

Foundations of Trello

Length: 3 Days

Summary: Whether it's managing a project with your team at work, checking off your daily to-do list, or planning a vacation, Trello can help you visualize your workflow and maximize your productivity.

In this Trello online course, you will learn how to use the software's flexible task and project management tools to stay organized and efficient across all areas of your life. Discover how to collaborate with your team in real time, integrate Trello with your most frequently used apps, and simplify and streamline your projects with these expert tips and tricks.

This Trello training features practical boards for both personal and professional use, including product development and home renovation projects. You can apply the knowledge you gain to virtually any project you can imagine across different industries, including marketing, software development, wedding planning, recruitment, and anything else you want to keep organized in Trello.

Course Highlights:

- Understand how to use Trello boards, lists and cards for task and project management
- Create, edit, move and copy cards
- Add due dates, labels, checklists and attachments to cards
- Search, filter and archive cards
- Add members to a card or board for collaboration on team projects
- Manage subscriptions, notifications and forward email to Trello
- Integrate Trello with your calendar and cloud storage like Dropbox or Google Drive
- Use Power-Ups for extra functionality, like card repeater, custom fields and voting buttons
- Example Trello boards for a sales funnel, personal to-do lists, and more

COURSE CONTENT

Module 1: Getting Started with Trello

#1

- Setting up a Trello Account
- Follow these simple instructions to set up a Trello account.

#2

- Editing Your Trello Settings
- Learn how to adjust and customize your user settings

#3

- Getting to Know the Trello Interface
- Get to know the navigation and terminology used within the Trello application.

#4

- Boards
- Recognize how to use boards to create and manage your projects.

#5

- Lists
- Discover how lists can be used and edited within a board.

#6

- Cards
- Find out how cards behave and are utilized with lists.

Module 2: Editing and Viewing Cards

#7

- Creating Cards and Descriptions
- Create your first card with additional text information.

#8

- Moving and Copying Cards
- Learn how to move and copy cards to other lists and boards.

#9

- Using Labels
- Add labels and customize what they mean for different cards.

#10

- Using Due Dates
- Utilize due dates and calendar reminders for certain cards.

#11

- Using Checklists
- Understand how checklists are created and can be re-purposed for later use.

#12

- Adding Attachments
- Learn about the various files which can be attached directly to a card.

#13

- Filtering Cards
- Get to know how to filter certain cards so you can find the information you want.

#14

- Searching for Cards
- Learn how to use the search bar so you can find the card you're looking for.

#15

- Archiving Cards
- Understand how archiving works and how to retrieve archived cards if necessary.

Module 3: Collaboration and Team Projects

#16

- Adding Members to a Board
- Learn to invite new or existing users to a board for team collaboration.

#17

- Adding Members to a Card
- Learn the benefits of adding members to a card.

#18

- Adding Comments to a Card
- Learn how to add comments and address specific members within a card.

#19

- Using Teams
- Learn how to create a team and why this can be beneficial.
- Permission Settings

#20

- Learn what each permission setting does and how to adjust for different member levels.

Module 4: Communication and Notifications

#21

- Subscribing to a Card
- Understand the benefits of following a card and receiving notifications of card updates.

#22

- Sharing a Card
- Learn how to share a card with others and how this helps communication among multiple members.

#23

- Managing Notifications
- Get to know the different notifications settings and decide which methods are best for you.

#24

- Forwarding Email to Trello
- Learn how to take advantage of emailing messages directly to Trello boards and lists.

#25

- Replying to Comments via Email
- Understand the benefits of responding to Trello updates directly from your inbox.

Module 5: Integrations and Power-Ups

#26

- Enabling the Trello Calendar
- Learn how to use the Trello calendar to see all of your cards in an easy to view schedule.

#27

- Integrating with Cloud Storage Services
- Get the file sharing services you already use integrated with Trello so you can include files directly to cards.

#28

- Integrating with Your Personal Calendar
- Learn how to have your Trello cards appear on your own calendar with iCalendar.

#29

- Adding Custom Fields
- Understand the benefits of adding custom fields to your card.

#30

- Adding Voting Buttons
- Learn how to use voting buttons so others can share their opinion or feedback on certain cards.

#31

- Adding Card Repeater
- Have cards that you use frequently re-appear at specific times.

Module 6: Trello Board Examples

#32

- Sales Funnel
- Learn how to create a simple sales funnel and turn your prospective clients into paying customers.

#33

- Personal Projects and To-Do List
- Learn how to manage all of your personal tasks and projects within a Trello board.

#34

- New Hire Onboarding
- Learn how HR teams can utilize Trello to ensure new employees have a fantastic experience when first joining an organization.

#35

- Vacation Planning
- Learn how to plan your next vacation and make sure you don't forget anything on your trip.