

# Tame your To-do List with Trello

Learn how to get things done (for real)



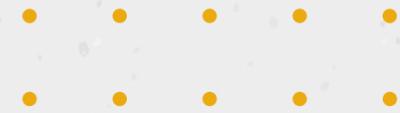
# Me, myself and *Trello*

I'm a Strategy Mentor and I'm passionate about start-ups and innovation but also about improving business processes and information-flow.

As a former Manager Assistant, together with Michela, I co-founded **The Assistant Academy** at the beginning of the year: this is the first training program dedicated to Executive Assistants in Italy, aiming to raise the professional standards.



# Learning Objectives



1

Assess the right priorities and decide how to tackle them

2

Identify how to reduce downtime and work in progress, in a lean and efficient way

3

Make use of the new tool (Trello) and approach in your daily routine

It is a commonplace  
observation that work  
expands so as to fill the time  
available for its completion.

Cyril Northcote Parkinson



## Listing

Do you feel like your activities are in control? Write them down!

- Write down all the activities, from the most important to the most mundane
- Search your documents / emails for any task you may have missed
- Open the calendar and see from 1 month before to 3 months later
- Update it every day

## Prioritizing

“What is important is seldom urgent and what is urgent is seldom important”.

- **IMPORTANT:** Activities that contribute to our long-term mission, values and goals.
- **URGENT:** Activities that require immediate attention. Often they are not important and waste our time.

## Planning

Have you completed your to do list?  
Schedule it !

- Estimate the duration of the activities
- Block time for priority tasks (up to a maximum of 60%, the rest leave it free for interruptions and urgencies)
- Group activities by type or consistency



Kanban is a strategy for

optimizing the flow of value

through a process that uses a

visual, work-in-progress

optimized pull system.



# Kanban is for you, if you identify in some or all these situations:

- Uneven flow of work
- Unplanned, disruptive requests
- Priorities change frequently
- Constant re-planning
- High abandonment, discard rates
- Delivered work, never used
- Too much work-in-progress
- You're really stressed
- Poor output quality



# How do you get started using Kanban?

MAP YOUR  
CURRENT  
WORKFLOW

PUT WORK  
ON THE  
BOARD

POPULATE  
YOUR  
BACKLOG

ACTIVELY  
MANAGE  
WORK IN  
PROGRESS  
(WIP)

MAKE  
POLICIES  
EXPLICIT

RUN YOUR  
DAILY  
MEETING

# Trello Basic

The board visually depicts the work in the various stages of the process using:

- cards to represent activities and resources;
- lists to represent the stages of the process.

## Power-up

superpowers that allow you to integrate third-party apps and services, customize tabs, add automations, or get a new perspective on boards.

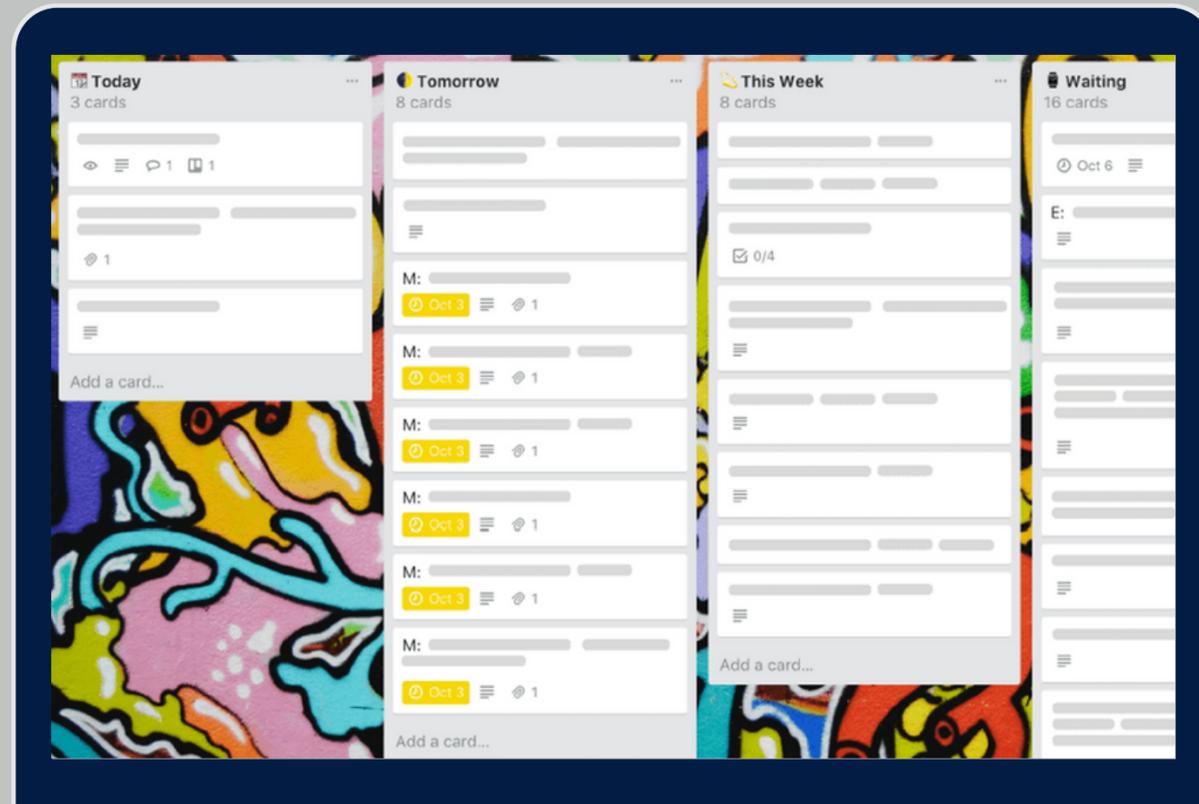
## Butler

an algorithm that performs automatic actions for you and that by monitoring your behavior suggests others.

## Labels

they allow you to group activities by priority, team, content, geography, etc.

# Top Trello Boards



## Personal Productivity

You can recreate your Time Management tools:

- Eisenhower Matrix (Important / Urgent)
- Weekly To do list
- Mindmap
- Weekly review and self-assessment

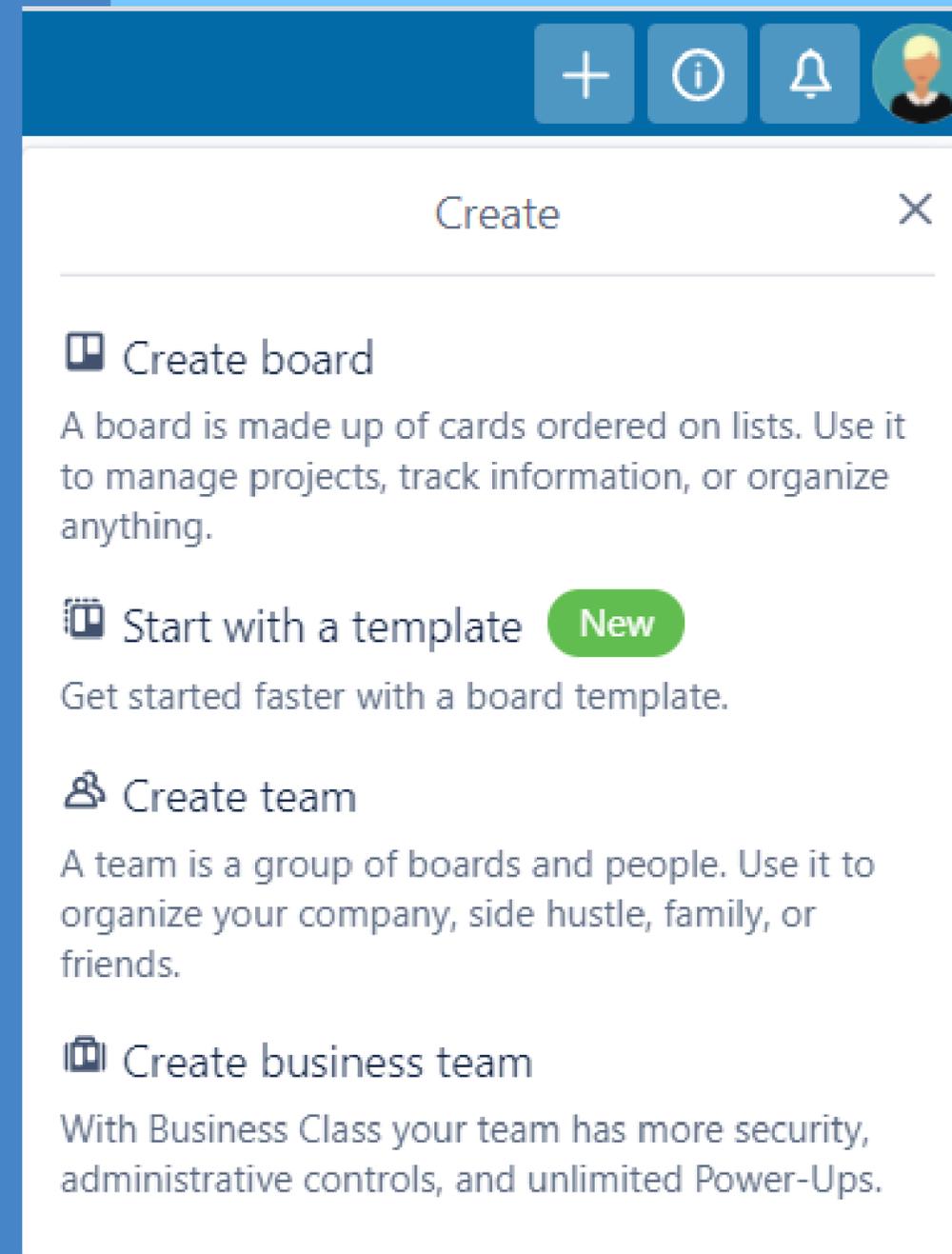
## Manager & Team Management

You can create a resource and activity sharing hub:

- 1 to 1 Meeting, a board shared only with the boss, to track activities and request approvals
- Overview Board, to share information on current and closed teams and projects
- Weekly Team Meetings, to improve team communication and reduce time spent in meetings

# Click the plus button (+) in the Trello header directly to the left of your avatar to add quickly new boards & new teams

Choose the right visibility for your board, depending on the content sensitivity (Private, Team or Public)



# Add new items with a click

## LISTS

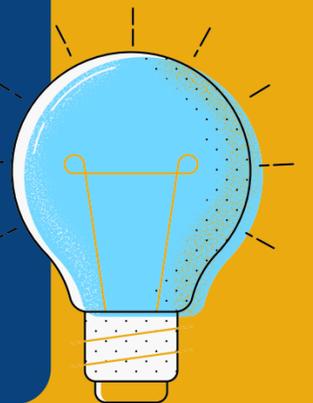
You can double click in any part of the board to add a new list or just scroll on the right side of the board and click on “+Add another list”. You can always drag a list to change their order.

## CARDS

Click on “Add another card” for a new card or on the card icon at the end of each list for your card templates. You can also add cards in bulk from a spreadsheet.

## PRO TIP

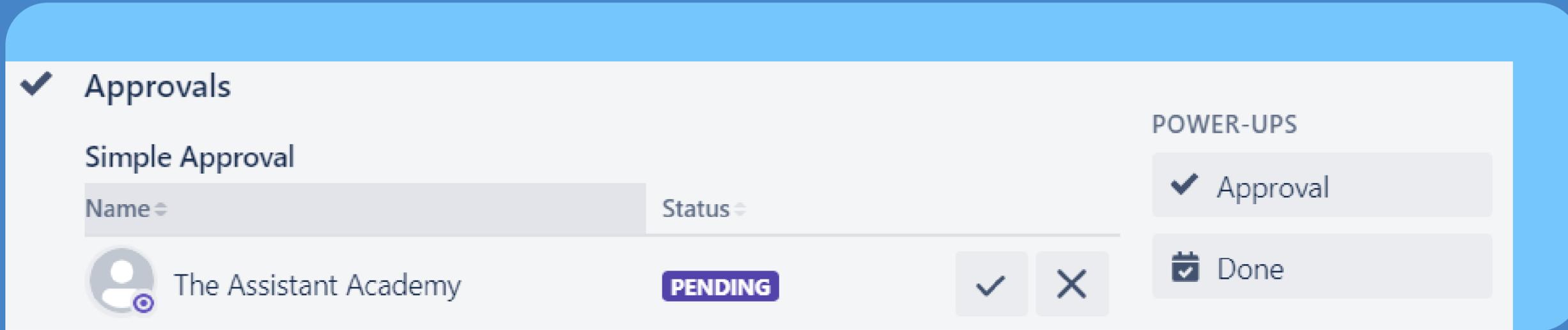
Click on the 3 dots on top of each list to open its menu. You can copy, move (also to different boards) and archive each list. You can reopen archived cards & lists any time from the Menu tab.



# The “card back” has three main sections

The screenshot shows the back of a Trello card titled "ExecSecTech Card1" in the "BACKLOG" list. The interface is divided into three main sections, each highlighted with a yellow box:

- Description:** Located at the top left, it features a text input area with the placeholder "Add a more detailed description...". Below the input is a green "Save" button and a close icon (X). A "Formatting help" button is also visible to the right of the input area.
- Activity:** Located at the bottom left, it contains a comment input field with the placeholder "Write a comment..." and a list of activity items. The first activity item shows a user profile icon and the text "Assistente Direzione added this card to BACKLOG a few seconds ago".
- Right Panel:** A vertical sidebar on the right side of the card back. It includes a "SUGGESTED" header with a settings gear icon. Below this are several menu items: "Join", "Feedback", "ADD TO CARD" (highlighted with a yellow box), "Members", "Labels", "Checklist", "Due Date", "Attachment", and "Cover".

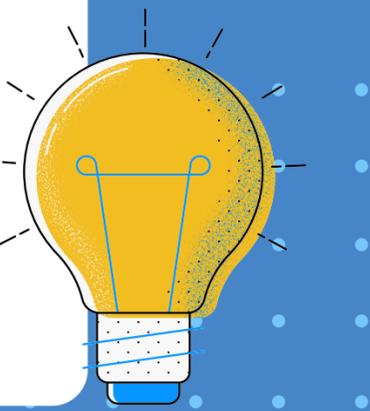


# Approval for Trello

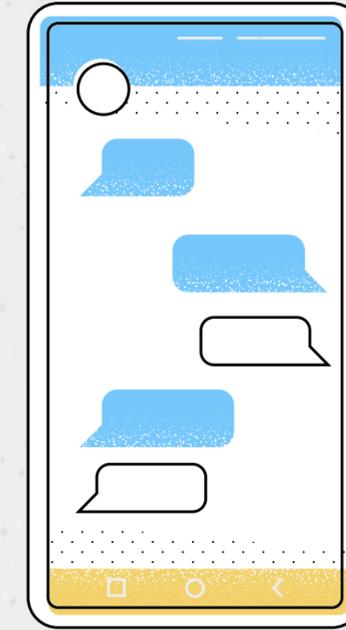
It's a power-up that enables you to assign your board members approvals for tasks in a card

## PRO TIP

Move all the cards to be approved in the Pending list, to have visibility of what is waiting on other members' actions.



# Get notified on any change in Trello



## A SINGLE CARD

Click on the "eye" symbol on the right side of the back of a card.

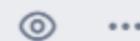
👁 Watch



## A LIST

Click on three dots on top of a list and then on "Watch".

PENDING



## A BOARD

Click on Menu --> More --> "Watch".

👁 Watching



# Powerful Filters & Search



## **BOARD FILTER**

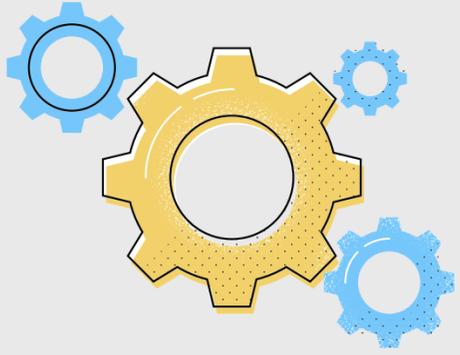
Tap F (or Menu --> Search Cards) to open your Board Filter and search cards of a specific board by label, members, name, or due date.

## **CARDS PAGE**

Click your name in the top right corner of Trello and select "Cards" (or go to [trello.com/your/cards](https://trello.com/your/cards)). You can keep track of the work you are doing across multiple boards.

## **SEARCH BAR**

When you need to quickly find something, type "/" in the search bar on the top left. You can refine your search using different operators.



# Mail to board shortcuts

Tired to waste your days responding to tons of emails? Choose the option the suits your email managing habits.

1

Menu --> More --> Email-to-board Settings: select where on the board the new card will be created, copy the board email address and forward manually or by any rule your emails.

2

Trello Add-In for Outlook: turn important emails into actionable items in Trello. After installing the integration, click the Trello icon to create a new card from the opened email.

3

Trello Add-on for GMail: your tool to inbox zero. After installing the integration, click on the Trello icon next to any email to create a corresponding card in Trello.

# Smart tricks to power your Trello Board



## TOP POWER-UPS

The Assistant Academy Pick:  
Approvals for Trello, Calendar,  
Custom Fields

<https://trello.com/power-ups>

## TIME TRACKING WITH CLOCKIFY

If you need to track your time for each card and list elements you can use the Clockify Trello Time Tracking Integration. You'll need to create an account in Clockify as well, to manage your records.

<https://clockify.me/trello-time-tracking>

## BOARD EXPORT IN EXCEL

the free version of Trello allows only JSON data export and CSV is only for Business Class. However, with the Export for Trello extension you can export the board as an Excel file.

[webstore Chrome search for export-for-trello](#)



# Keyboard Shortcut Cheat Sheet

## When viewing a **board**...



### Navigate anywhere.



Move between cards, dates, and more using the arrow keys.

### Open a card.



### Move that card.



### Quickly edit a card.



### Cancel or close a card.



### Access **Board** menu.



See all your boards from a bird's-eye view. Navigate & hit Enter to open a board.

### Search for something.



Start up a search! Type in search terms after the slash.

### Add a new card.



Open a new card after the last one you selected.

### Instantly edit the new card.



+



After typing in a card title, press Enter + Shift to go straight to card editing.

### Auto-copy a card.



WINDOWS



MAC

Navigate to the card whose link you want, then use copy and paste shortcuts to grab the link!

### See only **your** cards.



Quickly filter to show just the cards that are assigned to you.

### Easily **filter** cards.



Filter by keywords, labels, members, or due dates.

### Clear all filters.



Get back to square one with this clearing move.

## When viewing a **card**...



### Open the **label** menu.



See a pop-up menu of all available labels.

### Add a **label**.



Quickly add colored labels to cards.

### Make a **due** date.



Open the due date picker and navigate to a date.

### Archive a card.



C is for clean up those cards!

### Save your edits.



+



WINDOWS



+



MAC

Anytime you're writing or editing text, save it!

### Auto-link a card.



Hashtag link it! Type # plus the start of a card title to link any card to the text you're typing.

### Talk to **your** team.



Start writing a team member's name after @ to have it autocomplete.

### Assign yourself.

SPACE

Add your avatar to any card with a space.

### See these shortcuts again!



Can't remember one of these shortcuts? We're just a question mark away.

# Start with our Kanban Template for Assistants

[Click here to open it](#)

A quick view of the lists in our Kanban Board:

- Archive resources that you access frequently
- Important Items questions to to unlock activities
- Backlog list of all tasks, sorted by priority
- To do's activities you decide to work on
- Pending activities waiting on decisions by third parties
- Doing activities you are working on
- Done completed activities

The screenshot displays a Kanban board titled "Your Kanban Board @Office - The Assistant Academy" with a "TEMPLATE" label. The board is organized into three columns: "READ ME", "ARCHIVE", and "IMPORTANT ITEMS".

- READ ME Column:**
  - Header: "The Assistant Academy Kanban Board" with a logo and 3 items.
  - Item: "Starts from here" with 1 item.
  - Item: "How to get the most from our Kanban Board" with 1 item.
  - Item: "Power-Up & Butler" with 1 item.
  - Item: "Checklist to manage your remote meeting" with 1 item.
  - Item: "Contact us" with 1 item.
  - Footer: "+ Add another card" with a plus icon.
- ARCHIVE Column:**
  - Header: "Archive" with a gear icon and 1 item.
  - Item: "Logo and company info to be reported on all documents" with 1 item.
  - Item: "Purchase order request template" with 1 item.
  - Item: "Shared folders" with 1 item.
  - Item: "Wallet: aka where the cash is!" with 0/4 items.
  - Footer: "+ Add another card" with a plus icon.
- IMPORTANT ITEMS Column:**
  - Header: "Important Items" with a megaphone icon and 1 item.
  - Item: "MEETING" written on a whiteboard with a hand holding a marker.
  - Item: "(date) update key points" with 1 item.
  - Footer: "+ Add another card" with a plus icon.

# Why taking advantage of our Kanban Board Template?

EAs tested and approved, the Trello Board is a staple of our training method



## Designed for EAs

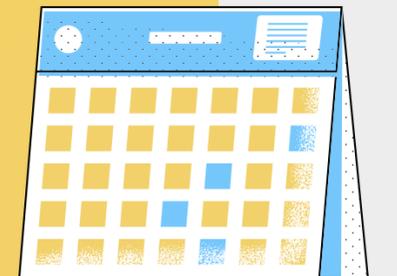
We know which are your most recurrent and relevant tasks

## 11 Card Templates

Pre-made models to speed up your workload

## Two preset automations

We value your time, so we enabled Approval and Done Buttons.



If you need help to implement your daily routine into our Trello board, we've got you covered!



Get your **Kanban Board** for free when purchasing 1-to-1 consultancy session to speed up your work!



**Special offer**  
**#ExecSecTech 99,00€**



The Assistant Academy

*Strategic training for strategic people*



# Contact Us

Send an e-mail with **#ExecSecTech** to:  
[info@assistentedirezione.pro](mailto:info@assistentedirezione.pro)

Go on our website, to the English section



[www.assistentedirezione.pro](http://www.assistentedirezione.pro)

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