage projects effectively, and ensure client satisfaction.

Client portal

ManyRequests is built to collaborate with your clients. You can invite as many clients as you want under all plans.

Client Requests

Your clients and yur team need

Client Management

Your clients and yur team need

Time-Tracking and Reporting

Lastly - our team is here to help. Our support via live chat and email gets all your queries answered within 1 business day (and often - much faster!)

Workflows and Automations

Lastly - our team is here to help. Our support via live chat and email gets all your queries answered within 1 business day (and often - much faster!)

Why ManyRequests?

You might wonder, **why choose ManyRequests over several other options such as ClickUp, Monday, Asana, Trello, or even building your own solution?**

First of all - don't hesitate to try out the other tools too and see what's best for your use case.

Benefits

1) Built for delivering creative requests

One thing you'll love about ManyRequests it's that it's built exactly for your creative service agency. We're not a generic project management tool with features you don't need.

It's a simple yet robust solution to help you sell more creative services, manage projects effectively, and ensure client satisfaction.

ManyRequests is built to deliver creative services at scale to your clients. You can invite as many clients as you want under all plans.

2) Unified way to manage your business

Juggling with several different tools - that are not built to run a creative service, is not ideal. ManyRequests takes a holistic approach where your billing, client projects, client management, and automations are in one place, all working together. This gives you a robust base to run your business and reduces stress of juggling with multiple tools.

3) Ease of use

As you'll see in this guide, ManyRequests is easy to implement, but also easy to use for your team and clients. We've taken great care to make the app look modern, with simplicity and robustness in mind.

4) Constantly improved and updated

As you can see in our product updates, we constantly update ManyRequests with new features, listen to the feedback of our users, and make improvements.

5) Reasonably priced

Our plans start at $29/mo (*that's $0,96/day!*), that's comparable to other tools but with much more features, namely:

- Time-Tracking
- Design Feedback
- Built-In Automations
- Ticketing
- File Sharing

6) Customizable

As you'll see you can customize ManyRequests to your own needs.

7) Exceptional Support

We take pride in offering exceptional support. Our team is here to help your agency succeed.. Our support via live chat and email gets all your queries answered within 1 business day (and often - much faster!), you get

8) Sustainable, and in it for the long haul

We're a partner for your projects for the long term. We're backed by Calm Company Fund, an awesome group of investors that back sustainable and profitable software companies. We've also been around for 4 years.

Pro Tip: Check out our Help Center

We have a help centre with tutorials if you're stuck. Don't hesitate to look at it!

Customer examples

So you might wonder, who's successfully using ManyRequess for their agency?

Here's a few examples:

1. Trevor Pare (DarkRoast) – We've been using ManyRequests for several years. It's the backbone of our agency and since using them we've scaled from 5 to 35 designers. The software is great, easy to use, and their support is exceptional.

2. Luka (Flowout) – We started our agency with ManyRequests and have now scaled past $1m ARR, acquiring clients like Sequoia, Jasper.ai, and more**.**

3. Alexandra Adam (SquidPixels) – We've processed 17000 requests with ManyRequests.

4. Luis Camaco (GetAds) – Built an ads design agency

5. Shelby (GetAds) – Running her outsourced 3D architecture firm with ManyRequests

6. Shelby (GetAds) – Running her architecture firm with ManyRequest

Understanding ManyRequests

A first step when getting started with the ManyRequests' platform is to understand its components and hierarchy.

Our platform comprises modules, features, settings, and views (portal admin, admin, team, client views)

1. **Modules and Features**

Example: Billing is a module where you can manage details such as invoicing (a feature) or taxes (another feature)

2. Settings (Permissions and preferences)

This is the section where you can control your overall portal permissions and preferences.

Example: If you want to manage which notifications are sent to clients, you'll go to that section.

3. Views (Portal Admin, Admin, Team, View)

Our platform has different views for each user role. For example, team don't get access to details such as revenue or all clients.

Let's dive into each!

Modules and Features

ManyRequests comprises **9 different modules.**

These modules can be **turned on or off** (for example - some agencies don't use billing at all) depending on the workflow of your agency.

Modules is also **where you can access all your settings and preferences** for each feature. For example, if you want to disable subtasks for your client requests, simply go to "Client requests > Subtasks" and disable it.

Or, if you want to enable sign up pages for your portal, go to Portal > Sign up pages and turn them on.

Let's dive into each module and its key features:

Portal

This is where you'll be able to manage things such as your sign up page, portal branding, or even adding a subdomain!

Key features:

- Custom domain
- Portal branding
- Sign up pages

- Onboarding

Billing

One of the most important module is Billing! This is where you'll manage your invoicing details such as address or taxes for example.

Key features:

- Invoicing
- Payment processing (Stripe)
- Taxes

Services

The best way to describe services is basically to think of them as the "products" that your agency sells. For example: Design subscription for $2000/mo, or a 10 hour design for $1000.

Key features:

- One-off services
- Recurring services
- Credit-based services
- Discount and coupons
- Order forms

Requests

This is where client work happens!

Key features:
- Subtasks
- Design annotation
- Status

Client Management

This is the module dedicated to managing everything related to your cients: Messages, announcements, and client list.

Key features:

- Messaging
- Announcemnets
- Client list
- Client teams
- Client storage

Reporting

In this module you can manage all features related to tracking the efficiency of your agency, team performance, and client satisfaction.

Key features:

- Time-Tracking
- Client Ratings
- Team performance (soon)

Integrations

Another important module – integrations (available on our Standard and Pro Plans), this allows you to connect existing apps (such as your email service for example) or Zapier with other apps.

Key features
- Live chat integration (Intercom, Crisp, Tawk.to)
- Zapier
- Email marketing integrations (ActiveCampaign, Mailchimp (Soon)
- Accounting software integration (Xero, Quickbooks) (Soon)

Extensions

Lastly, a powerful module is extensions. This allows you to embed other apps in the portal. For example, if you want to embed an Airtable dashboard to your portal you can do exactly that with ManyRequests!

Settings

In addition to modules, you can customize your portal by managing **notifications** (which notifications you want you, your team, and your clients to receive) and **permissions and preferences.**

1) Notifications

Do you want to get an email everytime there's a new request?

Soon: You'll be able to connect Stripe directly to your portal for each new request.

2) Permissions and preferences

Let's say you want your team members to be able to see all requests, or just requests assigned to them, you can edit that too.

Views

You might wonder, how does the portal look like for your clients as well as for other roles ? (teams and other admins?)

Pro Tip!: You can sign in as client to see how the portal looks like!

1) Portal Admin View

The portal admin is the user who created the portal.

Portal admins control the ManyRequests Billing and Invoices and can also add or remove admins.

[Image of Portal]

2) Admin view

The Admins are usually team leaders or managers. You can decide whether or not to give them access to the portal set up (modules and extensions) as well as settings

[Image of Admin View]

3) Team view

Team view is generally for contractors, or your employees that actually work on client requests. You can decide for example if they're able to see all requests or just requests assigned to them.

[Image of Team View]

4) Client view

Finally, client view. This is what your clients will see when they log in to their portal.

[Image of Team View]

Implementation

A first step when getting started with the ManyRequests' platform is to understand its components and hierarchy.

Our platform comprises modules, features, settings, and views (portal admin, admin, team, client views)

1. Set up and customization

The first step in implementing ManyRequests is to complete the **Quick Set Up**

It's five tasks to get you all up and running with ManyRequests. It takes about 15min in total to complete these tasks.

Upon completing these steps you will be able to…

- Accept payments for your agency
- Get your portal customized with your own branidng
- Understand how client requests work
- Understand admin, team, and client views

Here are the 5 tasks:

1. Connect billing
2. Create service
3. Create test client
4. Create test request
5. Customize portal

1. Connect billing

- Go to Portal > Modules > Billing
- Connect your Stripe account

[image billing]

2. Create service

- Go to Services
- Choose One Off or Recurring Service
- Choose whether you want to bill hourly or not
- Customize Service Request Form for each

[images service creation wizard]

Pro Tip: Request forms

3. Create test client

You're already halfway through the step.

Now, create a test client so you can see how to submit requests and how the portal looks like.

Create that client, then open that client and assign the service you just created to that client.

Pro Tip: Log in as client to see the portal from the clients' perspective

4. Create test request

Once logged in as client, click on "Create request" and you'll be able to submit your first request.

5. Customize portal

Lastly, you can customize your portal. Here's 3 things I recommend you to customize:

1) Your logo and favicon
2) Your portal colors
3) Your custom domain (app.youragency.com)

2. Systemizing Service Delivery

We've completed the basic set up, now it's time to get a deep dive into actually making service delivery efficient. We'll focus on the Client Requests part of the app (we're planning to release other guides on agency billing and agency automation later)

There are 3 areas we'll explore

1. Mapping out your service delivery
2. Assigning requests and managing workload
3. Delivering requests

Mapping out service delivery

What I highly recommend you to do is **systemize as much as you can your service delivery.**

In essence: **What are the steps that happen from when a client (or you) starts a request until project close and delivery.**

Note: This is more a guideline that anything – but having everyone in your agency follow the same steps will reduce errors, keep everyone accountable, and keep your agency organized.

For example:

1) Client submits brief
2) Request assigned to team member
3) Team member sends message + sets deadline
4) First draft sent within “X” days
5) Revisions
6) Closing and Delivery
7) Project Complete

Managing requests and workload

A question we often get at ManyRequests is: **What’s the best way to assign requests and handle workload?**

First of all - during service creation you can set up max concurrent requests. This means clients can only have “x” active requests (the other requests will be marked as “Queued” or “Pending” depending on the settings). This not only make sure clients don’t submit too many requests but also encourages upgrades.

Here are a few tips to handle workload:

1. Use tabs and filters

Filters are a powerful way to see what’s happening in your agency.

You have tabs “Unassigned” / “Auto-assigned” / “Assigned”

You can also use filters such as “Overdue” to see which requests should be worked on in priority.

Finally, tags are another powerful feature.

2. Auto-assign requests

Note: This is more a guideline that anything – but having everyone in your agency follow the same steps will reduce errors, keep everyone accountable, and keep your agency organized.

Service delivery best practices

In this section we'll explore other best practices to efficiently manage requests:

1) Use canned responses

2) Customize status and change them automatically

3) Revisions with design feedback tool

4) Use subtasks for complex projects

5) Sending deliverables to clients
- Send a copy to their Google Drive
- Use a naming convention for files (so your team can easily find files)

3. Team management and training

In this section we'll explore three core areas:

1) Team structure
2) How to train your team
3) How to track team performance

Team structure and roles

A good way to get started with delegating is to **write down your team role and duties.**

In ManyRequests you can set two different roles for your team memberst: Admins and Team Members.

Here's an example:

Admin:

Role: Team Leader
Duties:
- Assign new requests to team members (Twice daily- before 10am and before 4pm)
- Send message to clients on new requests
  – Use canned response ("Thanks for submitting your request! We'll assign it to the best designer and give you an ETA within a couple of hours!")

- Verify workload for each team members (Daily)
- Verify that overdue tasks, and due today tasks are being marked as delivered (Twice daily)
- Handle project close once team members send deliverables
- Train new team members

Pro Tip: Create Team Pods - for example 6 team members that cater for the same clients. This will create redundancy in your agency and also increase satisfaction since clients will work with the same team members.

Training your team

One key element to consider here is : **Setting expectations**

Specifically, focus on expectations around communication (internal) as well as client communication.

Pro tip: **Use canned responses. These are pre-saved messages and you can encourage your team to use them.**

For example:

- Working hours
- Reply time for new requests
- When and what deliverables (for example source files) should be sent

In addition to that, it's a good practice to create a training manual (which you may already have done after Systemizing Service Delivery), you can use flowcharts to make it more visual.

You can then train your team members is to work on a few test requests internally or internal projects.

Pro tip: Keep your training manuals simple, you don't want to overwhelm your team (especially running a creative service), these are more general guidelines than a set of strict rules to follow.

Tracking Team Performance

ManyRequests has two features to track team performance:

1) Time-Tracking

2) Client Ratings

Both can be turned on or off.

4. Client onboarding and management

The final step in setting up your agency operations is client onboarding and management. This section we'll explore what you can set up in ManyRequests in that regard as well as some best practices.

Particularly we'll focus on 3 areas:

1. Setting client expectations
2. Effective client onboarding
3. Communication best practices

Setting client expectations

Probably the most important foundations of an agency success is to manage expectations.

In short: **What you do and what you don't do for your clients.**

Productizing your services helps with that though a lot of agencies that use ManyRequests have other models (Hourly or Project-based)

No matter which model you focus here are a few steps to take at when it comes to setting client expectations effectively:

1. Focus on the right clients

The truth is, not everyone will be a fit for your clients.

Pro tip: Create a "Who it's for" section on your website + add link to recommended resources from blog.

2. Define which services your offer and their exact scope

For example, if you're a Webflow agency, what are your packages and what do they entail?

Pro tip: Create a scope of service with what you offer, what you don't offer

3. Create communication expectations

What do you require from your clients? How often you'll communicate

In short: Avoid surprises.

***Pro tip: Create a "How it works" or "Our processes" or Demo for your services, this will allow clients to understand better how your team work*.**

Effective client onboarding

Once you've set expectations, it's time to focus on client onboarding.

Here are a few ideas:

1. Create an onboarding screen in ManyRequests

2. Send a welcome email to your clients

3. Create a video

Client communication best practices

Once you've set up all the above, it's up to you, your team leaders, and team to always focus on great communication.

Here are a few tips:

1. Give frequent updates on requests

2. Use templates to maintain consistency

3. Give request ideas to clients

Conclusion

Setting up operations from your agency comes with having a repeatable workflow with one source of truth. ManyRequests helps you streamline that - by unifying and organizing client work in one place with views for portal admins, admins, team members, and clients.

This guide helped you understand modules, features. Don't hesitate to check the following resources for more tips, best practices:

Recommended resources

- Help Center
- Case studies
- Video tutorials (soon)

Migration service – we also offer a free migration service for clients on our Standard and Pro plans. If you need help to get started, import your existing clients, team, and tasks, just contact us on our livechat or book a migration call here where we'll let you know the next steps.

In addition to this, feel free to contact our support if you have any questions about ManyRequests.

Thanks for reading!