



ClickUp Refresh Checklist

5 Simple Steps to Clean Up & Streamline Your Workspace

Get ready to declutter your ClickUp and make it work for you with these quick, actionable steps! Whether you need a full refresh or just a mini cleanup, this checklist will keep you on track and make your workspace more efficient.

1. Clear the Clutter

- ✓ **Quick Win:** Archive or delete old tasks that are just taking up space.
- ✓ **Deep Clean:** Review ClickUp folders and remove outdated or duplicate projects.
Pro Tip: Not sure what to delete? Create an “Archive Review” list and set a reminder to review it in 30 days.

Tasks to tackle:

- ✓ Clear out inactive tasks (not updated in 90 days).
 - ✓ Remove completed tasks from active lists.
 - ✓ Archive or delete old client projects.
 - ✓ Delete empty lists and folders.
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2. Update What's Not Working

- ✓ **Quick Win:** Replace an outdated task list with a new one that fits your current needs.
- ✓ **Deep Clean:** Update your views so you can easily track the tasks that matter most.

Tasks to tackle:

- ✓ Swap old task lists for fresh ones.
 - ✓ Update views that help keep you organized.
 - ✓ Replace outdated statuses with ones that fit your current workflow.
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3. Eliminate Distractions

- ✓ **Quick Win:** Find one task that isn't moving the needle and remove it.
- ✓ **Deep Clean:** Categorize tasks into High Impact vs. Busy Work—focus on what moves the needle.

Pro Tip: If you keep pushing a task forward without doing it, ask yourself: “Does this really need to be done?”

Tasks to tackle:

- ✓ Resolve any assigned comments (close them out).
- ✓ Declutter unnecessary notifications.
- ✓ Organize your brain dump notes—turn them into tasks or store them for later.



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4. Optimize for Efficiency

- ✓ **Quick Win:** Update one automation that isn't working efficiently.
- ✓ **Deep Clean:** Review your ClickUp dashboards to ensure your most-used views are easy to access.

Pro Tip: Do a Task Tidy-Up (3-Minute Reset!) - Check off completed tasks and move items to their proper places, adjust upcoming deadlines based on your current workload, and pause or delete old recurring tasks that are no longer relevant.

Tasks to tackle:

- ✓ Reassess your task structure—spaces, folders, and lists should match your current needs.
 - ✓ Update or add new SOPs.
 - ✓ Give your templates a touch up.
 - ✓ Audit your custom fields and streamline.
 - ✓ Group overdue tasks by priority (or assignee for a team) for easier follow-up.
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5. Streamline for Focus

- ✓ **Quick Win:** Automate one repetitive task.
- ✓ **Deep Clean:** Create a Weekly CEO Hour to check your systems, tasks, and progress.

Pro Tip: Batch similar tasks together to save time instead of constantly switching between work types.

Tasks to tackle:

- ✓ Simplify task names and descriptions—keep them clear and concise.
 - ✓ Remove unused views to keep your workspace neat.
 - ✓ Standardize task statuses to avoid confusion.
 - ✓ Centralize your brain dump notes for easy access.
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Keeping It Up

- ✓ Set a monthly reminder to review ClickUp and declutter.
- ✓ Schedule a “No New Tasks” Day to catch up on existing tasks before adding anything new.
- ✓ Use ClickUp's Automations to streamline your daily processes and reduce manual work.

Ready to Get Started?

Take action on just one task today, and build momentum as you work through the rest of the checklist. With these small, simple steps, you'll keep your ClickUp organized, optimized, and stress-free!