# Trello:
Best Practices

DigiComm

A few things to remember:

❖ **Transparency**: Trello fosters transparency and ownership with your team members: know who is responsible for tasks, set deadlines, enjoy automated reminders, and easier communication.

❖ **Autonomy**: everyone on this trello board has editing capabilities. It is not all up to the creator of the Trello board to maintain in.

❖ **Single point of truth**: Trello should function as the single location for all information regarding a task. For effective task management, each card should ideally have:
  ➢ Members
  ➢ A description
  ➢ A deadline

❖ Helpful features:
  ➢ **Attach files**: add images, documents, presentations, gifs, etc to any card. Great for planning presentations or making your board more personalized.
  ➢ **Calendar Power-up**: cards are arranged on the calendar by due date
  ➢ **Checklists**: great for meeting agendas, to-do lists, and keeping track of elements within a task.

Create Swimlanes that Promote Process and Progress

To improve project managements and flow, we encourage you to create swimlanes that will allow cards to move from left to right as team members progress with their work. A basic set up will be "To Do" "Doing" and "Done." However, DigiComm has expanded our swimlanes to include time frames, meetings, and ideas.
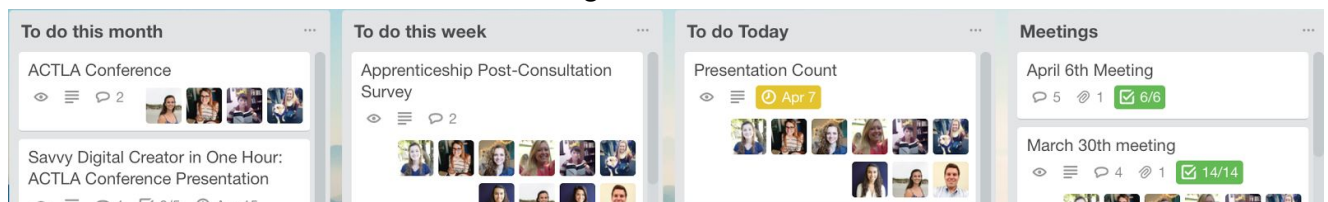
Best Practices: While your team might be tempted to create project-based swimlanes, like "Presentation," we've found these work against the flow. Instead, we recommend creating a "Presentation" label for those tasks.

Creating Cards that are Task-Focused
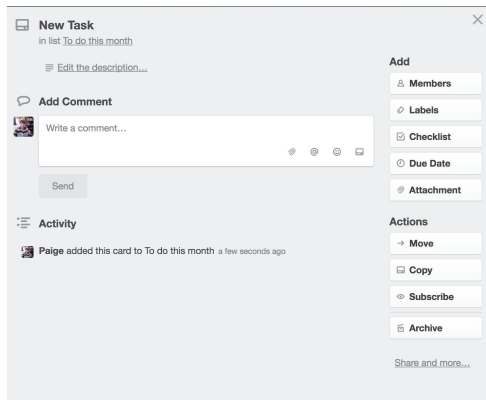
At the bottom of each swimlane is an option to "**Add a card...**" Once you give the card a title, you can click on it to add more information.

Best Practice: Cards should be the single point of truth for that task. Ideally this means writing a clear description of the objective, adding team members who will be responsible for the task, and a due date. You can also add **attachments**, a **checklist**, or **labels** to improve the clarity of the task.

Adding Members to Cards
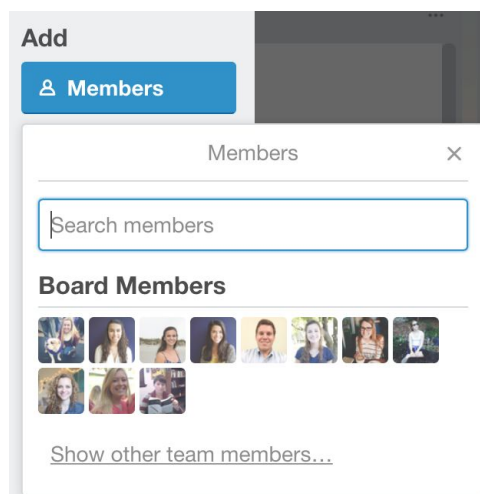
Any team member can add anyone to a card. Once someone is a member of a card, they will receive automatic notifications when someone comments on the card or reminders as the due date approaches.

Best Practice: To ensure that your team isn't overwhelmed with Trello notifications, only have members on cards that they are actively working on. To avoid Trello Notification Fatigue (TNF), we highly recommend incorporating a different app, such as Slack, for team communication rather than the Trello comment feature.
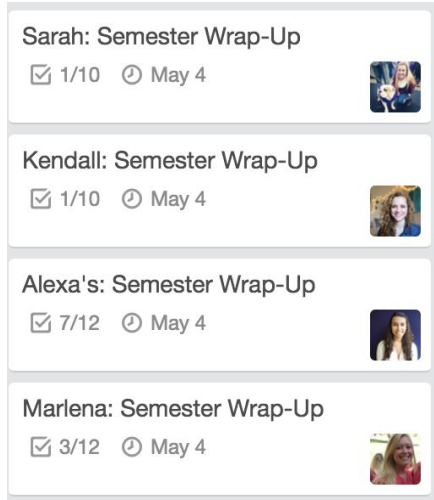
See What Each Member is Working On
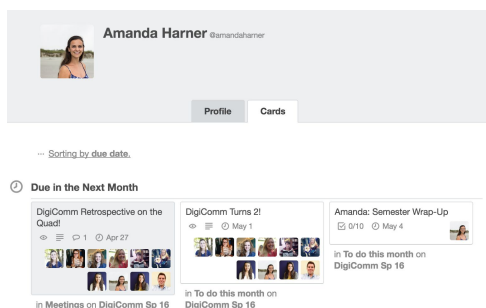
You can click on any team member's name to go to their profile to see an overview of the cards they are on and the comments they've made.

This is an easy way for team members to keep up with their tasks and for coordinators to see what each member is working on.

Checklists: Tasks and Agenda Items

Sarah: Semester Wrap-Up
☑ 1/10 ⏱ May 4

Kendall: Semester Wrap-Up
☑ 1/10 ⏱ May 4

Alexa's: Semester Wrap-Up
☑ 7/12 ⏱ May 4

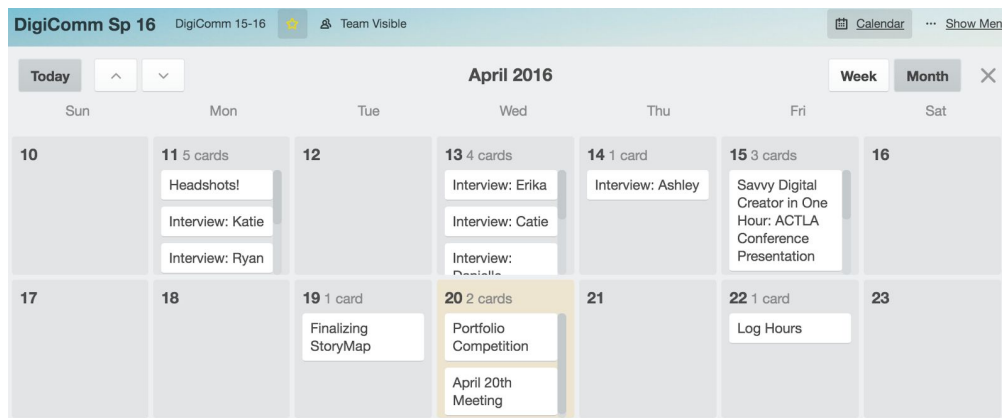Marlena: Semester Wrap-Up
☑ 3/12 ⏱ May 4

Checklists are an easy way to see the level of progression on a card's to-do list. Easily see how far team members are on their project and follow up accordingly. The checklist promotes accountability and allows team members to see a percentage of how much they have accomplished from their list.
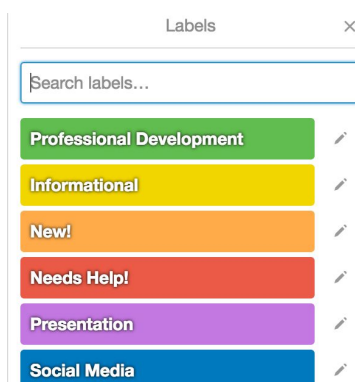
Use the checklist feature for **Meeting agendas**. Invite all team members to contribute topics they'd like to address during our meetings and check them off as you go. This is an easy way to stay on top of our meetings and reinforces a sense of accomplishment.

Add Due Dates and View Them on your Calendar

You have the option to add a due date to each card you create on Trello. Enable the **Calendar Power-up** and you can view all of your due dates in your calendar!

Utilize Labels to Color Code your Cards

Labels   ✕

Search labels…

Professional Development
Informational
New!
Needs Help!
Presentation
Social Media

Trello has the option so that you can add labels to cards. This helps give an overview of the different tasks.

Best Practices: To make your board easier to navigate and prioritize work, we recommend: a **"New"** label for newly added cards. A **"Needs Help"** or "Urgent" label for cards that need attention. Labels for **regular activities**, like "Presentation" or "Social Media"