



The content described herein is intended to outline our general product direction for informational purposes only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

The development, release, and timing of any features or functionality described herein remain at the sole discretion of Atlassian and is subject to change.



A low-angle, black and white photograph of several modern skyscrapers reaching towards a cloudy sky. The perspective is from the ground looking up, creating a sense of height and scale. The buildings are framed by the sky, which is filled with soft, white clouds. The overall mood is professional and aspirational.

# cprime



# Customer case study: Unlock Trello's work management capabilities





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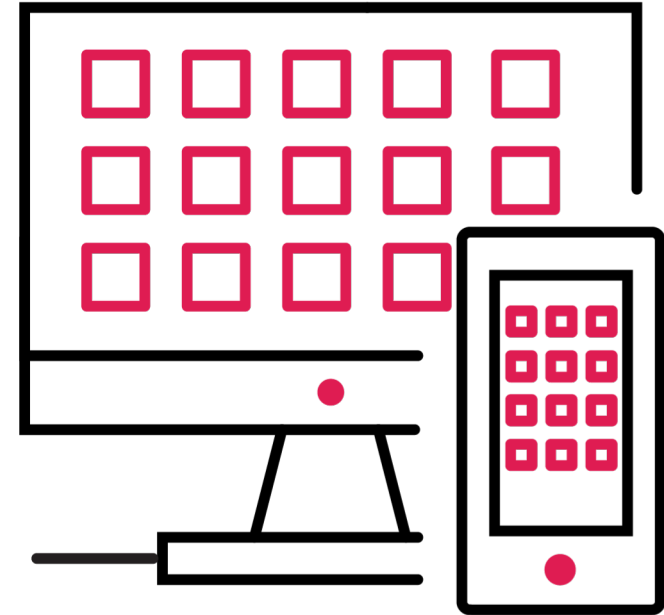
# Agenda

- 01 Identifying process inefficiencies
- 02 Finding the right tool in Trello
- 03 Customizing the Trello environment to meet the basic needs
- 04 Testing and iterating to refine the tool to maximize efficiency
- 05 Training and rollout of the Trello environment
- 06 Q&A



# Way too many channels!

- Email
- Teams
- SharePoint
- Spreadsheets (emailed back and forth!)



# Targeting inefficiencies

## Teams:

- Internal communications
- External communications
- Social media
- Corporate events
- Charitable giving

## Needs:

- Calendar views
- Dashboards





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# Manage your work, not your tool

Trello is extremely easy to use!

- Automation tools to maximize efficiency
- Big-picture views
- Integration with the Atlassian suite of tools
  - Jira AND Trello, not Jira vs. Trello





# Manage your work, not your tool

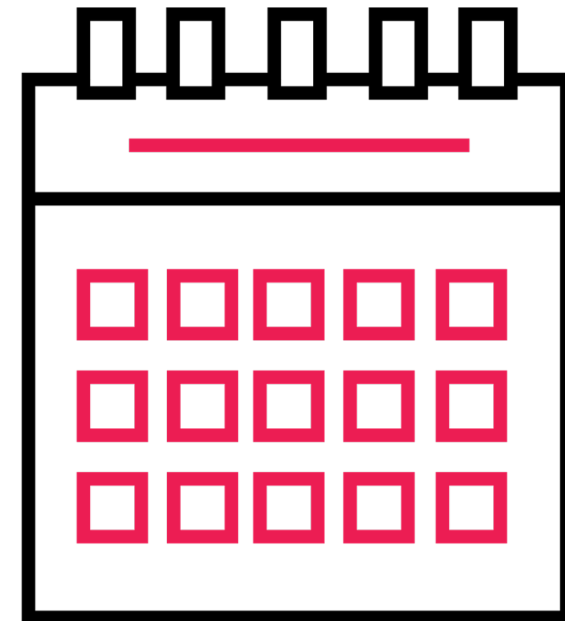
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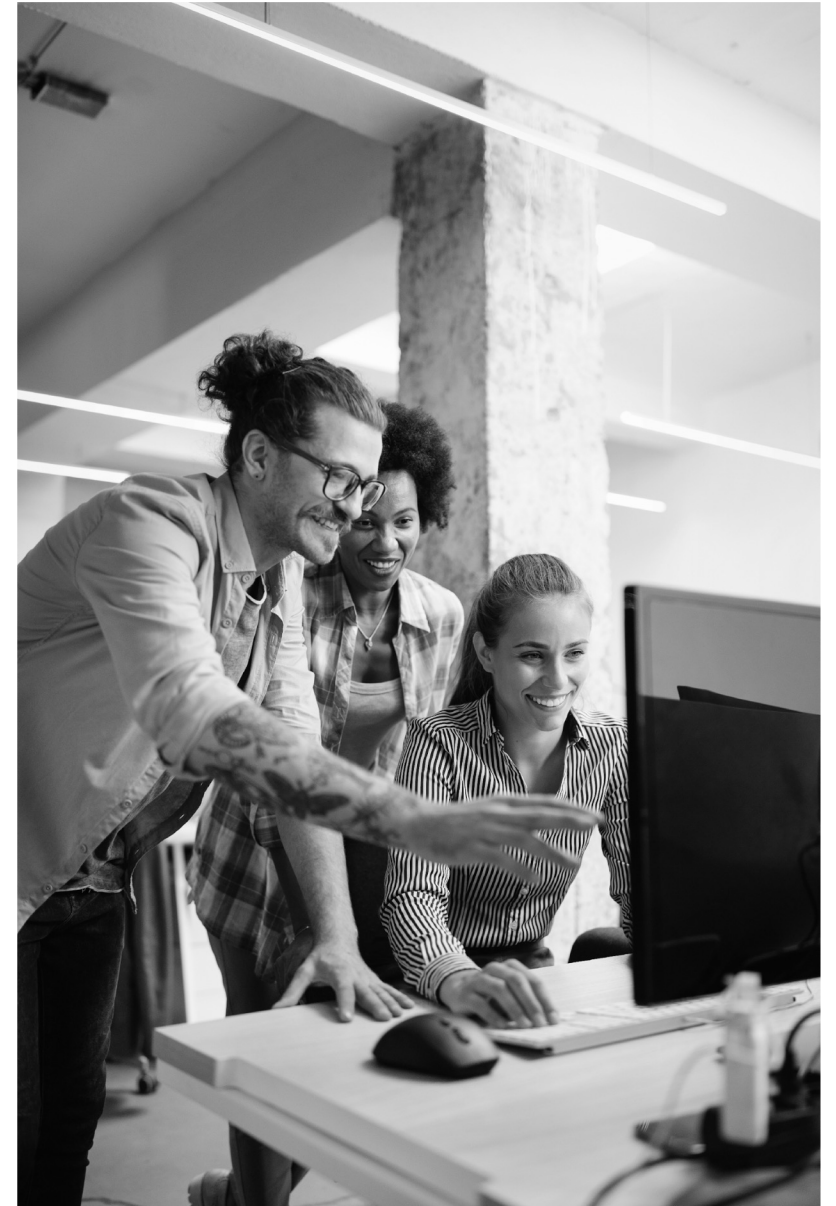
# Custom views

- Essential ability to create custom calendar views that combine boards
- Team-level publish date calendars
- Department-wide publish date calendar
- Timeline views for campaigns



# Project launch

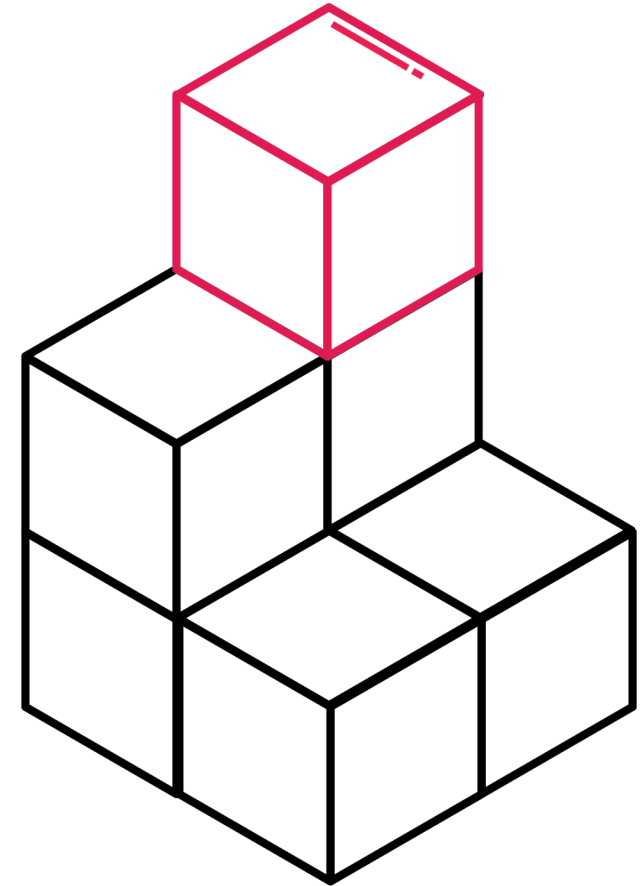
- Lock in the requirements
- Prioritize the wants vs. the needs
- Understand the differences in how each team would use the tool
- Determine how the teams will need to interact with each other
  - Example: Events team and Sponsorships team have a lot of crossover, as many events have sponsors and many sponsorships require events.





# Building blocks

- Start with the basics
- Board structure
  - Broken down by team and communication channel
- Workflows
  - Specific to each board and the needs of each team
- User security
  - Enterprise access linked to SSO



# Early stumbles

- Third-party powerups
  - Some did not bring the expected benefits
  - Some had separate, non-enterprise billing
  - Out-of-the-box solutions won out
- Board mirroring
  - Tried to build mirrored & synced roll-up board that included all cards from all boards

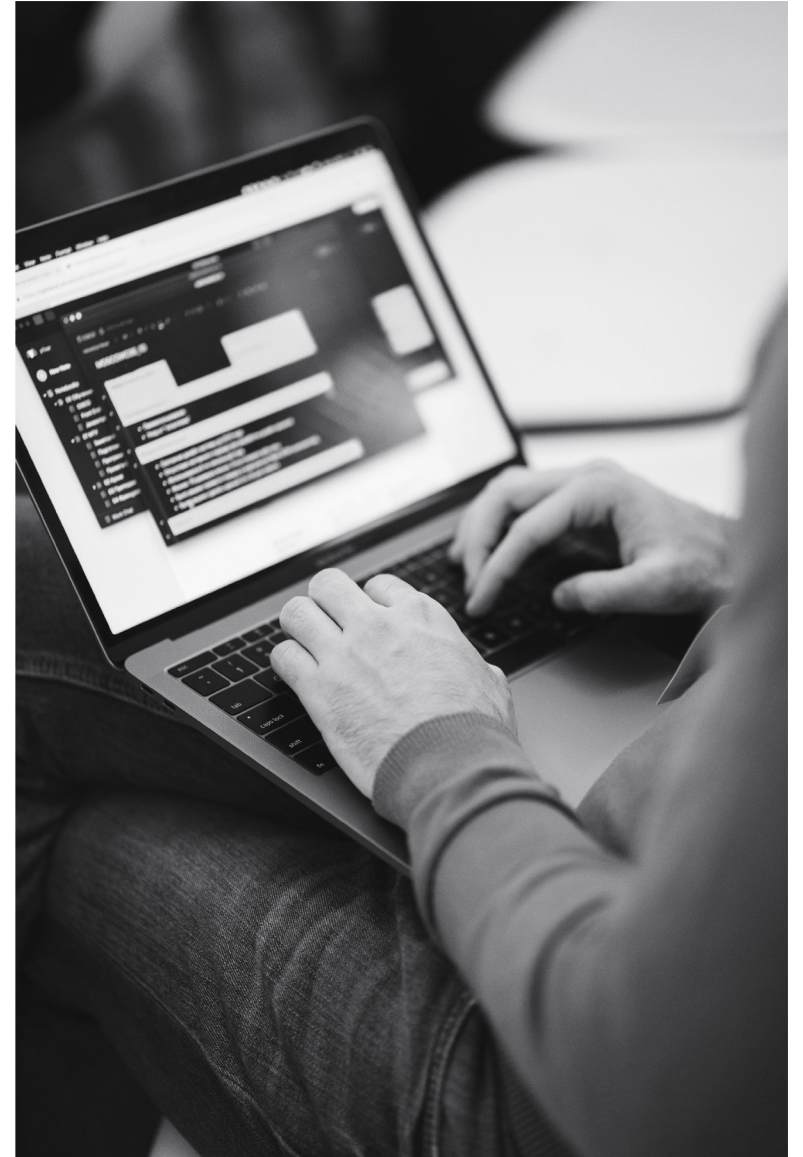
# Automation, automation, automation

- Checklist automations
  - Example: The Events team needs the prebuilt checklist for contracting a caterer.  
User can toggle Catering custom field to “yes.”
- Transition automations – minimum number of statuses
  - Ready for review and edits needed.
- Linked card creation automations
  - Example: The Events team needs the Social Media team to build awareness of the event.  
User adds Social Media label, and it creates a linked card on the Social Media team board.
- Holiday heads-up cards
  - Notice of upcoming holidays to begin communications planning.



# Build, test, repeat

- Twice-weekly meetings
  - Demo new features built since last meeting
  - Discuss changes or adjustments to the new features
  - Outline next features to be built
- Experiment like crazy
  - Try new and different approaches to solving the problems
  - Keep what works and drop what doesn't
- Expanding perspective
  - Bring more team members into the demo meetings as the environment matures, to get as many perspectives as possible



# Final product

- Well-organized environment
- Customized workflows for each team
- Automation to create shortcuts
- Calendar views:
  - Individual team view
  - All-teams roll-up view
  - Toggleable holiday view
- No third-party powerups needed



# Documentation & training

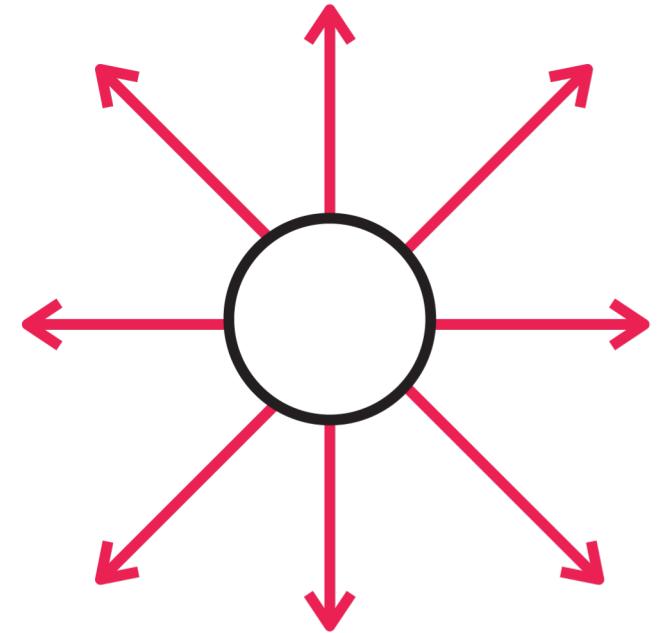
- Documentation
  - Automations
    - Descriptions, conditions, etc.
  - User administration
    - Permissions, etc.
- Training
  - General Trello training
  - Environment-specific training





# User adoption and expansion

- High user adoption
  - Skin in the game – contributions during the buildout helped build feeling of ownership and drop adoption
- Expansion
  - High user adoption and advocacy led to other teams within F&G looking at their own Trello buildout, and to further integration into daily processes with other Atlassian tools





# Questions?

# Thank You

A group of people are silhouetted against a dark, overcast sky as they stand on the edge of a cliff. Several individuals have their arms raised in celebration or triumph. The cliff face is dark and jagged, and the overall scene conveys a sense of achievement and accomplishment.