

ClickUp Alternatives for Agencies

Compare agency-friendly ClickUp alternatives — client portals, retainer templates, asset proofing, and billable-hour workflows for 2026 marketing agencies.

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TL;DR Agency workflows punish generic PM tools. Multi-client context switching, retainer accounting, asset proofing, and client-facing transparency all stretch a tool built for single-organisation use. Asana remains the cross-functional agency standard from \$10.99 per seat per month on Starter. Monday.com brings visual client dashboards with Standard at \$12 and Pro at \$19 per seat per month annual. Notion handles client-facing wikis alongside internal tasks from its Plus tier. Teamwork is purpose-built for client services (capability only — vendor pricing not verified in this audit). The choice depends on whether you need cross-functional reach, visual breadth, doc-and-task fusion, or agency-native features.

Agency Workflow Challenges

Running an agency is not running one project, it is running fifty in parallel under different contracts. The tool needs to absorb multi-client context, retainer economics, and client-facing exposure without leaking information across boundaries.

Most agency PM problems are not workflow problems — they are accounting and trust problems wearing workflow clothes. The right tool reduces the cost of all three.

Multi-client context switching all day long

The cognitive cost of context switching across clients is the largest hidden expense in agency operations. A tool that surfaces "my tasks across all clients" in one view, then lets you drill into a specific client without losing your place, saves several hours per week per producer. Asana's "My Tasks" inbox crosses projects natively, Monday's "My Work" view covers the same ground, and Notion's database filters can be configured to do it. The pattern that matters: one cross-client home, with clean drill-down paths.

Billable hours, retainers, and scope creep

Retainers create a peculiar accounting problem: the work is fluid, but the budget is fixed. Tools that track time against retainer hours and surface burn-down by the end of week three save the agency from the end-of-month surprise. Native time tracking exists in Monday Pro at \$19 per seat per month annual; Asana and Notion rely on integrations (Harvest, Toggl, Hubstaff — referenced on capability only because per-seat pricing was not verified across all three this cycle). Scope creep needs a change log on the project, not an apology email after the fact.

Client-facing transparency without exposing internals

Clients want visibility, but they should not see internal commentary, capacity notes, or the conversation about their unrealistic deadline. Guest seats with read-only access solve this in Monday and Asana. Notion's share permissions cover it at the page level. Teamwork is built

around the client-facing/internal split, with separate views by default. The trap: a tool without granular sharing forces the agency to maintain two parallel versions of the project, which always drift.

- Cross-client home view saves hours per producer per week
- Retainer burn-down should be a dashboard, not a month-end recovery exercise
- Guest seats with role boundaries beat parallel project copies

Pick a tool that absorbs multi-client context, retainer accounting, and client-facing exposure — three problems other PM categories don't face.

Campaign Collaboration Features

Campaigns chain creative, copy, paid, and stakeholder approval into a sequence that rarely matches the tool's default project template. Reusable briefs, asset proofing, and calendar views are the load-bearing features.

Campaign work has its own shape: brief → draft → review → revise → approve → launch → report. Generic project templates miss the review loops; agency PM tools that handle proofing natively shorten the loop by days.

Asset proofing and approval flows

Proofing means showing the client the asset in context, capturing markup, routing to internal and external reviewers, and tracking versions. Monday's WorkForms and approvals cover lightweight proofing; full proofing typically lives in dedicated tools (Filestage, Ziflow) integrated with the PM workspace. Teamwork includes proofing in-product. The pick depends on whether proofing is a one-stop or a five-stop process in your workflow.

Briefs as reusable templates per client

Templates are how agencies industrialise. A reusable brief template per client type — paid-social campaign, content launch, brand refresh — captures the steps, stakeholders, and time budgets that experience has taught the team. Asana templates from the Starter plan at \$10.99 per seat per month annual handle this cleanly. Monday templates do the same. Notion's template gallery and per-page template buttons are equally capable. The discipline that matters: maintain the templates each quarter or they drift from reality.

Calendar views for content and paid campaigns

Editorial calendars and paid-media flighting both want the same view: rows by channel or client, columns by date, cards showing status. Monday's calendar view at Standard \$12 per seat per month annual covers it. Asana's timeline plus calendar views from Starter handle the same pattern. Notion's calendar database view does it at lower fidelity but more flexibility. The selection is less about features and more about which UI your team will keep current.

Pricing and feature data verified against vendor pages on May 13, 2026.

1. Proofing in-tool saves a tool-switching loop; proofing in a dedicated app catches more issues
2. Maintain templates quarterly or they become obstacles
3. Calendar fidelity matters less than calendar usage

Reusable briefs, embedded proofing, and a calendar view the team actually keeps current are the three features that pay for themselves.

Client Management Tools

Client-facing exposure is the trust layer of agency software. Read-only portals, white-labelled views, and intake forms separate a tool that scales with the client roster from one that creates incidents.

Client portals are where agency PM tools earn or lose their place. The features below decide whether you give clients a real window into the work or send them weekly PDF status reports.

Guest seats and read-only client portals

Guest seats let clients see scoped views without paying full seat price. Asana includes free guest collaboration. Monday allows guest access on Standard at \$12 per seat per month annual and higher. Notion's external guest count is limited on the free tier (10 external guests) and expands on paid plans. The math to run before picking: estimated guest count times the number of clients, multiplied by seat cost if guests aren't free. Plans without free guests get expensive fast.

Branded or white-labeled client views

White-labelling matters more for boutique agencies whose brand is part of the deliverable. Monday allows custom branding at higher tiers; Notion supports custom domains and branding on paid plans; Asana's branding is lighter. Teamwork was designed with client-facing whitelabel as a default. If your sales pitch includes "your branded portal", select for it; otherwise standard guest access usually suffices.

Client request intake forms

Intake forms route client requests into the right project queue, with the right fields, instead of arriving as Slack DMs and emails. Monday Forms (Standard at \$12 per seat per month annual) and Asana Forms (Starter at \$10.99 per seat per month annual) both cover this. Notion's forms are newer; for high-volume intake, dedicated form tools (Tally, Typeform) often integrate cleanly. The discipline: every client must know the request channel, or the form gets bypassed.

Free guest seats can swing per-client costs by hundreds of dollars a month at scale — model the guest count before signing.

Client portals are a trust feature — guest pricing, white-labelling, and form intake decide whether the tool scales with your client roster.

Productivity Automation Systems

Automation pays off hard in agency work because the same handoffs repeat across every client. Auto-assigning roles, status-driven client notifications, and recurring retainer templates remove dozens of small steps per week.

The automation difference between a junior account manager and a senior one is partly experience and partly tooling. Good automation rules give the junior the muscle memory of the

senior, plus a few hours back per week.

Auto-assigning roles per project type

When a new "video production" project starts, the director, editor, and account lead auto-assign. When a "paid campaign" starts, the media buyer and analyst auto-assign. Asana Rules and Monday automations both handle this. The pattern that compounds: each role assignment also triggers the role's template tasks, so the new project is half-populated before the kickoff call. Monday's Standard plan at \$12 per seat per month annual ships 250 automation actions per month; Pro at \$19 raises that ceiling materially.

Status-based notifications into client Slack

Clients in their own Slack workspaces want milestone notifications, not invitations to your PM tool. Status-change automations that post into a shared Slack channel keep them informed without giving them another login. Monday, Asana, and Notion all integrate with Slack at this level. The discipline: notify on milestones (start, draft ready, review needed, launched), not on every status change, or the channel becomes noise within a week.

Recurring monthly retainer task templates

Retainers run on rhythm: kick-off meeting first Monday, mid-month check-in, end-of-month report. Recurring task templates create these without anyone managing the calendar by hand. Asana, Monday, and Notion all handle recurring tasks. The trap that catches new agency operations leads: when the retainer scope changes, update the template, not just the next instance, or you replay last month's scope forever.

- Role auto-assignment per project type saves the kickoff hour
- Slack notifications belong on milestones, not status flips
- Recurring retainer templates must be updated, not just instantiated

Agency automation pays back fastest on role assignment, milestone notifications, and retainer rhythms — invest there before fancier rules.

Best Platforms for Agencies

The four platforms below cover most of the agency market in 2026. Pick by which agency pain point dominates — cross-functional reach, visual client dashboards, doc-and-task fusion, or client-services-specific features.

Quick comparison of the four agency PM tools most commonly shortlisted in 2026. Verified pricing where confirmed; capability framing where vendor pricing was not parsed in our audit.

Tool	Paid entry (annual)	Agency strength	Best for
Asana	Starter \$10.99 per seat per month	Cross-functional reach, free guests	Mid-sized agencies, mixed disciplines
Monday.com	Standard \$12, Pro \$19 per seat per month	Visual client dashboards, native time tracking on Pro	Visual-led agencies, retainer accounting

Tool	Paid entry (annual)	Agency strength	Best for
Notion	Plus \$10 per seat per month	Wiki + tasks for client-facing knowledge	Boutique agencies with strong content output
Teamwork	Capability only — pricing not verified	Built specifically for client services	Agencies wanting client-services-native

Asana: proven cross-functional agency standard

Asana sits as the default for mid-sized agencies because it covers creative, paid, and account-management workflows in one workspace with free guest access. Starter at \$10.99 per seat per month annual covers the typical agency need; Advanced at \$24.99 per seat per month unlocks portfolios and goals for agencies with multiple service lines. Workload views and timeline planning carry agency-grade capacity work without forcing every team into a separate tool.

Monday.com: visual client dashboards

Monday's strength is visual: status pills, colour-coded boards, and dashboards that look like dashboards. Standard at \$12 per seat per month annual handles 250 automation actions per month plus guest access. Pro at \$19 per seat per month annual adds time tracking and 25,000 automation actions — the tier most retainer-running agencies end up on. Enterprise pricing is custom. The visual fluency Monday brings is actually useful when clients sit in on weekly reviews.

Notion: client-facing wiki + internal tasks

Notion suits boutique agencies whose deliverable is content or strategy, where the wiki is part of the value. Plus at \$10 per seat per month yearly covers the team experience with limited external guests; Business at \$20 per seat per month adds advanced permissions. The trade-off: Notion asks more setup discipline than Asana or Monday, and its task management is lighter. The reward is a single tool for client-facing documentation and internal work.

Teamwork: built specifically for client services

Teamwork is the niche agency choice, designed around client services from the start. Time tracking, retainer accounting, proofing, and white-label portals are built-in rather than configured. We did not verify 2026 vendor pricing in this audit, so reference Teamwork on capability and engage sales directly. Agencies whose primary pain is "every generic PM tool needs work to become an agency tool" should shortlist it.

For agencies whose work overlaps heavily with editorial calendars and content production, the marketing team PM tools comparison covers complementary platforms. Agencies billing by the hour will want to read the agency time tracking tools coverage for native time tracking deeper than this section. Larger agencies approaching the enterprise threshold should weigh the enterprise-grade project software with SSO project management capabilities once seat counts cross a few hundred.

Editor's note: in agency buyer scenarios, the highest-ROI licensing change is often switching from per-project guest seats to free-guest plans when the client roster is large.

— Mara

Asana wins on cross-functional reach, Monday on visual dashboards, Notion on wiki fusion, Teamwork on client-services-native — pick by which agency pain dominates.

FAQ: Agency ClickUp Alternatives

Recurring questions from agency operations leads evaluating ClickUp alternatives in 2026, with answers grounded in verified vendor data where available.

Five direct answers to the agency-specific questions that drive shortlisting.

- Asana is the most common agency PM tool above ten seats in this 2026 buyer scenario.
- Teamwork wins on agency-native features but requires direct vendor pricing engagement.
- Monday Pro at \$19 per seat per month annual is the most common retainer-agency tier.

Match agency pain to tool strength — cross-functional, visual, doc-fusion, or client-services-native cover most decisions.

FAQ

Which ClickUp alternative is built for marketing agencies?

Asana is the most common pick for marketing agencies above ten seats in this 2026 buyer scenario, with Starter at \$10.99 per seat per month annual and Advanced at \$24.99 per seat per month for portfolio modelling. Monday.com is a strong alternative for visual-led agencies, particularly on its Pro plan at \$19 per seat per month annual. Teamwork is the agency-native option but its 2026 pricing requires direct vendor engagement.

Does Teamwork beat ClickUp for client-facing work?

For agencies whose primary pain is client-facing transparency, retainer accounting, and proofing, often yes. Teamwork was designed around client services from the start, where ClickUp generalises across many workflows and asks the agency to configure the client-facing layer. The trade-off is feature surface beyond agency work — ClickUp covers more general PM territory. We did not verify Teamwork's 2026 pricing this cycle, so engage sales directly for retainer-tier modelling.

Can agencies white-label their PM tool for clients?

Yes, with caveats. Monday allows custom branding at higher tiers. Notion supports custom domains on paid plans. Teamwork includes white-label portals natively. Asana's branding controls are lighter — typically the client sees Asana-branded views. The economic question is whether white-labelling justifies the higher-tier cost: for boutique agencies where the portal is part of the deliverable, yes; for production-heavy agencies where the deliverable is the work itself, the cost is usually not warranted.

How do agencies handle retainer billing inside Asana?

Asana itself does not bill — retainer billing usually pairs Asana with a time tracking integration (Harvest, Toggl, Hubstaff — each referenced on capability since per-seat pricing was not

verified across all three this cycle) and an invoicing tool (QuickBooks, Xero, FreshBooks). The Asana side tracks scope and hours estimates; the time tracker captures actual hours; the invoicing tool produces the bill. Agencies preferring an all-in-one approach should look at Teamwork or Monday Pro at \$19 per seat per month annual for built-in time tracking.

What's the cheapest tool for a 5-person agency with 20 clients?

Asana Starter at \$10.99 per seat per month annual is typically the lowest total cost for that profile because guest collaboration is free, so the 20 clients don't add seat costs. Five seats at \$10.99 lands near \$55 per month annual. Monday Standard at \$12 per seat per month annual reaches \$60 per month for the same count and includes guest access. Notion Plus at \$10 per seat per month yearly lands at \$50 per month with limited external guests on the free tier. Run the guest math first — it dominates the price difference.

Do agencies need a separate proofing tool?

For agencies producing creative assets at volume (video, design, print), usually yes. Dedicated proofing tools (Filestage, Ziflow) handle annotation, version control, and external reviewer routing better than embedded PM features. For agencies with light proofing needs, Monday's approval flows or Teamwork's built-in proofing cover most cases. Match the proofing fidelity to the asset complexity — over-tooling proofing is a common agency expense.

Full article: <https://clickalternatives.net/agency-clickup-alternatives>

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