

Is it a bird or a plane?  
No, it's task visualization  
using  Trello

*WHERE THERE'S A TRELLO CARD, THERE'S A WAY...*

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# Objectives

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Share advantages of visualizing work with Trello

Provide a brief intro to Trello

Show ways to integrate Trello with Outlook to erase the email task “black hole”



# Moving Beyond the Reaches of Your Brain

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The majority of us are visual learners (65%)

We retain more information visually compared to reading alone

If used effectively, electronic task tools can help you remember what you won't remember

No tool works for everyone



# Intro to Trello: What is Trello?

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“Trello is a collaboration tool that organizes your projects into boards. In one glance, Trello tells you what's being worked on, who's working on what, and where something is in a process.”

<http://help.trello.com/article/708-what-is-trello>

## Key Features:

Electronic KanBan or Day Board

Calendar

Notification system

Collaborative tool

Integrates with productivity applications, such as MSFT Outlook and Toggl



# Intro to Trello: Basic Layout

The screenshot shows a Trello board interface with a blue header. The board is titled "Anthony's Demo Board O' Fun" and is marked as "Private". The user "Anthony Brown" is logged in. The board is organized into four columns: "Backlog", "In Progress", "Stuck", and "Done".

- Backlog:** Contains four cards: "Tell everyone that attended your Learnapalooza presentation Thank You!", "Attend: Time Mgmt and Personal Productivity at X-Mansion 1445", "Help with Learnapalooza clean-up", and "Check some emails and create next actions in Trello".
- In Progress:** Contains one card: "Learnapalooza presentation: Is it a bird or a plane? No, it's task visualization using Trello!".
- Stuck:** Contains one card: "Check in with NE group about Wi-Fi connectivity at Learnapalooza" with a sub-note "Waiting On: NE person- left VM".
- Done:** Contains three cards: "Make sure laptop battery is charged", "Bring back-up USB drive with presentation" (with a green checkmark and "3/3"), and "Bring list of presentations to Learnapalooza so I don't miss key presenters".

Each column has an "Add a card..." button at the bottom. On the right side, there is an "Add a list..." button.

**Learnapalooza presentation: Is it a bird or a plane? No, it's task visualization using Trello!**  
in list [In Progress](#)

Description [Edit](#)

Hi, this is a comment that is supposed to be more detailed than a regular old comment. It is special because it's "detailed".

**Add Comment**

AB Write a comment...

Send

**Activity** [Hide Details](#)

AB **Anthony Brown**

This is a comment. It isn't anything special and therefore was relegated to this little comment box.

2 minutes ago (edited) - [Edit](#) - [Delete](#)

AB **Anthony Brown** added this card to [In Progress](#) yesterday at 11:48 PM

**Add**

- Members
- Labels
- Checklist
- Due Date
- Attachment

**Power-Ups**

- Custom Fields

**Actions**

- Start timer
- Move
- Copy
- Subscribe
- Archive



# Intro to Trello: Card Anatomy



# Intro to Trello: Checklists

The screenshot shows a Trello board titled "Anthony's Demo Board O' Fun" with a search bar and user profile "Anthony Brown". Two columns are visible: "Stuck" and "Done".

**Stuck Column:**

- Card: "Check in with NE group about Wi-Fi connectivity at Learnapalooza"
  - Checklist:  2/3
  - Text: "Waiting On: NE person- left VM" (highlighted with an orange box)

**Done Column:**

- Card: "Make sure laptop battery is charged"
- Card: "Bring back up USB drive with presentation"
  - Checklist:  3/3 (highlighted with a blue box)
- Card: "Bring list of presentations to Learnapalooza so I don't miss key presenters"

Other elements include a "Boards" button, a search icon, the Trello logo, a "+" button, a user profile "AB Anthony Brown", an info icon, a notification bell, a "Private" lock icon, a "Show Menu" button, and an "Add a list..." button on the right.

# Intro to Trello: Checklists

The screenshot displays the Trello interface. At the top, the user's name 'Anthony Brown' is visible. A card titled 'Bring back-up USB drive with presentation' is highlighted. This card contains a checklist with three items, all of which are checked. A progress bar at the top of the checklist shows 100% completion. The checklist items are: 'Search for an extra-USB-drive in office', 'Load presentation onto-USB-drive', and 'Place drive into laptop-bag so I don't forget it'. The card also has a description 'Bring back-up USB drive with presentation' and a '3/3' indicator. The right sidebar shows options to add members, labels, checklists, due dates, and attachments.

Done

- Make sure laptop battery is charged
- Bring back-up USB drive with presentation  3/3
- Bring list of presentations to Learnapalooza so I don't miss key presenters

Add a card...

**Bring back-up USB drive with presentation**  
in list Done

[Edit the description...](#)

**Checklist** [Hide completed items](#) [Delete...](#)

100%

- Search for an extra-USB-drive in office*
- Load presentation onto-USB-drive*
- Place drive into laptop-bag so I don't forget it*

Add an Item...

**Add**

- Members
- Labels
- Checklist
- Due Date
- Attachment





# Learnapalooza presentation: Is it a bird or a plane? No, it's task visualization using Trello!

in list [In Progress](#)

[Edit the description...](#)

## Add Comment

AB Write a comment...

Send

## Activity

AB Anthony Brown added this card to In Progress yesterday at 11:48

Add

Members

Labels

### Change Due Date

Date: 5/12/2017 Time: 3:00 PM

Prev May 2017 Next

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
|    | 1  | 2  | 3  | 4  | 5  | 6  |
| 7  | 8  | 9  | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 |    |    |    |

Save Remove

# Intro to Trello: Due Dates

Can be set up to send email notifications 1 day before due date



Archive


 Reply  Reply All  Forward

Mon 9/26/2016 12:15 PM

 <do-not-reply@trello.com>

**Soin Rover go-live 9/27-9/29 on Work is due Sep 27 at 12:00 pm (EDT) at 12:11 PM on September 26, 2016**

To Brown, Anthony

 If there are problems with how this message is displayed, click here to view it in a web browser.

Attachments

+ Get more add-ins



Due soon...

[Soin Rover go-live 9/27-9/29](#) on [Work](#) is due Sep 27 at 12:00 pm (EDT)

[Communal brainstorming is a waste of time. Here's why.](#)

[Change email preferences.](#)

Get Trello for [iPhone and iPad](#), [Android](#), and [more](#).

# Intro to Trello: Due Dates Email Notification



# Intro to Trello: Recap

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Trello is a cloud-based electronic visual management application

The majority of us respond better to visualizing rather than to reading information

Task “cards” can be created to track a single item or a list of related activities

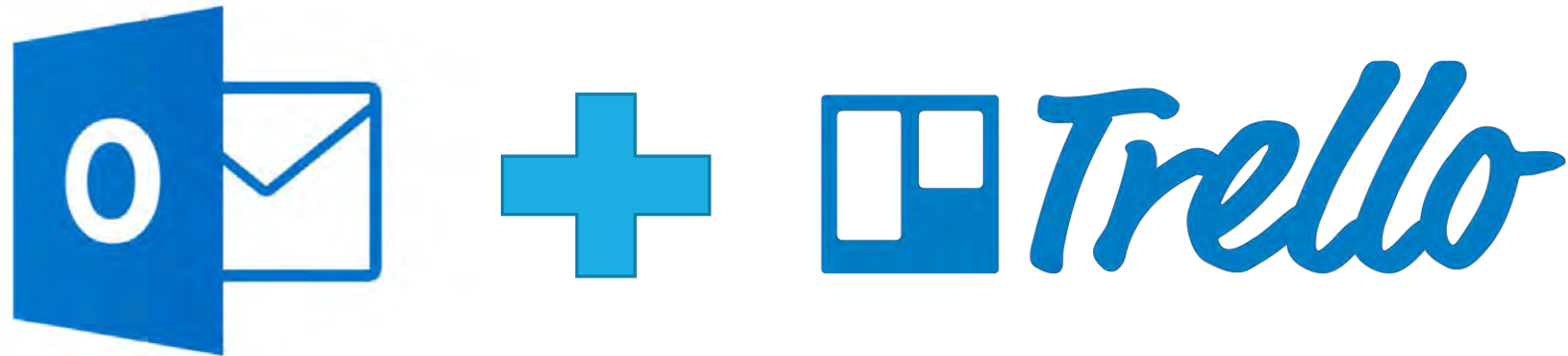
Due dates with email notifications can be attached to these cards

Trello can be integrated with several applications to increase personal and team productivity



# Using Trello and Outlook Together

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# Why?

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Struggles with follow-ups vs personal tasks

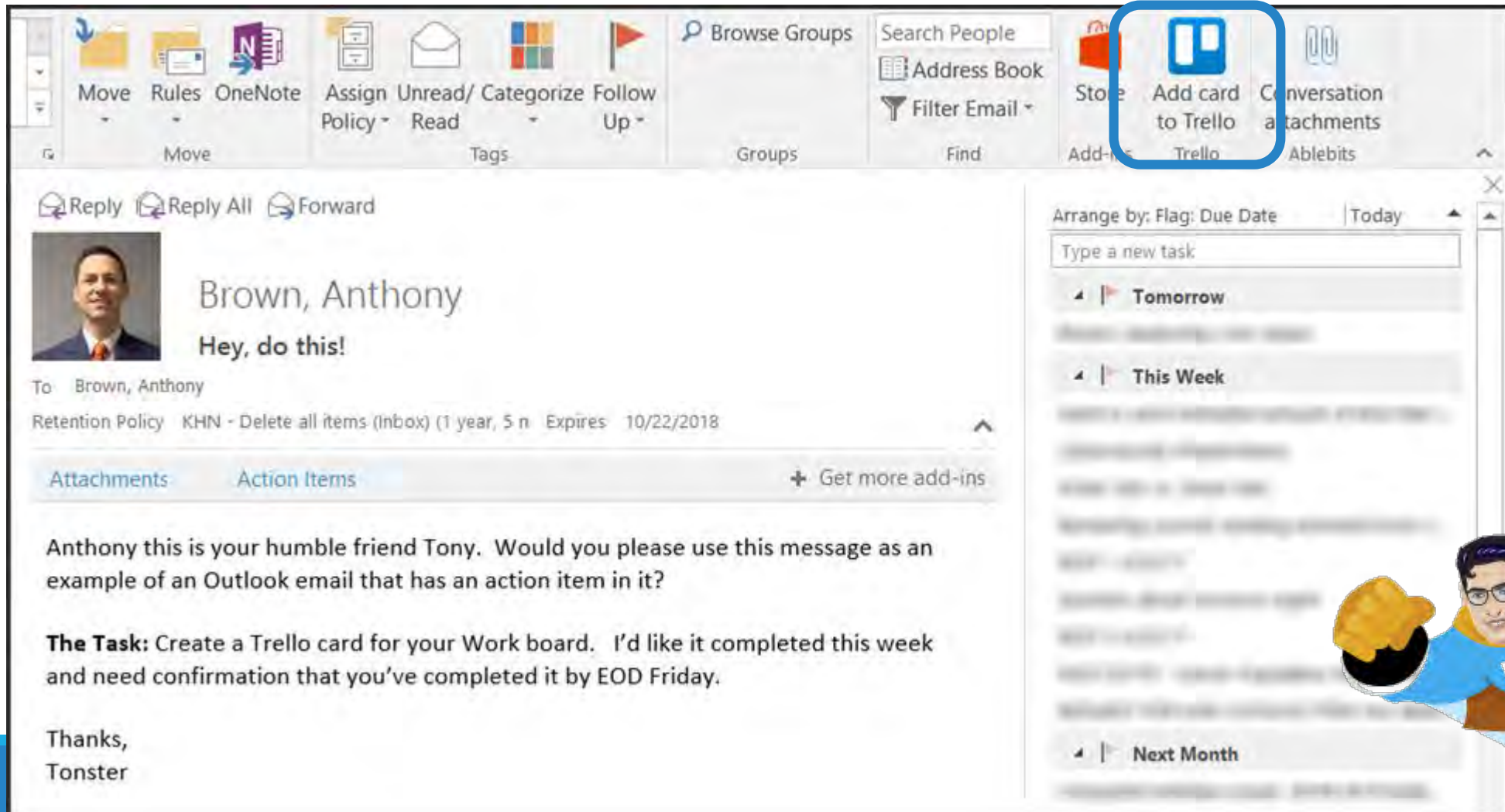
The majority of assignments received are via email (Outlook)

Outlook does not have a mature visual management system

Did not like way tasks presented on mobile device




# Option 1: Trello Add-in for Outlook



The screenshot shows the Outlook ribbon with the 'Add card to Trello' button highlighted in a blue box. The ribbon includes options like Move, Rules, OneNote, Assign Policy, Unread/Read, Categorize, Follow Up, Browse Groups, Search People, Address Book, Filter Email, Store, Add card to Trello, and Conversation attachments. The email content shows a message from Anthony Brown with a task to create a Trello card.

Move Rules OneNote Assign Policy Unread/Read Categorize Follow Up Browse Groups Search People Address Book Filter Email Store Add card to Trello Conversation attachments

Reply Reply All Forward

 Brown, Anthony  
Hey, do this!

To: Brown, Anthony

Retention Policy: KHN - Delete all items (Inbox) (1 year, 5 n Expires: 10/22/2018)

Attachments Action Items + Get more add-ins

Anthony this is your humble friend Tony. Would you please use this message as an example of an Outlook email that has an action item in it?


**The Task:** Create a Trello card for your Work board. I'd like it completed this week and need confirmation that you've completed it by EOD Friday.

Thanks,  
Tonster

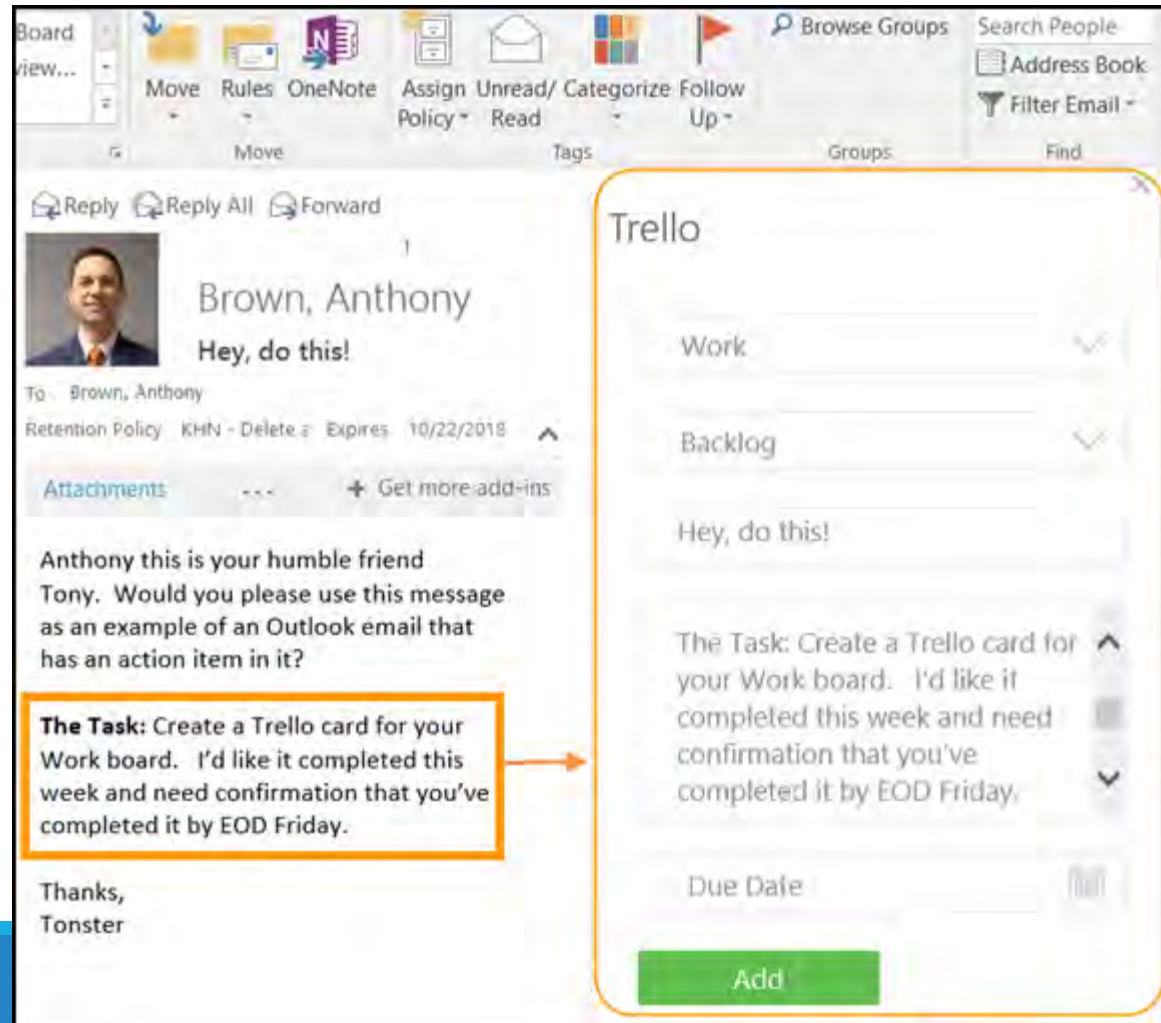
Arrange by: Flag: Due Date Today

Type a new task

- Tomorrow
- This Week
- Next Month




# Option 1: Trello Add-in for Outlook



The screenshot shows the Outlook interface with an email from Anthony Brown. The email content includes a task: "The Task: Create a Trello card for your Work board. I'd like it completed this week and need confirmation that you've completed it by EOD Friday." This task is highlighted with an orange box. To the right, a Trello add-in panel is open, showing a "Work" board with a "Backlog" list. The task text is pasted into the card creation area, and a green "Add" button is visible at the bottom of the panel.

Board view... Move Rules OneNote Assign Unread/ Categorize Follow Policy Read Tags Groups Find

Reply Reply All Forward

 Brown, Anthony  
Hey, do this!

To: Brown, Anthony  
Retention Policy KHN - Delete Expires 10/22/2018

Attachments ... + Get more add-ins

Anthony this is your humble friend Tony. Would you please use this message as an example of an Outlook email that has an action item in it?

**The Task:** Create a Trello card for your Work board. I'd like it completed this week and need confirmation that you've completed it by EOD Friday.

Thanks,  
Tonster

Trello

Work

Backlog

Hey, do this!


The Task: Create a Trello card for your Work board. I'd like it completed this week and need confirmation that you've completed it by EOD Friday.

Due Date

Add



# Option 2: Outlook Quickstep

 **Email-to-board Settings**

Add Cards via Email

Your email address for this board

[Generate a new email address.](#)


[Email me this address.](#)

Your emailed cards appear in...

| List           | Position      |
|----------------|---------------|
| <b>Backlog</b> | <b>Bottom</b> |

**Tip:** Don't share this email address. Anyone who has it can add cards as you. When composing emails, the card title goes in the subject and the card description in the body [More email formatting tips.](#)



 **Name:**

Edit the actions the quick step performs.

Actions

**Forward**

**Move to folder**

**Archive**





# Wrap Up

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Gain work clarity!

Erase the email task black hole!

Manage your work anywhere!

Extend your brain with Trello!



Extend your  
brain with  
Trello!



Q & A

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Thank  
You!



# References

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Benefits of visualizing work: <http://creately.com/blog/how-to-increase-workplace-productivity/>

How to create a Quickstep in Outlook: <https://support.office.com/en-us/article/Automate-common-or-repetitive-tasks-with-Quick-Steps-a9caf57e-0eb0-4b48-9141-a9904da0aaf9>

