ATLASSIAN

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The complete guide to keeping a team on track in Trello

CAITY COGDELL | PRODUCT MANAGER

ALL
OF
US
FABIAN REY

Team sync meeting

Big Picture

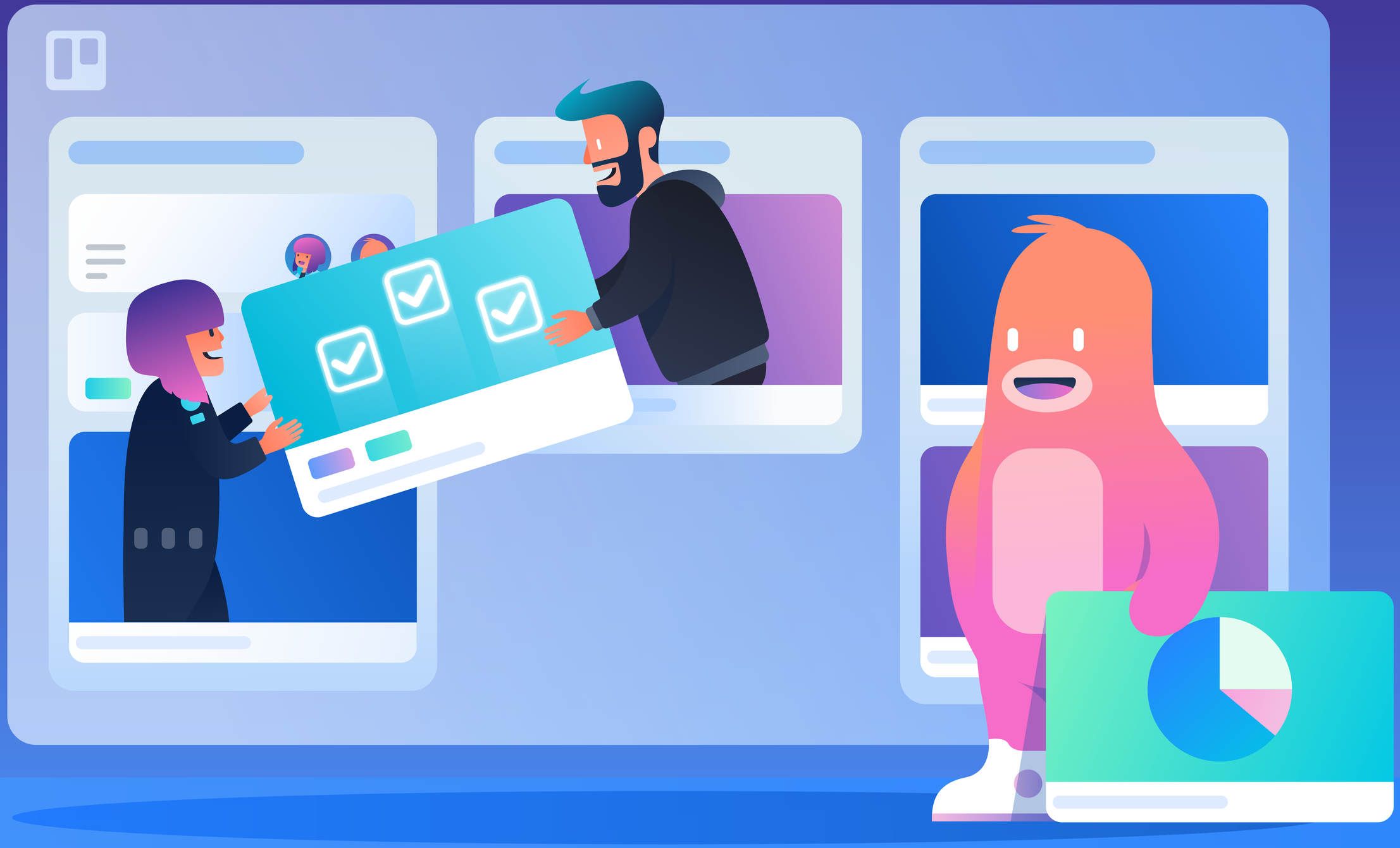
Why are we here again?

Project Updates

So, how's work going?

Announcements

Did you hear the news?



Agenda

Setting up your meeting board

Preparing for your meeting

During your meeting

After your meeting

Advanced features

Agenda

Setting up your meeting board

Preparing for your meeting

During your meeting

After your meeting

Advanced features

Agenda

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Advanced features

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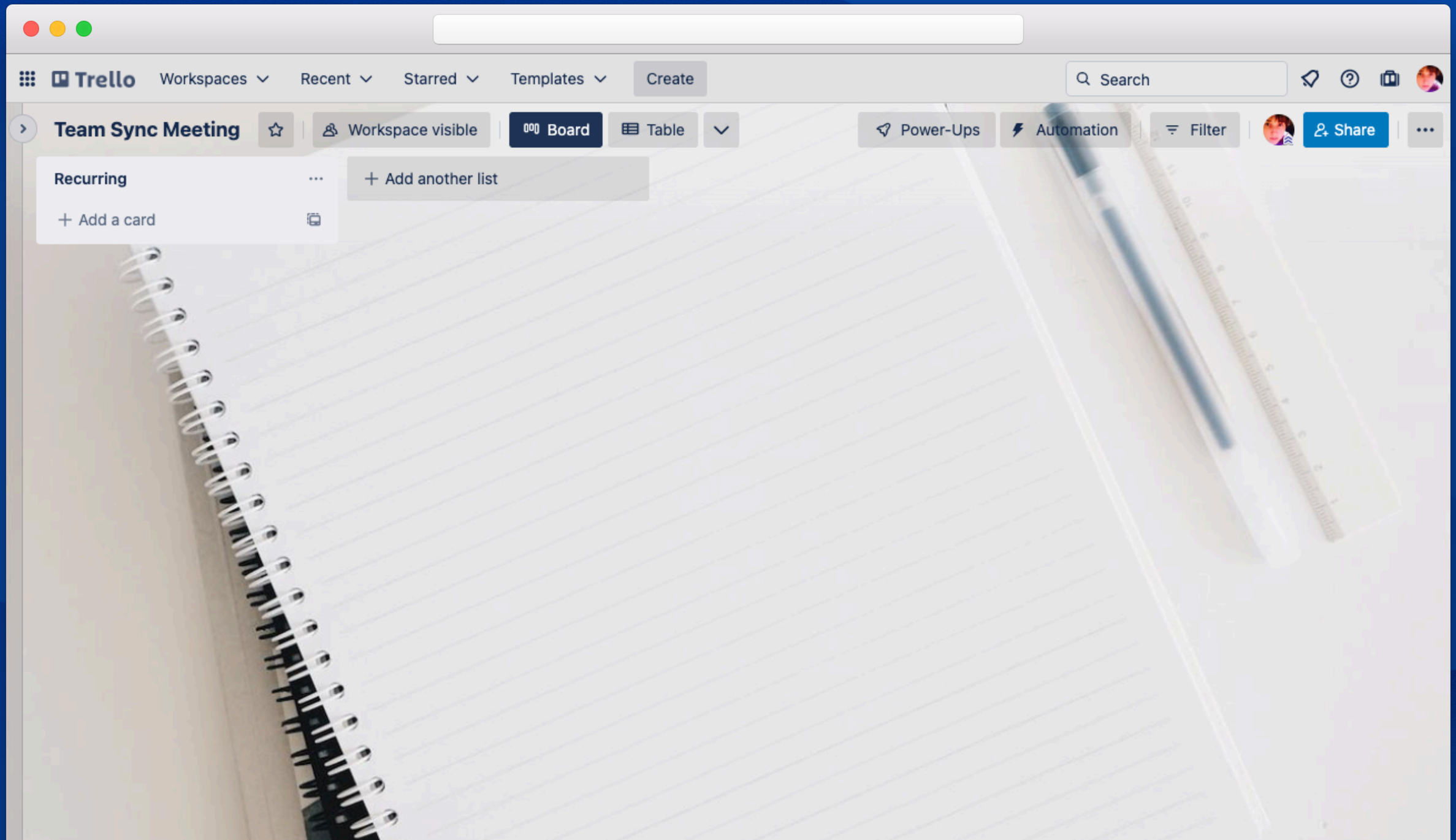
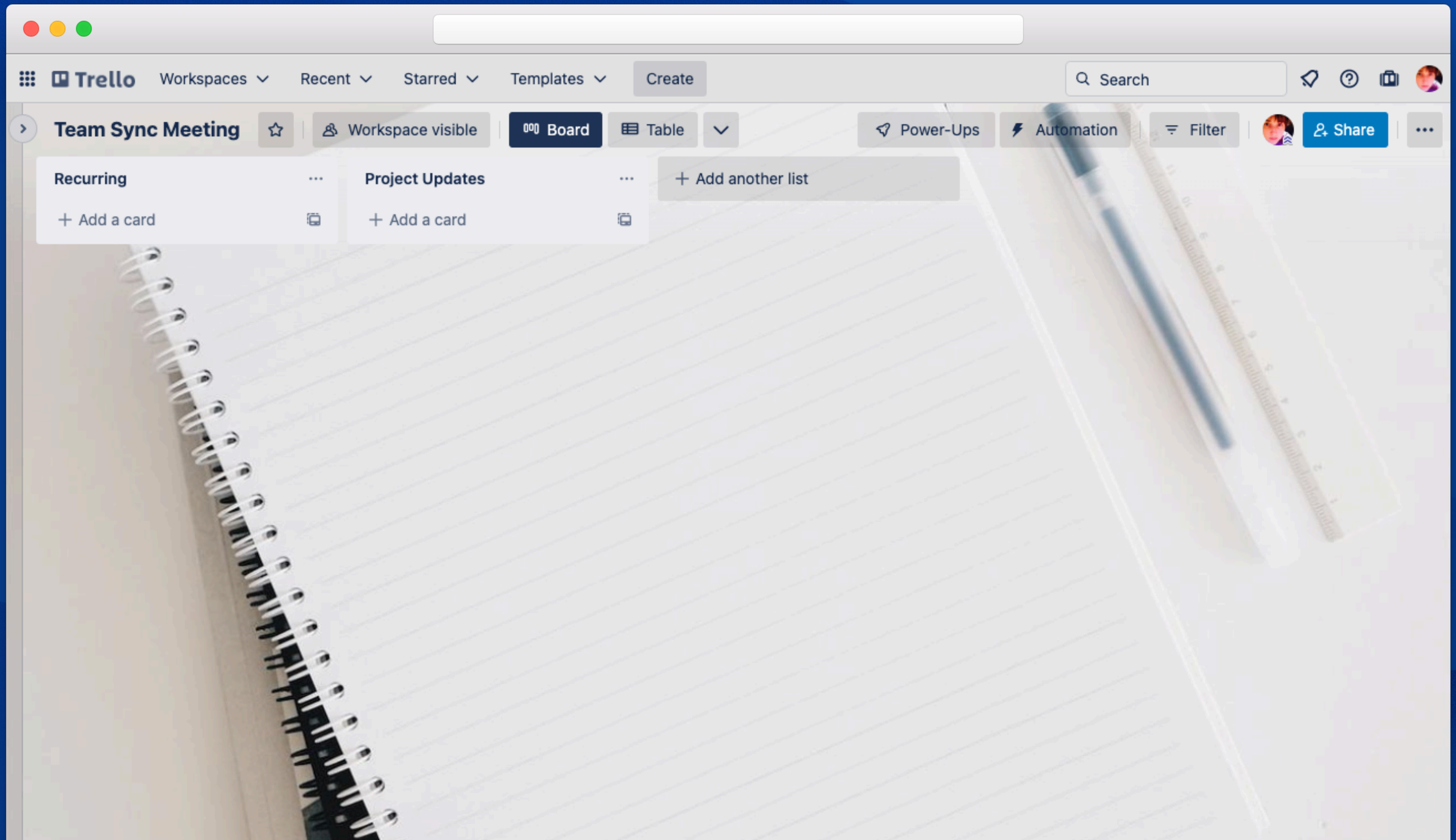
Advanced features

Setting up your meeting board


Trello
Workspaces
Recent
Starred
Templates
Create
Search
Team Sync Meeting
Workspace visible
Board
Table
Power-Ups
Automation
Filter
Share
Recurring
Add another list
Add a card


Trello
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Workspace visible
Board
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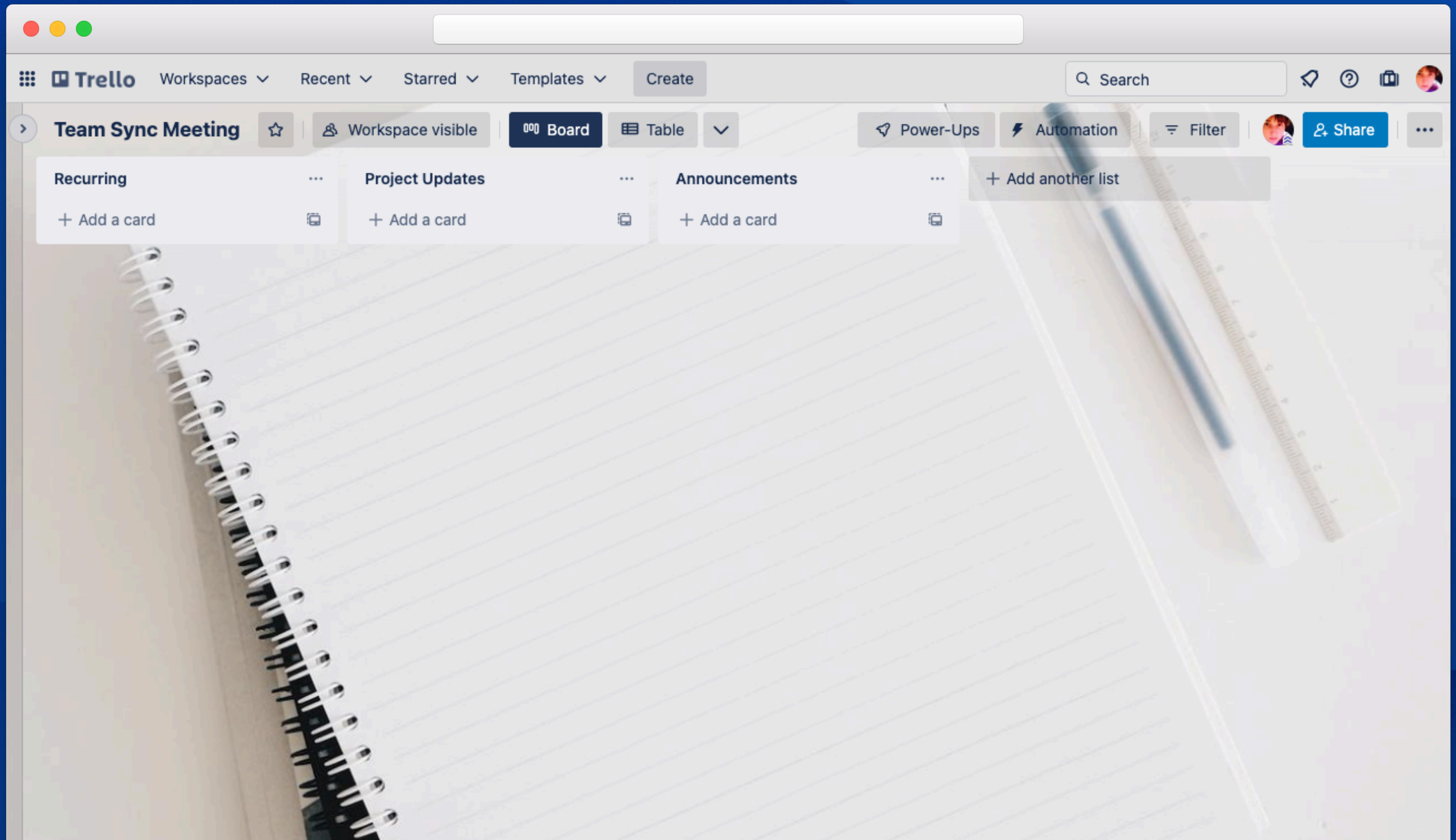
Share
Recurring
Add a card
Project Updates
Add a card
Add another list


Trello
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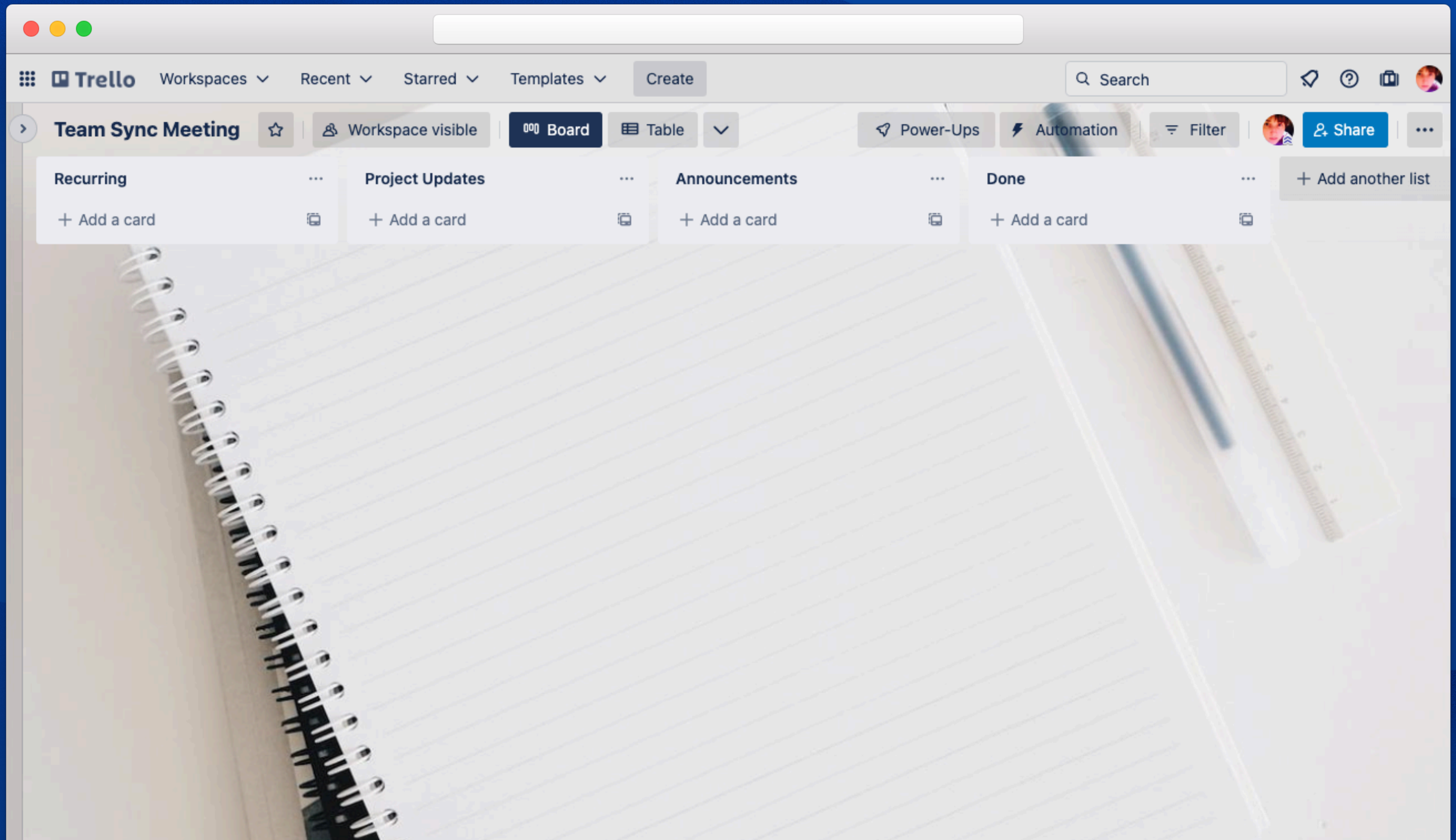
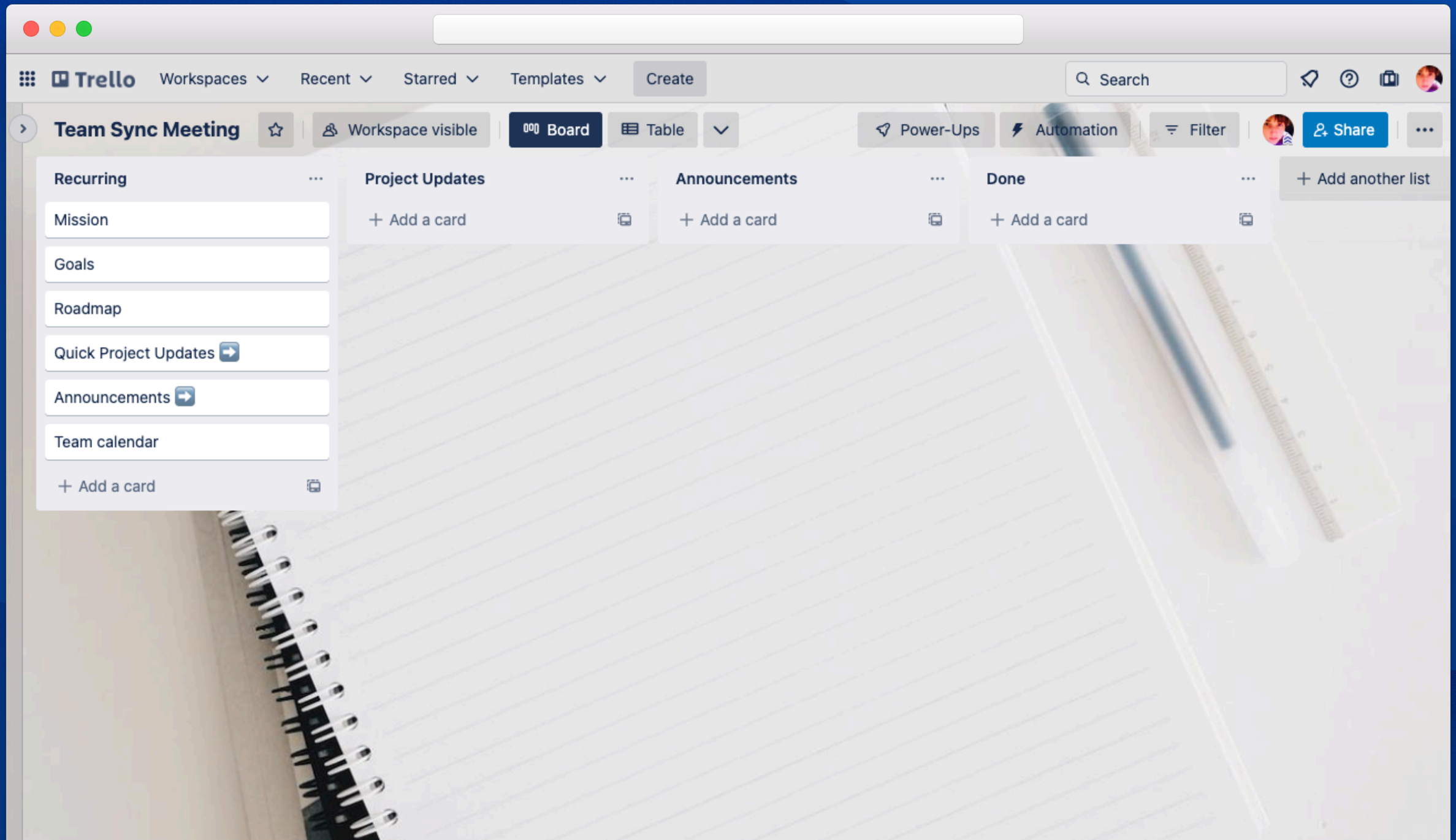
Workspace visible
Board
Table
Power-Ups
Automation
Filter
Share
Recurring
Add a card
Project Updates
Add a card
Announcements
Add a card
Add another list


Trello
Workspaces
Recent
Starred
Templates
Create
Search
Team Sync Meeting
Workspace visible
Board
Table
Power-Ups
Automation
Filter
Share
Recurring
Project Updates
Announcements
Done
Add another list
Add a card
Add a card
Add a card
Add a card


Trello
Workspaces
Recent
Starred
Templates
Create
Search
Team Sync Meeting
Workspace visible
Board
Table
Power-Ups
Automation
Filter
Share
Recurring
Mission
Goals
Roadmap
Quick Project Updates
Announcements
Team calendar
Add a card
Project Updates
Add a card
Announcements
Add a card
Done
Add a card
Add another list

Trello Workspaces Recent Starred Templates Create Search

Team Sync Meeting | Workspace visible | Board | Table | Power-Ups | Automation | Filter | Share

Recurring

- Mission
- Goals
- Roadmap
- Quick Project Updates ➡️
- Announcements ➡️
- Team calendar

+ Add a card

Project Updates

Mobile app update

New text editor

App integration

+ Add a card

Announcements

+ Add a card

Done

+ Add a card

+ Add another list

Trello Workspaces Recent Starred Templates Create Search

Team Sync Meeting | Workspace visible | Board | Table | Power-Ups | Automation | Filter | Share

Recurring

- Mission
- Goals
- Roadmap
- Quick Project Updates ➡️
- Announcements ➡️
- Team calendar

+ Add a card

Project Updates

Mobile app update

New text editor

App integration

+ Add a card

Announcements

- Holiday next week
- Don't forget to log your volunteer hours!

+ Add a card

Done

+ Add a card

+ Add another list

Preparing for your meeting

Trello Workspaces Recent Starred Templates Create Search

Team Sync Meeting | Workspace visible | Board | Table | Power-Ups | Automation | Filter | Share

Recurring

- Mission
- Goals
- Roadmap
- Quick Project Updates
- Announcements
- Team calendar

+ Add a card

Project Updates

Mobile app update

Time: 10 minutes

New text editor

Announcements

- Don't forget to log your volunteer hours!
- Urgent
  Holiday next week

+ Add a card

Done

+ Add a card

+ Add another list

Trello Workspaces Recent Starred Templates Create Search

Team Sync Meeting | Workspace visible | Board | Table | Power-Ups | Automation | Filter | Share

Recurring

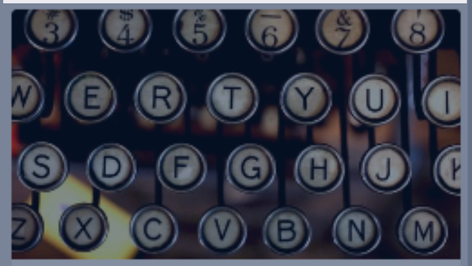
- Mission
- Goals
- Roadmap
- Quick Project Updates
- Announcements
- Team calendar

+ Add a card

Project Updates

Mobile app update

Time: 10 minutes



New text editor

Announcements

- Don't forget to log your volunteer hours!
- Urgent — Holiday next week

+ Add a card

Done

+ Add a card

+ Add another list

Trello | Workspaces | Recent | Starred | Templates | Create | Search

Team Sync Meeting

Workspace visible | Board | Table | Power-Ups | Automation | Filter | Share

Recurring

- Mission
- Goals
- Roadmap
- Quick Project Updates
- Announcements
- Team calendar

+ Add a card

Project Updates

Mobile app update

Time: 10 minutes

New text editor

Announcements

Don't forget to log your volunteer hours!

Urgent

Holiday next week

+ Add a card

Done

+ Add a card

+ Add another list

Trello Workspaces Recent Starred Templates Create Search

Team Sync Meeting

Filter Share

Recurring

Mission

Goals

Roadmap

Quick Project Updates

Announcements

Team calendar

+ Add a card

+ Add another list

Cover

New text editor

in list Project Updates

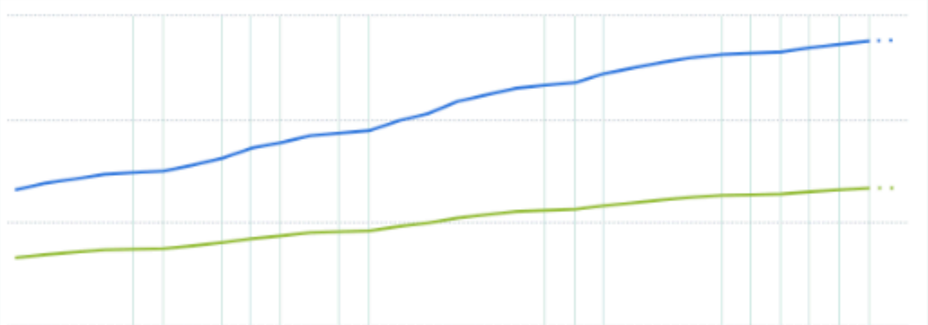
Notifications

Watch

Description

Edit

- Looking at a June completion date
- Waiting on some upgrades from our partner team
- We're seeing some results already from early adopters:



Add to card

Members

Labels

Checklist

Dates

Attachment

Location

Custom Fields

Power-Ups

+ Add Power-Ups

During your meeting

Activity

Show details

Write a comment...

Caity Cogdell 10 minutes ago

- iOS update delayed
- QA complete for Android update

Edit • Delete

Caity Cogdell Feb 16 at 11:48 AM

- iOS ready for QA
- Blocking bug found for Android. Fix in progress.
- Look for testing blitz on your calendar next week.

Edit • Delete

Caity Cogdell Feb 9 at 11:46 AM

- Design review complete
- First round of testing for Android starting next week
- iOS in progress

Edit • Delete

Copy

Make template

Archive

Share

Quick Project Updates

Announcements

Team calendar

+ Add a card

Action items

Hide checked items | Delete

50%

- [ ] Contact the app store for expedited review — Mar 15
- [x] ~~Schedule testing blitz for Android update~~

Add an item

Activity

Show details

Write a comment...

Caity Cogdell 10 minutes ago

- iOS update delayed
- QA complete for Android update

Edit • Delete

Caity Cogdell Feb 16 at 11:48 AM

- iOS ready for QA
- Blocking bug found for Android. Fix in progress.
- Look for testing blitz on your calendar next week.

Edit • Delete

Caity Cogdell Feb 9 at 11:46 AM

Power-Ups

+ Add Power-Ups

Automation

+ Add button

Actions

- Move
- Copy
- Make template
- Archive
- Share

Trello | Workspaces | Recent | Starred | Templates | Create | Search

Team Sync Meeting

Workspace visible | Board | Table | Power-Ups | Automation | Filter | Share

Recurring

- Mission
- Goals
- Roadmap
- Quick Project Updates ➡️
- Announcements ➡️
- Team calendar

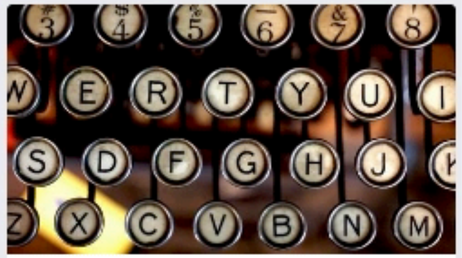
+ Add a card

Project Updates

Mobile app update

3 | 1/2 • Mar 15

Time: 10 minutes



New text editor

2

+ Add a card

Announcements

Don't forget to log your volunteer hours!

Urgent

Holiday next week

+ Add a card

Done

+ Add a card

+ Add another list

After your meeting

Trello | Workspaces | Recent | Starred | Templates | Create | Search

Team Sync Meeting

Workspace visible | Board | Timeline

Power-Ups | Automation | Filter | Share

Recurring

- Mission
- Goals
- Roadmap
- Quick Project Updates
- Announcements
- Team calendar

+ Add a card

Project Updates

Mobile app update

3 | 1/2 • Mar 15

Time: 10 minutes

New text editor

2

+ Add a card

Announcements

Don't forget to log your volunteer hours!

+ Add a card

Done

Urgent

Holiday next

Discussed: Ma

+ Add a ca

Menu

Caity Cogdell moved Holiday next week from Announcements to Done

15 minutes ago

Caity Cogdell on Mobile app update

2 hours ago

- iOS update delayed
- QA complete for Android update

Caity Cogdell completed Schedule testing blitz for Android update on Mobile app update

2 hours ago

Caity Cogdell on Mobile app update

2 hours ago (edited)

- iOS ready for QA
- Blocking bug found for Android. Fix in progress.
- Look for testing blitz on your calendar next week.

Caity Cogdell added Action items to Mobile app update

Using advanced features

Trello | Workspaces | Recent | Starred | Templates | Create | Search

Team Sync Meeting | Workspace visible | Board | Timeline | Power-Ups | Automation | Filter | Share

2023 | Today | Year | List

	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Recurring (6) Not scheduled +												
Project Updates					Mobile app update							
						New text editor						
							App integration					
Announcements (1) Not scheduled +												
Done (1) Not scheduled +												

Trello Workspaces Recent Starred Templates Create Search

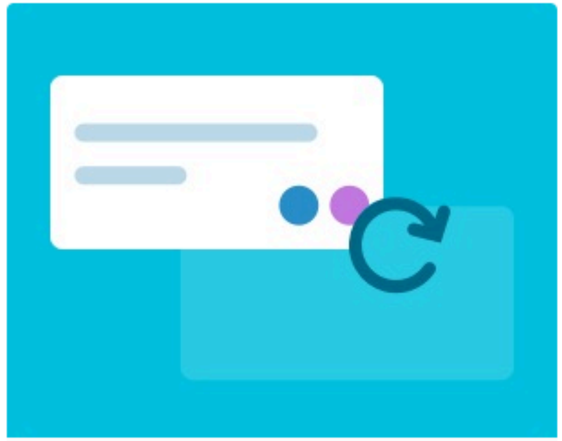
Team Sync Meeting | Workspace visible | Board | Timeline | Power-Ups | Automation | Filter | Share

Power-Ups

Search

- Featured
- Enabled
- Made by Trello
  - Analytics & reporting
  - Automation
  - Board utilities
  - Communication & collaboration
  - Developer tools
  - File management
  - HR & operations
  - IT & project management
  - Marketing & social media
  - Product & design

Featured Power-Ups

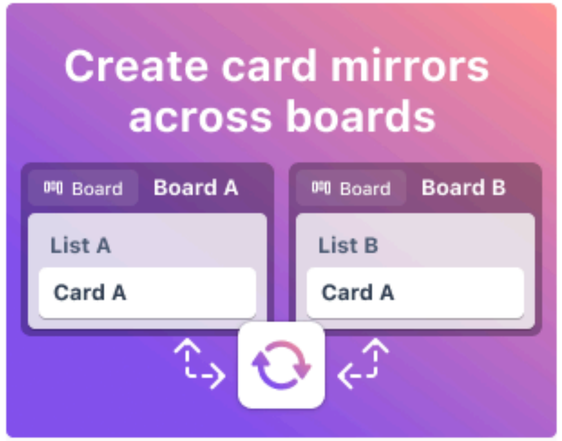


Card Repeater

Add

Automatically copy Trello cards for repeated tasks to save time and bring process to your workflow.

500,000+ Staff pick

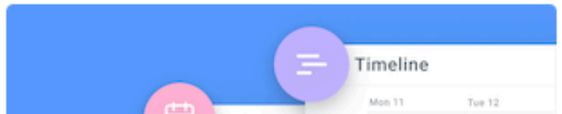


2 way Card Mirror & Sync by Placker

Add

Mirror & Sync cards across boards. Winner Atlassian codegeist, best app for remote working.

10,000+



Trello Workspaces

Team Sync Meeting

Recurring

Mission

Goals

Roadmap

Quick Project Updates

Announcements

Team calendar

+ Add a card

Filter

Share

+ Add another list

Cover

Mobile app update

in list Project Updates

Notifications

Watch

Parent

Attach Parent

Children

1/2 done

Description

Add a more detailed description...

Children: 50% done

Remove...

Change Icon

Hide completed cards

Project tracking

Doing

Android update 3/4 done

Done

iOS update 3/3 done

Action items

Delete

Add to card

Members

Labels

Checklist

Dates

Attachment

Location

Custom Fields

Power-Ups

Hello Epics

+ Add Power-Ups

Automation

+ Add button

Trello | Workspaces | Recent | Starred | More | Create | Search

Team Sync Meeting | Filter | Share

Recurring
- Mission
- Goals
- Roadmap
- Quick Project Updates
- Announcements
- Team calendar

+ Add a card

+ Add another list

Cover

App integration

in list Project Updates

Notifications: Watch
Parent: Attach Parent
Children: Attach Children

Description

Add a more detailed description...

Custom Fields

Time: Add time...
Discussed: + Add date...

Activity

Hide Details

Write a comment

Add to card
- Members
- Labels
- Checklist
- Dates
- Attachment
- Location
- Custom Fields

Power-Ups
- Hello Epics
- + Add Power-Ups

Trello Workspaces

Team Sync Meeting

Recurring

Mission

Goals

Roadmap

Quick Project Updates

Announcements

Team calendar

+ Add a card

Cover

Filter

Share

+ Add another list

App integration

in list Project Updates

Notifications

Watch

Parent

Attach Parent

Children

Attach Children

Description

Edit

INT-4: Increased customization options IN PROGRESS

INT-4: Increased customization options IN PROGRESS

In order to meet our users' needs with this integration, we need to add new customization options for a more flexible integration.

1

Jira

Full screen view

Custom Fields

Time

Add time...

Discussed

+ Add date...

Activity

Hide Details

Add to card

Members

Labels

Checklist

Dates

Attachment

Location

Custom Fields

Power-Ups

Hello Epics

+ Add Power-Ups

Automation

+ Add button

Trello Workspaces Recent Starred More Create Search

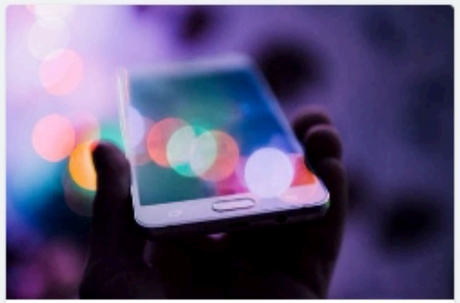
Team Sync Meeting Private Board Table Power-Ups Automation Filter Share

Recurring

- Mission
- Goals
- Roadmap
- Quick Project Updates ➡️
- Announcements ➡️
- Team calendar

+ Add a card

Project Updates



Mobile app update

1/2 • Mar 15 Time: 10 minutes

New text editor

Announcements

Don't forget to log your volunteer hours!

+ Add a card

Done

Urgent

Holiday next week

Discussed: Mar 2

+ Add a card

+ Add another list

Trello Workspaces Recent Starred More Create Search

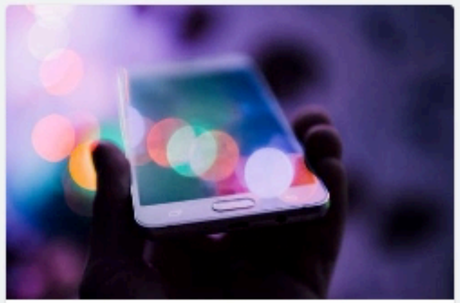
Team Sync Meeting Private Board Table Power-Ups Automation Filter Share

Recurring

- Mission
- Goals
- Roadmap
- Quick Project Updates ➡️
- Announcements ➡️
- Team calendar

+ Add a card

Project Updates



Mobile app update

1/2 • Mar 15 Time: 10 minutes

New text editor

Announcements

Don't forget to log your volunteer hours!

Changes to weekly updates

Weekly updates for all projects related to our key initiatives will now be due on...

Confluence Full screen view

+ Add a card

Done

Urgent

Holiday next week

Discussed: Mar 2

+ Add a card

+ Add another list

Now what?

Trello Workspaces Recent Starred Templates Create Search

This is a public template for anyone on the internet to copy. Create board from template Explore more templates

Weekly Sync Meeting

Template Public Board Timeline Filter

Recurring

Use this list for topics that you'll discuss every time

Team Mission

Team Goals

Roadmap

Quick Project Updates ➡️

Announcements ➡️

Project Updates

Add a card for each of your team's major projects here

Sample project

This card is a template.

Announcements

Add any one-time announcements here

Show who's speaking about each topic by adding them as a member to the card.

CC

Use labels to signal the highest priority topics

Need to share an announcement from Confluence? Paste the Confluence URL directly as a Trello card title to create a link card like the one below!

Link cards | Trello | Atlassian Support

Link cards are a card type in Trello. They are automatically created when a URL is...

Atlassian Support

Done

Move cards here when you're done discussing them

Want to see when each card was discussed? Use Trello's Automation feature to add the current date any time a card is moved to this list.

Scan here!

1

Try the free Trello meeting template!

Thank you!