



# TRELLO<sup>®</sup>

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**Setup Guide**

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## FOCUS OF THIS GUIDE

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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 groundbreaking work-life management system and bestselling book<sup>1</sup> 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.

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

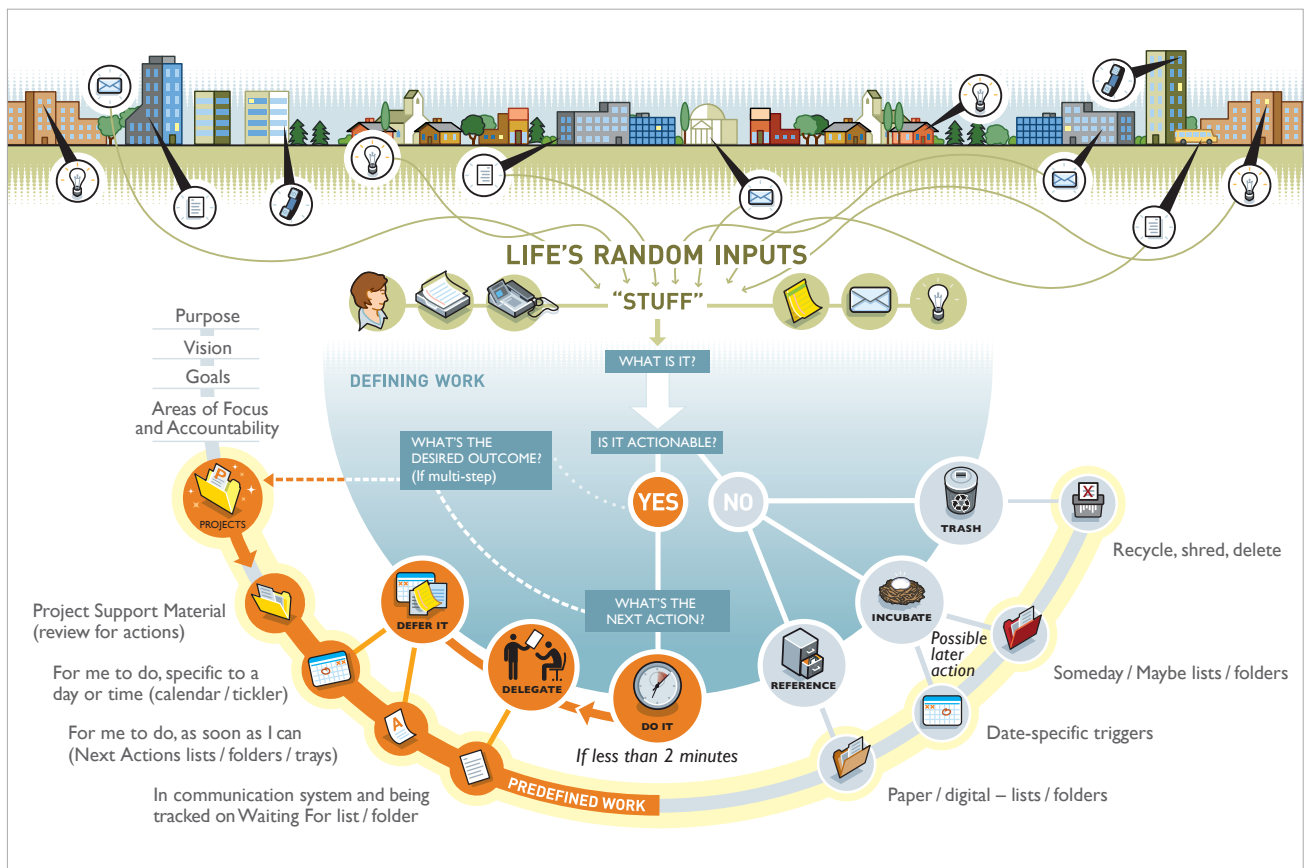
**THERE ARE MANY WAYS TO GET A BASIC UNDERSTANDING OF GTD, INCLUDING:**

**Read or listen to the book** *Getting Things Done* is the essential manual for this methodology (part one is an excellent overview of the whole game).

**Take a course** The courses offered by our global partners around the world are excellent primers for understanding the key steps of Mastering Workflow.

**Practice, practice, practice** The GTD Workflow Map (shown below) is a fantastic coaching tool for walking yourself through the core models for capturing, clarifying, organizing, reflecting, and engaging.

**THE GTD WORKFLOW MAP**



We recommend getting the full Workflow Map, with all of the GTD models, which comes as a PDF download. Visit our online store at [gettingthingsdone.com/store](http://gettingthingsdone.com/store) to learn more.

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## THE GTD WEEKLY REVIEW<sup>®</sup> CHECKLIST

Any tool you use will take effort to keep clean and current, so that you can trust your action choices. The Trello application is no exception. Rest assured, the Weekly Review<sup>2</sup> is what ties this whole thing together, ensuring that you have actions for all the active parts of your projects on a consistent basis, so you can trust that what you are choosing from your next action lists is current. The Weekly Review steps include:

### GET CLEAR

#### **Capture Loose Papers and Materials**

Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-tray.

#### **Get “IN” to Zero**

Clarify completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

#### **Empty Your Head**

Put in writing and clarify any uncaptured new projects, action items, waiting for's, someday/maybe's, etc.

### GET CURRENT

#### **Review Next Actions Lists**

Mark off completed actions. Review for reminders of further action steps to record.

#### **Review Previous Calendar Data**

Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

#### **Review Upcoming Calendar**

Review upcoming calendar events—long and short term. Capture actions triggered.

#### **Review Waiting For List**

Record appropriate actions for any needed follow-up. Check off received ones.

#### **Review Project (and Larger Outcome) Lists**

Evaluate status of projects, goals, and outcomes, one by one, ensuring at least one current action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting for's, etc.

#### **Review Any Relevant Checklists**

Use as a trigger for any new actions.

### GET CREATIVE

#### **Review Someday/Maybe List**

Review for any projects which may now have become active, and transfer to “Projects”. Delete items no longer of interest.

#### **Be Creative & Courageous**

Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system???

<sup>2</sup> See the *Getting Things Done* book or our GTD Methodology Guides for a Weekly Review checklist.



# APPLYING GTD TO TRELLO®

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## 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
2. Anywhere
3. Calls
4. Computer
5. Errands
6. Home
7. Office
8. Waiting For
9. Someday/Maybe
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 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.

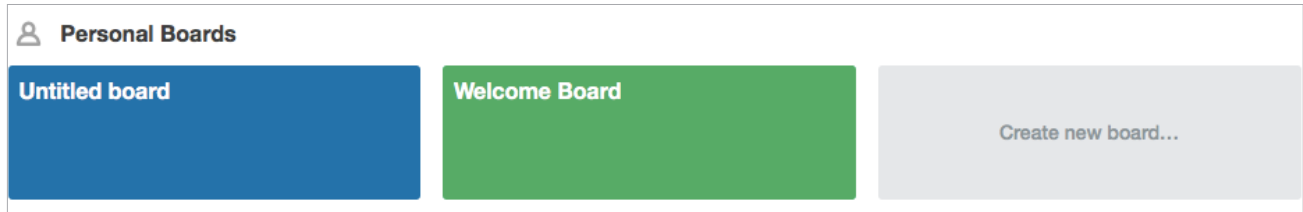
**Note:** *We recommend doing this initial setup on your desktop and not your mobile device.*

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:

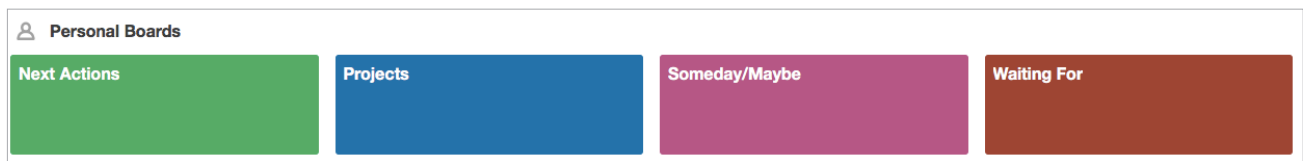
- Create separate **Trello boards** for the four main areas you will need for your system: Projects, Next Actions, Waiting For, and Someday/Maybe.
- Within each board, you will have **Trello lists** (e.g., Next Actions board will hold separate lists for contexts like Calls, Computer, etc.).
- On each 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 BOARDS

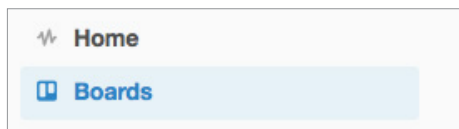
For our purposes, think of Trello boards as key areas of your system. For new users, Trello comes pre-populated with two boards under your Personal boards: Untitled and Welcome.



We will be customizing your boards so that the final view (at least in this initial setup of projects and next actions) will look like this:

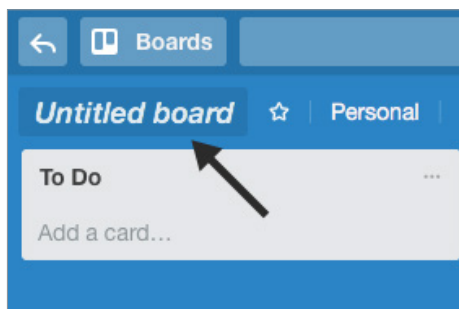


1. Let's start by editing the Untitled board to become one of your 4 GTD areas you will need. Starting from the Trello Home screen (the main view when you open Trello), click on Boards in the left margin.

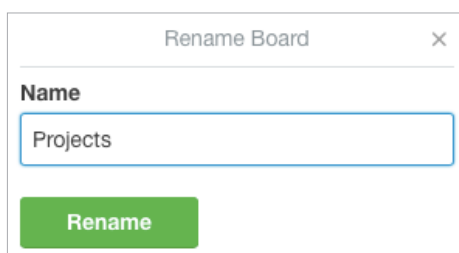


Click on the tile for the Untitled board.

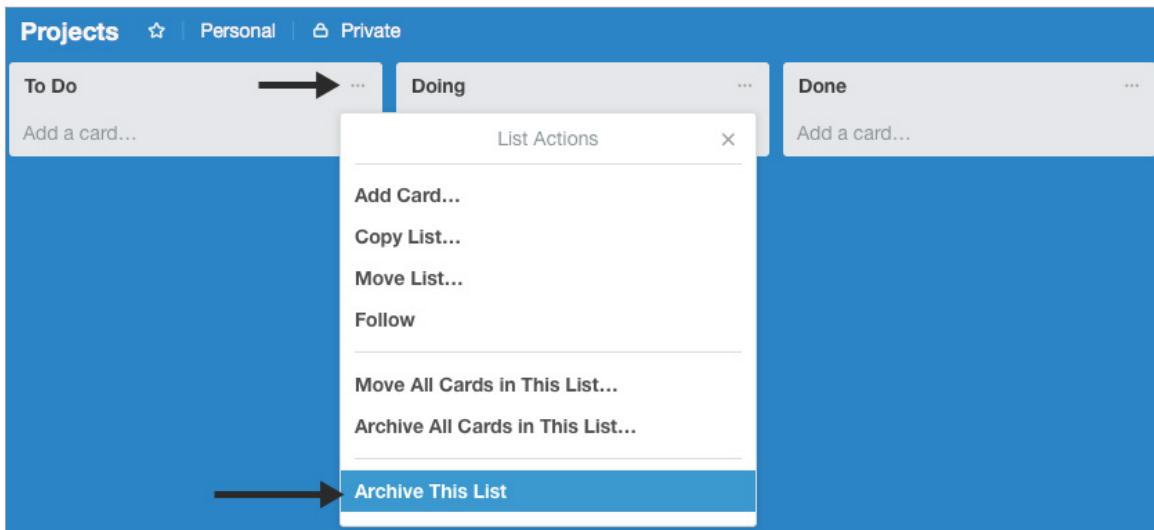
2. Click on the name of the board in the top left corner.



3. Title the board Projects and click rename when done.

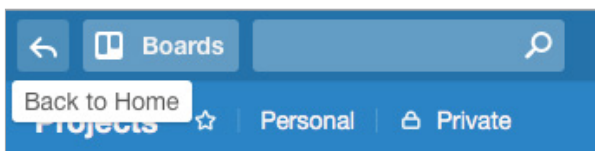


- Remove the three default lists that appear under this new Projects board by clicking the ellipses to the right of the list name and choosing Archive This list.

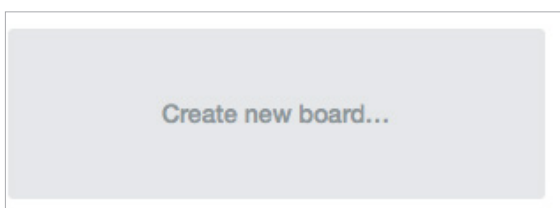


We will add back in new lists later on. For now, you're done with this board. You can leave the Welcome board, if you're a new user and it's appearing for you, as you may find some helpful tips and tricks in that board to read at some point.

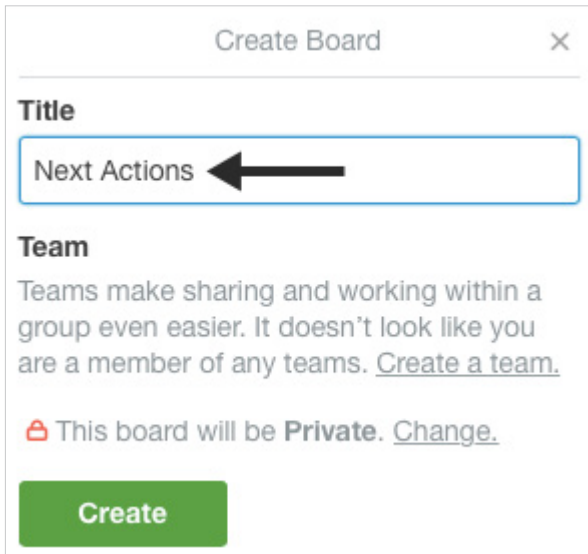
- Click the back arrow in the top left corner to return to the main view for your boards. If you are on Windows and don't have a back arrow, click the Trello icon in the top center of your Trello window instead.



- Click on the Create new board... tile.



7. Add the title Next Actions and click Create.



Create Board ×

**Title**

Next Actions ←

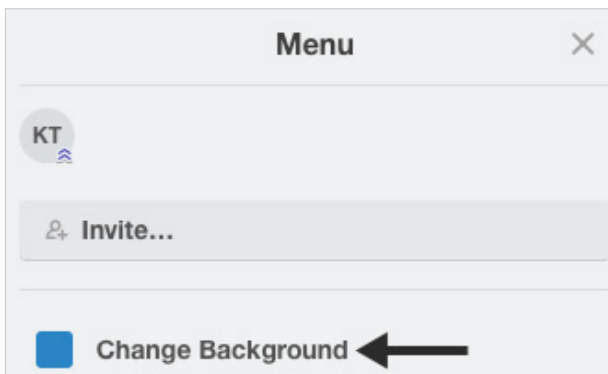
**Team**

Teams make sharing and working within a group even easier. It doesn't look like you are a member of any teams. [Create a team.](#)

🔒 This board will be **Private**. [Change.](#)


Create


8. Change the background color of the board, if you wish, to something different than the color you used for Projects. This is not a requirement, but it may help with navigating to your boards and lists when you are moving quickly in your day-to-day workflow.



Menu ×

KT 

 Invite...

 Change Background ←

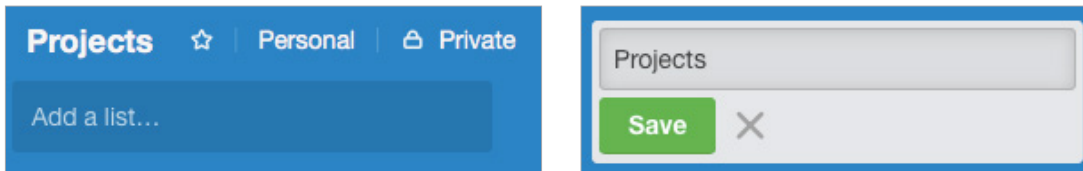
9. Click the back arrow or Trello icon to return to the main view for your boards.

10. Repeat steps 6–8 to create a board called Waiting For and another one called Someday/Maybe.

## 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.

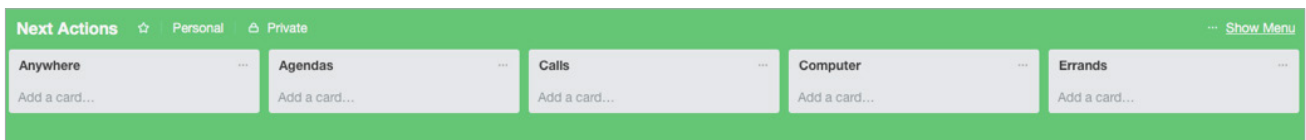


This is a list that has the same name as the board, at least for the initial setup. You may decide later on to further delineate your Projects board with more specific lists, such as Projects-Professional, Projects-Personal, and/or Projects-On Hold. We'll talk about customizing your lists later in the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

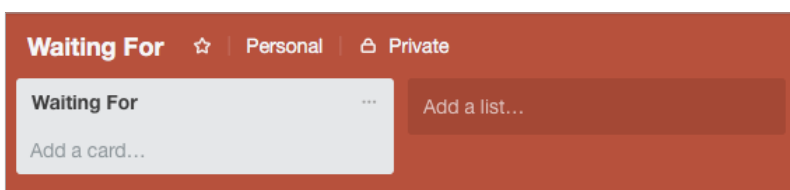
3. Click the back arrow or Trello icon to return to the main view for your boards.
4. Click on the Next Actions board.
5. Repeat step 2 and add new lists for each of your Next Actions contexts:

Anywhere    Errands  
 Agendas    Home  
 Calls        Office  
 Computer

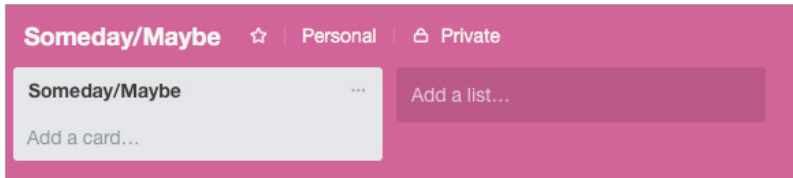
When you have finished adding each list, they will be represented by their own tiles in the Next Actions board:



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.



9. Click the back arrow or Trello icon to return to the main view for your boards.
10. Click on the Someday/Maybe board.
11. Create a list called Someday/Maybe. Again, once 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 someday/maybe items into specific lists such as Someday/Maybe-Professional, Someday/Maybe-Personal, Someday/Maybe-Travel, etc.



The final result is four boards (Projects, Next Actions, Waiting For, and Someday/Maybe), with lists total nested within each board:

- Projects board includes Projects list.
- Next Actions board includes Anywhere, Agendas, Calls, Computer, Errands, Home, and Office lists.
- Waiting For board includes Waiting For list.
- Someday/Maybe board includes Someday/Maybe list.

## ADDING ITEMS TO YOUR LISTS

### CREATING TRELLO CARDS WITHIN YOUR LISTS

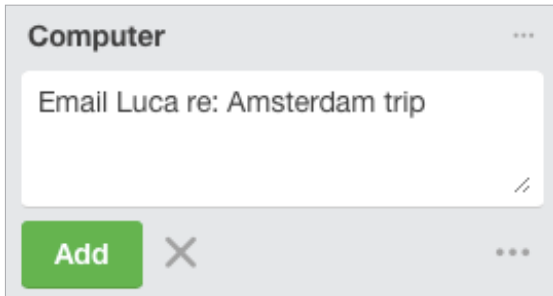
Now that you have your lists setup, let's populate them. Items added to your lists are called cards in Trello. Each card represents one list item. For example, if your Calls list has 10 calls to make, you will have 10 cards on that list.

#### How to add a new card (list item):

1. Navigate to the list you want to add to. For example, go to your Computer list in your Next Actions board. Click Add a card...

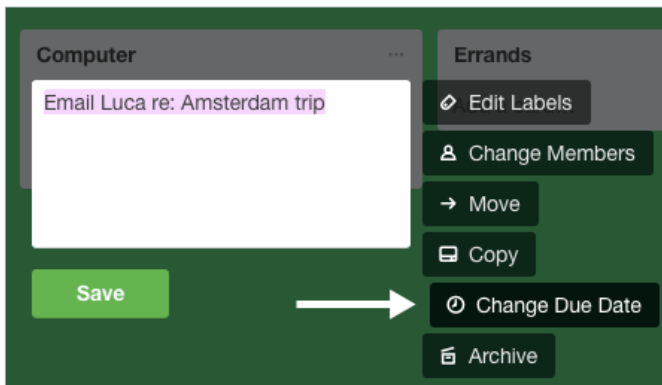


2. Type your next action.

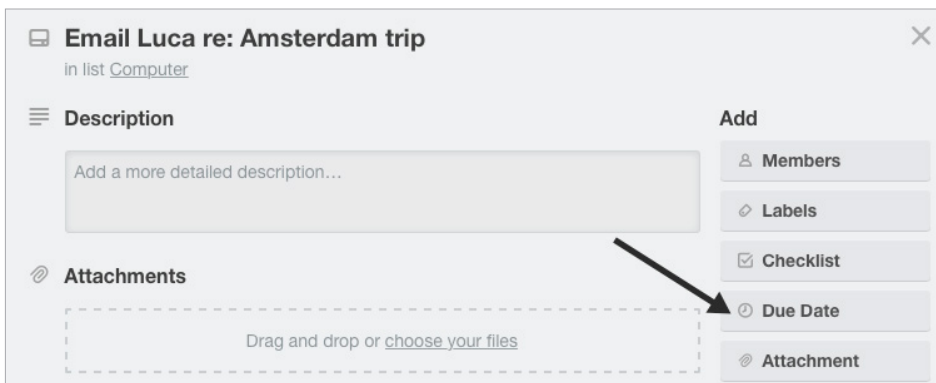


3. Unfortunately, there is no way to add a due date to the item at the same time you are first adding the item. However, there are two easy ways to add a due date once the entry has been created:

Hover over the item, click on the pencil to edit the entry, and select Change Due Date:



Another way is to click on the item to open the full detail menu for that item and click on the Due Date button in the Add panel, or press the keyboard shortcut D to open the Due Date window:



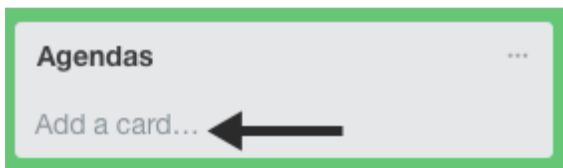
That full detail menu, by the way, has a wealth of useful options for you to explore. We'll talk about a few of them later in the Guide.

Now that you know how we recommend using Trello boards, lists, and cards, we'll now go into greater detail about what goes on these lists and options for customizing even further to match what works best for you.

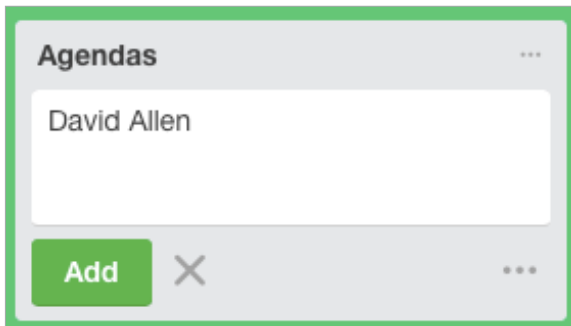
## EXPLANATION OF THE COMMON GTD LISTS

**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.

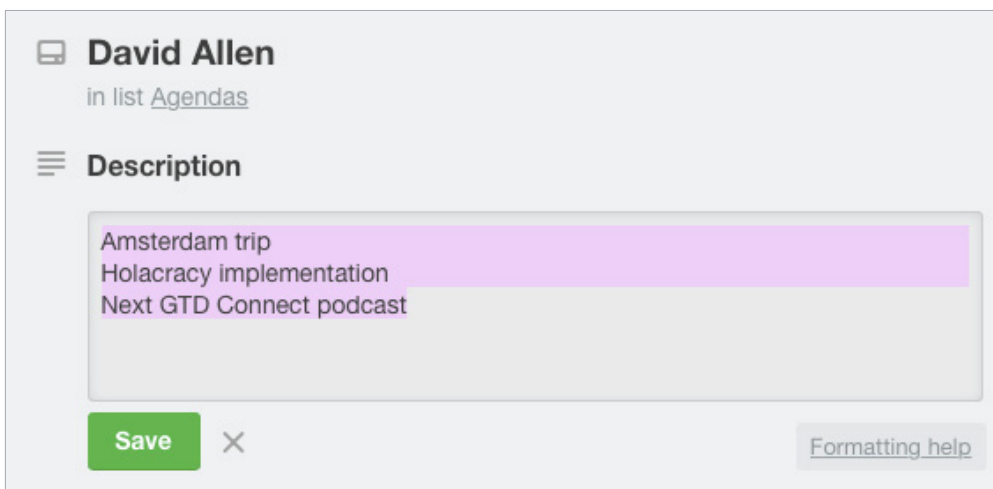
To create an agenda for a particular person or team, click on the Agendas list and click Add a card.



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:



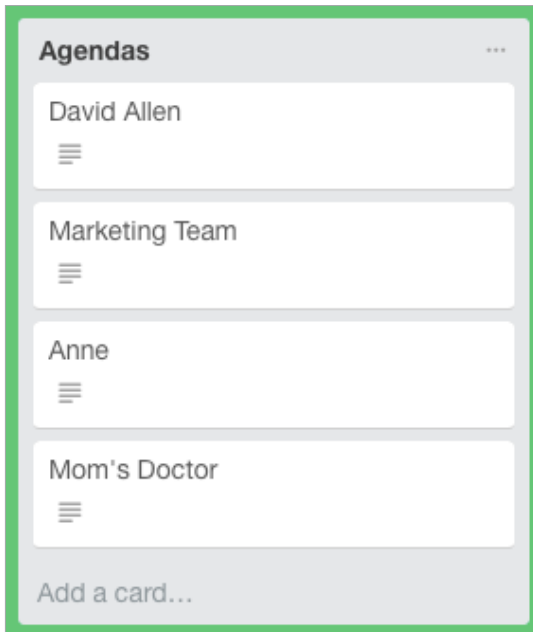
To capture specific items for that Agenda list, click on the item (in this case David Allen’s name) to open the details menu for that item. Add your agenda items in the Description box and click Save when done.



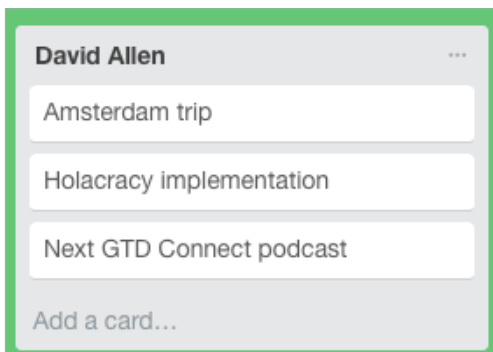


The entry will remain static, as long as you need agenda items for that person, whereas the Description field will be dynamic, as your agenda topics for them change.

You could easily have half a dozen people and meetings that you are tracking through Agenda lists—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.



Some people have so many items for just one person or team that they create an entire list for them within the Next Actions board, rather than park them as a card under the Agendas list. For example, if David were your boss and you often have a large volume of agenda items, you might create a list dedicated to David:



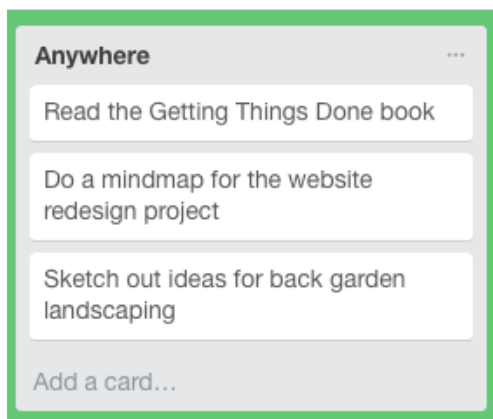
If you create a list for a specific person or meeting you'll have a little more flexibility in how easily you can add new entries to that Agenda list, versus going to Agendas list > Person/Meeting > Description field. Play around with it to see what works best for you!

Just be careful that you don't create so many lists that it becomes difficult to find what you need and keep them current.

Remember, Agendas are for standing items to discuss or bring to a meeting. They are not where you would go to be reminded of a next action you have related to that person. For example, if you needed to pull together some SEO figures for the next marketing meeting (which is also an agenda item), this list would not be your reminder to do that, something like your Computer list would be.

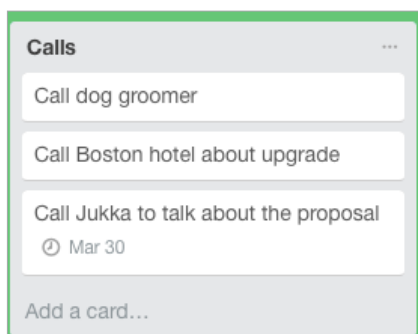
***Go ahead and add any people or regular meetings you have as new “cards” under your Agendas list, as placeholders, that would make sense to you.***

**ANYWHERE** An action that can be accomplished, without any restriction about where it’s done, would go on this list. Notice in the example below that all the next actions on this list start with a verb. That is the recommended best practice for all of your next actions entries so that when it comes time to choose what to do, you’ve already done the thinking about what your action is.



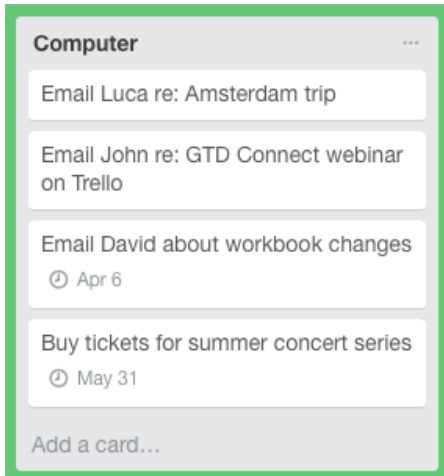
***Go ahead and capture any new items for your Anywhere list that come to mind.***

**CALLS** Place reminders of calls you need to make on this list if they can be made from any phone. If a call requires a specific location instead (like home or office), we recommend putting the action in one of those lists instead. If the phone number is not already in your contacts, then add it to the title, so you’re ready to go when you’re available to make the call.



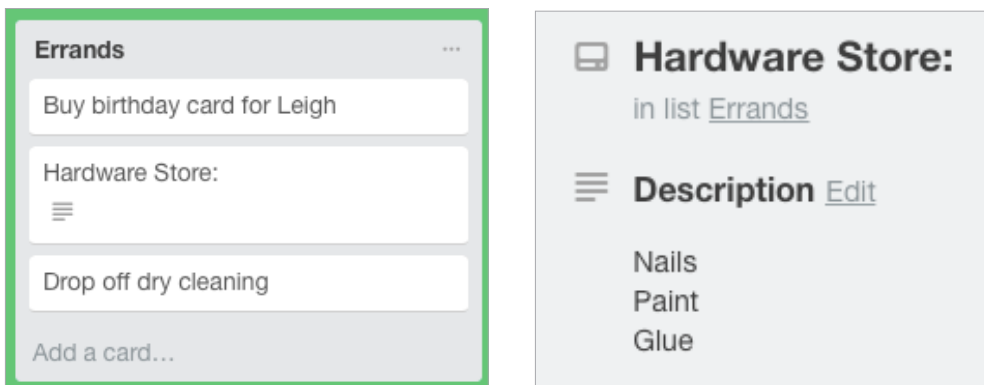
***Go ahead and capture any new items for your Calls list that come to mind.***

**COMPUTER** If the action requires a computer (e.g., emails to send, documents to edit or draft, spreadsheets to develop, websites to visit, data to review, etc.), add it to this list. This list then comes into play whenever you are at your computer(s) with any discretionary time. Even if you only have a computer in the office, it's still convenient to have this list separate from your Office list of things to do, because you wouldn't need to look at this list when you are looking for non-computer things to do. Many people these days also like to have a separate Computer list just for email next actions, given their volume.



**Go ahead and capture any new items for your Computer list that come to mind.**

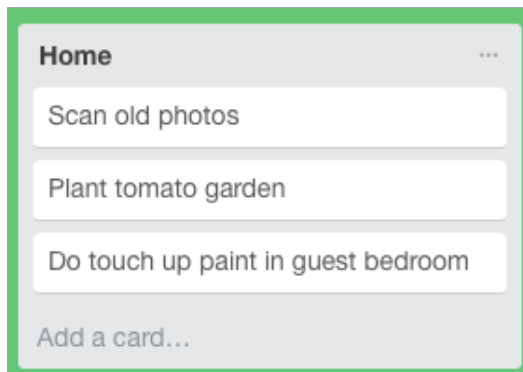
**ERRANDS** This list is for next actions that have to be done when you are “out and about” (e.g., take something to the tailor, buy something at a store, etc.). If you are likely to think of more than one action to take at one of those locations (like the hardware store), you can make “Hardware store” the Subject and put your running list of things to get/do there in the Description field.



If you travel quite a bit for work, you might consider having two errands lists—one for things you could do anywhere, in any city, and one for errands that need to be completed where you live.

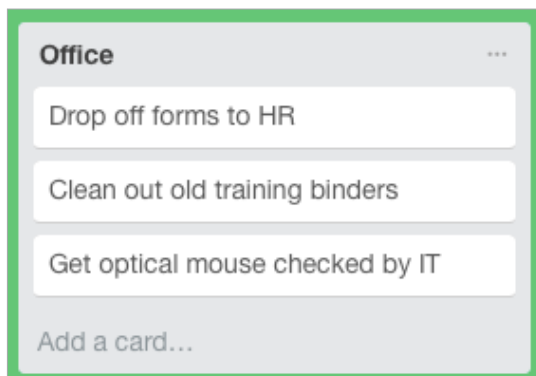
**Go ahead and capture any new items for your Errands list that come to mind.**

**HOME** This list is for next actions that have to be done in your home environment (e.g., gather tax receipts, repair the cabinet door, organize old hard copy photos, etc.).



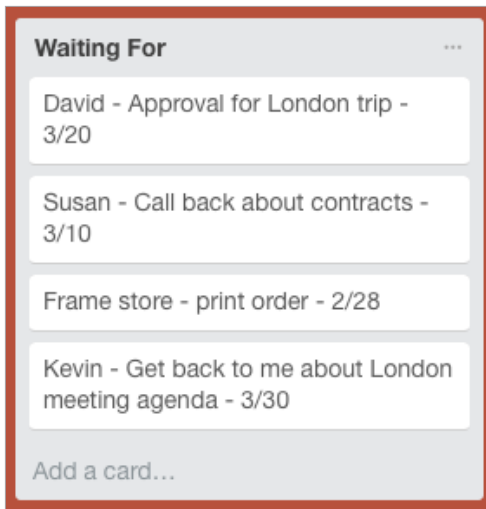
*Go ahead and capture any new items for your Home list that come to mind.*

**OFFICE** These are the next actions that require you to be at your office, such as calls that you have to make from your desk because of the materials or equipment (like your laptop) you need for the call, purging old printed files, scanning documents on the office scanner, etc.



*Go ahead and capture any new items for your Office list that come to mind.*

**WAITING FOR** This list keeps track of all the actions, projects, and deliverables that you want to happen, but which are someone else's responsibility. It could be something you've ordered that hasn't come yet, something you've handed off to your assistant for which you're waiting on a response or something your boss is supposed to be finding out before you can move forward on a key project.

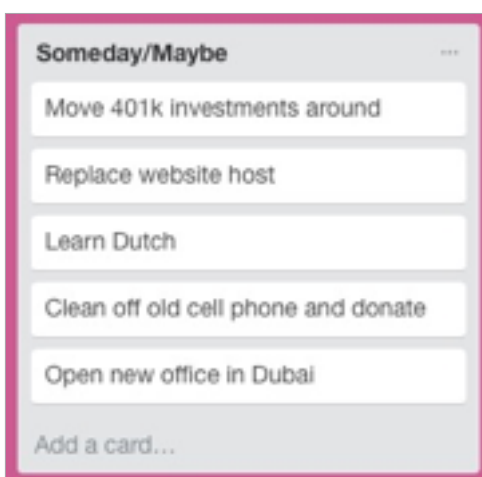


We suggest adding the date you started waiting in the title of the item. This can be helpful when deciding when it's time to follow up again if they have not responded.

The Waiting For list should be reviewed as necessary (at least once a week in the Weekly Review), triggering appropriate actions on your part to follow up, light a fire, or just check the status.

***Go ahead and capture any new items for your Waiting For list that come to mind.***

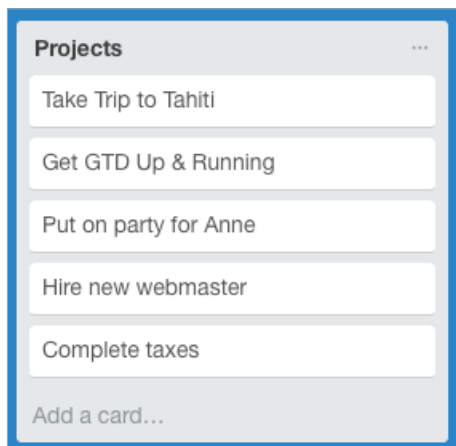
**SOMEDAY/MAYBE** These are the things you might want to do at some point in the future, but with no commitment to move on them at present. They could represent next actions or projects that were current at one time or not.



Many people find they triage things onto and off the Someday/Maybe list when their priorities shift. Your only commitment to items you put on the Someday/Maybe list is that you will review the choice regularly in your Weekly Reviews. That should give you the freedom to capture onto this list without the stress of feeling like you've made a commitment you may not have the resources to take on.

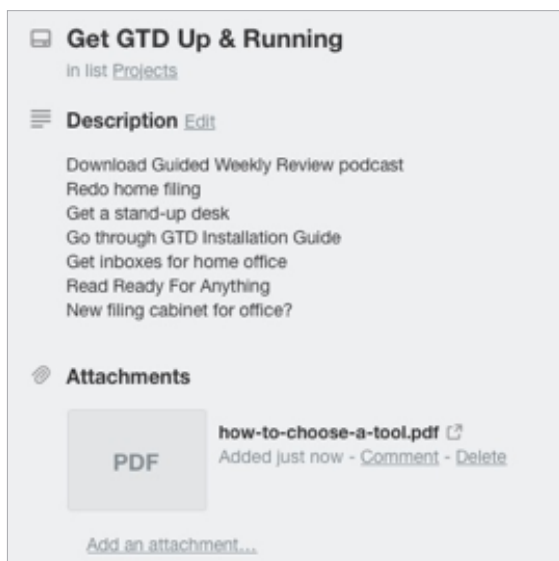
***Go ahead and capture any new items for your Someday/Maybe list that come to mind.***

**PROJECTS** The Projects list tracks any of your desired outcomes that require more than one action step to complete, which you expect to be done over the next 12 months. Projects should always have a defined endpoint.

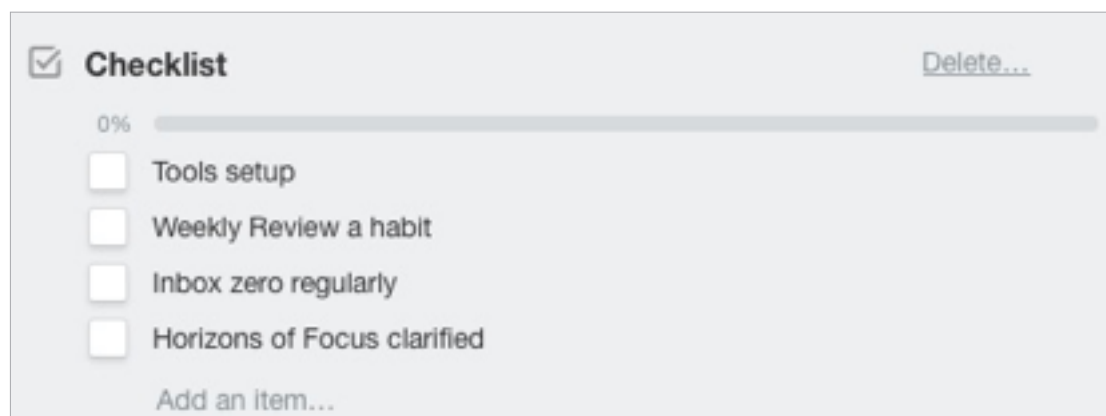


Any notes you have about the project, also known as your project plans/project support, can be added to the Description field for each project on the list, as well as uploading relevant files. While this Description field may not be robust enough to capture all of your project details, and it may not make sense to transfer everything to this location (such as all of the emails also related to the project), it will be useful for quick bullet lists of notes, files, milestones, and “future” actions you want to capture. The current next actions and waiting fors for the project are not tracked in this Description field but on those lists.

**Example of project support included in the Description field of a project:**



If you have key milestones to track for a project, try the Checklist section of the project details:



Remember, the recommendation is that project support in this description field or the checklist section only hold future actions, project plans, notes, and support material. Current next actions on a project are instead tracked under the correct context list. When one of your future actions becomes current, you would copy it from project plans (if it was parked there) and move it to a current Next Actions list, Waiting For list, or your calendar.

***Go ahead and capture any new projects for your Projects list that come to mind. If you have more project planning to do on the project or need to add more details to the project plans, add that as the next action on a context list (e.g., Computer, Office, Waiting For, etc.) now as well.***

## LINKING PROJECTS TO THEIR RELATED ACTIONS

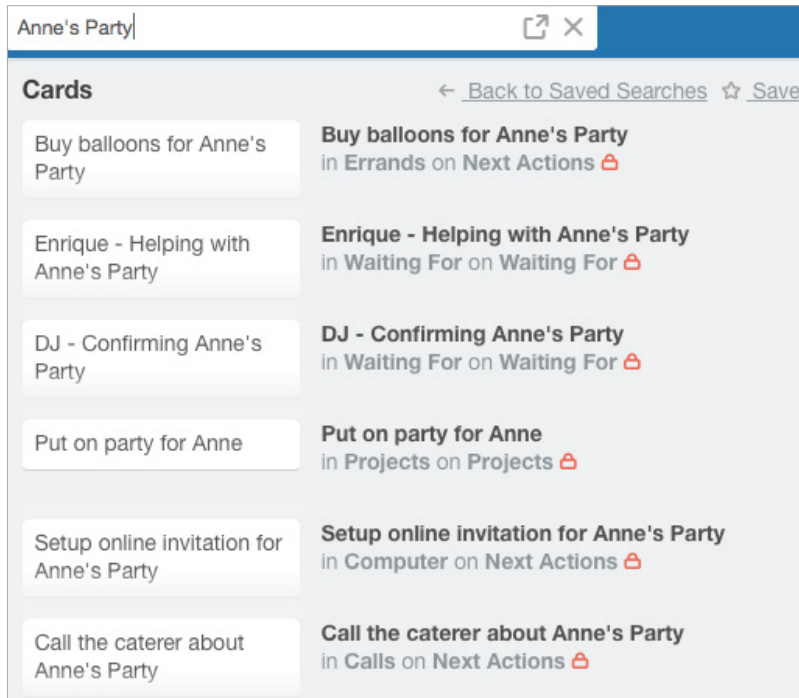
Sorting next actions by context, not by project, can initially seem awkward. Some people are used to having multiple files, piles, notepads, documents, and spreadsheets related to a project, with next actions for the project buried amongst all of that information. Next Actions lists don't replace project plans—we would just call that data "project support," and in our experience, it rarely works to have current next actions buried among project support for day-to-day action management.

Think of the last time you had 20 minutes free and decided to work on a key project. How easy was it to dig through your project support to find the immediate next actions based on the tools, people, and places available to you at the moment? You probably chose to avoid it and do something else, especially if you knew there was still thinking to do on next actions in the project materials.

When your next actions are already defined and sorted by context, you can move more quickly, more easily, and more in sync with how you are naturally choosing what to do first—by context. Then project support remains the parking lot for actions that are incubated for future action.

## USING KEYWORD SEARCH

You can always add a keyword for the project in your next action or waiting for title. That way, you can rely on the powerful Trello search function to pull together related information. For example, if you wanted to pull together everything related to the “Anne’s Party” project, searching on that keyword will show you the results of all entries that include that word.

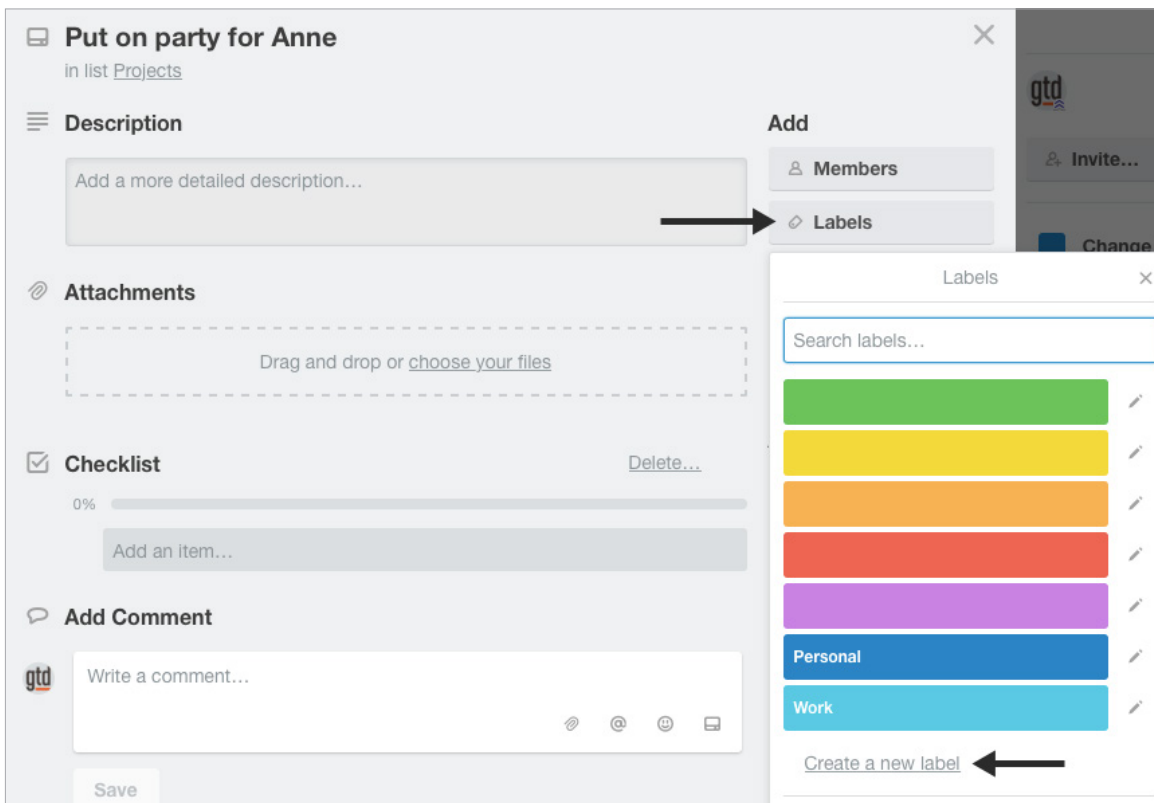


## USING LABELS

You can also use labels for a specific project and search on that label. For example, you could label the project, and all of the related next action and waiting for items. Then, when you filter or search on that label, you can see everything related to the project in one quick view.

To add a label to an entry, open up the details window for any item you want to label, click on Labels in the Add menu on the right, and click on Create a new label.





**Important: Labels will need to be created for each board. You can simply give them the same name. Unfortunately, they are not universal across all of your boards. However, they are easy to create, filter, and search on.**

To filter a label within a board, select go to the Menu in the right side of your Trello view. If it's not appearing, click on Show Menu in the top-right corner.

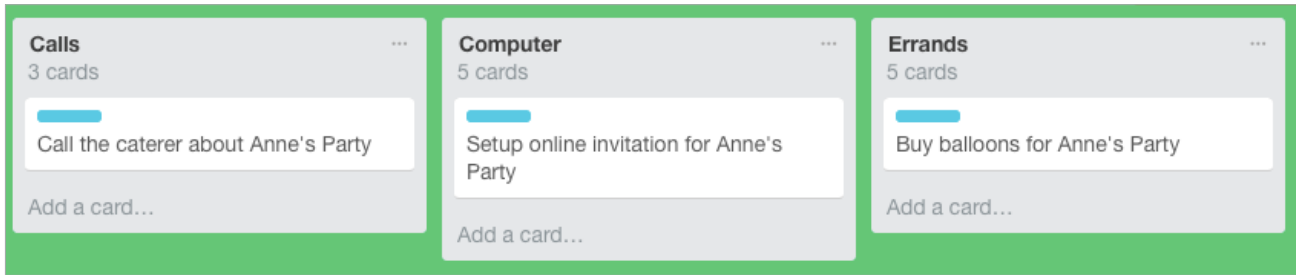
Click on Filter cards.



Select the Label you created. For this example, we'll use "AnneParty".



Trello will return all of the results within that board for that label.

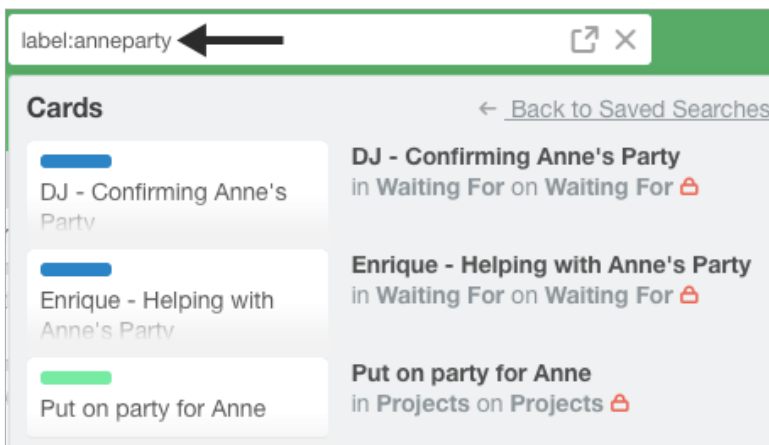


You can also use the Search bar at the top of your Trello window to search on your labels. Type “#labelname” or “label:labelname” to search across all of your boards, versus filtering which is just within each board.

For example:



or



Be careful that whatever additional criteria you add for creating new entries, like creating and adding labels, do not become a burden or requirement. You may find labels useful for one project, but overkill for another. It's easy to let a feature like labels become unwieldy, so watch it carefully to ensure it's helping your productivity and not hindering it.

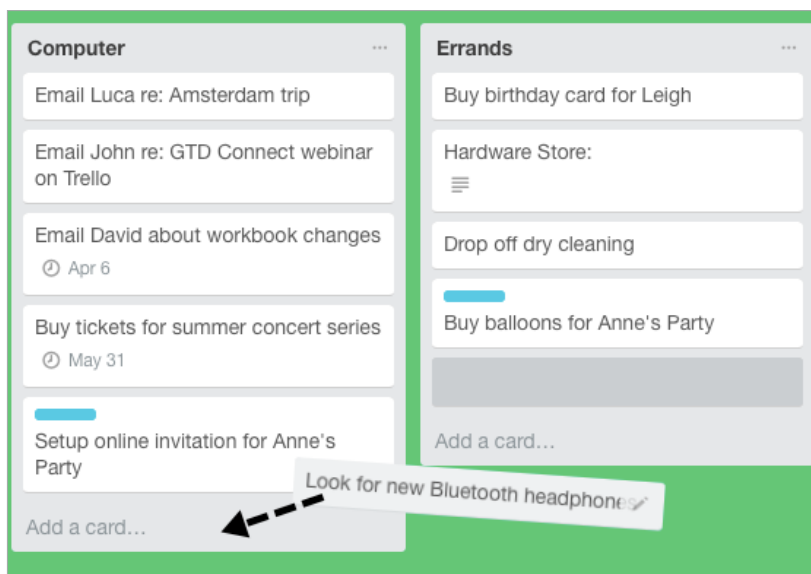
## TYING IT ALL TOGETHER

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](http://gettingthingsdone.com/store).

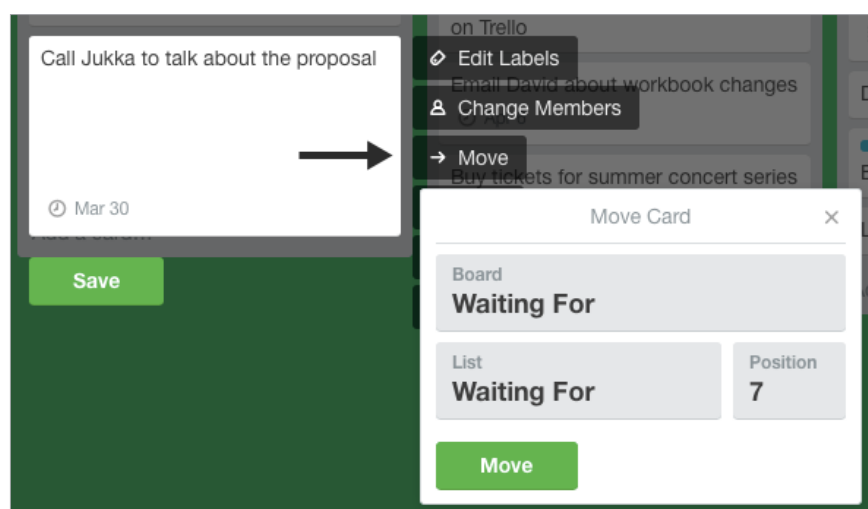
## MOVING ITEMS BETWEEN LISTS

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:



To move items to a list in another board, open the item and choose → Move from the menu that appears. Choose the new board and list.



## CUSTOMIZING TRELLO

The lists and setup we have suggested should serve as a starting point. There are many ways to set up Trello for GTD and no two setups will be the same. You may need more lists and boards or fewer than we suggest. We write these Guides to offer a solid foundation to get you started, without overwhelming you with all of the possible options and scenarios. That said, here are some customizations to consider:

### CONTEXTS

Some people find they want to break out Computer into more specific lists, such as which type of computer work, such as email-related next actions. Executive support staff can often use a context called Meetings to Schedule. Or, you may find you don't want to use as many contexts, and a simple list called Next Actions would suffice for your action lists. And, some people like to keep Next Actions and Waiting For in the same board, instead of separate boards, to take advantage of dragging and dropping of cards between lists versus choosing Move through the menu options.

### PROJECTS

Some managers find a Projects-Delegated list useful as a high-level Waiting For list, or Projects-On Hold as a place to park projects that are not current, but are not Someday/Maybe either. Also, if you have a large-scale project with many steps, and multiple people sharing the project, you may find it warrants its own board or list.

### PERSONAL VS. PROFESSIONAL

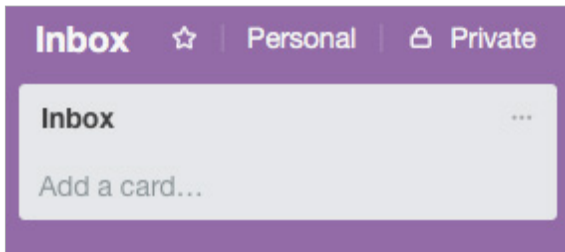
And of course, you could create entirely separate boards for personal versus professional. That's up to you. David Allen does not make a distinction between the two in his book or in his personal system. But some people do find it helpful to separate professional from personal, especially if they want to share lists with colleagues.

Be willing to experiment to find the set of lists that will work best for you. Just 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.

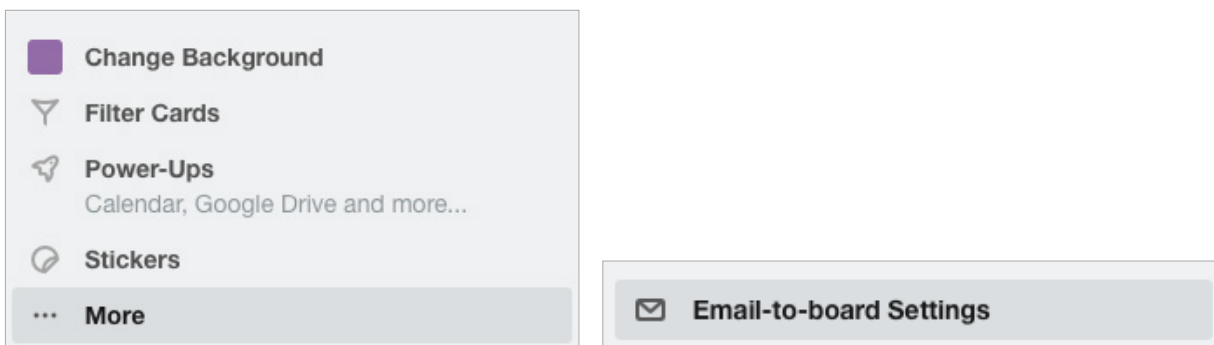
## CREATING A TRELLO INBOX

A Trello Inbox list can be used to hold Mind Sweep items that still need to be processed. For example, you may have a thought or idea on the fly while you are in email, not know exactly what the next action is yet, but you don't want to lose the idea. Adding items to the Inbox stores the idea until you are ready to clarify it (through the questions on the GTD Workflow Map shown on page 3 of this Guide) to decide what it means and what you want to do about it.

Create a new board called Inbox and a list within that board called Inbox.

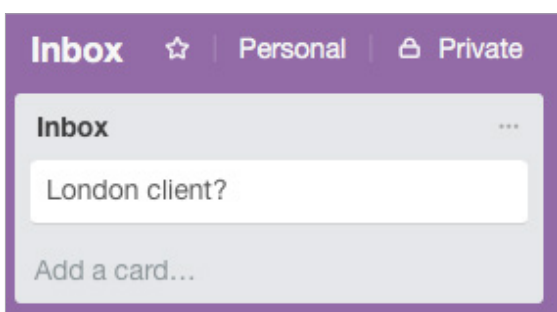


In the Menu for the board on the right side of your Trello window, select More and then Email-to-board Settings:



Copy the email address and add it to your email address book. Send a test email now, with a Mind Sweep item in the subject line. For example, you know you want to do something about the client in London, but you're not sure what yet. Send it to your Trello Inbox to be clarified and organized later. Here is how the email will be dispatched in Trello:

- The subject of the email becomes the card's title
- The body of the email becomes the card's description
- Attachments in the email will be added to the card

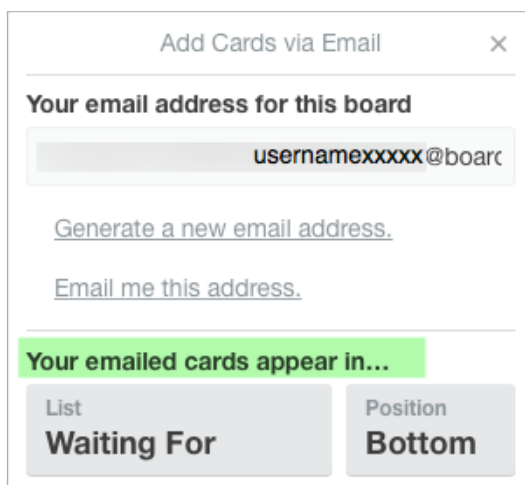


The difference with the Inbox versus your other lists is that these items are unprocessed. You still have not clarified yet what the item is or what you want to do about it. To make the Inbox work, you'll need to treat items you create there with the same rigor you would your email inbox and paper in-tray, meaning, clarify the items in this list down to zero on a regular basis.

## OTHER USES FOR EMAILING TO BOARDS

When you've already clarified the item and just need to get the item organized on a list, the Email-to-board feature can be used for your other boards as well, particularly the ones that only have one list within the board, such as Projects, Someday/Maybe, and Waiting For.

Each Trello board has a unique email address and one default list within the board for emailing new items that become cards within a list. For example, if you wanted to email to your Waiting For board, find the unique email address for that board under Menu > More > Email-to-board Settings.



The screenshot shows a dialog box titled "Add Cards via Email" with a close button (X) in the top right corner. Below the title, it says "Your email address for this board" followed by a text input field containing "usernamexxxx@board". Underneath the input field are two links: "Generate a new email address." and "Email me this address.". At the bottom of the dialog, there is a green highlighted section titled "Your emailed cards appear in...". Below this section are two buttons: "List" and "Position". The "List" button is set to "Waiting For" and the "Position" button is set to "Bottom".

All items sent to the email address for the Waiting For board will appear as new cards on that list.

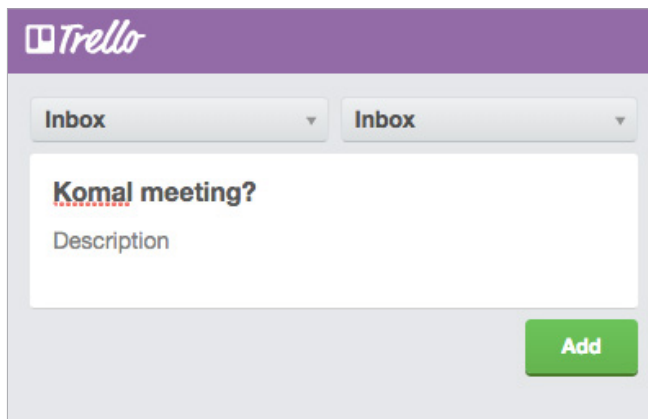
Unfortunately, for the Next Actions board where this feature could be most useful, you could have seven contexts lists if you follow our setup instructions. You would have to choose one default list for emailed items to go to within that board, which would not be accurate most of the time and would require you to move the item anyway. For that reason, we do not recommend using this Email-to-board feature for Next Actions lists, but instead sending those items to your Trello Inbox where it will be clearly designated as an item that needs further organizing onto the appropriate list. Or, just keep Trello open throughout your day to make it quick and easy to add new items directly onto your lists.

## CHROME USERS

If you use the Chrome browser, Trello offers a great browser extension that supports quickly and easily creating new cards, including Mind Sweep items that get sent to your Inbox, without having to open Trello. Install the Chrome extension here:

[https://chrome.google.com/webstore/detail/trello/dmdidbedhnbabookbkpkgomahnocimke?utm\\_source=gmail](https://chrome.google.com/webstore/detail/trello/dmdidbedhnbabookbkpkgomahnocimke?utm_source=gmail)

Once installed, click on the Trello icon  in your Chrome toolbar to create a new card.



To open boards quickly using the Chrome extension, select the address bar using  $\text{⌘} + L$  on OS X or  $\text{Ctrl} + L$  on Windows and then press  $\text{t}$  space followed by the name of the board you want to open.

If you are an Outlook user, you might also want to enable the Outlook Add-In to be able to create Trello cards without leaving Outlook.

**Enabling Outlook Add-In:** <https://help.trello.com/article/1075-outlook-add-in>

If you are a Gmail user, you might also want to enable the Gmail Add-on to be able to create Trello cards without leaving Gmail.

**Install Gmail Add-on:** Gmail > Settings > Add-ons > Get Add-ons

## REVIEWING YOUR LISTS

On a daily basis, we recommend reviewing your Next Actions lists (the ones we set up as contexts, such as Calls, Computer, etc.), when appropriate. On a weekly basis, in your Weekly Review, we recommend reviewing your calendar and all of your actionable lists in Trello; including Projects, Next Actions, Waiting For, and Someday/Maybe lists.

This will be valuable time spent to acknowledge what you've completed, capture any new next actions, and ensure each project is moving forward.

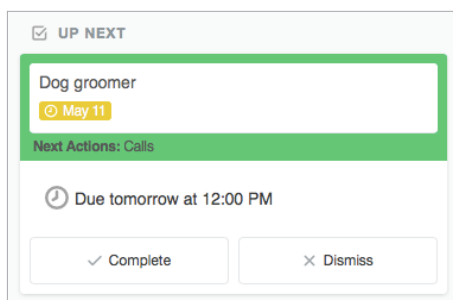
## USING DUE DATES

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 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.



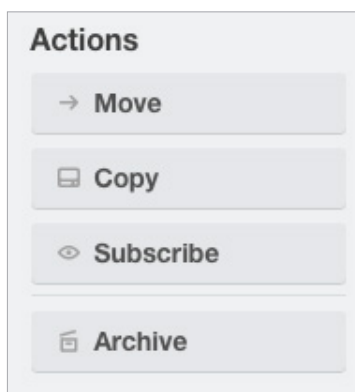
You can also see all of your cards with upcoming due dates and those that recently passed their due date, on the Trello Home screen. From Trello Home you can also mark cards complete, without having to navigate to the List where the card is stored.



## 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.

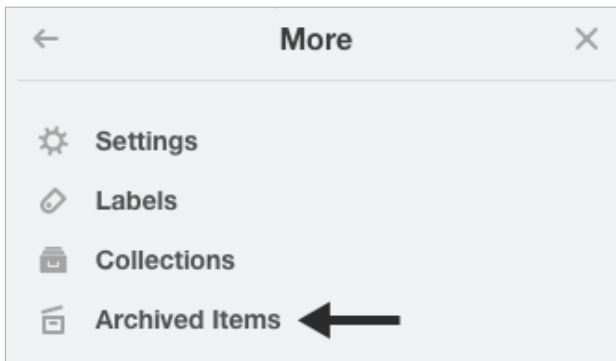
To mark an item complete in Trello, select Archive under the Actions menu for the item:





If you want to delete it, you will need to click Archive first, for the Delete button to appear.

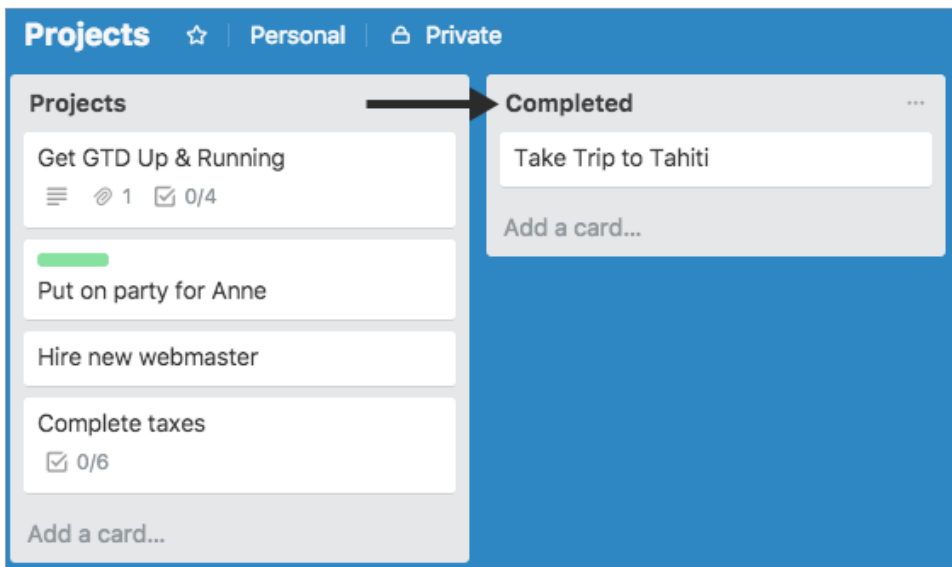
To see what you've archived for a board, go to the board's Menu on the right and click on Archived Items.



**Note:** You can delete or archive Trello cards. You can only archive Trello lists. You can only close Trello boards.

Another option for completed items is to create a list called Completed or Done within your Projects, Next Actions, and Waiting For boards. Some users find this option faster for marking items completed and then reviewing completed items in the Weekly Review, versus navigating through Archived cards.

With this method, when items are complete, simply drag or move them to the Completed list.



## SHARING IN TRELLO

Trello isn't just for managing your personal workflow; you can also use it for collaborating with friends, family, and coworkers. Here are some practical uses for sharing:

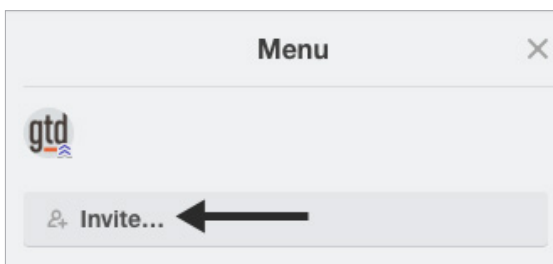
- Sending your boss your Projects board
- Sending your assistant your Waiting For list
- Collaborating with colleagues on a work project
- Collaborating with family or friends on a personal project

Trello allows you to share access to your boards and their contents by adding someone as a Member of your private board, or by making the board open to the public. Unfortunately, it is not possible to share just one list within a board. It's all or nothing in terms of board access.

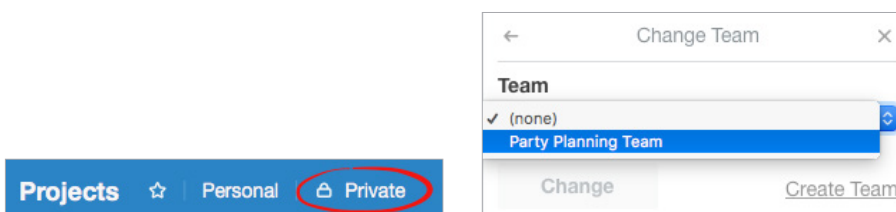
For this reason, if you are using Trello's share features, you may find it necessary to further customize your boards to narrow down what information others see (e.g., creating a board for work projects only or just one large-scale shared project, so your colleagues are not seeing your personal projects.)

### ADD MEMBERS TO SHARE A BOARD

To share a board, open the board Menu and click on Invite... to invite them. The person will get an email inviting them to the board. They will be able to view the board right away through the link in the email and will be asked to create a free Trello account (not required to view, only to edit or comment).



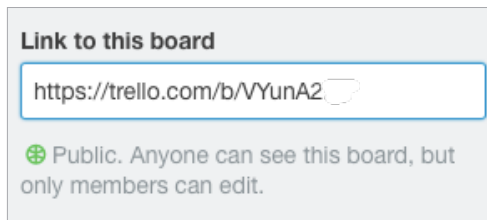
If you are using Trello with a team of people, you can give them access to the board under the Privacy button and choosing an existing team or creating a new team.



### CHANGE PRIVACY TO SHARE A BOARD

You can also open up a board to the Public. (Yes, the general public, including through search results, so proceed carefully with this option!) By default, boards are set to private. To change the privacy of a board, click on the Private icon at the top of the board and change to Public.

For others to view the board, click on Menu and copy the link to the board. For others to edit the board, you will need to add them as Members as we described in the previous step.



## USING SHORTCUT KEYS

The ability to capture information and facilitate tasks quickly, through shortcut keys, can greatly enhance your productivity. Trello offers many shortcut keys for common functions in the app. Here is a short list of the most common ones:

- “b” opens the boards menu and lets you search for boards instantly. Press “b”, type the first few letters of the board you’re looking for, press enter, and it switches you to that board. You can also use the arrow keys on your keyboard and the enter key to select a board from the list of options.
- “f” opens the card filter while on a board. Press “f”, type the first few letters of the filter you’re looking for, press enter, and it switches you to that filter.
- “j” and “k” or the up and down arrows on your keyboard select the card above or below the current card.
- Press “n” while hovering over any card to open the new card window right below the selected card.
- “d” opens the due date selection window.

You’ll find a [full list of Trello shortcuts on their website](#). You can also press Shift + ? on your keyboard while in Trello to view a list of shortcuts.

## SYNCING

Syncing Trello to your iPhone or Android device should be seamless. Obviously, some of the drag and drop features and menu placements we describe in this will be different, but your data will be the same and having access to your lists on the go is a great way to take advantage of weird windows of time to move forward on actions and projects.

## EMAIL

### INTEGRATING ACTIONABLE EMAIL WITH TRELLO

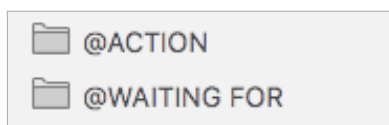
The master key to managing email is the most difficult habit for many to change—working from a regularly empty inbox.

It takes less mental effort to operate from a zero base than to leave anything sitting in the inbox. That doesn't mean that the inbox in email is kept at zero—just that it gets there on some regular basis. The problem is that most people do not have a system for managing their emails beyond the inbox area, so if they can't move on or finish dealing with the email right then, they will leave it in “In” as the safest place.

### TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

#### OPTION ONE: USE THE EMAIL AS THE REMINDER

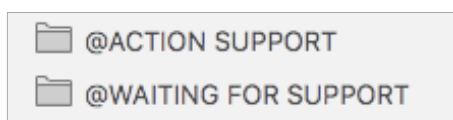
Create @Action and @Waiting For folders in your email program and use them as an action list. You would not also put those reminders on your calendar, or Next Actions or Waiting For lists in Trello—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your lists and calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.



People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some “re-deciding” about emails you've already processed if the next action is not apparent in the subject line.

#### OPTION TWO: USE LISTS IN TRELLO OR YOUR CALENDAR AS THE ACTION REMINDER

Create @Action Support and @Waiting For Support folders in your email program to hold supporting information for actions that are tracked on your calendar, Next Actions, or Waiting For lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action on. You would be reminded of the action when you review your calendar, Next Actions, or Waiting For lists. It's one less place to look for actions or waiting for items, whereas the first option adds an additional location to look for a complete view of your reminders.



People often like this second option because all of your reminders will be tracked in as few places as possible.

***Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.***

## GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have decided about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in the Guide) you would simply ask:

### WHAT IS IT?

### IS IT ACTIONABLE?

**NO** Is it trash, to file as reference, or to incubate (add to your Someday/Maybe list, calendar, Tickler/Bring Forward file<sup>3</sup>)?

**YES** What's the next action?

Do now, delegate to someone else, or defer to do myself later?

**Do it now** If it takes less than 2 minutes, handle it in the moment.

**Delegate it** If you need to track this getting completed, track the waiting for reminder in your @Waiting For folder in email or Waiting For in Trello.

**Defer it** If you need to do it later, track the action reminder in @Action folder in email, Calendar, or on a Next Actions list in Trello.

If multiple actions, what's your desired outcome?

Track that outcome on your Projects list in Trello.

We recommend getting your inboxes to zero daily, or at least once a week in your Weekly Reviews.

<sup>3</sup> For more information on using a Tickler/Bring Forward file, see the *Getting Things Done* book.

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## CALENDAR

### WHAT BELONGS ON YOUR CALENDAR

Outside of Trello, your calendar is a critical component in your system for reflecting the action choices that need to be done ON a specific day versus those that you see on your Next Actions lists in Trello, which can be done on ANY day, or BY a specific day. Your daily calendar page should represent the “hard landscape” for your day and will provide a trusted foundation at a glance for moment-to-moment orientation about “what’s next?”

#### THERE ARE ONLY THREE THINGS THAT BELONG ON YOUR CALENDAR:

**1. Time-specific actions** Things that need to happen on a specific day and time.

Examples:

- Meetings, appointments, time blocked to work on projects

**2. Day-specific actions** Things that need to happen during the day, but not at a specific time.

Examples:

- A call you have to make before you leave for the day
- Something that you have to finish and submit by the end of the day
- An agenda you must cover with someone before they leave the office

**3. Day-specific information** This is information you want to know or be reminded of that day—not necessarily something to do.

Examples:

- Things that might disrupt your day (server shut-downs, office moves, etc.).
- External events to be aware of (marathons, elections, heads of state visits, etc.).
- Activities related to other significant people of interest to you (kids, spouses, bosses, assistants, vacations, etc.).

Here is a calendar showing all three types of entries:

	FYI: David in Tokyo	3
	Morten's Birthday	
	Send updated spreadsheet to Jose	2
	Submit expense report	
GMT-07		
	Update meeting with Luca	1
11am	10am – 1pm	
12pm		
1pm		
2pm	Marketing Team meeting	
3pm	2 – 3pm	

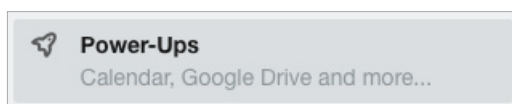
## REVIEWING YOUR CALENDAR

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>

## REFERENCE

### USING TRELLO TO STORE REFERENCE INFORMATION

Trello can manage a limitless number of potentially useful (and fun!) non-actionable simple reference lists and checklists that you would not want to combine with your Next Actions lists. This functionality is open-ended and in one sense, so simple the possibilities are infinite.

#### Have you ever...

- had a wild idea you didn't know what to do with?
- wanted to remember the great restaurant you ate at in London?
- needed to remember all the things to check before you leave on a trip?
- read something inspirational you wanted to keep and re-read every once in a while?
- wondered where to put a suggestion about something to do the next time you visit a country?
- needed to remember everything you need to handle when you put on a special kind of event?
- wanted to keep track of all the articles, blog posts, or essays you might want to write?
- wanted to have a list of clients and prospects to review occasionally?
- wanted a place to keep track of the possible gifts to give special people in your life?
- needed a place to capture great team building and staff recognition ideas?
- needed a quick emergency contact list?

#### Here are some possible new reference lists to try:

- Checklists (e.g., Weekly Review, Packing, Home Maintenance)
- Areas of focus
- Higher Horizons of Focus<sup>® 4</sup>
- Fun
- Ideas
- Inspirations and affirmations
- Great quotes
- Lists
- Might like to buy
- Might like to read
- Music to download
- Next time in...
- Travel
- Vacation ideas

<sup>4</sup> See David Allen's *Getting Things Done* or *Making It All Work* books for more information on Horizons of Focus.

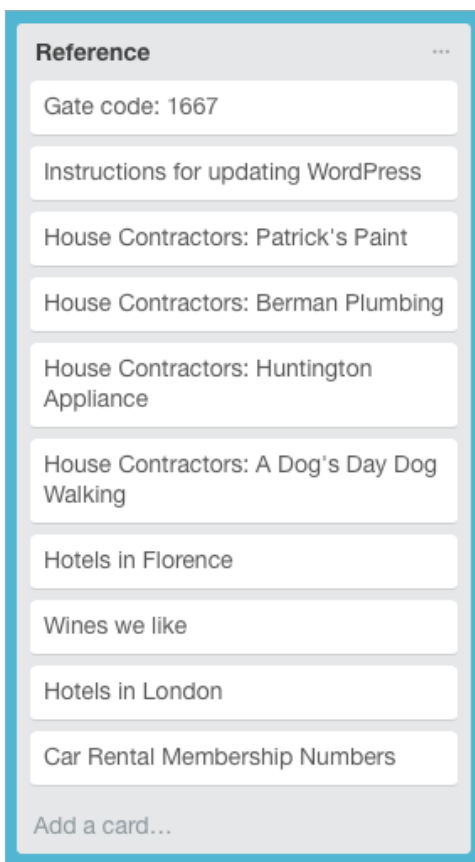


You have a few options for how to set this up in Trello. As we consistently suggest, be careful to not overcomplicate your system to the point where it becomes unwieldy to find or maintain the information.

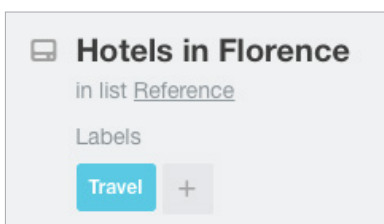
For both of these examples, start by creating a new board called Reference. The following examples will show options within that new board.



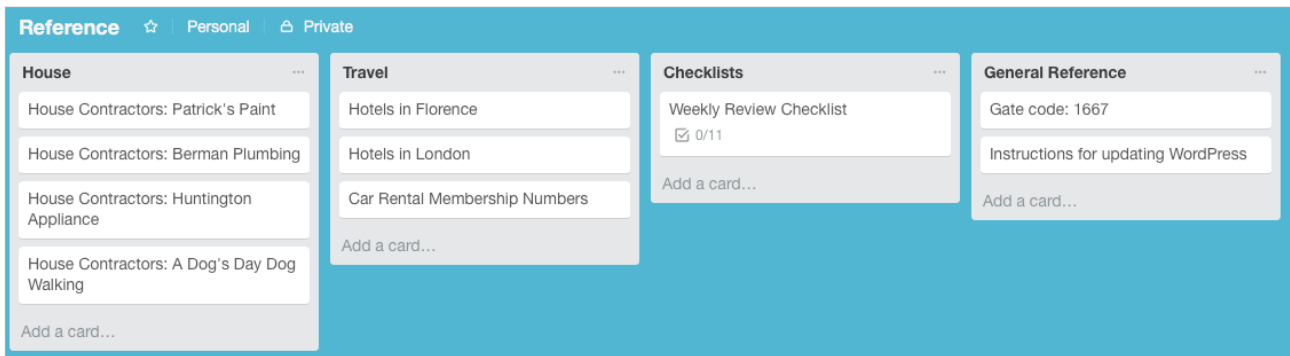
**Example One** Create individual items under one Reference list



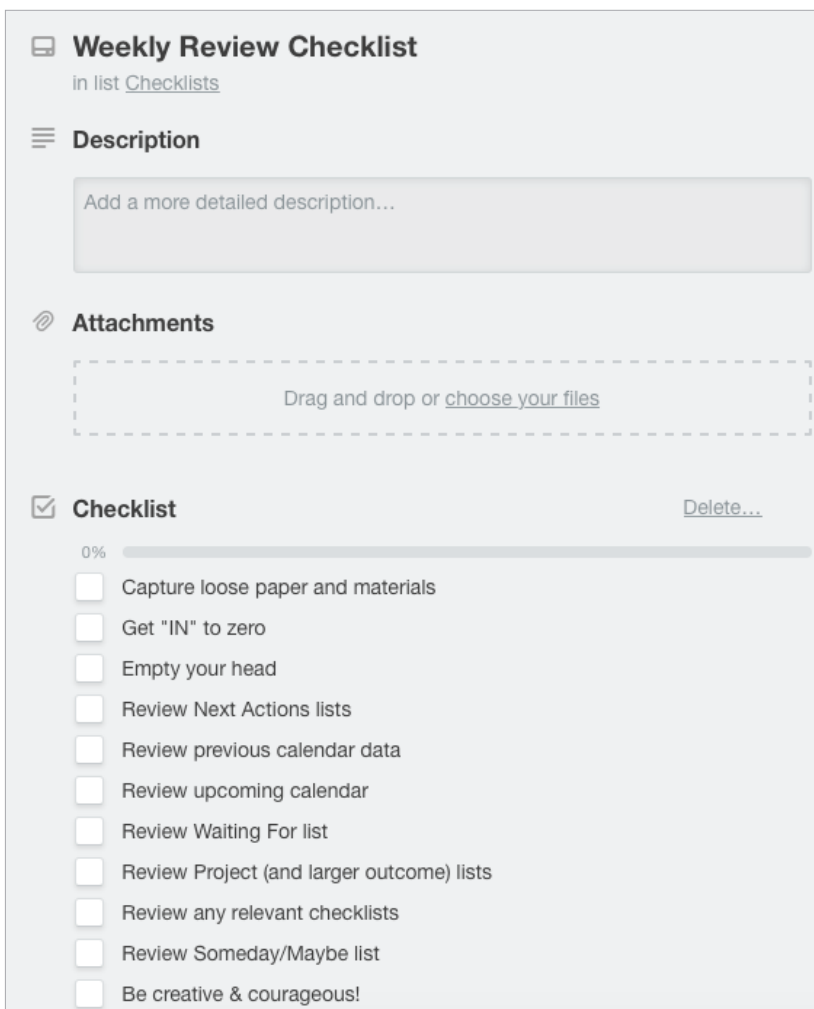
With this option, you could have dozens, if not hundreds of items of various topics in one list. For that reason, you may want to try adding Labels, like Travel, House, etc., to these list items to be able to sort quickly.



## Example Two Create multiple reference lists



With either option, the checklist feature under the Details menu is a great place to store your checklist items, like the Weekly Review checklist:



The possibilities with storing reference are endless. Just remember to keep it clean and current, and fast and fun.

# CONCLUSION

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## 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<sup>®</sup>.

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](https://gettingthingsdone.com)

[gtdconnect.com](https://gtdconnect.com)