studio evolution

Trello Organization Tips

Use the TRELLO Hierarchy to your advantage.

Teams
    Boards
        Lists
            Cards

Keep It SIMPLE: Organize your BOARDS by TEAMS.

Step 1: Set up your TEAMS.
Here's everything you need to know about Trello Teams: https://help.trello.com/category/700-category

Note: You can give someone access a board WITHOUT making them a Team Member (If they are a Team Member, then they have access to ALL boards associated with that Team).

    Theresa's TEAMS are:
    Business Playbook
    2018-19 Admin Tasks (Monthly to-do's listed by admin employee)
    Office Admin (Onboarding, Birthday Parties, Leads, Phone Log, Teacher Transitions, etc.)
    Music Lesson Teachers (Communication via monthly boards and other curricula or student boards)
    Kindermusik Teachers

Step 2: Create the BOARDS under each TEAM.
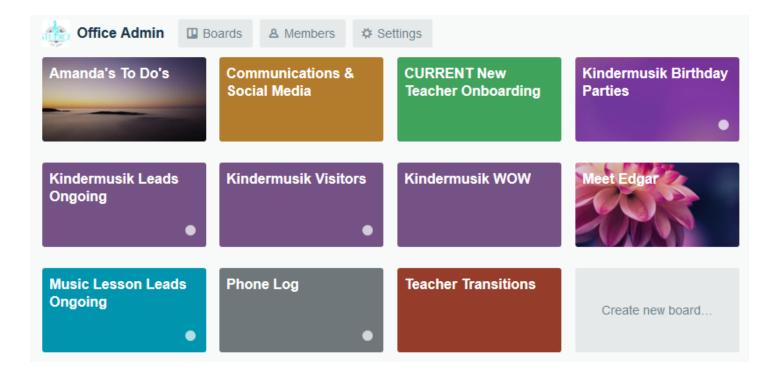Here's how to create a Trello Board: https://trello.com/guide/create-a-board

Step 3: Add LISTS to each BOARD. Under each LIST, add your CARDS.
Here's a helpful guide if you're new to Trello: https://trello.com/guide/trello-101

SAMPLE TEAMS and BOARDS

Business Playbook | Boards | Members | Settings

Apps, Purchasing Sources & Other Re...	ATTRACTION Playbook	COMMUNICATION Playbook	FINANCIALS Playbook
LIBRARY of Emails	LOCATIONS Playbook	OFFICE SYSTEMS Playbook	PROGRAMS SYSTEMS Playbook
RETENTION Playbook	TEAM Playbook	Create new board...	

2018-19 Admin Tasks | Boards | Members | Settings

01 September: 2018	02: October 2018	03: November 2018	04: December 2018
05: January 2019	06: February 2019	07: March 2019	08: April 2019
09: May 2019	2018-19 Touchpoints with Teachers	Create new board...	

And what if you want to reorganize once you create your Trello TEAMS?

Here's how to connect a BOARD with a different TEAM: https://help.trello.com/article/752-changing-the-team-to-which-a-board-belongs