



TRELLO[®]

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Trello® for your GTD® workflow. This Guide will focus on configuring and populating Trello for your Projects lists and plans, Next Actions lists, Waiting For lists, and Reference.

Our intention with this Guide is to make it useful for users on any version of Trello. We know many of you are using the free version of Trello, so our primary examples will serve you well. The screen shots throughout the Guide were done using the web browser version of Trello.

If you are new to Trello, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity, using the built-in, free features. If you already have an established system in Trello, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

We are aware that there are many features and ways to configure your system in Trello to support your GTD practice. This is not a technical Guide, nor will it cover all the features or ways to do something in Trello, such as third-party integrations. We'll leave that to the folks at Trello to share with you through their excellent support material.

This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including Trello. Even with your lists managed in Trello, you'll still have your calendar and email in other tools.

Whatever configuration you choose in tools like Trello, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to have a complicated system fall apart when you're not at your best. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu, you could still easily maintain them.

Don't worry about using every available feature and add-on in Trello. There may be more offered than you will ever need. Focus on what makes a difference for you.

OK...let's get started!

Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.

UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of Trello as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done® approach, so you understand how the methodology and tools will intersect.

WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done”, the ground breaking work-life management system and bestselling book¹ by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE STEPS OF MASTERING WORKFLOW

- CAPTURE** Collect anything and everything that's grabbing your attention.
- CLARIFY** Define actionable things into concrete steps and successful outcomes.
- ORGANIZE** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it.
- REFLECT** Step back to review and update your system regularly.
- ENGAGE** Make trusted choices about what to do in any given moment.

THREE STAGES TO INTEGRATING GTD

- 1. UNDERSTANDING** You understand the distinct differences in the five steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, clarifying what something is, and what you want to do about it.
- 2. IMPLEMENTATION** You have installed at least the basic gear to support your GTD practice, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.
- 3. BEHAVIOR CHANGE** The five steps of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on.”

This Guide will leap forward to the Implementation stage, by configuring Trello as an organizing tool for your projects, actions, and reference. Success at the Implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the “Understanding” stage.

¹ *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers everywhere.

APPLYING GTD TO TRELLO®

PROJECTS AND NEXT ACTIONS

USING TRELLO TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

Trello is an excellent option for managing the Projects, Waiting For, and Next Actions lists in your system. We recommend you create lists in Trello to match the common set of lists recommended in the *Getting Things Done* book, which we describe in more detail over the following pages.

THE MOST COMMON GTD LISTS

Here are the 10 lists that are a good starter set for most people:

- | | |
|-------------|------------------|
| 1. Agendas | 6. Home |
| 2. Anywhere | 7. Office |
| 3. Calls | 8. Waiting For |
| 4. Computer | 9. Someday/Maybe |
| 5. Errands | 10. Projects |

Sorting your next actions by context (lists 1–7 above) is recommended because when you are choosing what to do, context will always be your first limitation. For example, if you are at the office, you don't want to be seeing (and having to take the time to skip over) actions that require you to be at home to do. Contexts should map to the people, places, and tools you need to get work done.

SETTING UP YOUR LISTS

Let's set up the 10 suggested lists in Trello. You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

Note: *We recommend doing this initial setup on your desktop and not your mobile device.*

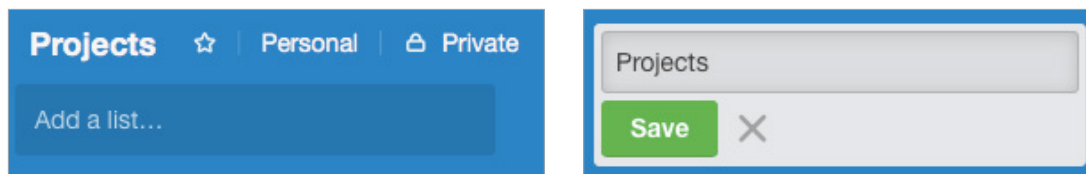
While there are a number of ways you could set up Trello for GTD, there is one method, in particular, we have found to work well for all users of Trello:

- Create separate **Trello boards** for the four main areas you will need for your system: Projects, Next Actions, Waiting For, and Someday/Maybe.
- Within each board, you will have **Trello lists** (e.g. Next Actions board will hold separate lists for contexts like Calls, Computer, etc.).
- On each list you will have **Trello cards** that describe your list items (e.g. Project list will have project names, a Next Actions list will hold next actions, etc.).

CREATING TRELLO LISTS WITHIN YOUR BOARDS

Now let's create lists that will be stored within your boards, following the 10 recommended lists in the *Getting Things Done* book.

1. Click on your Projects board.
2. Click on Add a list... or double-click any open space on your board to add a new list. Name the list Projects.

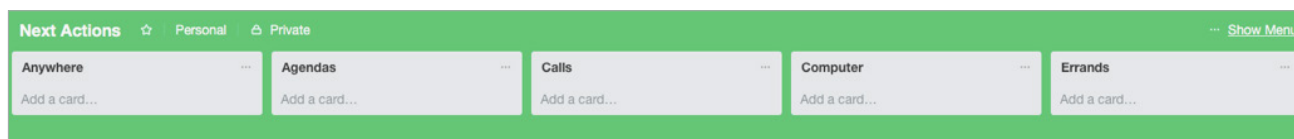


This is a list that has the same name as the board, at least for the initial setup. You may decide later on to further delineate your Projects board with more specific lists, such as Projects-Professional, Projects-Personal, and/or Projects-On Hold. We'll talk about customizing your lists later in the Guide.

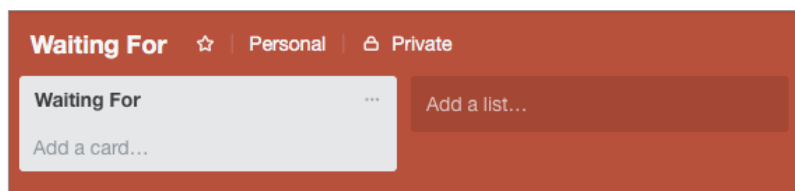
3. Click the back arrow or Trello icon to return to the main view for your boards.
4. Click on the Next Actions board.
5. Repeat step 2 and add new lists for each of your Next Actions contexts:

Anywhere Errands
 Agendas Home
 Calls Office
 Computer

When you have finished adding each list, they will be represented by their own tiles in the Next Actions board:



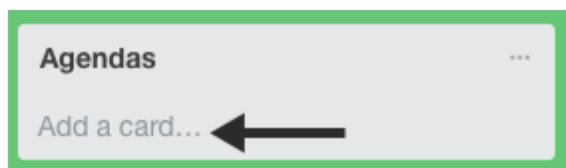
6. Click the back arrow or Trello icon to return to the main view for your boards.
7. Click on the Waiting For board.
8. Create a list called Waiting For. Again, like Projects, the name of the list is the same as the name of the board. You may decide later on to further sort your waiting for items into specific lists such as Waiting For-Professional and/or Waiting For-Personal.



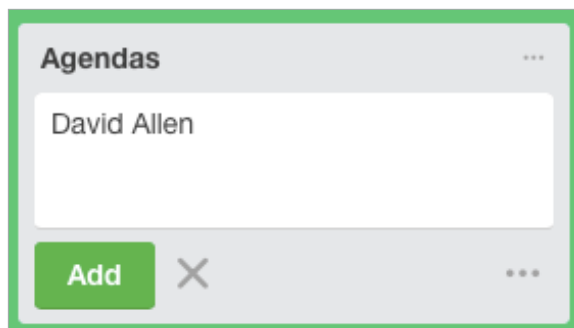
EXPLANATION OF THE COMMON GTD LISTS

AGENDAS This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them. The Agenda list is not for tracking next actions that you need to take related to that person or team (for example, a call you need to make to that person, which would instead go on your “Calls” list). Once you’re on the call, you may refer to the Agenda list for that person, but it’s the Calls list that is triggering the action to make the phone call, not Agendas.

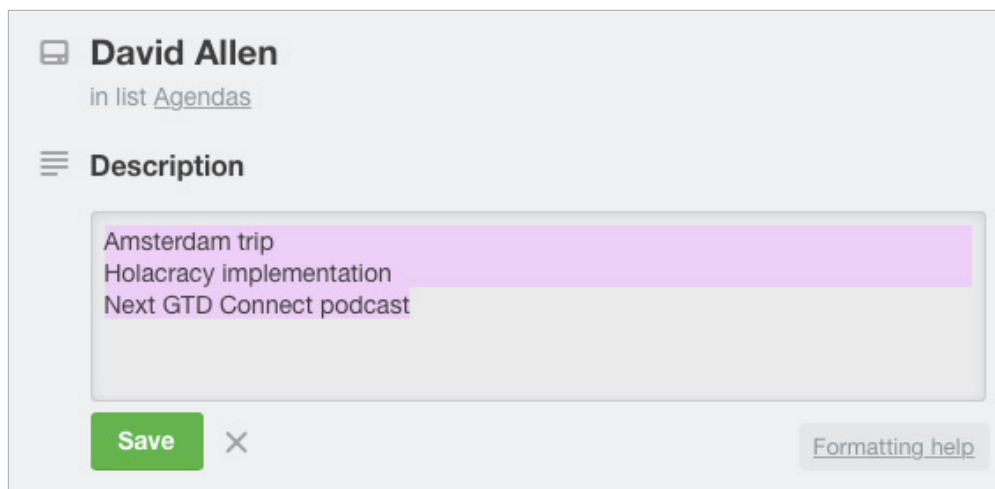
To create an agenda for a particular person or team, click on the Agendas list and click Add a card.



Then, enter the name of the person or group for which you want to create an agenda (e.g., Boss, Spouse, Marketing Team) and click Add. For example:



To capture specific items for that Agenda list, double click on the item (in this case David Allen’s name) to open the details menu for that item. Add your agenda items in the Description box and click Save when done.



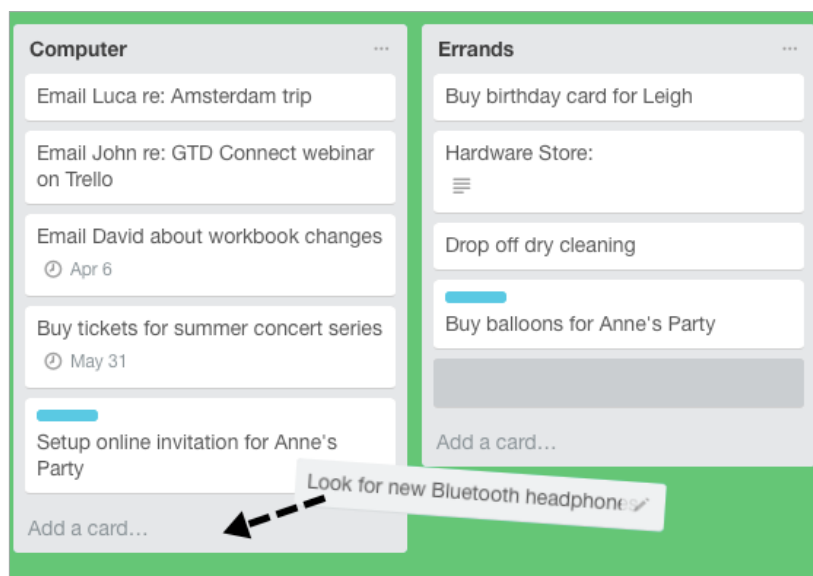
TYING IT ALL TOGETHER

Rest assured, the Weekly Review is what ties the whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, primarily based on those project support materials, so you can trust that what you are choosing from your Next Actions list is current. You'll find the Weekly Review checklist earlier in the Guide, as well as the *Getting Things Done* book, and in our Methodology Guides in our online store at gettingthingsdone.com/store.

MOVING ITEMS BETWEEN LISTS

When you are working your system, you'll be moving items between lists frequently. For example, you may have a next action in your Calls list to make a call. If you reach their voicemail but need to track that the person calls you back, that item would get reassigned to the Waiting For list. Or, you may have a project that has changed in priority and has become a someday/maybe, or vice versa.

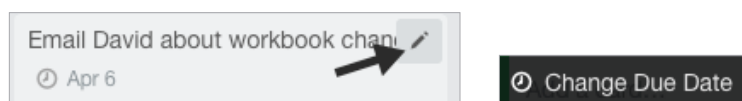
To change the list assigned to an entry, simply drag it from one list and drop it in another *if they are in the same board*. For example, to move a next action from the Errands list to the Computer list, drag it from the Errands list to the Computer list:



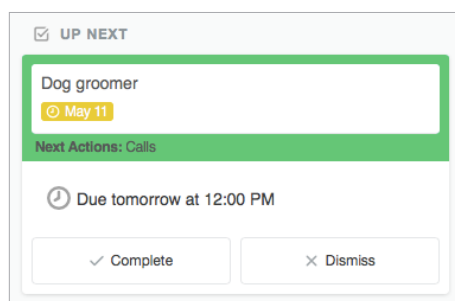
USING DUE DATES

We recommend using due dates judiciously. A quick way to erode trust in your system is to create a pattern of false due dates, where you are continually questioning what's a “real” versus “made up” due date, as well as spending your valuable time changing dates on overdue items you thought you would get to.

Due dates can be added to any list item by double clicking on the item and selecting due date from the Details menu or clicking the pencil icon next to an item and selecting Change Due Date from the menu.



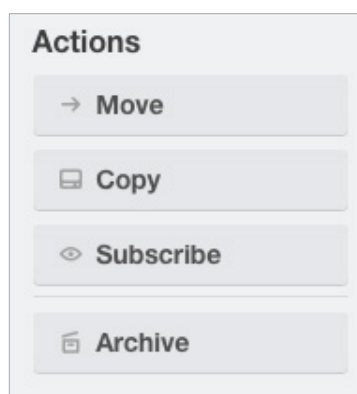
You can also see all of your cards with upcoming due dates and those that recently passed their due date, on the Trello Home screen. From Trello Home you can also mark cards complete, without having to navigate to the List where the card is stored.



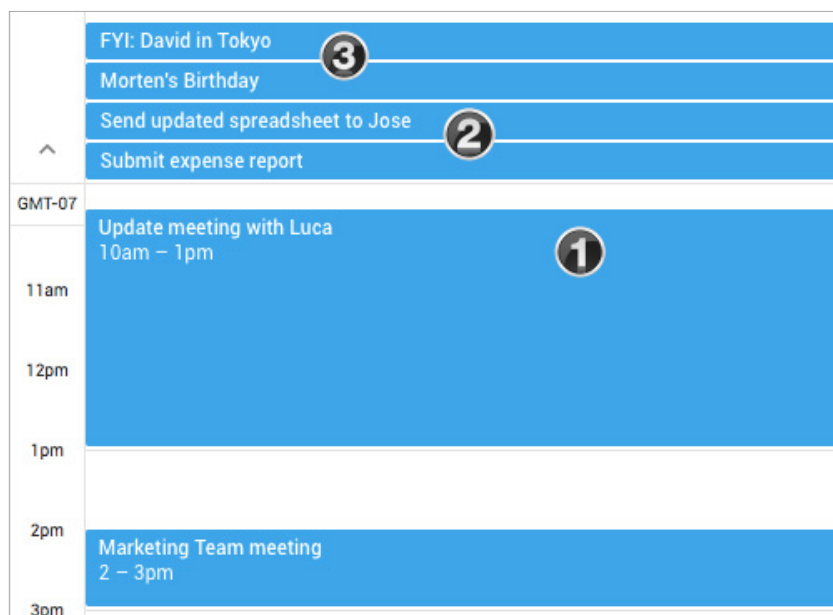
MARKING ITEMS COMPLETE

Many GTD users ask if they should keep or delete completed items from their lists. If you think you'll ever want to retrieve the item, we recommend keeping it. This can be useful for year-end reviews when you want to see and acknowledge all of the projects you completed. You may find this unnecessary though for all of the next actions. Trust that you know best about what would be useful for you to keep. As David Allen says, “When in doubt, keep it. When in doubt, throw it out!” The bottom line is that either works if you are making a choice that works for you.

To mark an item complete in Trello, select Archive under the Actions menu for the item:



Here is a calendar showing all three types of entries:



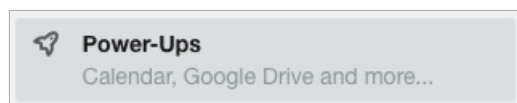
REVIEWING YOUR CALENDAR

On a daily basis, we recommend reviewing your calendar for time-specific and day-specific actions, any chance you get. On a weekly basis, in your Weekly Review, we recommend reviewing your calendar backward for any “Oh, that reminds me...” items, and forward for any “I need to start prepping for...” items to capture.

SETTING UP A CALENDAR FEED

Trello Power-Ups make it possible for your cards that have a due date appear on your iCalendar, Google, or Outlook calendar. While it certainly doesn't replace reviewing your lists regularly, you might find it helpful as an extra safety net for reminding you of items that are due.

Power-Ups are enabled under the Menu for each board.



Here are helpful support Trello docs for completing the process in iCalendar, Google, or Outlook:

Setup in iCalendar: <https://help.trello.com/article/811-viewing-cards-in-a-calendar-view>

Setup in Outlook: <https://help.trello.com/article/1064-using-trello-with-microsoft-outlook>

Setup in Google: <https://help.trello.com/article/829-using-trello-with-google-calendar>

CONCLUSION

ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect®.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD system up and running.

FOR TECHNICAL SUPPORT WITH TRELLO, PLEASE VISIT:

[Trello.com](https://trello.com)

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com