

**STREAMLINE & ORGANIZE YOUR BUSINESS
TO SAVE 10+ HOURS PER WEEK**

TRELLO BUSINESS GAME PLAN



**THE VIABLE
COACH**

KARL JACOBSON



ABOUT

THE AUTHOR

WHO AM I?

I'M KARL JACOBSON, **FOUNDER OF THE VIABLE COACH.**

Here at The Viable Coach, I help entrepreneurs get more done and work less through simplified systems, productivity tools and time-management strategies. I've helped many people go from chaos to clarity to confidence in their business and life.

I've worked as a performance coach for over 12 years, and I've worked with over 40+ NBA clients, CEOs, small business owners and entrepreneurs just like you. I've owned and operated multiple successful businesses, and I want to help YOU DO THE SAME.

My mission here at The Viable Coach is to educate, equip and empower 100,000 purpose-driven entrepreneurs with the productivity skills that translate into viability. Simply put, I help you go further and faster in your entrepreneurial journey with productivity.

This *Trello Game Plan* is your first step towards organizing your business and finally getting more done. Use this guide to help you take your business and life to the next level and achieve your biggest goals.

I'm glad you're here! Let's get started.



Karl Jacobson

Karl Jacobson

1 SET UP A TRELLO ACCOUNT

Go to Trello's website with the link below. Use your personal or business/custom email address to set up your Trello account (Ex. yourname@yourbusiness.com).

If you do not have one yet, you can set it up with G Suite ([here is the link](#)).

[CLICK HERE TO SET UP YOUR ACCOUNT](#)



2 CREATE YOUR WORKSPACE

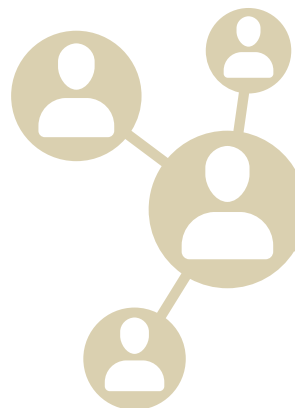
Now its time to break your business up into “workspaces”. Think of “workspaces” as branches within your business and set them up. To create a new workspace click on the “create” button on the top menu bar, then select “create workspace”.



Even if it's just you right now, this is something you want to do. Part of my Trello system is preparing you for your business to grow. We want to set up systems now for outsourcing and delegating to a team in the future.

SAMPLE WORKSPACES:

- Marketing
- Sales
- Products & Services
- Operations
- Human Resources / Support
- Personal

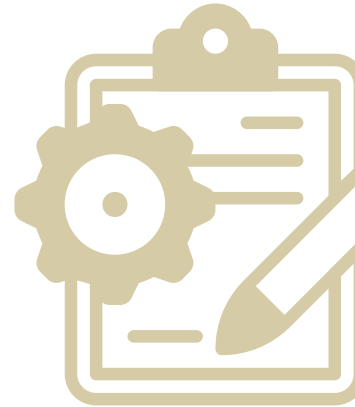


3 CREATE INITIAL BOARDS

“Boards” are larger groupings of work or projects. They can be ongoing parts of your business or fixed projects. Keep the number of projects you have as low as you can. If you add too many, then it will be more of an organizational pain, rather than an asset. Under 10 boards/projects is ideal to start.

SAMPLE BOARDS:

- Content Calendar
- 90-Day Planning Board
- Product Creation
- Product Launch
- Research and Development (R&D)
- Business Operations



>>> VIEWS + ADD CALENDAR POWER-UP

When you create a board in Trello, you will only have the option of the “board” view. The rest of the views (Table, Calendar, Timeline, Dashboard and Map) are all premium features. There is one work around to add and access the calendar for your boards and that’s by adding the free calendar power-up.

Adding The Calendar Power-Up

Go to the “Power-Ups” button on the top menu bar the click on “Add Power-Ups”. Once you are in the app marketplace, click on “Made By Trello”. Then find the “Calendar Power-Up” and click on “Add”.



Note: Your calendar will be blank until you add due dates to cards. I’ll show you how to do this in Step 7.

Video Tutorial: Need help setting up the calendar power-up? [CLICK HERE](#) for a quick tutorial.

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CREATE LISTS

Think of “lists” as sections of your project or workflow. Break up your projects into different sections using lists.

Example #1: Basic Workflow Example (can be used on any board)

- List 1 = Ideas
- List 2 = To Do
- List 3 = Doing
- List 4 = Done

Example #2: Video Content Board (for creating content with Instagram, YouTube, Podcast)

- List 1 = Outline / Script
- List 2 = Film / Record
- List 3 = Edit
- List 4 = Upload



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CREATE CARDS & CHECKLISTS

Now it's time to start adding cards & checklists to your project.

Whenever you add a card, you **must**:

- Assign it to someone (Do this even if it is just you right now, assign it to yourself!). Click on a card and then click on the “members” button to do this.
- Set the date you're going to complete this task. Click “dates” button to add the date.
- Add a description with any important details and files.
- Add any relevant checklists (this will create sub-tasks or smaller action items under the task)

Add Checklists: Checklists are essentially sub-tasks for your cards.

To add a checklist, click on the card you want to add the checklist to. Click on the “checklist” button on the right menu. Type the name of the checklist, then click on “Add”. From there you can click on “Add an item” and add all of your subtasks to the card.



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ADD IMPORTANT LINKS & TEMPLATES

Under the "Description" part of the card, create a section that is titled "Important Links." Here is where you can add links to important documents or files team members might need.

Use the "Attachment" button to add important and relevant files. This will significantly cut down on the amount of time spent searching for files.



Whenever it's a file, start the filename with "[FILE]".

It is recommended to use templates for recurring tasks and to include the steps involved as subtasks. This will create a checklist of all the steps you need to complete that task.

Whenever it's a template, start the filename with "[TEMPLATE]".

To make a template, click on the card you want to make a template. On the right side of the card click "Make Template" button. The card will now become a template. To create another card click on the "Create card from template" button on the top right of the card.

For example, if you create video content on a regular basis, you would have a template for creating & publishing YouTube/Instagram/Facebook videos.

You would first create the template card and title it "[TEMPLATE] YouTube Video".

Form there, add all steps of creating a YouTube video as "subtasks."

YouTube Card Template Example:

1. Research idea
2. Film Video
3. Edit Video
4. Upload & Publish Video



Video Tutorial: Still need help setting up template cards?
[CLICK HERE](#) for a quick tutorial.



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GO TO HOME SCREEN & GET TO WORK

The “Home” screen is where you will check in and get your daily action plan to achieve your goals. To get to the home screen, click on the Trello logo on the top left. On the left menu click on the “home” button.



This section will display all of the tasks across all boards that have been assigned to you.

Under the “Highlights” section, you can start working on all of your tasks and projects for the day. I would suggest that you look at all of the items in 3 different sections, Do Today, Do This Week, and Do This Month. This will give you a great to-do list to work from.

>>> SET DUE DATES ON CARDS

One of the best ways to keep track of all of your deadlines is to use the **DUE DATES** function.

Click on any card that you want to add a due date to. On the right side of the card click on “Due Date” and a calendar will pop up. Click on the date that this project is due / when you want this item to be completed by.

You can check tasks off (using the checkbox on the cover of the card) as you complete them and they will “turn green”. This way you can get a good sense of accomplishment as you go about your day and will always be able to see what you have already completed.



8 TRACK YOUR PROGRESS

It's very important to track your progress and see what is and isn't working.

Click into any card and click on the "labels" button. Create labels and name them "On Track" and "Behind". For each card and pick the cards status and apply the label. Click into a card, click label and apply the label.

Do this to add in regular updates and let your team know how the project is going!

NEXT STEP

9 JOIN MY ONLINE COURSE TRELO BUSINESS BLUEPRINT



There is so much more to teach you about Trello!

My online course, **Trello Business Blueprint**, not only helps you master Trello, but also teaches you how to use it to hit your biggest business goals.

You'll get step-by-step, easy-to follow video tutorials, done-for-you Trello templates and so much more.

CHECK IT OUT HERE!

