The Essential
Trello Team Toolkit

Contents

Introduction

Teams everywhere have big things to do and even bigger things to accomplish, together. We want to give teams something extra to celebrate—a day-to-day way of working that is more productive, more collaborative, and easier to manage.

Business today is experiencing a steady shift towards work that is accomplished among cross-functional teams. These new organizational models are paying off for organizations that are executing with ease and efficiency.

But how do these teams achieve these high levels of productivity and collaboration?

They use a common tool and platform that can be accessed from any device, anytime.

This technology becomes the central productivity hub for all projects. Collaboration and communication become simpler. Visibility and transparency into what's going on at any moment among the team results in a single source of truth. The team can make better decisions, improve cross-team communication, and support remote work.

Trello is the tool chosen by millions around the world for seamless team collaboration and to bring perspective to any project. However your teams are structured, and no matter how big the project, Trello is flexible and adaptable to meet any demand.

The Trello Team Toolkit includes free template boards for better meetings, more organized team information, smoother projects, loftier goals, and bigger bashes.

In this eBook, your team will learn how to:

- Build a central station for goal-setting
- Unlock project management perfection with Trello
- Use Trello as a knowledge base manager system
- Put an end to time-wasting meetings
- Celebrate team wins with the perfect party plan

The workflows and boards in the Toolkit have been tried and tested by teams just like yours (it's been copied over 30,000 times!). Discover how teams are planning, working, achieving, and celebrating better, together!
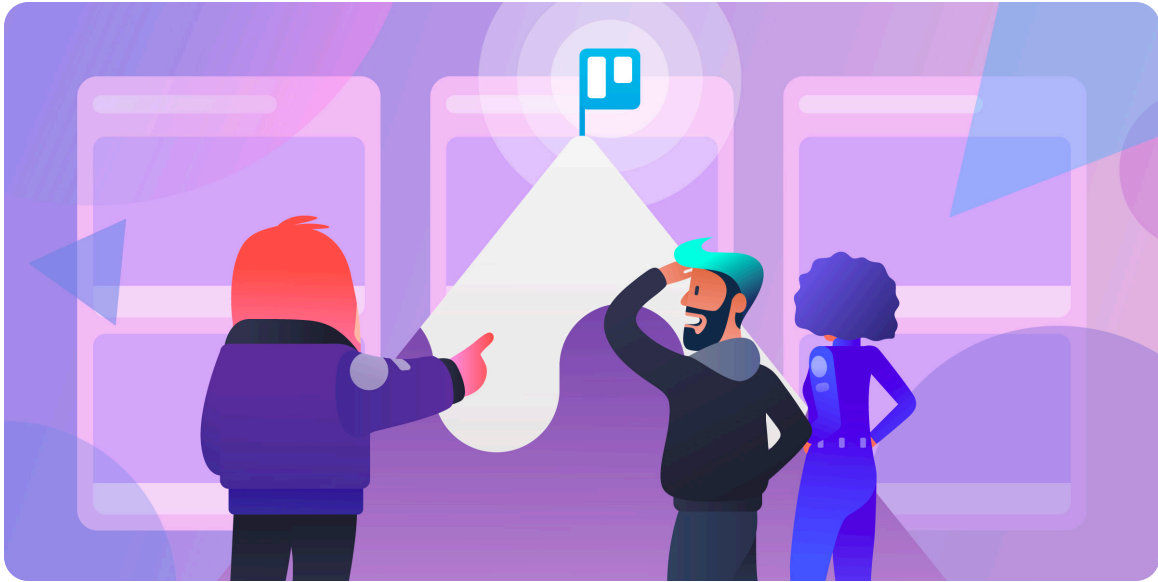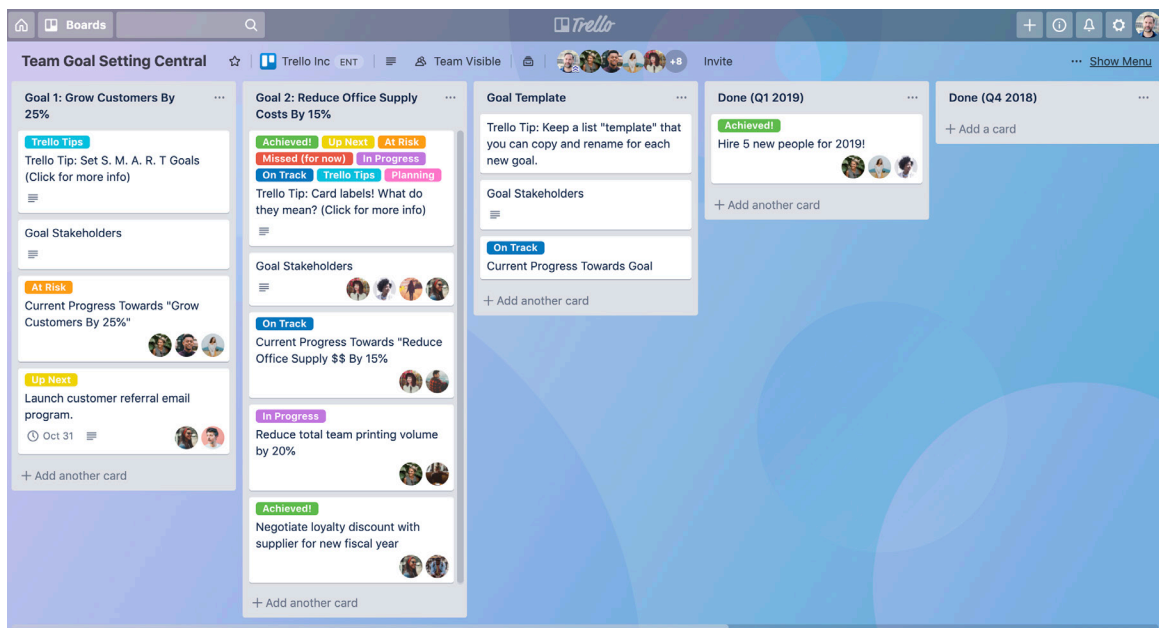
How To Become A Team That's #Goals

Setting goals can seem fun when you're in the brainstorming stage, but recording target numbers and quarterly initiatives can dry up enthusiasm pretty quickly.

Then there's the issue of tracking progress and informing your superior on your weekly or monthly accomplishments. You're already busy trying to achieve that stretch goal, so it's hard to find time to stop and report back on things you've already done. But establishing and working towards a goal shouldn't be so cumbersome. The entire point of establishing clear objectives is to clear the way and identify markers of success that build purpose and plan for what work matters most. They should serve to motivate and focus team efforts so distractions are kept to a minimum and everyone can be allowed to contribute at their best.
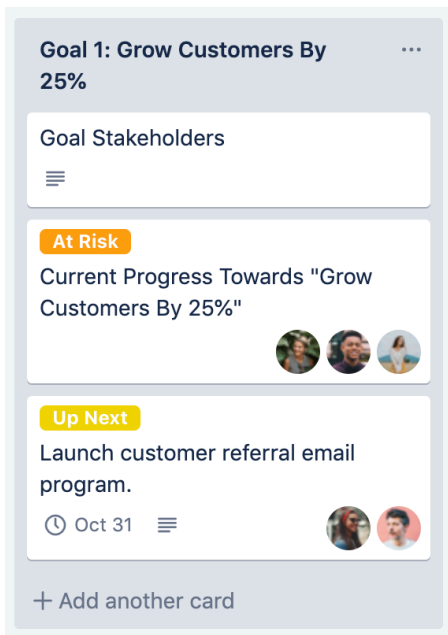
Let's put an end to painful, pointless goal-setting exercises and time-wasting tracking requirements. This Trello workflow paves the path so your team can be motivated by clear, trackable goals that help everyone feel productive and accomplished every day.

Build A Central Station for Goal Setting

Now it's time to create a space where goals can be defined and put them into an easy and transparent tracking tool. Copy this Team Goal Setting Central sample board to get started, and customize the following parts to fit your team's unique needs:

Copy the Board ➡

Goal 1: Grow Customers By 25%   ...

Goal Stakeholders

≡

At Risk

Current Progress Towards "Grow Customers By 25%"

Up Next

Launch customer referral email program.

🕐 Oct 31 ≡

+ Add another card

Each list name is the goal itself. By keeping the goal as a "title" it serves two purposes:

1. It keeps the goal concise so that it's easy for the team to intake and remember as a north star for future business decisions.
2. It makes it easier to move past the end outcome, and focus instead on the process—which is represented as the cards that define each project or effort that will contribute toward reaching the goal.

Each card should summarize a specific project or time-bound effort that the team is working on to reach the goal. Set a due date by when each project will be completed.

The people on your team working on the project can attach other Trello boards or cards where work is happening, as well as strategy documents and presentation decks that can give executives or higher-ups the context they need to be looped into progress.

There is also a card on each goal list that summarizes all the stakeholders involved in reaching that goal as a visual reminder of the teamwork that's going into the entire process.

Done (Q1 2019)   ...

Achieved!

Hire 5 new people for 2019!

+ Add another card

Finally, finished projects and closed goals can be placed in "Done" lists organized by quarter or other set time period, so you have a viewable history of all the great things your team has accomplished! If the board gets cluttered, you can always archive the lists.

They're never permanently deleted so you can bring them back if you need to reference anything in the future.

Track Triumphant Team Goals

Once you have a structure for the Trello board that works for your team, you'll want to define how the board is going to be used so that the team stays involved in updating and referring to it regularly.

Weekly updates go on each project card in the comments section, and can be easily organized in a bullet list format:
To keep the updating process from becoming a chore, goal
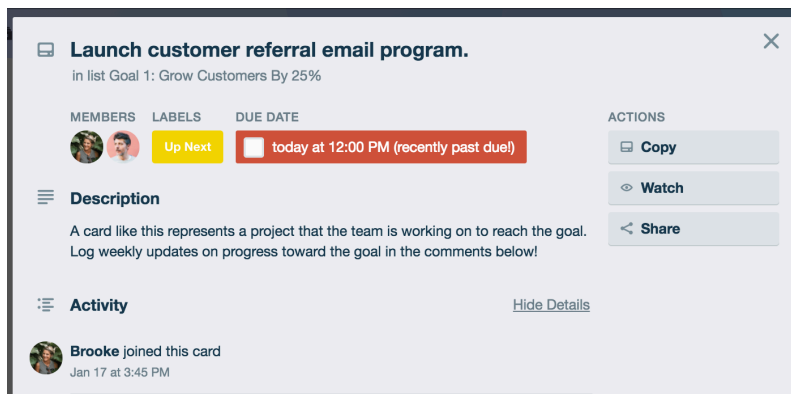
stakeholders should rotate weekly or monthly so that tracking is a team effort. The person doing the updates can simply @ mention the next person in line on the card so they'll know they're up to bat on the reporting deck. Another hurdle can be making sure that the team reads

the updates and gets the benefit of celebrating those team wins (cue the confetti!). Updating each project card with a label that summarizes progress is a fast way to make the overall progress viewable at a glance.

You can include labels like:
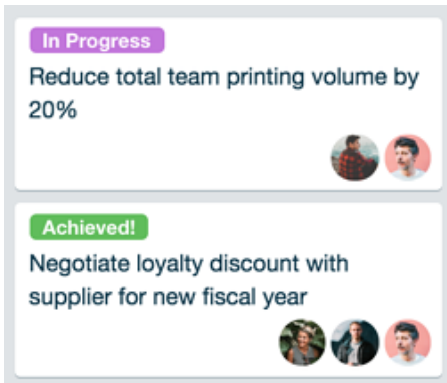
- **Achieved!:** Add this card to initiatives that you finish up during the quarter.
- **Planning:** This indicates the project is just getting started.
- **Up Next:** This can communicate that the project hasn't started yet.
- **In Progress:** This will let your team know you're working on it!

- **On Track:** Your team is on track to reach this goal.
- **At Risk:** If you don't think you can hit the goal, add this label to be transparent, and get some help!
- **Missed (for now):** It's OK to miss a goal now and then. Logging that will help your team revisit it later and try again.

Each team member can decide on how to receive the updates in the place where they read information easiest. This can be through email notifications or by watching the board to get in-app notifications on web or mobile.

Trello also has Power-Ups that integrate with other apps where your team communicates the most. See the last section in this ebook. For example, the Trello team pipes weekly updates into team Slack channels using the Slack Power-Up.

And that's it!

The rest should be up to you and your team to customize to your unique goal-setting processes. You can move lists around, designate cards for smaller components of projects or break them out by type of work. As long as your team is working on the goals together, keeping progress transparent and up-to-date, and feeling like the process is helping them be more productive, then your goals will give your team stellar results!

Plan And Manage All Projects Like A Pro

We've all dabbled in project management at some point whether it's our job title or not. Most of us have worked with our team and planned some sort of project (and yes, rallying everyone together for an off-site lunch counts).

If you are specifically a project manager, you wear many hats and juggle one too many balls in the air. Project managers are the glue that keeps the team together. From planning, communication, and reporting, it's essential that you are able to stay organized in order to keep your team moving in the right direction towards launch.

The most popular toolkit board of all is our Project Management board.

We call it your team's watchtower position and it's where you collaborate on all the details of a project, from the timeline and strategy, to your kickoff meeting up until the last task you blissfully drag to Done. With one place to rule them all, you'll always have an up-to-date, single view of your project progress.

Luckily for you, you can easily copy ready-made Trello board to get your next project off the ground in a matter of seconds!
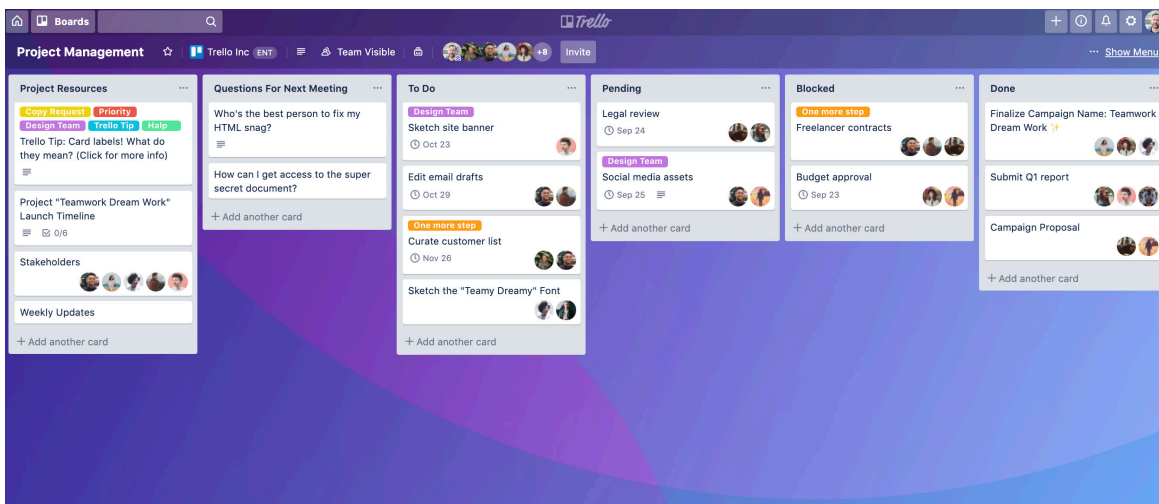
Copy the Board →

The Secret Sauce To Project Planning

Before we jump into the specifics, let's talk about the keys to managing team projects. A good system will help you in three main areas:

1. Organizing a whole lot of information. And then some.
2. Tracking tasks and statuses every step of the way.
3. Reducing bottlenecks by looping in the right stakeholders at the right time.

So, if we translate these directly onto a productivity system, your team needs:

1. One single source of truth to store all the relevant details of your project.
2. A visual representation of what's currently being worked on, in addition to what's been done and which tasks are coming up.
3. An easy way to bring in the right people at the right stages of the project.

Let's see what this looks like in action!

List: Project Resources

Here's where you store important, high-level details about the project. This list is perfect for any board guidelines/tips (like detailing your board labels) and keeping track of all participants.

It's also a great place for asynchronous status updates. Teammates can add a weekly (or whichever interval works for you) update. This means, at a glance, you can quickly see the big picture.
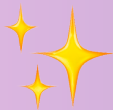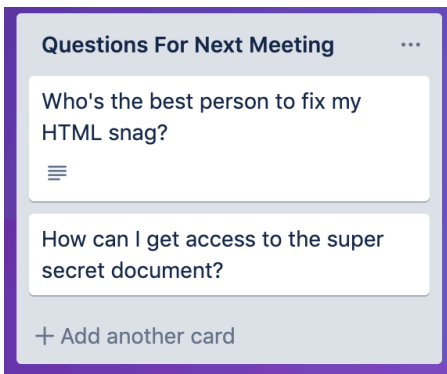
> **Bonus:** Status updates on cards is a remote-work friendly practice!

List: Questions For The Next Meeting

This list is here to make sure your team project meetings don't fall into the trap of unclear agendas and expectations around what to discuss.

All team members can add cards to this list with any questions or updates they have to discuss in the stand up. This becomes helpful in two ways:

Questions For Next Meeting ···

Who's the best person to fix my HTML snag?

How can I get access to the super secret document?

+ Add another card

1. Develops a natural agenda to help maintain meeting focus.
2. Sometimes, questions get answered on the card—preventing the need to dedicate time to a topic in a meeting.

With these simple tips, your team meetings are going to be more focused and effective than ever.

List: To Do

We all need some motivation to do the work that we said we would do in those pesky meetings.

Keep a card for all the things going on this list. Any new project task should start here. This is where you can see all the W's: who is working on what and when it's due.

This is where some of Trello's features really shine:

- Adding team members to cards quickly shows who owns each task.
- Due dates give a quick glimpse at when a task needs to be done.
- Comments allow quick, asynchronous discussion to occur and be associated with the task.
- Checklists let you plan out every last detail.

Pro Tip: Checklists can be added to cards when a task requires several sub-steps that aren't big enough to need a full card but need to be documented for tracking progress. If you have the same checklist steps for multiple cards, you can copy that checklist from card to card to create a repeatable process.

This organizes all the discussion, feedback, and file sharing on a single card that represents something specific. Then, as each task progresses, you can move it into the other lists that best represent its state.

List: Pending

To keep your To Do list looking as crisp as the Fresh Prince himself, the Pending list is the perfect place for those cards that are almost done. While legal finishes their review, or that last person signs off, you can get the card out of the way and move on to the next item.

List: Blocked

It wouldn't be a real project without some sort of hold up. Instead of letting a card linger, drop it in this list when it's blocked.
This keeps the To Do list free of distractions, but doesn't let the card fall through the cracks. Make use of due dates here to resurface a card that's not getting the attention it needs.

Much like a succulent, it's easy to neglect and forget to tend to a card. Check out the Card Aging Power-Up to ensure no card goes ignored. This adds an extra visual layer to your boards, prevents a vital task from being missed, and provides a nice reminder when you might need to give someone a nudge to move things along!
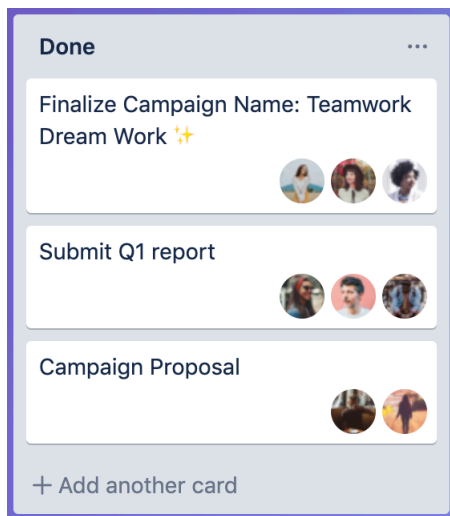
List: Done (AKA Time To Celebrate!)

Enjoy the satisfaction of dropping that card in the Done list. 🎉 You earned it!

In addition to getting completed tasks and cards off of your team's plate, this list provides a good snapshot at what was recently completed by your team. If someone is looking for a speedy status update, they can take a perfect quick look and get their questions answered without having to pull everyone into yet another meeting.

Make Your Next Project That Much Easier

There are always so many moving parts to a project, but keeping track of it all doesn't have to be headache-inducing. Let this project management board get you and your team started on the right foot!

When you centralize a project and maintain the workflow, you'll be surprised how all the little details come together. So, give it a shot – future you will thank you!

Put Your Team's Knowledge In One Place

As teams grow from infancy, they get smarter about what makes them run like a well-oiled machine, like new processes, pertinent research, and rules for how to operate within their team. All this useful knowledge needs to go somewhere and it's crucial for teams to organize that information into an accessible resource.

But catch this crazy fact: Many workers spend as much as 20% of their workweek looking for internal information that they need to accomplish tasks, whether that's digging through folders of documents or tracking down a colleague to answer their questions. Now that's a lot of time wasted.

Enter, the team knowledge board.

This is a centralized, go-to source of truth where all of the team's important information, links, schedules and more are housed. A Trello board is a great place to build a knowledge base because it can be easily updated and modified as new information comes in and old information gets archived. With a team resources board, organizational chaos becomes organized calm.
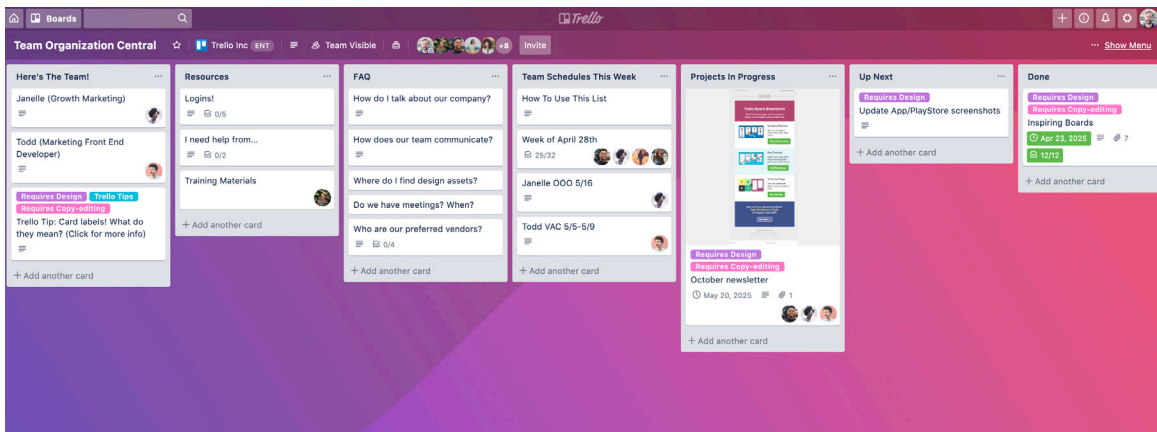
Copy the Board →

Here are the top tips for getting the most out of your Team Resources board.

Keep Track Of Those FAQs In One Place

Do you or your team ever find yourselves repeating the same question over and over again? Create a FAQ list to help keep track of those important answers.

An active list for FAQs, or too-frequently asked questions, is an easy way to create shortcuts for common queries. Each card's title is the question (Where is the monthly reports Google Drive folder?), and the answer is included in the card back— along with relevant links, people to contact for further questions, or other important details.

## Don't Let Vacay Slow Down Your Productivity

Especially around the holidays, vacation schedules can seriously slow down work. Keep all those days off in one view by having people add cards for the days they're out of the office each month.

A Who's Who On The Team

Team cards help you get to know who's who on the team—especially if you work on a semi or fully distributed team.

Every work team is different, but studies show that the most profitable companies are the ones that have the most engaged employees. What better way to improve engagement than by talking about your passions outside of work?

You'll never know what you'll have in common with someone else. It'll bring you closer together and help foster more trust among team members.

Here's The Team!
Janelle (Growth Marketing)
Todd (Marketing Front End Developer)
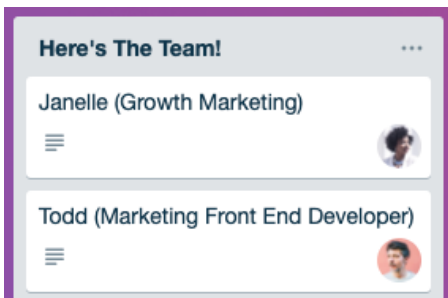
Each person fills out a card with their role and responsibilities and a photo to make new hires feel familiar with the team structure. If you have folks include their birthday, likes, dislikes and hobbies onto their card, it also makes it super easy to get thoughtful birthday gifts for them every year.

A Birds-Eye View Of Project Progress

Keep a high-level view of project progress on this board too and log weekly updates in the comments section of each project card.
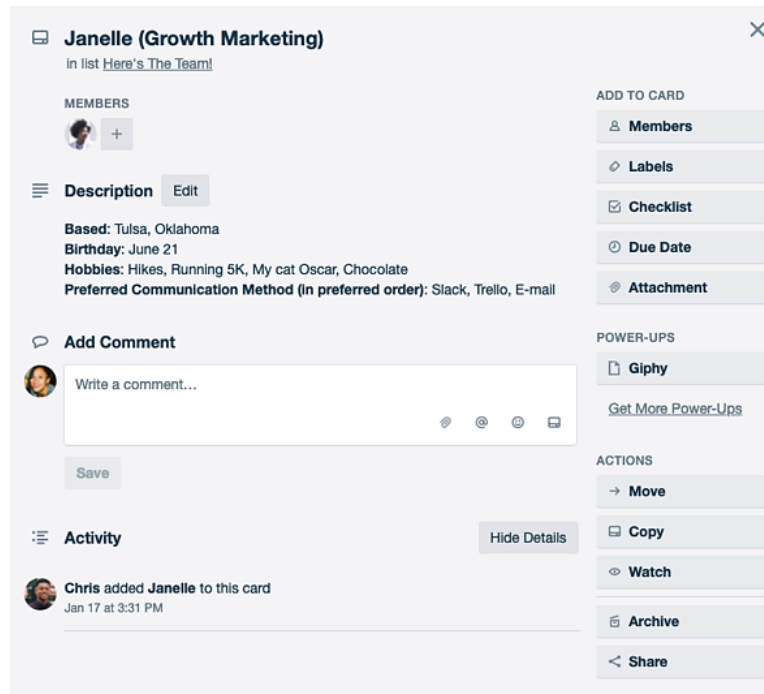

These three lists in your Trello Team Resources board can help your team stay organized and informed in an easy way:

1. **Team Schedules This Week:** This list helps break down a team's outstanding tasks into a weekly checklist. Additionally, if any team members are out of town, the entire team is aware and can prepare for it.
2. **Projects In Progress:** This list is useful for projects that involve multiple team members or span multiple weeks. You'll be able to see the bigger picture and are able to link to other relevant files or Trello Boards.
3. **Up Next:** Goals shouldn't only be kept to a 12-month planning cycle (although that's helpful too, and here's a team board for that). It's important for your team to prioritize upcoming initiatives each week to reduce uncertainty in goal setting.
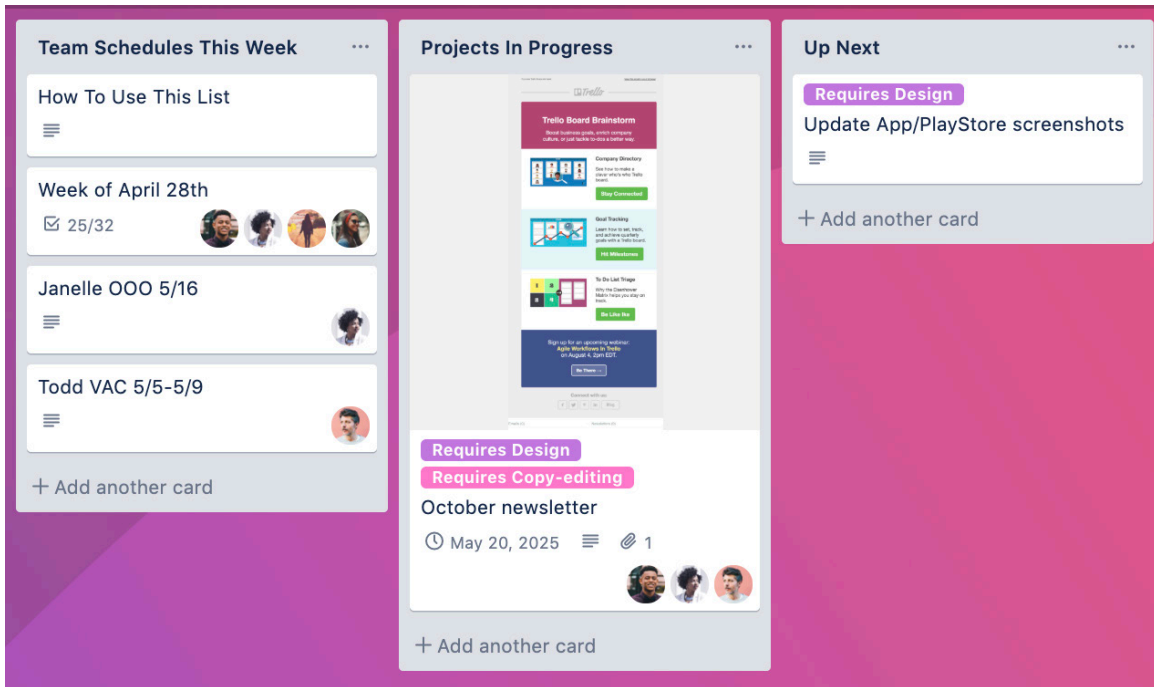
That's it. Start compiling your own official team knowledge base today so keeping a record of everything and everyone is a breeze.
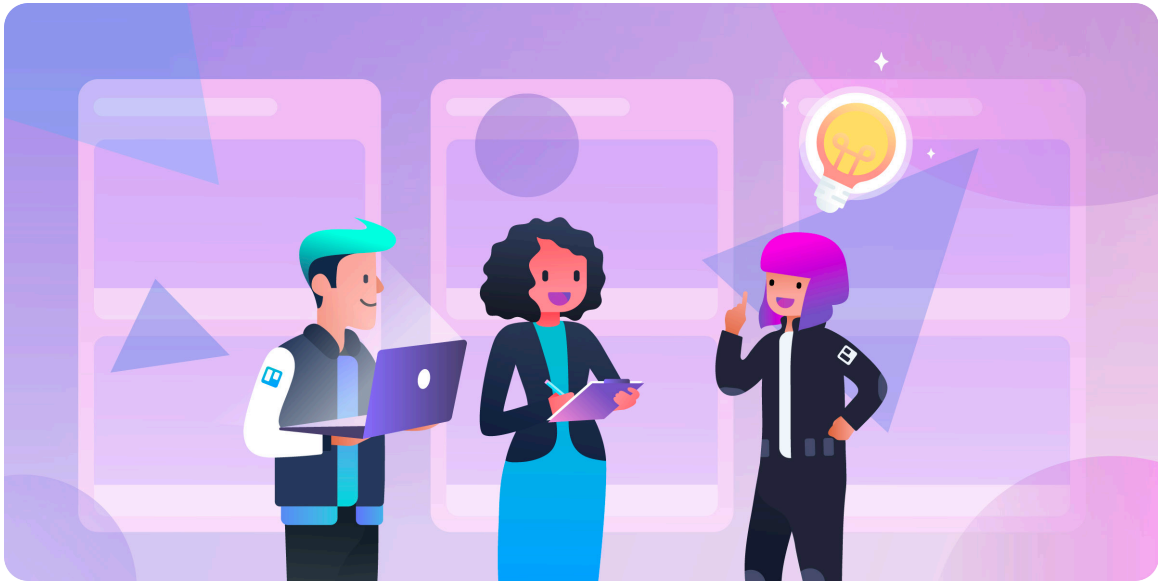
Say Goodbye To Time-Wasting, Team Meetings

Meetings are time. Time is money. Actually, time is more important than money. It's your valuable energy that you spend once, and can't get back.

We've all been to a meeting that should've been an email. In fact, this study by Atlassian concludes unnecessary meetings cost U.S. businesses $37 billion in salary costs.

So imagine walking out of a meeting and feeling empowered. You see the bigger picture and have a clear view of how and where your work fits into it. You know what to do next, and so does the rest of the team.

It might be time to put your foot down and make that schedule more appealing. We've developed tried-and-true time-protecting guidelines

and a free [Team Meeting Trello Board](#) that you can copy to enjoy a blissful future where your co-workers happily participate in team meetings that are free from frustration.
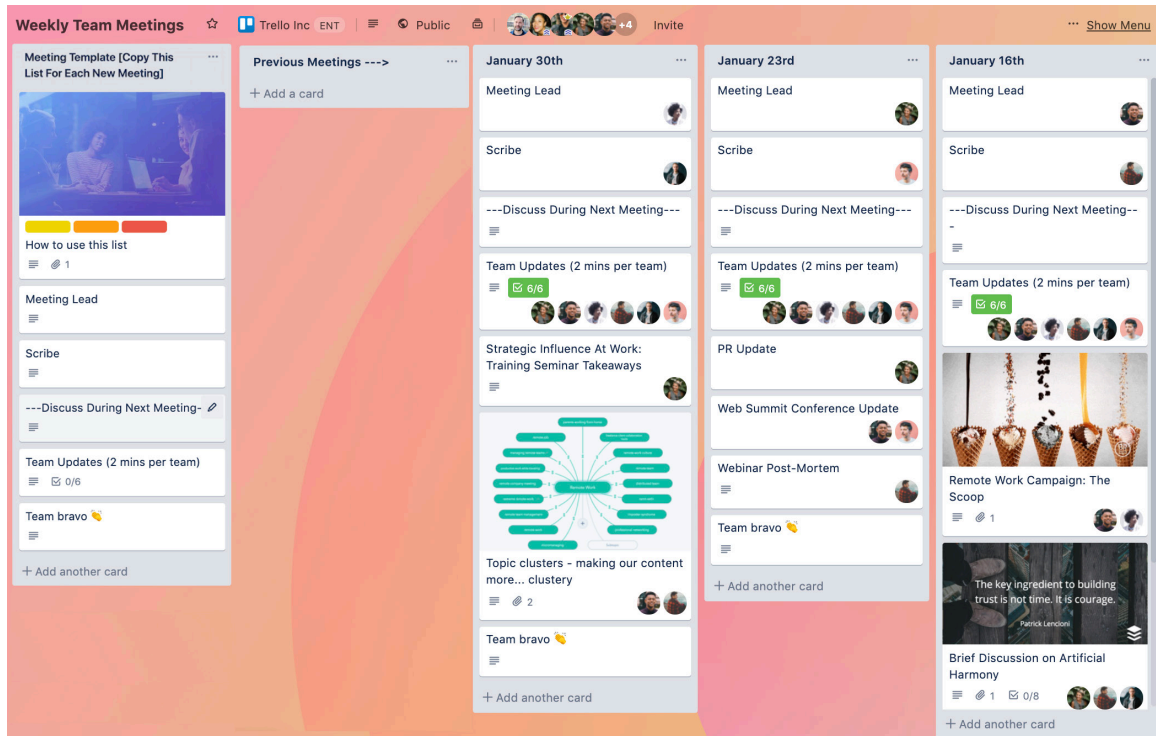

Copy the Board ➡️

Give Your Team Time To Prepare For Every Meeting

If your team likes to prepare for meetings a few minutes prior to when it starts, well, that may need to change. A successful team meeting requires a few days of preparation to give your team time to prepare.
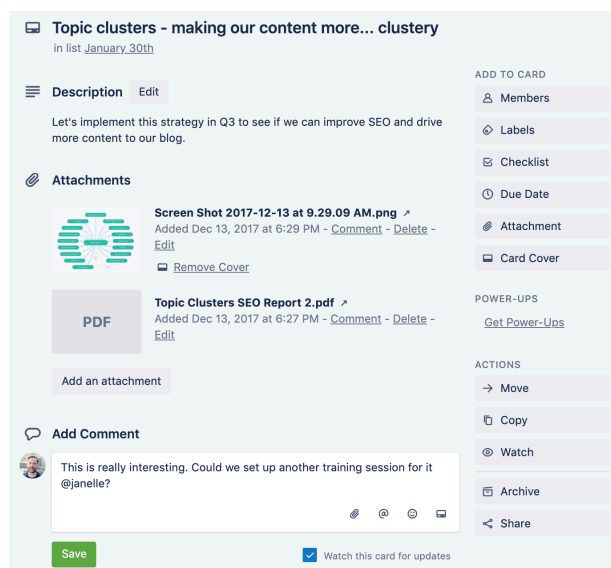
Here at Trello, we hold weekly and bi-weekly team meetings and like to remind everyone involved to start adding cards that will be up for discussion 4-5 working days before the meeting. We normally communicate this via chat or set up reminders for everyone.
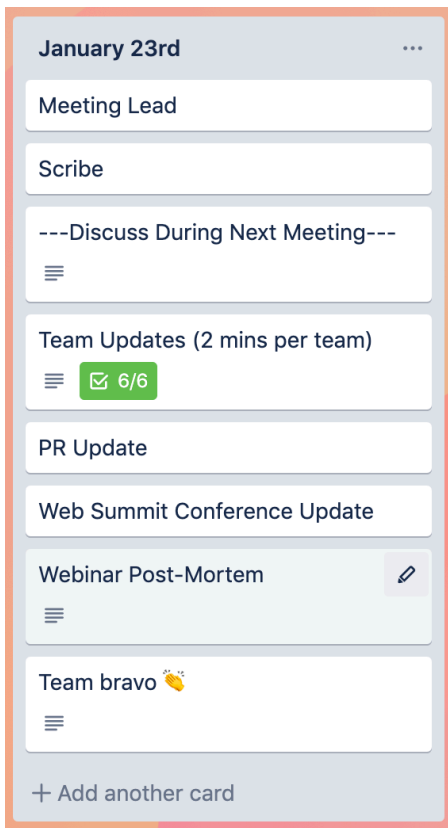
Once the meeting list has been shared, anyone is free to add cards to the list as long as the topic to be discussed affects at least a quarter of our team.

Review the agenda items in advance to build points of discussion. Comments, questions, or suggestions can be added by teammates to the meeting cards prior to the meeting so that the owner of the card can prepare their part ahead of time.

Comments, questions, or suggestions can be added by teammates to the meeting cards prior to the meeting so that the owner of the card can prepare their part ahead of time.

January 23rd   •••

Meeting Lead

Scribe

---Discuss During Next Meeting---
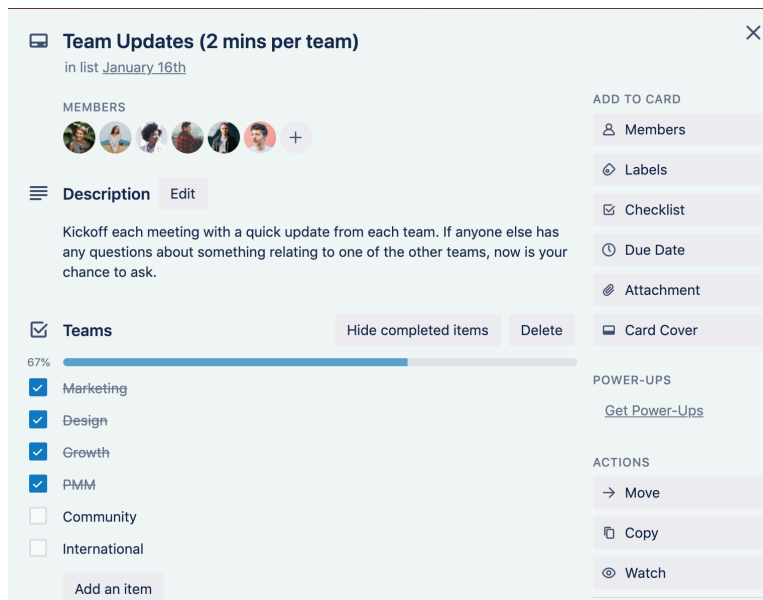≡

Team Updates (2 mins per team)
≡ ☑ 6/6
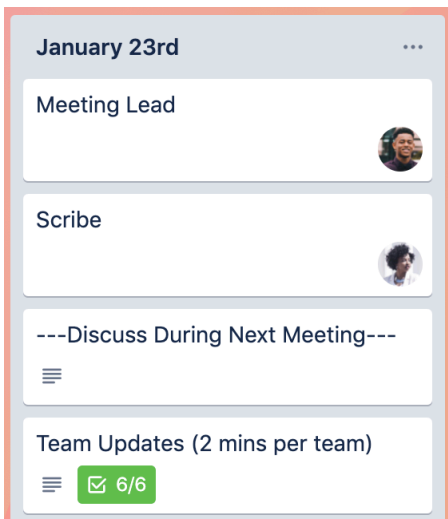
Everyone Has A Meeting Role!

Ok, maybe not everyone in every meeting. But, how about assigning a rotating meeting lead or note taker from your team to keep things fresh? Here's how they work:

Meeting Lead

Rotating who leads the meeting gives everyone a chance to hear a different person on the team talk and gives everyone a sense of ownership for the meeting.

For each meeting, there will be someone's face on the "meeting lead" card. They're in charge of wrangling any last-minute attendees (messaging them if they're not there), running the meeting, making sure everything on the cards is covered, keeping the conversation on topic, and tabling conversations for auxiliary/follow up meetings if they run too long.

▭ **Team Updates (2 mins per team)**   ✕
in list January 16th

MEMBERS

 +

≡ **Description**   Edit

Kickoff each meeting with a quick update from each team. If anyone else has any questions about something relating to one of the other teams, now is your chance to ask.

☑ **Teams**   Hide completed items   Delete

67% ▬▬▬▬▬▬▬▬▬▬▬▬

☑ ~~Marketing~~

☑ ~~Design~~

☑ ~~Growth~~

☑ ~~PMM~~

☐ Community

☐ International

Add an item

ADD TO CARD

👤 Members

◇ Labels

☑ Checklist

🕐 Due Date

📎 Attachment

▭ Card Cover

POWER-UPS

Get Power-Ups

ACTIONS

→ Move

❐ Copy

👁 Watch

Scribe

A scribe is someone who takes summary notes during the meeting. Add the notes in the comments section of the card so your team can review any ideas, decisions, or outcomes later.

There will also be someone's face on the "scribe" card. A volunteer, or even the last person to arrive can be the scribe and take notes (that will encourage everyone to arrive on time 😏). Make sure this is defined before the meeting begins. As conversations about the cards on this list happen, the scribe will add comments summarizing the conversation.

Hosting A Perfect Team Meeting

Time to get the meeting rolling! Starting on time and keeping each talking point concise and to the point, such as 2-to-5 minutes per item, will help everyone stay focused and interested. Leave the last few minutes of every meeting point to discuss the next steps. This step should involve creating a list of action items, deadlines, and the owners of each task.

If the topic's running overtime (everyone's time is being used for this), politely cut it off and suggest moving it out of the meeting. Ending on time will make sure the energy of the team members isn't drained. Towards the end of the meeting, dedicating time for bravos and to give peer-to-peer shout outs is a great way to give acknowledgement for teamwork. It doesn't have to be big visible wins, it might just be something a colleague did to help you accomplish an important task. These smaller weekly celebrations are a great way to bond as a team.

Another way to turn meetings into an open and transparent discussion platform, is to include a section about woes or failures.

Despite being quite the opposite from a celebration it has a similar effect as the bravos. Candid conversations in a more relaxed environment can lead to great ideas. Also, knowing that everyone fails now and then, and that's ok, will make the team more courageous to undertake riskier initiatives.

Remember that you ideally want to be able to get through the meeting in 45 - 60 minutes max. One of the greatest pitfalls of running a meeting is having participants who lack enthusiasm or are distracted—and the longer the meeting, the more this is likely to happen.
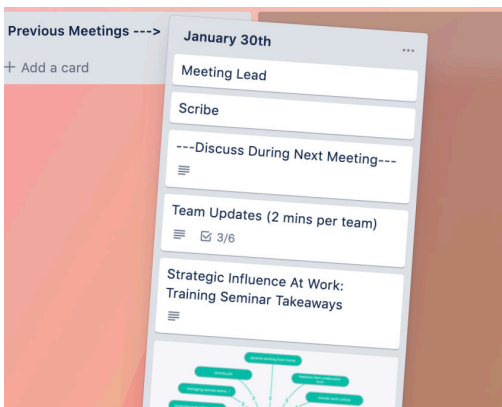
After the meeting, drag the full meeting list to the previous meetings section of your Trello board. This will be helpful for you to keep a history of all meetings and it will facilitate access to the items that were discussed for members who weren't able to attend.

Don't be afraid to change your meeting structure in the template as you go along.

Once a quarter or so, ask for feedback from your team members about the meeting structure about what works and what doesn't. Their input will be an invaluable source for improvement over time. With a board that holds a reference to previous meetings, at a glance, you will be able to see how they have evolved.

Celebrate Team Wins With A Perfect Party Plan

Celebrating milestones and wins in business can be the difference between seeing a decrease in employee engagement and injecting life into the organization. Everything that gets done and contributes to the mission of the team is a team success. So take time to reward everyone involved as milestones are achieved!

The smaller successes, like getting a report done early, can be better to celebrate in a team meeting or in a 1:1. However, landing a $1 million contract, may be a good reason to throw a party with streamers and balloons.

Taking the time to build team spirit shouldn't be a drag. Everyone loves a good party but planning and hosting them? It can be a total drag without the right resources in place. Thanks to the Office Party Planning Board, everyone on the team will enjoy the party and all the planning that leads up to celebration day.
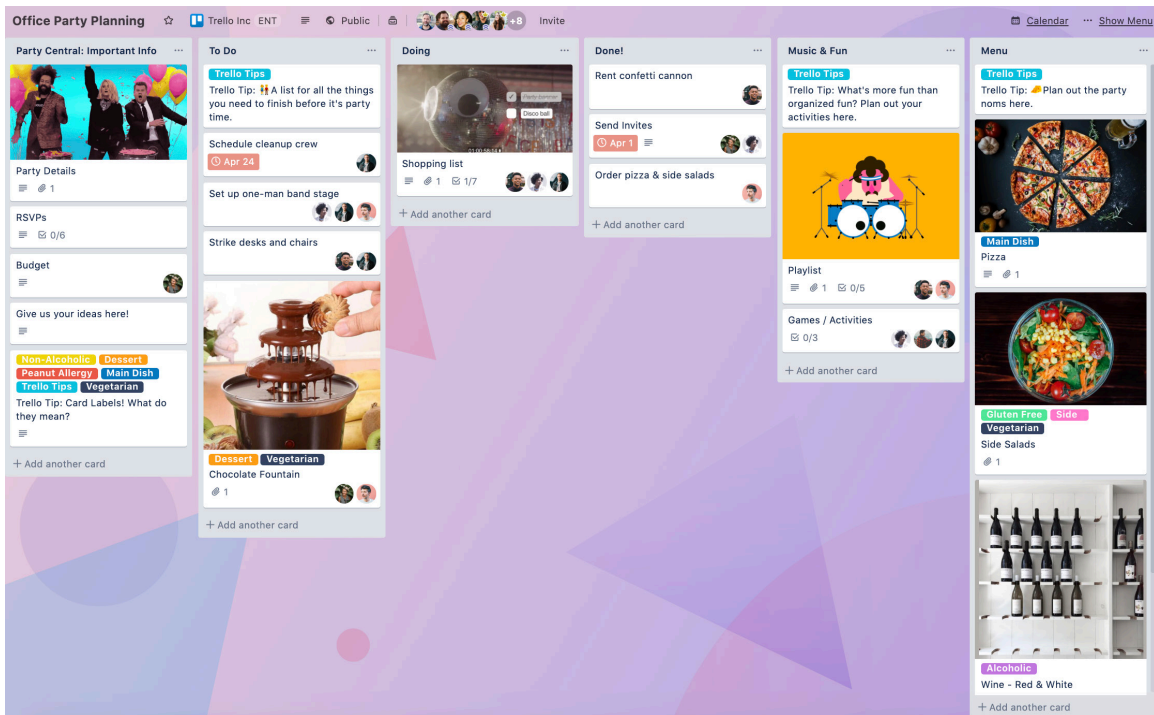

Copy the Board ➡

No Low-Hanging Fruit Here! Unless You Count The Piñata

There's no straightforward formula for throwing the best bash, because it should be tailored to how your team likes to wind down and celebrate a job well done. This party planning Trello board is fully customizable, so once you copy it, feel free to add/remove lists.

Let's take a tour of how to make it into a workflow where everyone pitches in to RSVP, plan the menu, pick activities, and more.
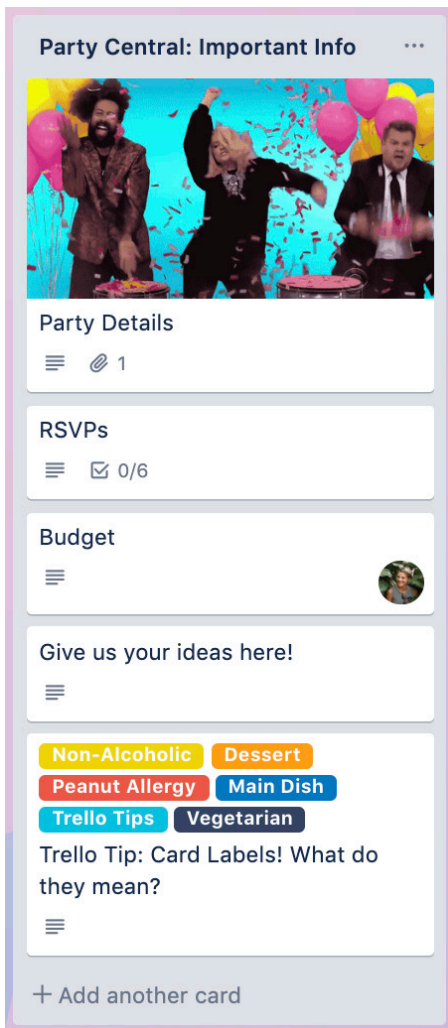
Party Central: Important Info

This first list is the hub where you and your team can keep all the important details of your party in order, such as the time and date, the budget, party suggestions, and the guest list.

Having these top-level items handy is an easy way to direct people who have all those frequent FAQs like the location, timing, or even dress code.

RSVP Card

Creating a guest list can get deceivingly complicated at times. Who's bringing a +1? Who's allergic to shellfish again?

Including an RSVP card in your Party Central list allows your guests to contribute information that can better help you plan for your event. Having a spot to designate any diet/allergy issues, drink preferences, or where guests can ask questions, is important to stay as organized and sane as possible.
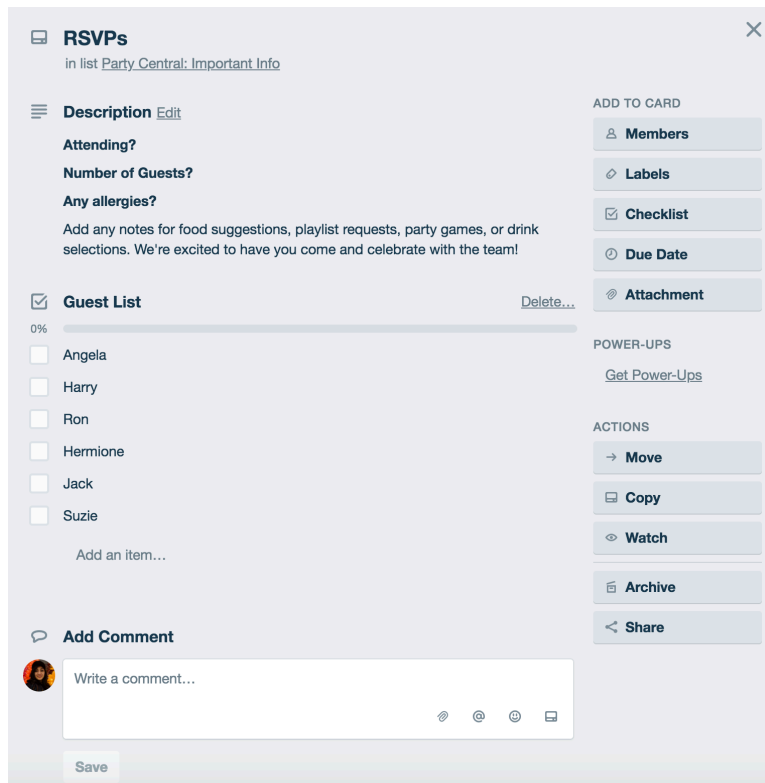
A quick and not-so-dirty way to plan ahead for all your guest's different needs is to create labels. On our sample board, we've created six different labels to help with meal and drink planning.
Once you've copied the board, adding or removing labels isn't tricky at all!
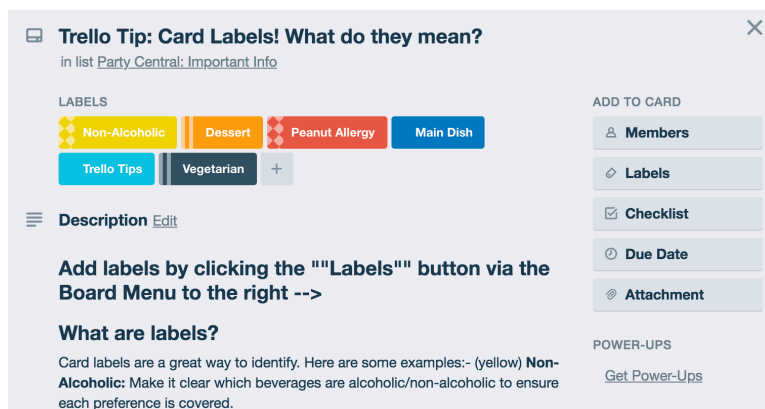
Like our [Trello Tip card](#) explains, click on the button titled "Labels" in order to create and edit your own tags. On our board, we've used the labels to create a menu. Whether it's a non-alcoholic drink like kombucha or a large pizza perfect for everyone, labels can give you peace of mind that everyone will have something good to munch and sip on.
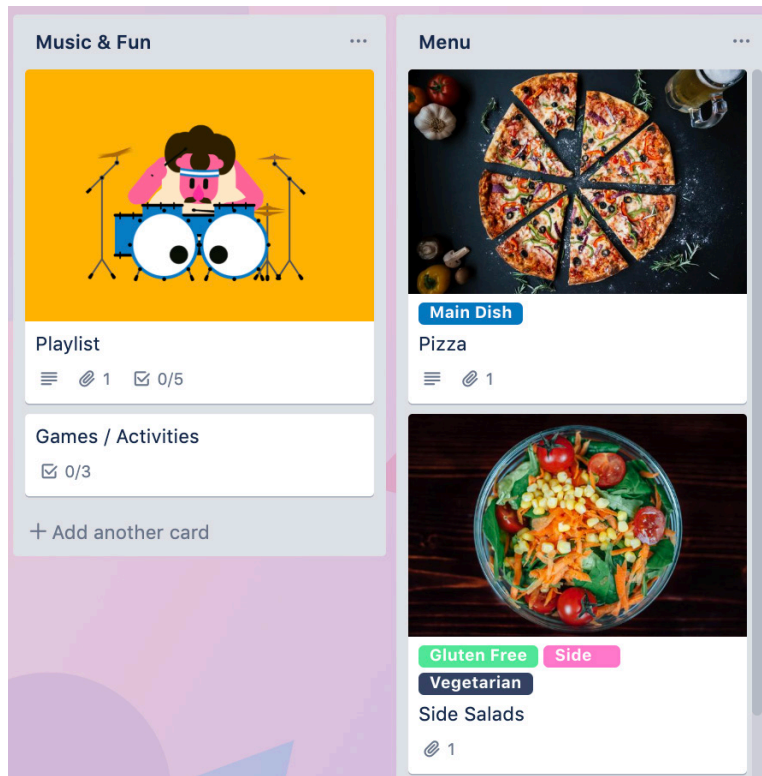
Dot The 'I's And Cross The 'T's, Lead Me To The Chocolate Fountain, Please

Even party planner novices know that a checklist is key to making sure day-of prep goes without a hitch. To start your own checklist of groceries, supplies, or songs you'd like to play, look for the "Checklist" button on the right-side menu of any card.

Remember there's no 'i' in team, or party—Which means checklists are perfect to get your team's feedback on what may be missing.

> **Fun Fact:** Already have a list ready and need to input it quickly into Trello? Just copy and paste your entire list into a Trello card checklist and it will automagically populate as separate checklist items!

Make Your Next Event A Level Party Field

Planning a work event of any sort means involving a lot of different opinions, stakeholders, vendors, and budgets.

So go ahead and get this party started. Confidently crowdsource that playlist, budget for that chocolate fountain, and finally convince your boss to set up a piñata in the rec room—because teams celebrate better, together!

Power-Up Your Team Communication With These Integrations

Simple, adaptable, customizable—Trello integrates with the tools your team members already love to use. Without leaving your favorite Trello boards, you can connect your favorite apps and enable additional features to conquer your unique challenges. **Say hello to over 140 Power-Ups!** And with Trello Enterprise, you get unlimited access to them all.

Board Utilities

Calendar, Custom Fields, Card Repeater, and more. For very specific Trello board needs, add these Power-Ups to skyrocket your team's productivity

- **Calendar:** Bring perspective to due dates with the [Calendar Power-Up](#) for Trello. Whether you are planning a conference, managing an editorial calendar, or organizing a family vacation, the Calendar Power-Up lets you display cards with due dates in a weekly or monthly calendar view.
- **Custom Fields:** Ever want to add a dropdown menu, checkbox, or additional date fields to Trello cards? The [Custom Fields Power-Up](#) lets you do all that and more, bringing process and formality to your workflow to meet your team's unique needs.

File Management

All your work attached in the right place. When you are managing a project, you need to be able to access all the useful knowledge instantly.

- **Google Drive:** The [Google Drive Power-Up](#) for Trello brings your files and folders to Trello cards. Search Google Drive right from Trello and attach relevant files and folders. See real-time previews and details and click back into Google Drive. It also lets you turn your Trello board into a Google Slides presentation with one click.
- **Evernote:** Easily attach notes or create new notes directly from cards with the [Evernote Power-Up](#), and see real-time information for any notes attached to cards.
- **Confluence:** Do you sometimes need to add a bit more context to your work in Trello? The [Confluence Cloud Power-Up](#) helps provide the detail behind your goal-setting work on a Trello card and the permanency to revisit what happened after the project is done.

Project management

Gain more control of all the moving pieces in your projects.

- **Planyway Team Planner:** Display Trello cards on a timeline to manage plans, team workload, and deadlines across boards with the [Planyway Power-Up](#). Visualize team workload and capacity, create project roadmap, and control deadlines and milestones.
- **TeamGantt:** The [TeamGantt Power-Up](#) gives you the ability to view your cards from multiple boards in a beautiful timeline inside Trello.

Communication & Collaboration

No matter where your team works, keep teams updated and in sync across platforms.

- **Slack:** The [Slack Power-Up](#) for Trello makes it simple to keep your communication and collaboration apps connected so that no brilliant ideas or important tasks fall through the cracks. Link the cards to Slack to have those updates piped into your team channel for easy reading.
- **JIRA:** The [Jira Power-Up](#) allows you to link Jira issues to cards, connecting different teams across your organization.

Automation

Automate your process so that your team can focus on the work that matters most.

- **Butler:** Bring powerful workflow automation to Trello—no coding skills or kryptonite required. The [Butler Power-Up](#) allows teams to boost productivity and remove mental overhead by creating simple rules, commands, and buttons that can perform almost any task you throw its way.

Trello Enterprise

Create a central productivity hub for all of your team's projects—accessible from any device, anywhere. With Trello Enterprise, your team can easily navigate users, security, and privacy settings through a single dashboard.

Trello Enterprise is flexible enough for all teams to build productive, customized workflows that encourage collaboration. A few of our Enterprise users' favorite features include:

- Everything you love about what's free in Trello
- Unlimited Power-Ups and 100+ app integrations to efficiently leverage all your teams' top tools.
- Advanced security such as hourly data backups, data encryption, and Single Sign-On (SSO).
- Enterprise-wide permissions to control who can do what within your Trello boards.

Upgrade to Enterprise ➡