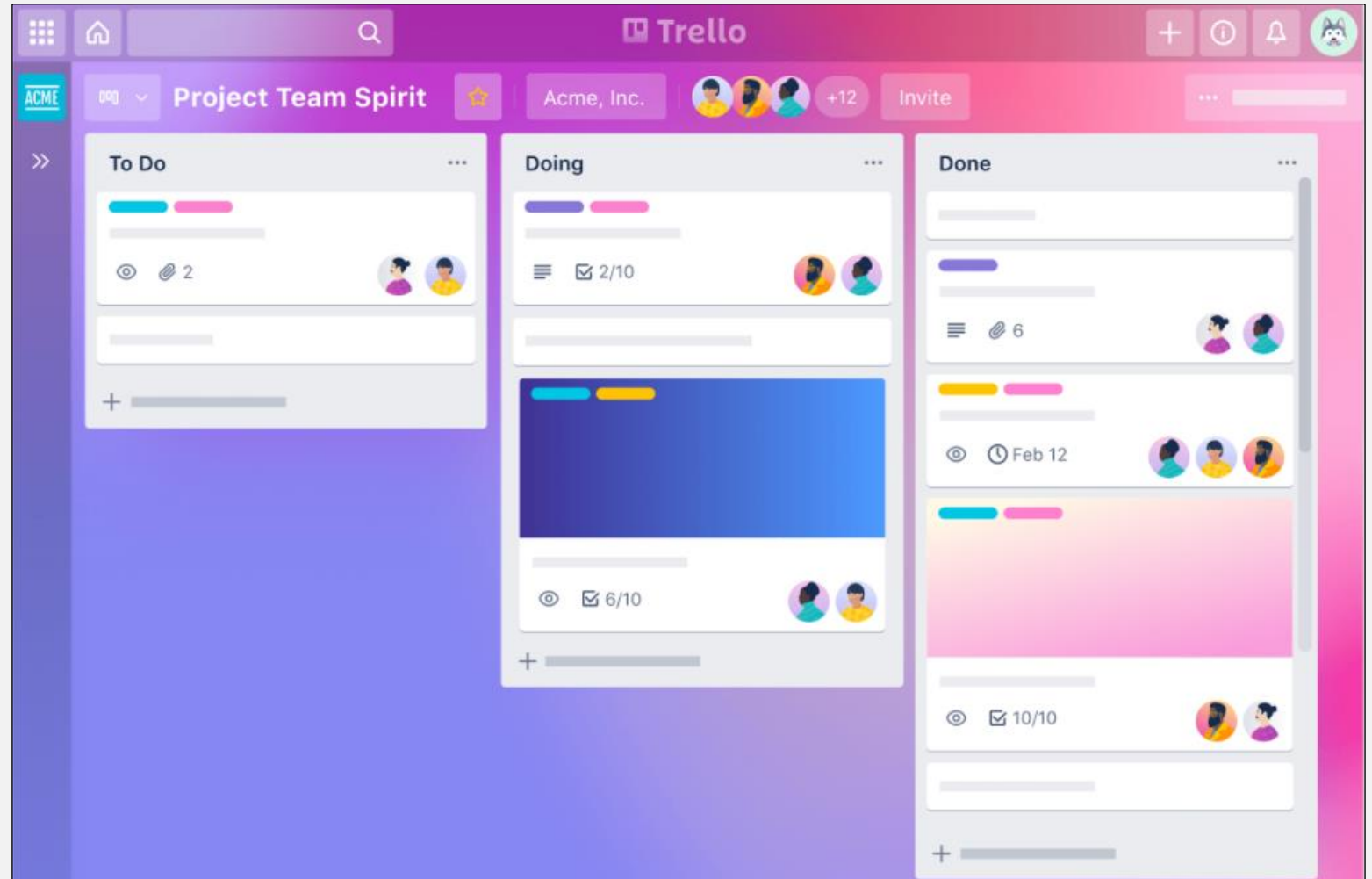# Using Trello To Organize & Collaborate

- Designed for Kanban
    - To do ⇔ In process ⇔ complete

- Trello lends well to individual, team:
   - Organization
    - Collaboration

Overview:

- Solution
- Features
- Collaboration
- Competitors
- Subscriptions
- Learn more about Trello

Solution:

- Trello's intent
    - Help teams move work forward; working together
    - Kanban organization
        - To Do
        - Doing
        - Done

- My personal utilization
    - Thus far, as an individual, with limited sharing ➔ Organization
    - Framing & vision boarding
        - Structuring out the disparate components of establishing a business
        - Capturing 'to learn/improve' along the path of development
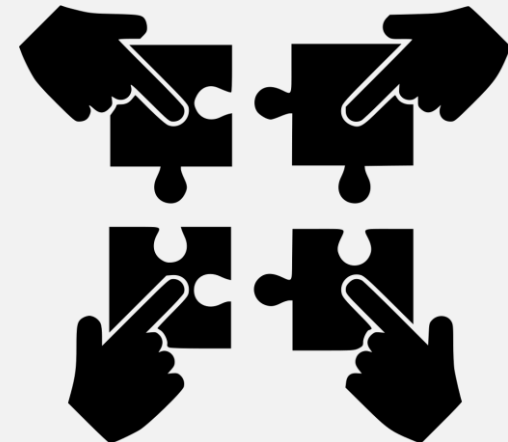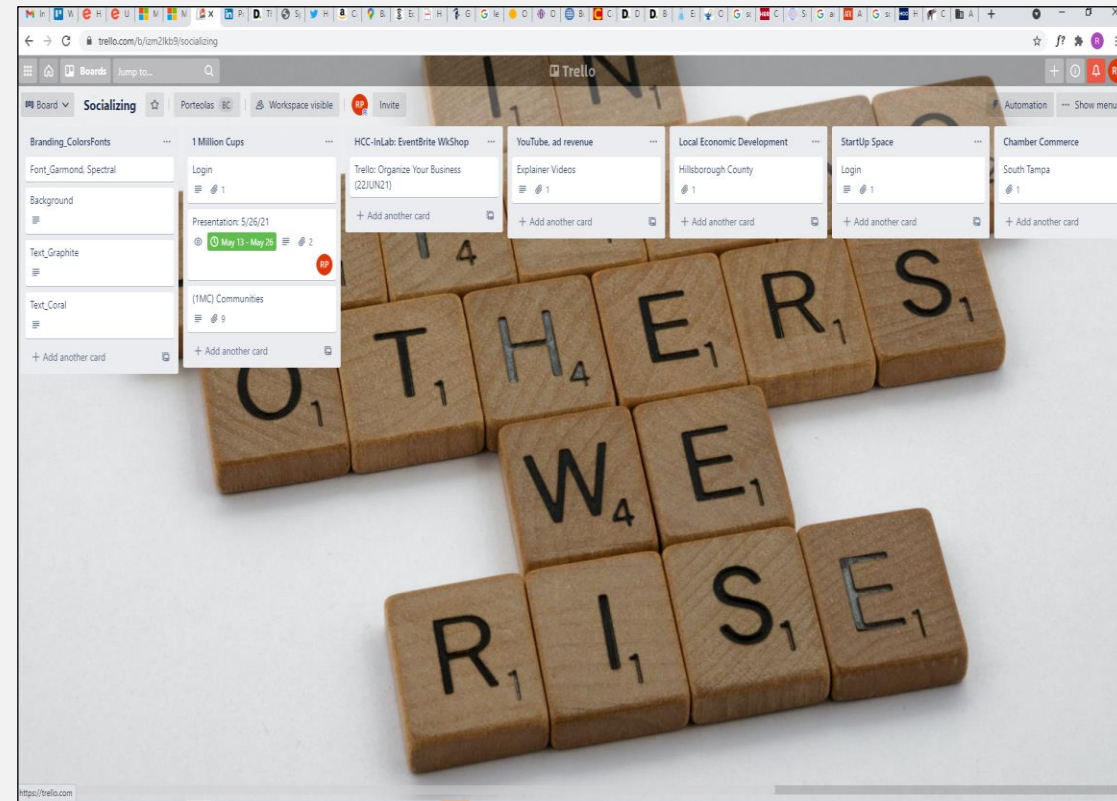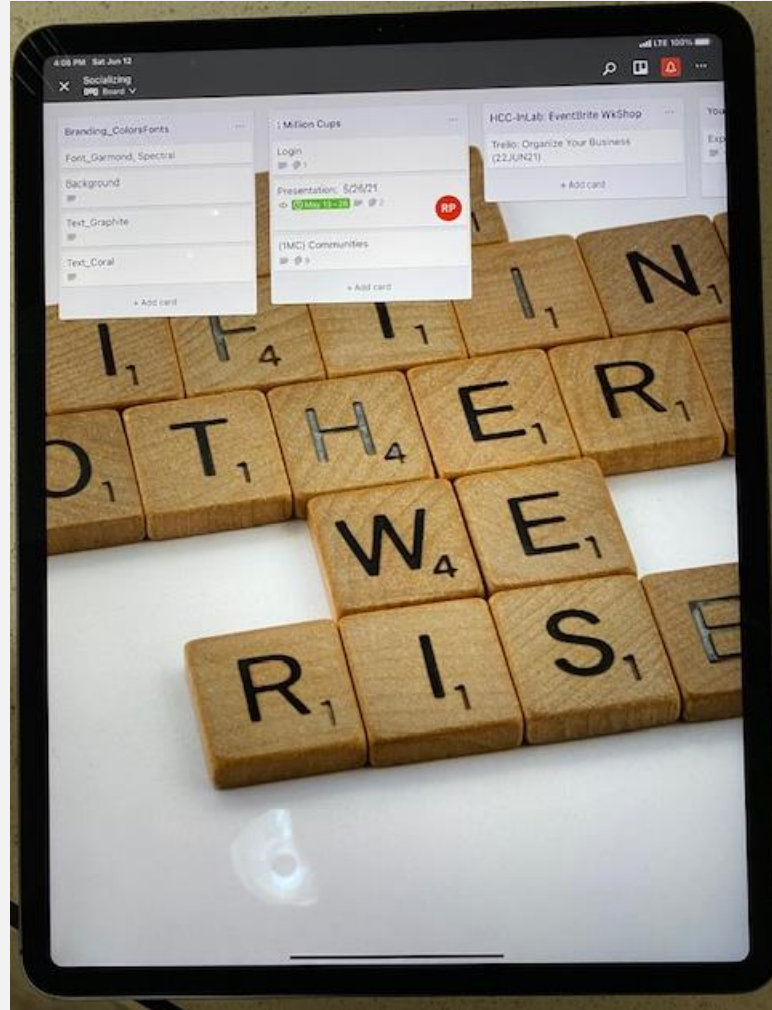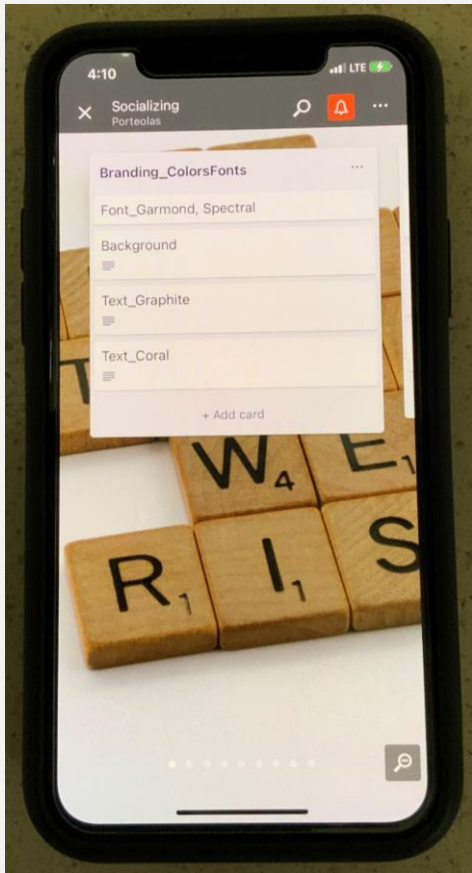
Features:

- Multi-platform
- Hierarchy:
    - Board (project level)
    - List (task level)
    - Card (sub-tasks)
- Collaborative
    - Share boards
    - Delegate tasks
    - Comment on & annotate activities
- Views
    - Board
    - Location
    - Timeline
    - Calendar
    - Dashboard
    - Workspace Table
- Butler
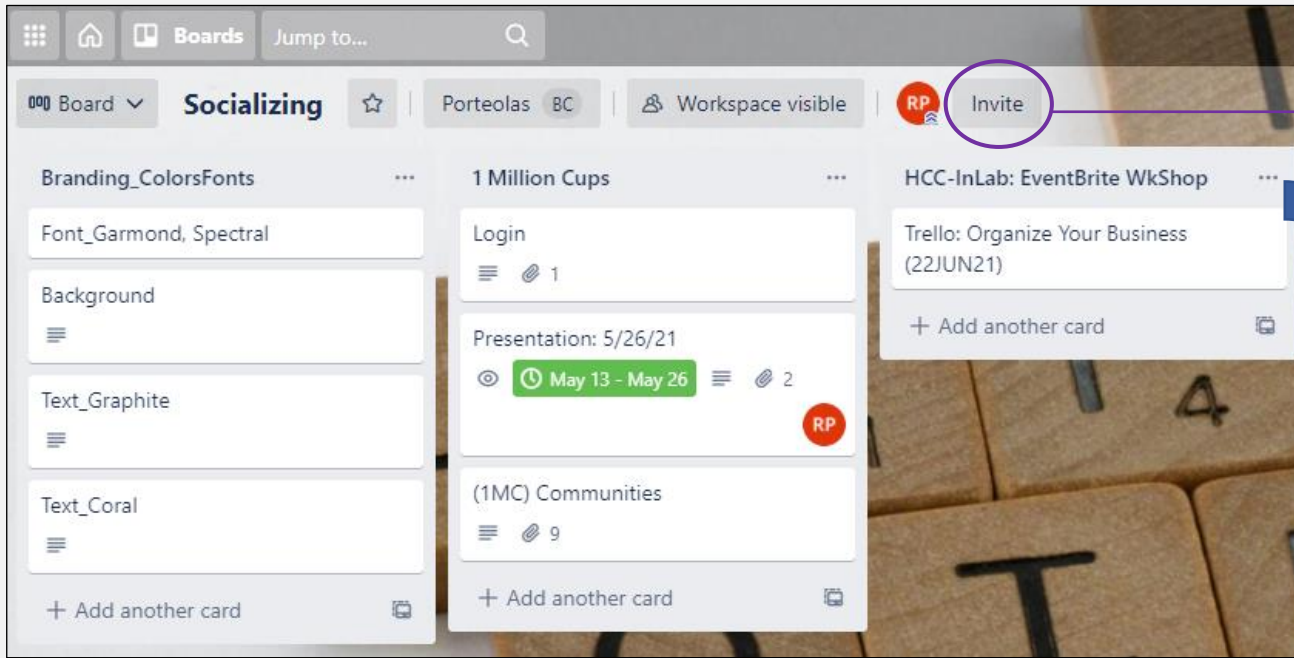   - No-code automation
- Power-Ups

Features: Multi-Platform

- Web & mobile enabled
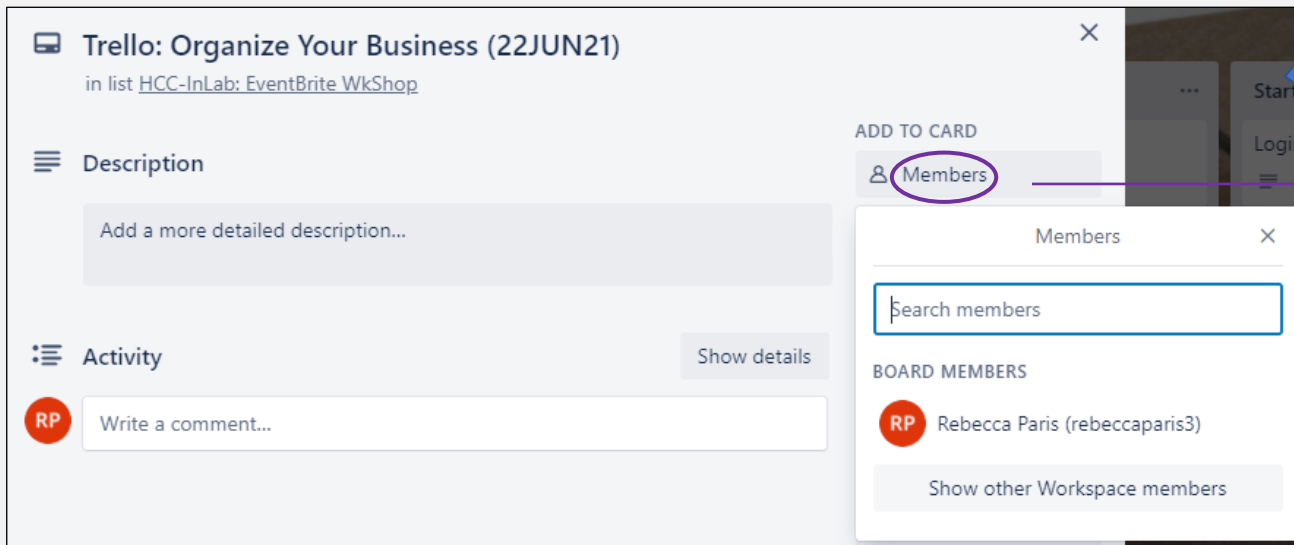   - Seamless syncing between desktop & mobile application

Features: Collaborative

- Invite people to board

- Notice, I've opened up the 'Trello' card on the 'HCC-InLab' list

- Add members to task
  - Assign
  - Follow

Collaboration & Organization: Teams & Individuals

- Teams & organizations
    - Meetings
    - Projects
    - Events
    - Goal setting
        - Friend/I using Trello to map out our 'study buddy' approach to 'Tableau Desktop Certification'
- Individuals
    - Goal Setting
    - Event planning
        - Used it to frame out my 14day Scotland itinerary
        - Safety on vacation: Invited friends/family to my board, so they'd have awareness in event I went 'MIA'
    - Vision boarding / inspiration boards
        - 'how to blog'
    - Learning plan
        - Board/cards for biz concepts I could improve upon (marketing, ..etc)
            - Stash 'nuggets' that pass me by, so I'll not forget them / can focus on them in my time

Features: **Views**

- Original view (*Kanban inspired*)
    - Board
- 5 New views (2021) – *for business & enterprise customers*
    - Map
    - Timeline
    - Calendar
    - Dashboard
    - Workspace Table
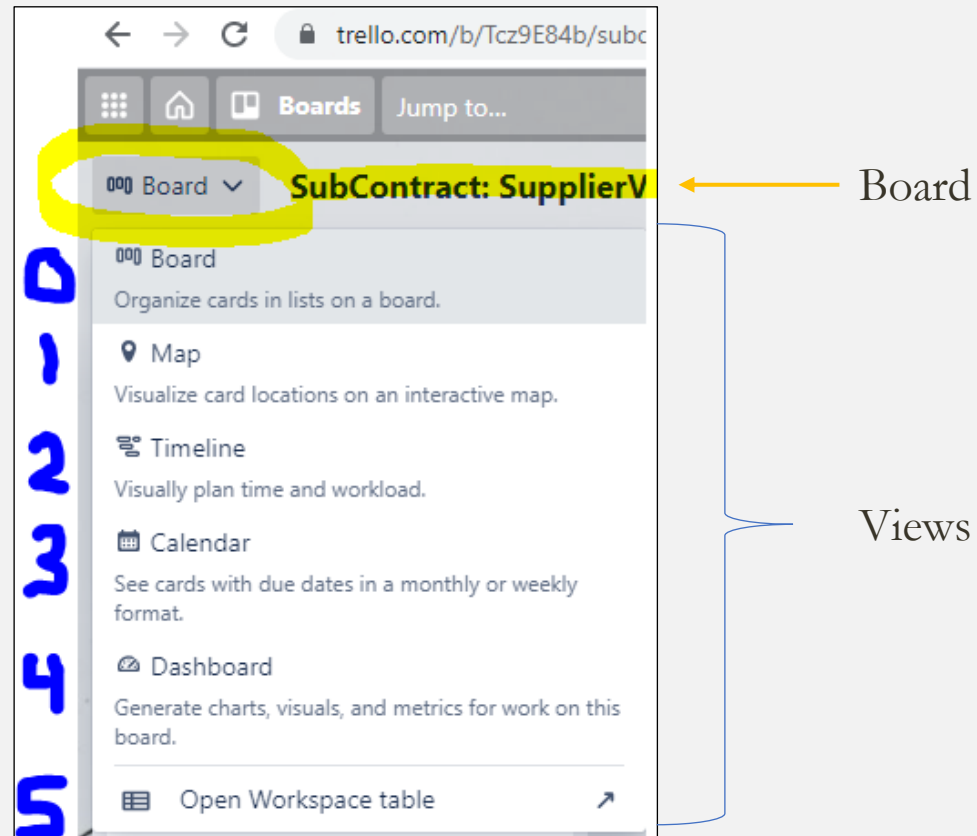
Views: **Board (Kanban)**

- Rather than Kanban, my board/cards serve as
    - Means of organizing components/moving parts of overarching project
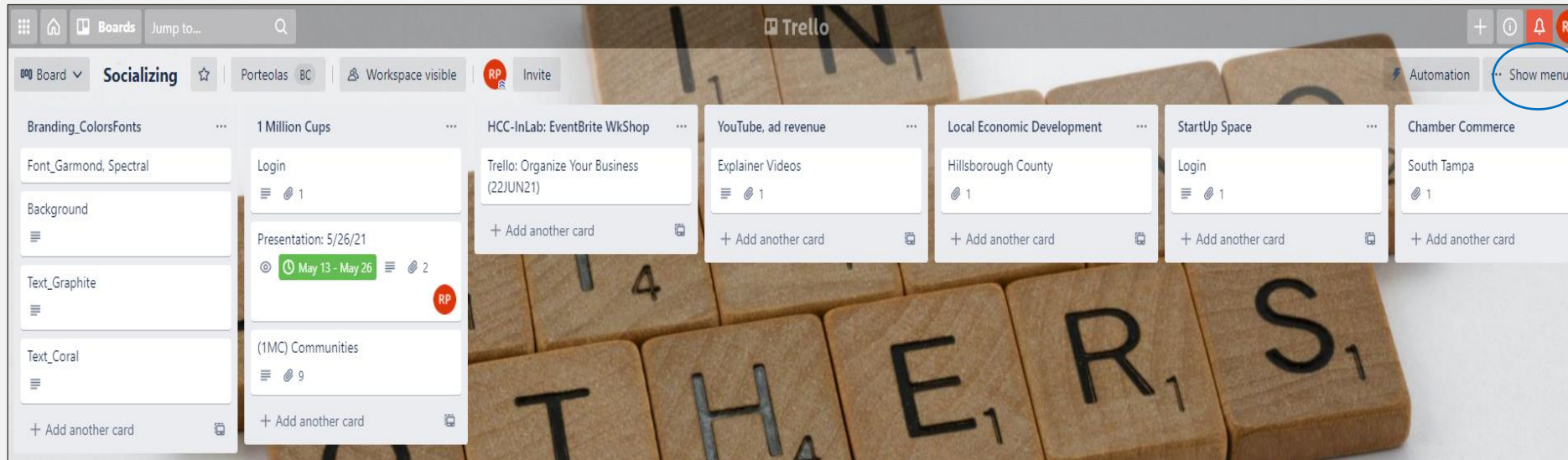   - Place for staging information, things to follow up on, new ideas to explore

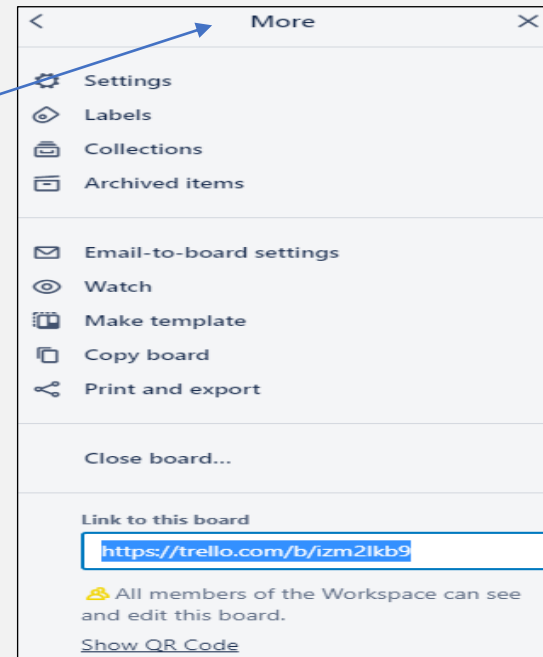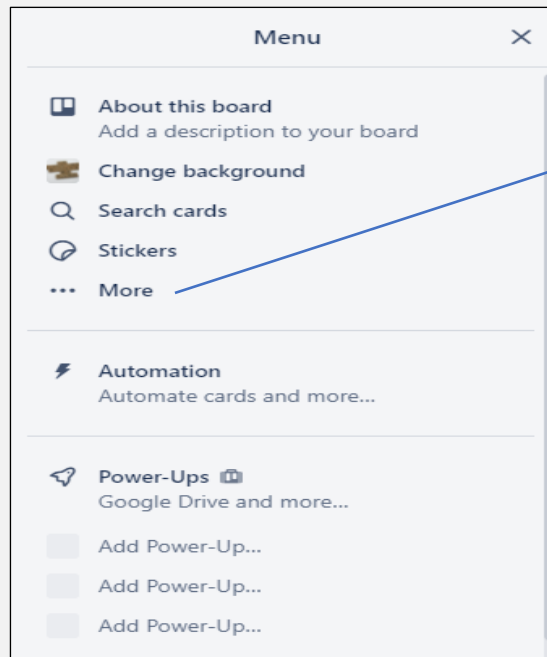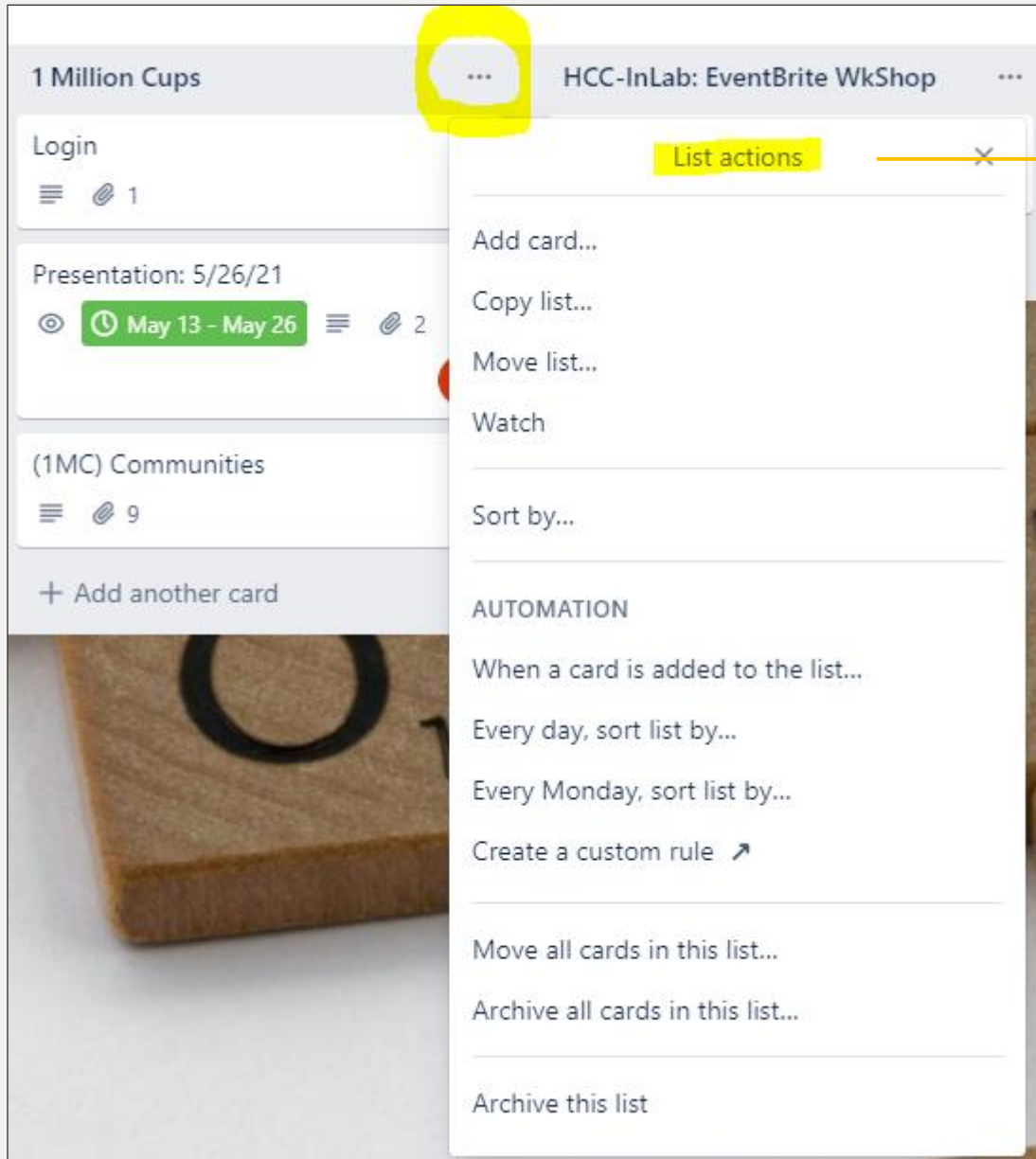Board
(project level)

List
(tasks)

Card
(sub-tasks)

View: **Board** (board)

Menu

- **About this board**
  Add a description to your board
- **Change background**
- **Search cards**
- **Stickers**
- ••• **More**

- ⚡ **Automation**
  Automate cards and more...

- **Power-Ups** 🎛
  Google Drive and more...
  - Add Power-Up...
  - Add Power-Up...
  - Add Power-Up...

More

- ⚙ **Settings**
- 👁 **Labels**
- 🗄 **Collections**
- 🗃 **Archived items**

- ✉ **Email-to-board settings**
- 👁 **Watch**
- 🎞 **Make template**
- 🗐 **Copy board**
- ⌁ **Print and export**

Close board...

Link to this board

https://trello.com/b/izm2lkb9

⚠ All members of the Workspace can see and edit this board.

Show QR Code

View: **Board** (list)

- Actions available from the 'list' menu

View: **Board (**card**)**

Trello: Organize Your Business (22JUN21)
in list HCC-InLab: EventBrite WkShop 👁

MEMBERS   **LABELS**   **DATES**

RP +   HCC InLab +   ☐ Jun 12 - Jun 22 at 11:00 AM ⌄

Description

Add a more detailed description...

Attachments

Trello ↗
Added a minute ago - Comment - Remove - Edit

Add an attachment

☑ **Content**   Delete

0%

☐ Solution
☐ Features
☐ Collaboration
☐ Pros / Cons
☐ Competitors
☐ Subscriptions
☐ Learn more

Add an item

Activity   Show details

RP Write a comment...

ADD TO CARD

👤 Members
🏷 Labels
☑ Checklist
🕐 Dates
📎 Attachment
📍 Location
🖥 Cover

POWER-UPS

➕ Add Power-Ups

AUTOMATION ⓘ

➕ Add button

ACTIONS

→ Move
⧉ Copy
🗃 Make template
👁 Watch   ✓
🗄 Archive
◁ Share

Menu available at the 'card' level

Next slide

Labels   ✕

Search labels...

LABELS

[green bar]   ✎
[yellow bar]   ✎
[orange bar]   ✎
[red bar]   ✎
[purple bar]   ✎
HCC InLab   ✓   ✎

Create a new label

Enable color blind friendly mode

View: **Board (**card**)**
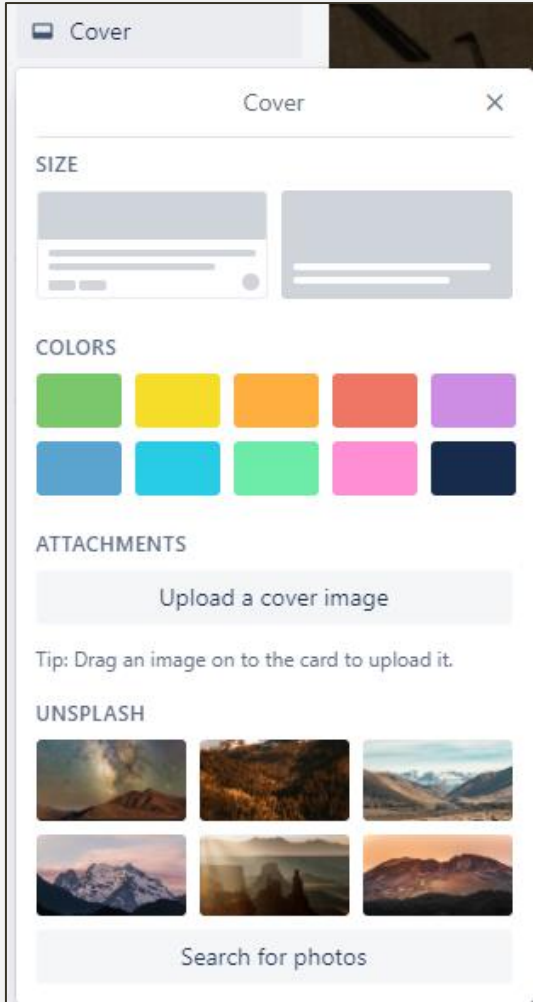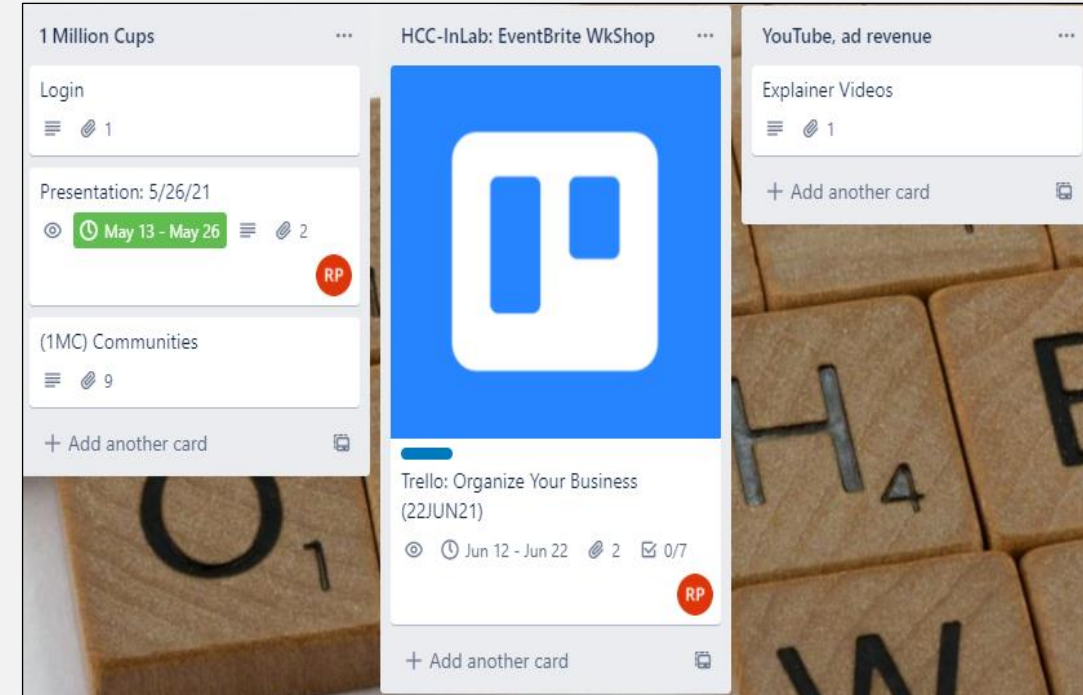
Card View
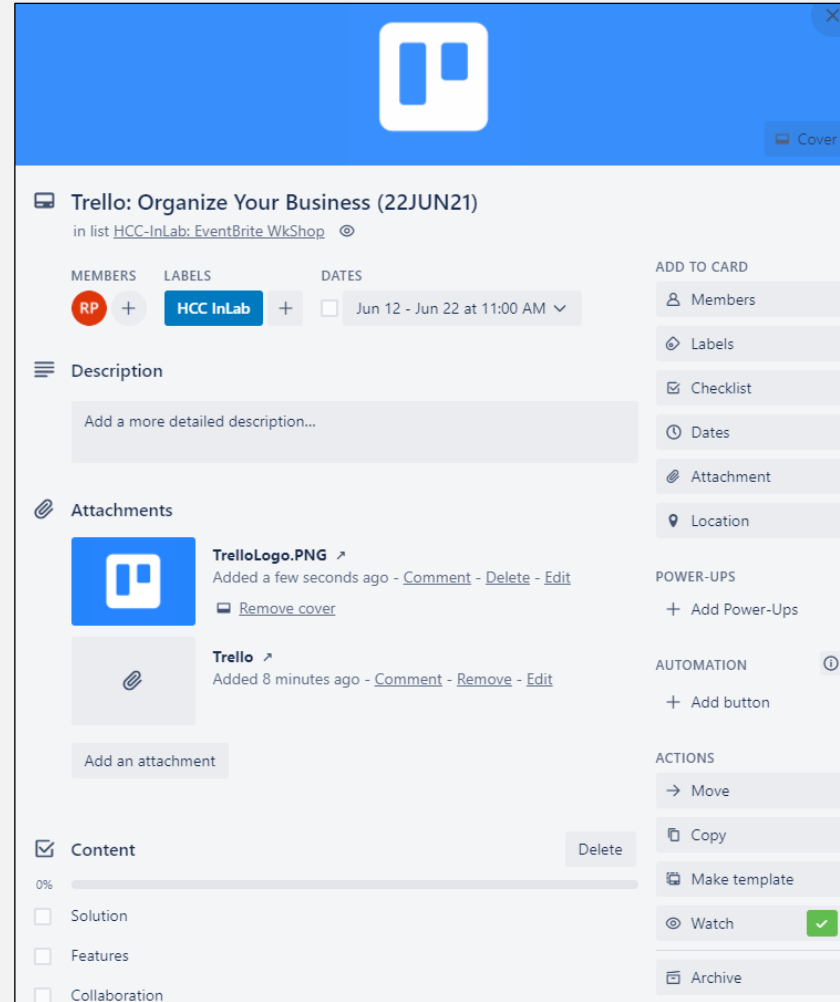
Board / List View

Views: Map

- *If you're familiar w/ Trello; you may have used this as a 'power up' (no longer available)*
- Syncs w/ your cards that have location data
- Cards will be represented on map as clickable 'push pins'
- Only 1 location per unique card allowed (*can be edited/deleted*)

Views: Timeline

- Gantt chart view
    - Start date (*newly added feature*)
        - Optional, not required; use checkbox to turn on/off
    - Due date
        - Does not require a 'start date'

- You can activate the card from the 'Gantt view'
- You can adjust dates w/n Gantt view
    - Grab/drag; start & end *separately*
    - *Dates are not 'linked'*
- View options:
    - List, Label, Member, None
    - Label req's category assigned

Views: Calendar

- Calendar
    - *If you're familiar w/ Trello; you may have used this as a 'power up'*
    - Improvement over the 'view' vs 'power up'
        - View allows task/project view to span multiple days ('Start' through 'Due')
        - Power up just listed the project 'Due Date' on the unique day of the month
- Calendar vs Timeline
    - Here, start/end dates are linked; so grabbing object shifts the start/end to maintain 'span'
    - {ex: 7days}
        - 23rd – 29th
        - Becomes
        - 7th – 13th
- Bug-a-Boo
    - At this time..
    - *Span into fwd/bwd month*
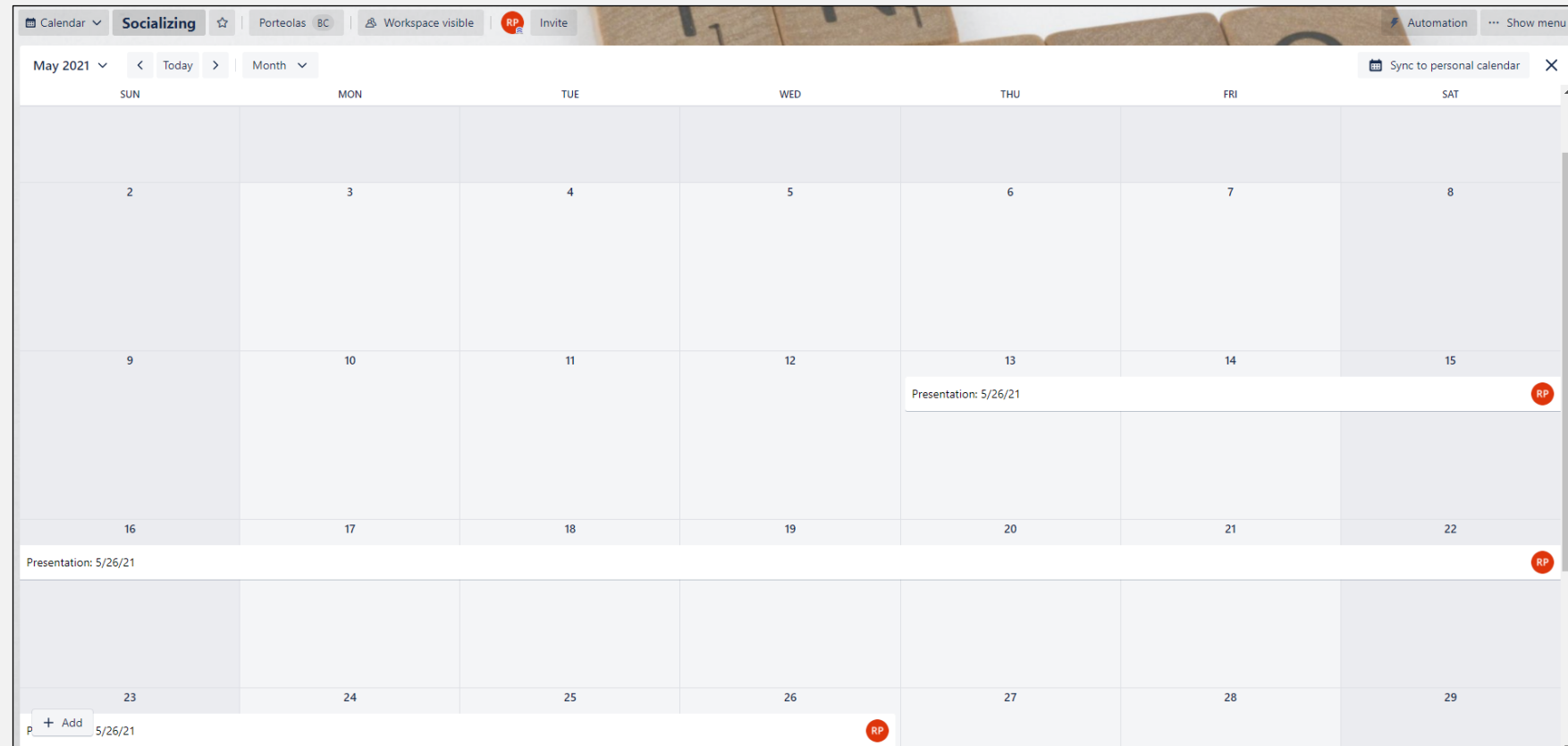
Views: Dashboard

- Default views:
    - Cards Per List
    - Cards Per Due date
    - Cards Per Member
    - Cards Per Label (*category*)

- Viewable only, not interactive/clickable

- Editable
- Customizable

Add new

Views: Workspace Table

- *If you're familiar w/ Trello, this replaces 'Teams' (no longer available)*
- View spans *__multiple__* Trello boards, *not just* the board you're *actively* on
    - Opens up a new browser window
- Interactive, edits can be made from this view

Add boards:
- Start w/ board you were on
- Add/include more boards

Quick filters:
- All cards
- Your cards
- Due date
- Member
- List
- Label

Features: **Butler**

- No-code automation, using NLP
  - Automate common actions
    - Best practice: learn what your repetitive tasks are before you begin embedding automations
  - Create custom buttons to build process quickly
  - Surface upcoming deadlines to team
  - Schedule teammate assignments
- Automated actions can be layered upon one another

- Free subscriptions
  - Up to 50 automated command runs/month
- Paid subscriptions
  - Biz Class: *up to 6K total automated run commands /month*
    - Up to 1K /Workspace
    - Up to 200 per user
  - Enterprise: unlimited automated command runs

[Automation] button, in upper right hand corner of window;
was once [Butler] button

Butler: **Rules**

Rules

Admin | Create Rule

Turn your Trello board into an automation machine.

- ✓ Create rules to have Butler automatically react to your actions on a board.
- ✓ Take productivity to the next level with simple "When this, do that" format.
- ✓ Here are some examples:
  - When a card is created in list "To Do" by me, add the "Steps" checklist.
  - When a card is moved to list "Done" by anyone, mark the due date as complete and remove all members from the card.
  - When I am added to a card, set the due date in 5 working days and post a comment saying "I got this!"

Create a Rule

Save | Cancel

Trigger

Your command doesn't have a trigger yet. Select a trigger for the command below.

+ Add Trigger

Create a Rule

Save | Cancel

Trigger

Your command doesn't have a trigger yet. Select a trigger for the command below.

Select a Trigger

→ Card Move | +− Card Changes | 🕐 Dates | ✓ Checklists | 💬 Card Content | ☰ Fields | ⬤ Advanced

when a card is [added to] the board [by me]   ⊕

"Added" means created, copied, moved into the board or emailed into the board.

when a card is [added to] list [List name] [by me]   ⊕

"Added" means created, copied, emailed or moved into the list.

when a card is [archived] [by me]   ⊕
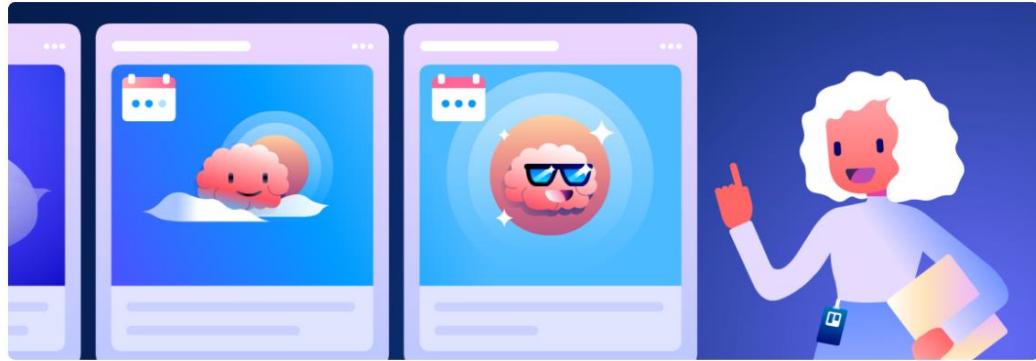
when a list is [created] [by me]   ⊕

when list [List name] has [exactly] [1] [+] cards   ⊕

Butler: Card Button

Card Buttons

Create Button

Trello cards, your way.

- ✓ Create custom buttons that appear right on the back of every card.
- ✓ Perform the actions you do most often with just one click.
- ✓ Here are some examples:
  - **Assign Me**: join the card, add the yellow "In Progress" label, and an empty checklist named "To Do" to the card.
  - **Completed**: move the card to the list "Done" and remove the card's due date.
  - **Send to Reviewer**: add member @JohnSmith to the card, set the field "Stage" to "In Review", and post a comment that says "Ready for review!"

Create a Card Button   Save   Cancel

Icon	Title	Options
⚙	Button Name	☑ Enabled by default ☐ Close card when action is performed

Actions

Your command doesn't perform any actions yet. Add some actions from below.

+ Add Action

Create a Card Button   Save   Cancel

Icon	Title	Options
⚙	Button Name	☑ Enabled by default ☐ Close card when action is performed

Actions

Your command doesn't perform any actions yet. Add some actions from below.

Select an Action

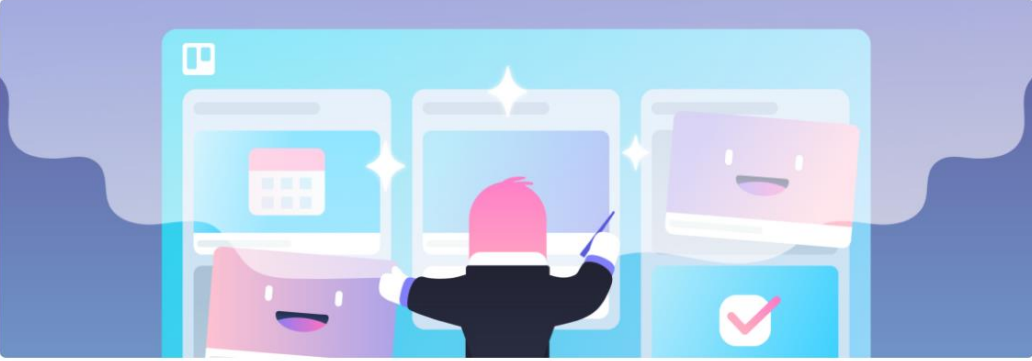| → Move | +− Add/Remove | 🕐 Dates | ✓ Checklists | 👤 Members | 💬 Content | ≡ Fields | �venti Sort | 🗄 Cascade | Jira | Slack |

move the card to the top of list [List name] ⊞   ⊕

move the card to the top of the list   ⊕

archive the card   ⊕

Butler: Board Button

Board Buttons

Create Button

Give your Trello board productivity super-powers.

⊘ Create custom buttons that appear at the top of the board.

⊘ Improve your workflow with board-wide actions at the touch of a button.

⊘ Here are some examples:

- **Monday Setup**: Archive all cards in list "This Week", and move all cards in list "Last Week" to "This Week".

- **Prioritize**: Sort the cards in list "Doing" by custom field "Priority" descending.

- **Shuffle Pick**: Move 2 random cards from list "Backlog" to list "Doing".

Create a Board Button

Save   Cancel

Icon   Title   Options

☰   Button Name   ☑ Enabled by default

Actions

Your command doesn't perform any actions yet. Add some actions from below.

+ Add Action

Create a Board Button

Save   Cancel

Icon   Title   Options

☰   Button Name   ☑ Enabled by default

Actions

Your command doesn't perform any actions yet. Add some actions from below.

Select an Action

| + Add Card | → Move Cards | ☰ Lists | ≡ Sort | ⧉ Other | Jira | Slack |

create a | new | card with title | Card title | ✎

in list | List name | ▥ 🏷 ✔ 👤 📅

By default, this action creates a **new** card. If you select the **unique** option, the card will be created only if one with the same title doesn't exist in the list (otherwise, the command will stop and no further actions will be executed).

Butler: Calendar

Scheduled Commands

Admin | Create Command

Make the schedule work for you.

✓ Set up recurring commands based on a given schedule.

✓ Create unlimited possibilities to save time and keep organized.

✓ Here are some examples:

- Every day at 8:55am, sort the list "Backlog" by due date.
- Every third Wednesday of the month, create a card called "Planning Meeting" to the list "To Do" and add member @JohnSmith to the card.
- Every year on the 14th of February, create a list called "Valentine's Day Ideas".

Create a Schedule Command

Save | Cancel

Trigger

Your command doesn't have a trigger yet. Select a trigger for the command below.

+ Add Trigger

Create a Schedule Command

Save | Cancel

Trigger

Your command doesn't have a trigger yet. Select a trigger for the command below.

Select a Schedule

| every | day | 🕐 | + |

| every | monday | 🕐 | + |

| every | 2 | weeks | on monday | 🕐 | 📅 | + |

| every | first | monday | of the month | 🕐 | + |

| every | month | on | the 1st | 🕐 | 📅 | + |

| every year on | the 1st | of | january | 🕐 | + |

Butler: Due Date

Due Date Commands

Never forget a due date.

✓ Create commands based on a card's due date.

✓ Stay on timeline and manage due dates on cards, stress-free

✓ Here are some examples:

- The moment a card is due, move the card to the top of list "To Do" and join the card.
- The Sunday before a card is due, move the card to the bottom of list "This Week".
- 2 hours before a card is due, add the red label to the card.
- 3 days after a card is due, post comment "@board This card was due 3 days ago".

Create a Due Date Command

Save   Cancel

Trigger

Your command doesn't have a trigger yet. Select a trigger for the command below.

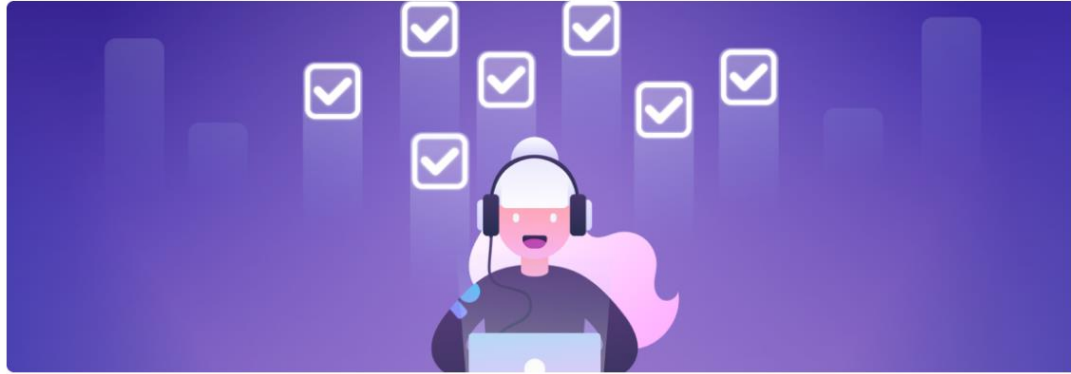⚠ **Due date triggers are not retroactive.**
For example, if you enter a command that says *2 days before a card is due,* ..., this will not trigger for cards that are already due in 2 days or less.

It will trigger the moment a card becomes due in 2 days through the passage of time, starting from the moment the command is entered.

Select a Due Date Trigger

⚪ Advanced

| the moment | a card is due | ⊕ |

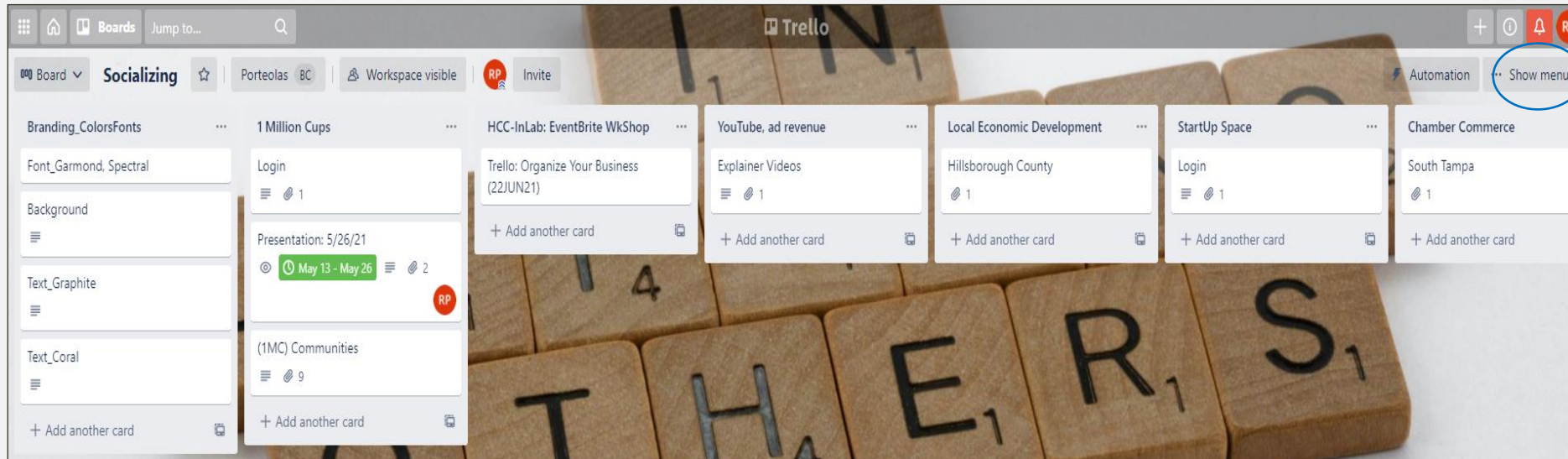| 2 | days | before | a card is due | 🕐 | ⊕ |

| on the | monday | before | a card is due | 🕐 | ⊕ |

Create a Due Date Command

Save   Cancel

Trigger

Your command doesn't have a trigger yet. Select a trigger for the command below.
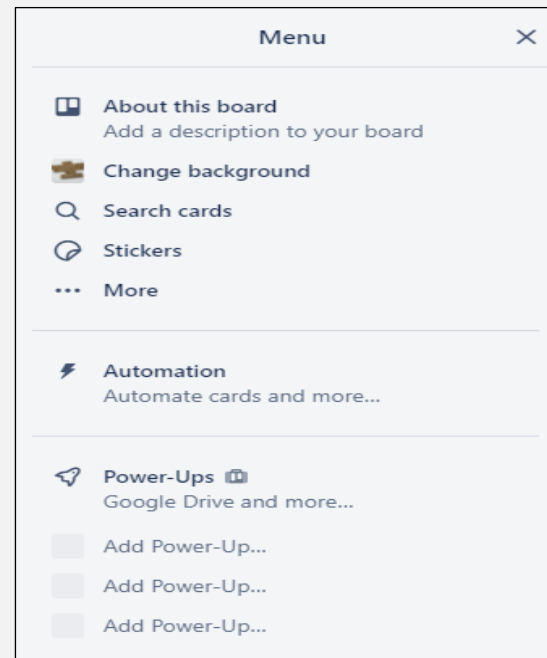
+ Add Trigger

Features: **Power-Ups**

- From the 'board' view
  - Show menu

- Integrate top work tools
  - Microsoft Teams
  - MailChimp
  - Confluence
  - CRM (Zoho)
  - Slack
  - Dropbox
  - Google drive
  - Evernote
  - SalesForce
  - ..., ...

- Free subscriptions
  - One power-up / board
- Paid subscriptions
  - Unlimited power-ups / board

PowerUps: Made By Trello

Made by Trello

Search

- ☆ Featured
- ✈ Enabled
- 📖 **Made by Trello**
- ✦ **Bonus** Limitless Power-Ups
- Analytics & reporting
- Automation
- Board utilities
- Communication & collaboration
- Developer tools
- File management
- HR & operations
- IT & project management
- Marketing & social media
- Product & design
- Sales & support

Confluence Cloud
Add
Attach Confluence pages to Trello cards to manage content, strategy, and ideas right in Trello.
📖 100,000+ ✦ Bonus

Custom Fields
Add
Add custom fields like text, numbers, checkboxes, dates, and dropdown lists to cards.
📖 1,000,000+ ❤ Staff pick

163 Dashcards
Add
Turn any board into a dashboard and track work across Trello with a new type of card
📖 1,000+ ✦ Bonus

Evernote
Add
Create and attach notes right to your Trello cards, and see when they were last edited.
📖 50,000+

Giphy
Add
Search, Share & Make All The GIFS!
📖 50,000+

GitHub
Add
Attach branches, commits, issues, & pull requests to cards, and see the status of pull requests on your boards.
📖 100,000+

Google Drive
Add
Access your Drive files for a project directly from its card, or create and attach new Drive files to a card.
📖 1,000,000+

Google Hangouts
Add
Skip the "Which video link are we using?" and create a video chat button on your boards.
📖 10,000+

Jira
Add
Eliminate context switching and ensures every member of your team is always on the same page.
📖 100,000+ ✦ Bonus

Jira Align
Add
Introduce agile components to your work and establish quick reporting on your team's progress.
📖 5,000+ ✦ Bonus

List Limits
Add
Set a limit on your lists to highlight them if the number of cards in it passes the limit.
📖 250,000+

MailChimp
Add
At a glance, get up-to-date information and stats about templates and campaigns attached to a card.
📖 10,000+

Competitors:

- Competitive analyses by bloggers/YouTubers
    - *likely need to be re-evaluated since newest updates/releases*
    - *The differences I found through research were 'debunked' through building the PPT (specifically, the latest views – level playing fields)*
        - I cannot 'speak to' the pros/cons of their competition, aside from Asana & Slack
            - In comparing Asana to Trello, I prefer Trello
                - Our team found managing Asana became a 2nd job w/n itself
                - I find Trello to be more customizable – visually appealing...
            - I only mention Slack here, for sake of avoiding redundancy & duplication
                - Slack is more of a communication/repository
                - Trello is enabled for 'commenting' on cards, etc; I cannot see value-add in running both concurrently – only vouch for distraction festered from frustration "which source?"
- General Use
        - Monday

- Enterprise
        - Wrike
        - Smartsheet
        - Celoxis
        - Teamwork
        - FunctionFox
        - Favro

Subscription Comparison:

Free

For individuals and teams looking to be more productive.

$0

[Get started]

✓ Unlimited cards
✓ Unlimited members
✓ Up to 10 boards
✓ 1 Power-Up per board
✓ Unlimited storage (10MB/file)
✓ 50 automated command runs per month
✓ Unlimited activity log
✓ Assignee and due dates
✓ iOS and Android mobile apps
✓ 2-factor authentication

Business Class

For teams that need to track multiple projects and visualize work in a variety of ways. Best for teams up to 100.

$10

per user per month billed annually ($12.50 billed monthly)

[Try for free]

Everything in Free, plus:
✓ Unlimited boards
✓ Unlimited Power-Ups
✓ Dashboard view **NEW**
✓ Timeline view **NEW**
✓ Workspace Table view **BETA**
✓ Calendar view **NEW**
✓ Advanced checklists
✓ Map view
✓ 1,000 automated command runs per Workspace + 200 per user, up to 6,000 per month
✓ Unlimited storage (250MB/file)
✓ Admin and security features
✓ Workspace-level templates
✓ Collections
✓ Observers
✓ Single board guests
✓ Custom backgrounds & stickers
✓ Saved searches
✓ Priority support
✓ Google Apps sign-on
✓ Simple data export

Enterprise

For companies that need to connect work across teams and enhance org-wide controls, security, and support. Ideal for orgs 100+.

Ready to learn more?

[Contact sales]

Everything in Business Class, plus:
✓ Organization wide permissions
✓ Organization visible boards
✓ Public board management
✓ Multi-board guests
✓ Attachment permissions
✓ Power-Up administration
✓ Unlimited automated command runs
✓ SAML single sign-on (SSO) included with free subscription to Atlassian Access

Learn more about Enterprise