

COLUMBUS STATE

COMMUNITY COLLEGE

Streamlining Workflow Processes with Trello

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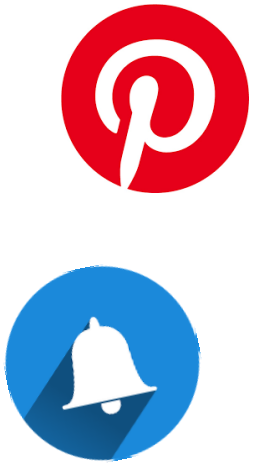
Overview

- What is Trello?
- Kanban System
- Trello 101
- Trello Board Walk-Throughs
 - New-Hire Onboarding
 - Purchasing
 - Project Planning

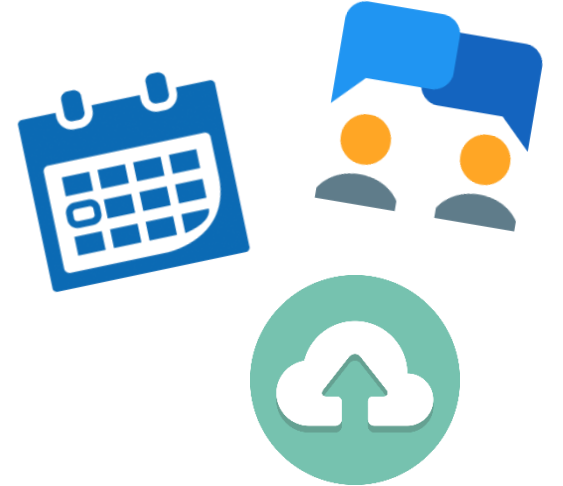


What is Trello?

Trello is a collaboration tool that allows you to organize your projects into boards.



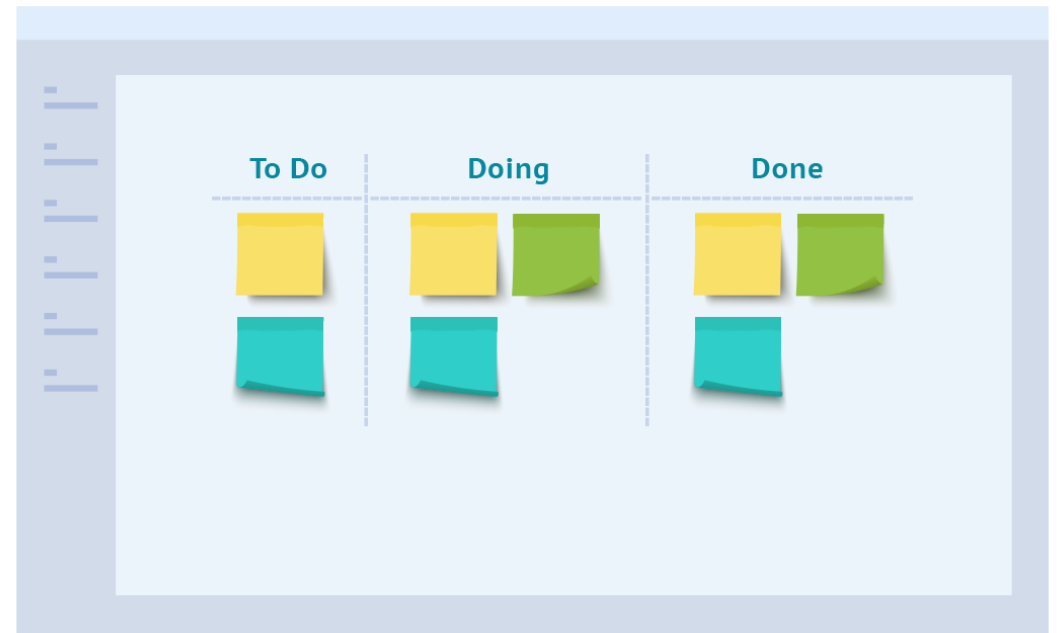
Your entire project, in a single glance.



Trello tells you what's being worked on, who's working on what, and where something is in a process.

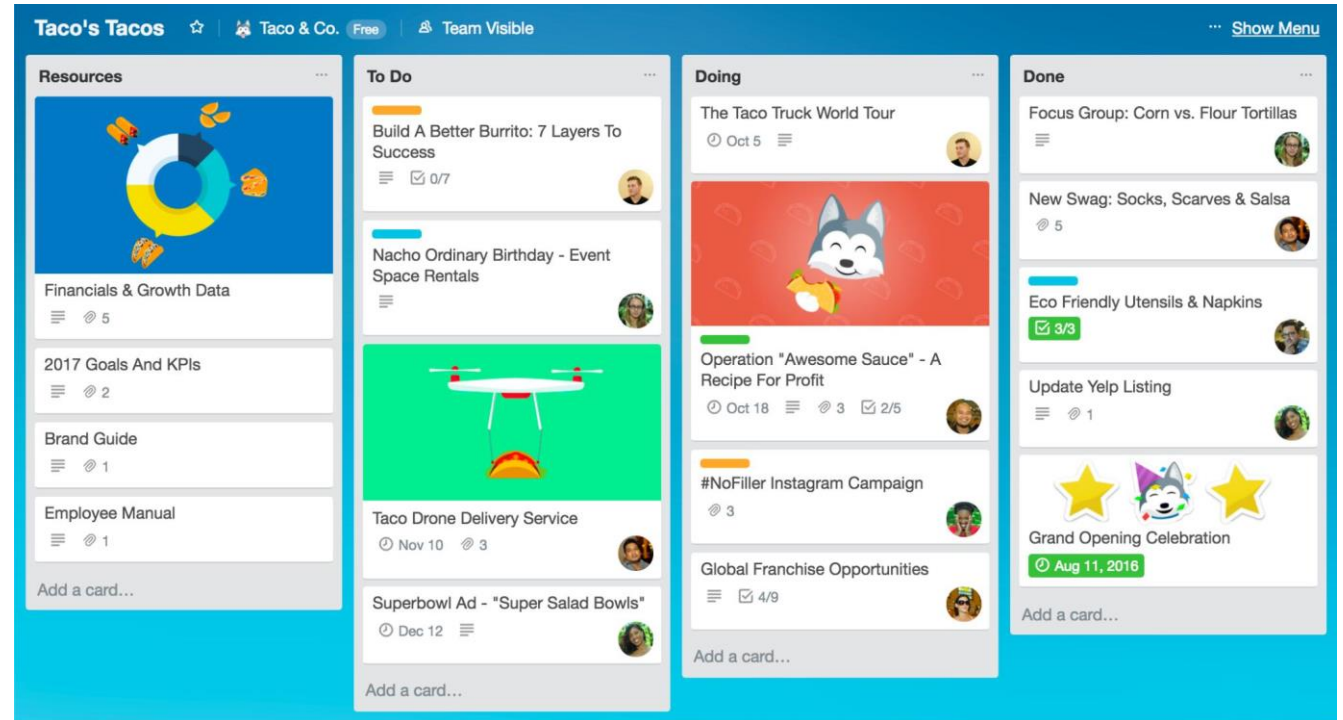
Kanban System

- Created by Toyota in 1940s
- Visual, board-based system
- Visualizes workflow
- Based upon collaboration
- Uses incremental change



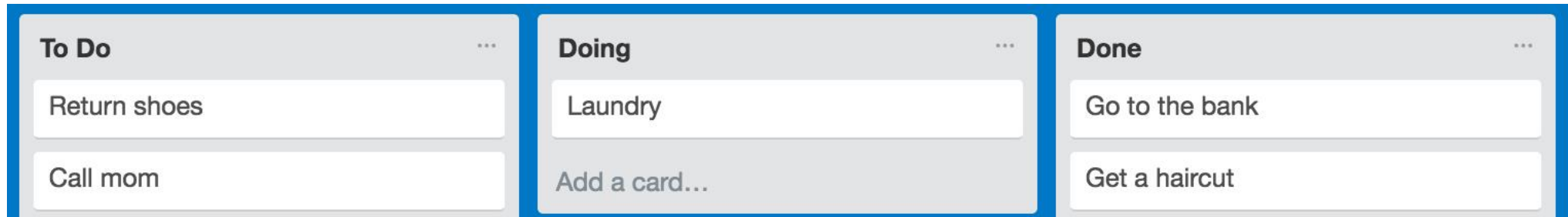
Trello 101- Boards

- A *board* represents a project or a place to keep track of information.
- A Trello board is the place to organize your tasks and collaborate.



Trello 101- Lists

Lists keep your board organized!

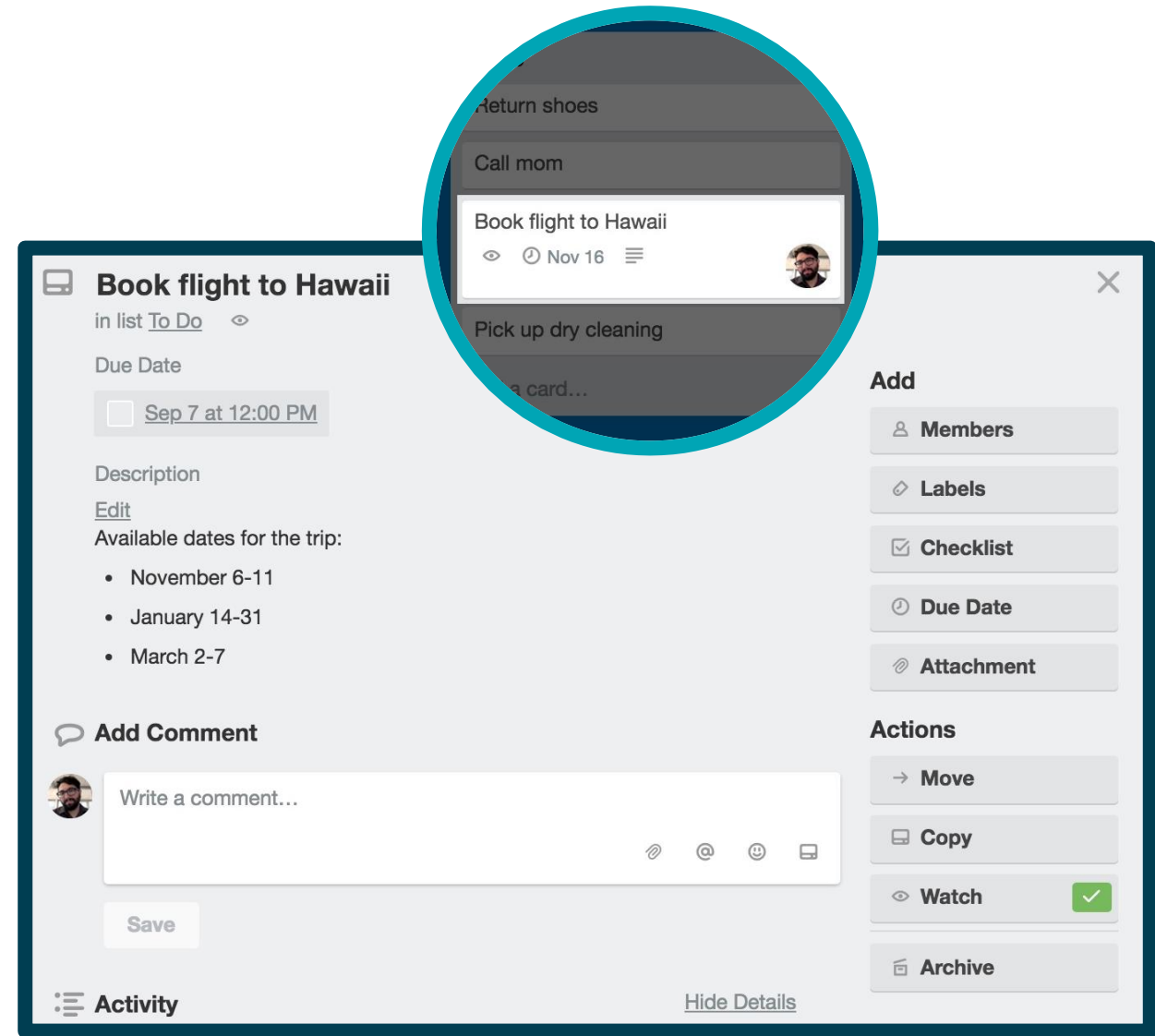


- **Workflow:** Move tasks or items from list to list to show progress.
- **Categories:** Act as a place to keep track of ideas and information.

Trello 101- Cards

The fundamental unit of a board is a card.

- Cards represent tasks and ideas.
- Add details to customize your cards:
 - Descriptions
 - Checklists
 - Due Dates
 - Documents
 - Members
 - Comments
 - Labels



Let's Explore Some Boards!



Onboarding

**Engineering Portfolio
Purchasing**

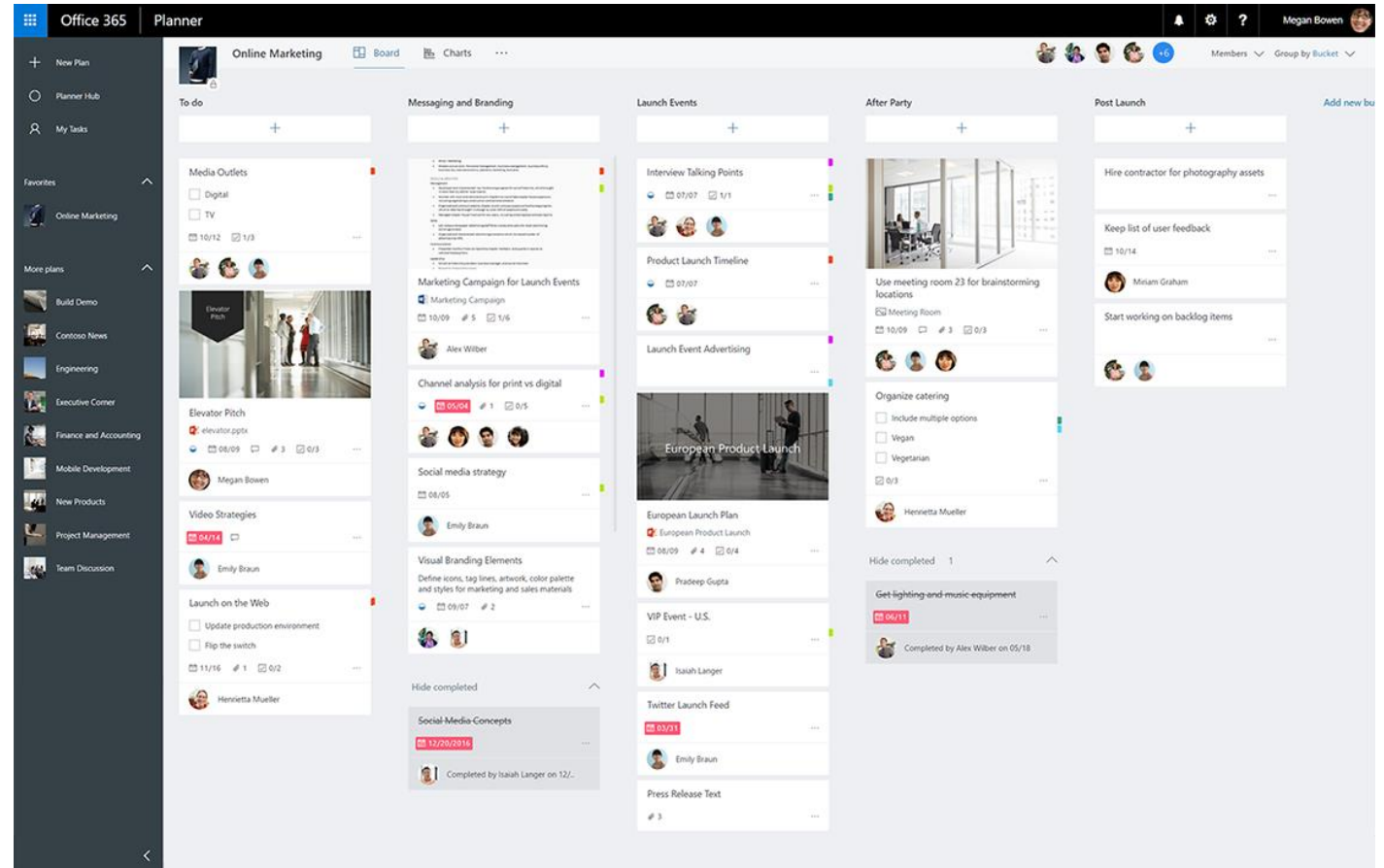
Purchasing

**Engineering Portfolio
Master Board**

Project Management

Trello Alternatives

- Microsoft Planner
- GitScrum
- Asana
- MeisterTask
- KanbanFlow
- Kanbanize
- SmartSheets



Top 10 Reasons We Love Trello

Top 10 Reasons We Love Trello

1. **It's simple.** Trello is a free, web-based tool (trello.com) you can access anywhere you have an Internet connection. With a clean design, Trello is user-friendly, easy to learn, and a good way to get organized.
2. **It's versatile.** You can create and customize boards that work for you and your workflow, down to as detailed of a level as needed.
3. **It has a robust community.** A quick search will yield several sample boards, how-to articles, and walk-through videos from a large community of Trello users.
4. **It's all about visibility.** You can map out the full life cycle of a project, creating a centralized hub for tracking progress. Every team member you've added to the board can see their contributions alongside others'.
5. **It's multifaceted.** Trello helps simplify and track multi-step processes. Want multiple contributors to a board? Working on multiple timelines? Trello is collaborative and customizable. You can integrate multiple project timelines into one board, making it easy to track and maintain your work and time.
6. **It automates.** Assign tasks and set deadlines—Trello does the rest for you. Team members will receive notifications and email reminders of approaching deadlines.
7. **It creates a repository.** Forget, "It's somewhere in my inbox." When you upload documents to Trello cards, they're easy to find when you need to reference the information. This feature is especially helpful for new hires. If you've stored documentation and tasks in Trello, it's all in one place—along with progress and timestamps—when it's time to write a final report.
8. **It helps with quality control.** Team leads can upload templates and track status updates to ensure everyone is following proper policies and procedures.
9. **It makes project hand-offs seamless.** If a project manager uses a Trello board, they can easily hand off their work when they're out of the office. Likewise, it's easy for them to pick up where the last person left off when they return.
10. **It has a free mobile app.** With the Trello mobile app, you don't need a computer to reference to-do lists, project statuses, or documents. You can create and edit boards and cards in the app, and you can receive reminder notifications on your phone.

For questions or to learn more, contact **Tara Sheffer**, Student Services Supervisor for Columbus State Community College, at tsheffer@csc.edu or **614-287-5903**.

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Questions?

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