SOFTWARE ROI GUIDE

One Hour Guide:
How to Use Trello to Break Down Your Marketing Tasks

Follow this one hour guide to organize your marketing tasks in Trello.

Minute 0–10: Create Your Board

1. Log into Trello or create an account at Trello.com.
2. Click **“Create New Board”** and name it (e.g., "Marketing Plan").
3. Add lists to represent task stages:
    - **Ideas**
    - **Planning**
    - **In Progress**
    - **Completed**

Minute 10–25: Add Your Tasks

1. Think of your major marketing goals (e.g., posting social media in multiple channels, launching a digital product or setting up a website).
2. Create a card for each task in the **Ideas** list. Examples:
    - "Create Instagram post templates."
    - "Draft email campaign for December."
    - "Outline blog post topics."
3. For each card:
    - Add **descriptions** with important details.
    - Create **checklists** to break tasks into smaller steps.
    - Set **due dates** for deadlines.

Minute 25–35: Organize and Prioritize

1. Add **labels** to categorize tasks (e.g., “High Priority,” “Social Media”).
2. Drag cards from **Ideas** to other lists (e.g., move “Outline blog topics” to **Planning**).

Minute 35–50: Enable Power-Ups

1. Click **Power-Ups** (top-right of your board).
2. Search for and enable the **Calendar Power-Up** to view tasks by deadline.
3. Activate the **Butler Automation** Power-Up:
    - Automate repetitive tasks, like setting due dates or moving cards to **Completed**.

Minute 50–60: Fine-Tune & Review

1. Integrate Trello with tools you use, like Google Calendar or Slack.
2. Assign tasks to team members or contractors by clicking **“Assign”** on each card.
3. Review your board to ensure it reflects all current marketing goals.