MARKETER’S GUIDE TO Trello

Tips, Hints and Sample Boards for an Agile World
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Introduction

Who is this guide for?
This guide is for any marketer trying to get more clarity into the plans, projects and tasks they need to track as part of their job. It’s for any marketer who wants to make their life a little easier and their team more effective.

What will you learn?
You’ll learn new approaches and tips for using Trello. If you are new to Trello you’ll gain a solid understanding of the core concepts. If you are already using Trello, you will discover a variety of power tips for individuals and teams. You’ll see some real use cases in which you can apply Trello.

What you won’t learn in this guide
This guide is not intended as a manual or the definitive guide to Trello. We think Trello is easy to use. We created this guide to help you apply Trello’s powers to the existing way you already manage your projects. We are not advocating for a specific project management philosophy - we don’t want this guide to be another piece of “productivity porn.”

What makes us an expert in Trello?
We have used a variety of different project management tools, including other Kanban-based systems. We adapted a few of these tools for use in our marketing projects even though they were more targeted for use in agile software teams. These explorations showed us how to apply these agile principles to our marketing projects.

We first started using Trello at the end of 2011 and haven’t looked back. It’s versatility, fluidity and visual nature make it a great fit for use in any project that requires speed, iterations and adaptability - characteristics found in most marketing projects. We use Trello to manage PageMutant’s marketing campaigns, content creation, software development work and on-boarding projects.

We still have a beginner’s mind. If you have a great Trello tip, share it on the Trello tip board or send a note to trello@pagemutant.com.
Trello Foundation
What is Trello?

At its core, Trello is a lightweight project management system. Even that might sound too grandiose and intimidating. Trello is a system for visually defining and tracking the progress of your projects.

You want your marketing tools to fit your situation. Like your favorite pair of jeans, it just fits and feels right. You can’t use Trello everywhere but you can use it for most situations.

The Tao of Trello

**SIMPLE**

Trello has a structure that is deceptively simple yet powerful. You can adapt Trello’s cards, lists and boards to fit a variety of workflows. At first, Trello might seem limited in its feature set. We recommend you embrace the constraints - you will likely soon appreciate its effectiveness and versatility.

**VISUAL**

Trello makes it easy to visualize your workflow. Unlike a long to-do list, you can easily see where you should focus your attention. The ability to add photos and colors to cards gets you even closer to the whiteboard you might be using as a home for sticky notes.

**FLUID**

The ability to drag and drop cards on a board gives your tasks and projects a physicality you won’t find in a to do list or many other digital project management systems. Trello helps you achieve clarity on what to work on next and where your project is stuck. Every element of Trello automatically stays in sync across your devices and across each team member. It’s always up to date.
What Trello doesn’t try to do

Trello is great for collaborative projects but it is not trying to reinvent how your team communicates or how you use email. Trello is not for centralizing your file storage, even though you can attach images and files to relevant cards. There are plenty of capable options, such as Dropbox and Google Drive, for sharing files with stakeholders. Trello doesn’t attempt to replace every type of project management system.

When is Trello not a good fit for your project?

Trello is likely not a good fit for projects that have many dependencies or when you need sophisticated financial and resource allocation tied to your schedule. If you dream in GANTT charts you should keep using your tool of choice. If you are managing a construction project or building the next version of the space shuttle, you should stick with a traditional project management system.

Additionally, if you need paper printouts, Trello may not be for you. Paper is great for immediate visibility for your daily items, but it is not great for keeping a team in sync. If your organization still requires lots of paper to manage a project or it needs you to keep your TPS reports up-to-date, you may want a traditional project management system.

But, for the 90%+ of us who live with rapidly changing, iterative projects, Trello could be for you.
What is Kanban?

If you want to become a Trello power user, it helps to understand a little bit about Kanban. Kanban loosely translates from Japanese to “signboard.” Kanban systems were originally developed at Toyota to improve the manufacturing process. Kanban gave a simple, visual way to track work in progress and help identify bottlenecks in a system.

Many software development teams have adopted Kanban methods, finding it a great fit for the iterative nature and continual development of today’s software applications. It complements agile software development practices. These same approaches are helping marketers, whether working as an individual or as part of a team. At it’s most basic use, a Kanban board has lists for To Do, Doing and Done.

Source: www.personalkanban.com
Key Components of Kanban

Visualize your workflow
The board structure makes it easy to see the structure of a project at a glance. It is clear what the stages are for each part of the project and what path a task must go through to be “done.”

Limit your work in progress
Like in an efficient manufacturing process, you don’t want a build up of inventory. You want to limit the number of items you are actively working on. More work in progress slows down the entire system.

Identify bottlenecks
Now that you can clearly see where tasks or projects are piling up, you can take action by focusing on tasks in the bottleneck or addressing the root causes for why so many items are stuck at that stage.

See the Resources section of this guide for more articles and books on Kanban.

Learn More about Kanban
You do not need to be a Kanban zealot to get value out of Trello. However, if you’re eager to learn more about how to apply Kanban to project management in your personal and work life, a great resource is Personal Kanban. Both the website and the book provide insights based on the authors’ use of Kanban in a variety of environments.
Anatomy of Trello - Boards & Lists

- **Board**: "Summer Vacation" with options to 'Pick a place', 'Book lodging', 'Schedule time off', 'Find flights', 'Look up friends nearby', and 'Add a card'.

- **List**: "Things to Pack" with items 'Jane’s suitcase' (0/3) and 'Jason’s suitcase' (0/4).

Source: www.trello.com
Anatomy of Trello - Card

Files
Include images, PDFs and other support materials

Checklists
You can have multiple checklists

Collaboration
You can @mention others to send a message

Key actions
Learn the keyboard shortcuts

Source: www.trello.com
Mobile
Trello keeps your boards up-to-date across all your devices and teams. You don't have to work at synchronizing the details. Your boards will always have the latest information. Download the app for your mobile device, including iPhone, iPad, Android phone, Android tablet, Kindle Fire or Windows 8 phone.

The Path to becoming a Power User
The rest of the guide will cover more advanced topics, such as using multiple boards, leveraging templates and saving time with keyboard shortcuts.
Trello Advanced
The best approach is to create a board and start using it. Once you get accustomed to Trello, start identifying ways to replicate and reuse items to save even more time.

**Checklists**

Although we often don’t bother to name a checklist on a card, we do recommend giving a specific name for a checklist that you want to reuse. In doing so, you can easily apply this checklist to other cards.

An example would be a checklist for a blog post. When creating a card for the next blog post, reuse a previous checklist.

**Cards**

If you want to clone other items on a card such as the assignee, labels or description, you should copy the whole card instead of just the checklist. Copying a card will give you the option of also copying the checklist on the original card.

**Lists**

If you want to copy a similar set of cards, consider adding them to a list template. You can then copy that list whenever you need to get a jump start.

**Boards**

At the widest level you may want to reuse everything on a board, including the cards and lists. At this level, you can set up an entire project in a couple of clicks by copying a board.

In the next section we’ll review several use cases for Trello.

Trello Board Templates

As a bonus for this guide, register to get a series of sample boards that you can clone.
We want to highlight a few tips and features that we have adopted as part of our everyday use of Trello. This is not meant to be a definitive list of tips.

We would love to learn more. Share your Trello tips with us at trello@pagemutant.com or check out the tips board.
Choose your zoom level - micro and macro views of your project

This is not about seeing your board up close. It’s about choosing how Trello’s elements fit your project.

**Zoom Out**

Sometimes you may need a board that shows several projects and their priority in relation to each other. In this case, a card represents a project. You may not even need the checklist capability as it would be more useful in the standard view. Using a board to organize other boards provides a macro view so you or your team can prioritize multiple projects.

**Standard**

Most commonly, a card represents a key activity. Individual steps for a key activity would be checklist items. The board contains multiple activities and allows you to visualize the overall project.

**Zoom In**

For a tactic-intensive project, each card represents a tactic, giving more visibility into the micro events in a project.
Trello Tips - Card Management

Card flow between boards
If your process is getting more complicated or your board is looking a bit too full, try moving cards between boards.

For example, your backlog list might be too full. Move those cards to a different board and only pull those items that make it out of the backlog.

See the UserVoice article on card flow.

Convert a checklist item to a card
Sometimes you will have checklist item that is worthy of its own card, or perhaps you know you won’t complete it as part of the original card. For any checklist item you can click on it to “convert to card.” In doing so, you remove it from the checklist and it becomes a card on a list.

Add cards via email
Sometimes the context or idea for a new card may originate in an email. Each Trello board provides you with a unique email address to forward emails to and automatically create a card. Trello can forward the unique address to you. Add this email address to your contacts with a name like “Add to XXXXX board.”

Add cards via other systems
Trello has an API and integrates with Zapier and Kevy. Use this ability to add cards based on triggers from other systems. For example, if someone completes a Google form, create a new card on a particular board.
**Bulk add**

Trello focuses on keeping things simple. If your boards become cluttered you lose some of the clarity you are seeking. But sometimes you have a list of text that you want to transform into cards or to a checklist on a card.

Fortunately, you don’t have to waste time typing. You can paste the list in to the “add card” or “add checklist” item area. When you click “add” it will create a new item for each line in your block of text.

This tip is especially useful when transferring items from a spreadsheet or other document.

**Move all cards in list**

When you need to purge and clean up a board, it can be easier to move cards around in bulk. Move all the cards in a list to a different list as part of the clean up process.
Finding a card with search and filters

Press “/“ and type your search term to find cards across any of your boards. If you only need to find cards on the board you are viewing, it is often quickest to use the search capability built into your browser. Click ctrl-f or cmd-f and type the phrase of interest. If you have multiple cards that match, ctrl-g or cmd-g will take you to the next search result.

Sometimes it is handy to filter a board to cards of a certain color or label or include a particular phrase. Use the sidebar of a board to set the filter criteria.

Finding a board

We use several different boards to manage our projects. The ability to rapidly navigate between boards is essential to our sanity. When on a board, type “b” and the board search will appear. Start typing a word in your desired board title and you will see that board. This capability is a huge time saver as your use of Trello increases.

Keep your board titles literal and descriptive and you’ll improve the ease with which you can find them.

Color code boards

If your list of boards and projects increases, consider giving different types of boards certain colors so it’s easier to organize and spot the right board at a glance.
Trello Tips - Visual Enhancements

Power ups

Not every board needs a power up but they are a handy feature. You have power ups for voting, calendar and aging. Voting adds the ability for cards to contain votes. Calendar lets you toggle between the standard list view and a calendar view. Aging fades out cards that you haven’t touched in a while.

Stickers

Use stickers for additional call out information on your board. This shouldn’t be about decoration. Get your team to agree what different sticker symbols mean. Get Trello Gold or a Trello Business Class account to customize stickers.

Here are some of the stickers you get with Trello Gold or Trello Business Class:

Download a Set of Custom Stickers

Note, you need Trello Gold or Trello Business Class to use custom stickers.

Trello Trivia: The Trello mascot is Taco the spokes-husky. Taco is named after Joel’s Spolsky’s dog. Joel is a co-founder of FogCreek, which spun out Trello.
For any application you use on a frequent basis, you will save time by learning the keyboard shortcuts. This tip applies to Gmail and Excel, as well as Trello.

While you are building the muscle memory for these shortcuts, you can always type shift+? to see the list of shortcuts. Here are the ones we use most frequently.

### Keyboard Shortcuts

- **ESC** Use this to close a card, search box or other pop-over or to open the dialog box.
- **/** Jumps you to the search box to find an individual card based on any of the text on a card, including title, description, comment or checklist item.
- **b** Opens up the list of boards and puts the cursor in a search box. Start typing the name of the board to jump to it. An essential time saver.
- **c** Archive a card. You can always pull a card out of the archive.
- **d** Add a due date to a card
- **l** Set up a label or color
- **n** Insert a new card
- **w** Toggle the board sidebar
Trello Boards for Marketing Situations
Most marketers are paying more attention to content these days. Whether it’s a blog post, ebook, email or infographic, it’s helpful to plan out your schedule of topics and themes. You can keep your team on the same page or, in this case, Trello board.

**Tips for the editorial calendar board**

- Define the key phases and themes.
- Use the labels to provide color-coding of boards. Labels could apply to themes, persona or products.
- **Apply stickers** for callouts and attracting attention to key cards
- Use due dates for planning out the calendar
- Set up the iCal capability to sync these dates with an existing team calendar
- Add the Calendar Power Up so you can see a board as a calendar.
- If you drag a card to another date in the calendar view, the due date for that card will automatically change.

**Marketing automation platforms:** If you already use a system like Marketo or Hubspot, consider using their built-in calendar capabilities instead.
Once you have defined your editorial calendar you need to execute on the plan. Define lists for each phase of the production process. For example, each piece of content may have stages for research, draft, edit, approval, production, promotion.

**Tips for the content production board**

- If your editorial calendar is in Trello, copy or move a card to this content production board when it’s ready to enter production mode.
- Add photos or attachments for cards for additional context about the piece you are creating. Your card can store some of your key research for the content.
Users of Salesforce are likely familiar with the idea exchange, where you can vote on your favorite features. These votes then influence Salesforce’s development roadmap.

You can do this too. Create a public board and have your users vote on which features are most important to them. Your internal team can use the voting capability when making group decisions, especially ones that need a collaborative approach for discovering and researching options.

**Tips for the voting board**

- Set up the Voting Power Up so cards can receive votes
- Make the board public or at least visible by other members of your team
- Have an owner for this board to consolidate similar cards
- Designate board managers who combine similar cards

**UserVoice** is another good option for tracking your voting. They are a Trello user too. Review this article for more details on how they use Trello for product development and their roadmap.

Get this board
Once you know which features you will build next, it’s time to make your plans actionable and ship these product enhancements.

**Tips for the product roadmap board**

- Define phases that map to your production process
- If you have a lot of steps you may want to have each phase organized as a separate board.
- Provide due dates if timing is critical. If timing is less critical, create lists for a week, month or quarter to indicate when a feature might ship.
Marketers have become more sophisticated in their use of technology. You may have to take on larger implementation projects of new systems. For example, implementing a marketing automation system or CRM will require steps of definition, preparation, implementation and testing. Track these details with a board and keep everyone informed of the project’s progress at a glance.

**Tips for the system implementation board**

- Collect actions that require input or decisions from IT.
- Include actions for various training activities. Your system implementation will fail if your marketing or sales teams don’t know how to use it.
- Define templates and content that need to be created in support of the implementation.
- Don’t try to tackle everything at once. Push phase 2 or 3 activities into an Icebox (or Backlog) list.
The user experience of Pinterest has spread the adoption of visual collaboration. The pinning impulse can work with Trello by adding photos and attachments to boards. This is a great application for research projects.

**Tips for the pinning board**

- Create a card for each item and include an image. Cards can contain multiple files.
- Consider adding screenshots, animated GIFs, wireframes or other items to your product roadmap.
- Set up the Voting Power Up so cards can receive votes.
- Copy or move cards to other boards when they require an action as part of another project.

Get this board

**Responsive Landing Pages**

Create, analyze & manage landing pages and calls to action.
As with the product road map or system implementation boards, Trello shines in this application. Define the key steps for each campaign or even individual parts of a campaign.

**Tips for the campaigns board**

- Add due dates for critical milestones.
- Reuse checklists to implement campaigns the same way every time.
- Define your internal process for a campaign as a checklist or board so it’s easy to begin a new project using a template.
- Apply visuals to cards to communicate relevant information for each step in the campaign.
- Use red, green and yellow labels for status.
- Choose other label colors to indicate product or theme for the campaign.
- Add the Calendar Power Up so you can see a board as a calendar.

Get this board
Some activities, such as online advertising, are not one-off projects. They involve maintenance on an on-going basis. Make it easy to complete these tasks in a consistent manner.

Many of the cards on this board could be rolled up into checklists on a card that exists on a campaign board. For example “Weekly recurring ad activities”

**Tips for the campaigns board**

- Add due dates if there is a particular day that is ideal for a recurring activity
- Add checklists for more details or reminders
- Include links to key reports and systems so you don’t have to remember them each time
- Color code cards if there are particular themes or systems that you want to highlight
- Add activity notes on a card to help you remember any issues from your previous performance of that task
Are you looking for the next addition to your team or trying to select the right vendor? Define the phases of the process and create lists for each one. Your team can then track and collaborate around each candidate as they go through the process of screening and hiring until you have found the right person.

**Tips for the hiring board**

- Add due dates for critical milestones.
- Reuse checklists to implement the steps the same way every time.
- Encourage comments on each candidate’s card to capture anecdotes and impressions of that candidate.
- Combine with Zapier or Kevy to add new cards from a form or other collection system.
- Consider a separate board for onboarding new members of the team.
- Color code cards based on function.
- Apply stickers so your star candidates get the attention they deserve.

Get this board
You get ideas all the time on ways to improve how you message prospects, acquire new leads and onboard customers. Why not provide a little more structure so you can focus your attention on those experiments that will have the biggest impact for the least effort?

**Tips for the experiments board**

- Put all of your possible experiments in the backlog
- Prioritize based on the maximum projected impact for the least amount of effort.
- Track the experiment through phases of Build, Measure and Learn
- Repeat the process as you refine your approach
- Color code cards based on the functional area or theme for the experiment
- Use the checklist capability to have a repeatable process for implementing and instrumenting each experiment.
Trello can handle more than tactical issues. Many organizations use OKRs (Objective Key Results) to track their progress toward quarterly goals.

**Tips for the OKRs board**

- Create a separate list for each objective
- Color code cards in a list that are key results
- Color code high-level plans to achieve those key results. These plans may need their own boards to track the implementation details.
- Use the Activity area of a card to provide updates on your key results
- Use red, green and yellow labels to indicate status of a particular Key Result
- Create or copy a board for each quarter

_Want More on OKRs: See the Resources section of this ebook for additional OKR information._

Get this board
This board is an example of the “zoom out” pattern. Each card represents another board or project. Use it as a curated list of initiatives. This board should match where you are focusing your attention.

**Tips for the board collection**

- Keep this board for projects only. Don’t clutter it with individual activities.
- Use red, green and yellow labels to indicate project status.
- Change the background to indicate that this is not a standard project board.
- Add visuals for easy reminders of the focus of each project.
- Make it easy to spot how active projects are assigned across your team.
- Add a list for Reference for research and resource boards.

Get this board
Trello Extras
Using the APIs with Developer Assistance

Trello has an API for customizing Trello or integrating it with other tools your team may be using. An example would be communication platforms like Slack or Hipchat.

Point your developers at the API documentation.

Using the APIs without Developer Assistance

If you want to do integrate Trello into your workflows across systems without the use of a developer, explore the integrations with Zapier and Kevy. Both of these solutions serve as an integration switchboard so you can choose a trigger system and an action system. You can then select the specific action you want to happen.

Two examples of connecting Trello with other systems:

- When a new Trello card is created, post a message to Slack
- When a new Wufoo form is completed, create a Trello card

Integration with other systems using Zapier:
Other Trello Resources

**Resources on Kanban**
- Personal Kanban: “Mapping your value stream” [Get article](#)
- Personal Kanban: “Limit Your Work-in-Progress #1–Calm Down and Finish” [Get article](#)

**Resources on Experiments**
- Brian Balfour: “The First Step To Building A Growth Machine” [Get article](#)
- Ryan Gum: “8 ‘Aha moments’ you need to have before marketing your startup” [Get article](#)

**Resources on OKRs**
- Rick Klau: “How Google sets goals: OKRs” [See video](#)
- First Round Capital: “How to Make OKRs Actually Work at Your Startup” [Get article](#)
- Niket Desai: “The Fundamentals - Objectives & Key Results” [Get article](#)

**Real world personal use of Trello**
- Marc Suster: “Trello versus Asana” [Get article](#)
- Gautam Ramdurai: “Locus / Focus: an approach to productivity without myopia” [Get article](#)
- Jordan Husney: “The Essentialist’s Dashboard” [Get article](#)
Real world business use of Trello

Product Development & Product Management

UserVoice on product development: “How we use Trello & Google Docs to make UserVoice better every day” Get article

Trello on roadmaps: “Going Public! Roadmapping With A Public Trello Board.” Get article

thoughtbot on product planning & development: “Playbook” Get article. thoughtbot’s playbook includes several other examples of how they use Trello.

GoSquared on product management: “How to maintain focus when managing a product” Get article

Groove on product management: “Why Bug Reports and Feature Requests Don’t Overwhelm Us Anymore” Get article

Joel Spolsky on product management: “Software Inventory” Get article

Marketing

Trello on editorial calendars: “Moved To Published: Using Trello As an Editorial Calendar” Get article

Help Scout on customer feedback systems: “How to Figure Out What Keeps Your Customers Up at Night” Get article

Tuts+ on editorial calendars: “How We’re Using Trello to Simplify Our Editorial Process” Get article

Vero on email marketing: “How The Founder of Vero Manages Email Marketing” Get article

thoughtbot on content production: “Playbook” Get article.

Managing & Hiring

Vero on managing a team: “How I Manage a Team of Five Without …” Get article

Ryan Carson on hiring: “How to Hire a Lot of Talented People, Very Quickly” Get article
It’s about Process, not the Tool

Trello is a wonderful solution for keeping you and your team organized. The simple, fluid, visual nature of Trello will make it easier for you to be more productive. But the key to achieving your goals and objectives is still about the processes and habits that fit how you and your team operate.

It’s easy to get buried in the tactical details by creating another pile of stuff to do. No tool by itself will keep you or your team organized. It takes diligence, focus and a continual desire for more clarity in your goals and the actions that will help you achieve them.

You are in a unique situation. Adapt our recommendations to fit your industry and how your team operates. Never lose sight of the projects and initiatives that matter to you, your team, and your company. Trello is a means to that end.


Go Be Productive.

Share your Trello Knowledge: Grab some of the sample boards or share a Trello board that has made your life easier. Add your favorite Trello tip on the tips board or send an email to trello@pagemutant.com.
PageMutant helps data-driven marketers build, manage & analyze landing pages at scale

- Create landing pages and calls to action
- Manage hundreds of pages with ease
- Analyze which messages, layouts and offers drive conversions for each segment
- Works with your existing systems

More Leads. Less Effort.

Build Landing Pages at Scale

Easily Create Hundreds of Landing Pages that Send Leads to Your CRM or Marketing Automation System

PageMutant makes it easy to create 1 landing page in 1 MIN.
- Test landing pages, confirmation pages and buttons
- Use forms that work with your marketing automation system, including Marketo, Eloqua and Pardot
- Personalize each landing page for the viewer
- Get a custom theme or layout to match your brand or product
- Responsive templates so your landing pages are mobile-ready

Build a Landing Page in 2 Seconds

No account required
Marketing Productivity Packaged for You
Get More Tips, Guides and Curated Articles.