



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...	

Office Admin Boards Members Settings

Amanda's To Do's	Communications & Social Media	CURRENT New Teacher Onboarding	Kindermusik Birthday Parties
Kindermusik Leads Ongoing	Kindermusik Visitors	Kindermusik WOW	Meet Edgar
Music Lesson Leads Ongoing	Phone Log	Teacher Transitions	Create new board...

PCS Music Lesson Teachers Boards Members Settings

A Month By Month Guide: Fall 2018	A Month By Month Guide: Spring 2019	A Month By Month Guide: Summer 2019	Curriculum Ideas for All Instruments
Music is My Super Power	Seesaw Resources	Skillmasters Performance Classes	Teacher Reference and Special Events
Trainings, Professional Develo...	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>