

# How to Use Trello for Advocates

# How to use this tool

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This guide will teach you how to use Trello to plan projects for your organization. Trello is an online tool that is kind of like a big whiteboard. It will talk about how each function works, and how to use them for a project. These are the functions that will be covered:

- Using Boards, Lists, and Cards
- How to Add Documents and Comment
- Adding People
- Tagging People
- Adding Deadlines
- Adding Checklists

all with specific examples and illustrations.

# Boards

The first thing you should do is make a Board for your project. Boards are the biggest sections to put things in. Boards allow for projects to be separated, or for big ideas to be separated.

Each project or big idea should have its own board. For example, if your self advocacy organization has a plan for self-advocacy in your state, you might make a board for your plan.

In the picture below, you can see an example of a Trello with 4 boards: one for each state plan in the Pacific Alliance, and one “welcome” board, which teaches you how to use Trello.



# Lists

Lists are the next step. Lists are a way to organize all of the steps in a project, or all of the smaller ideas in a big idea. One board can have many lists.

Below, you will see a board about an advocacy plan for Georgia. The advocacy plan has 4 parts, so this board has 4 lists.

Each list shows a different part of the advocacy plan: a coalition letter draft for other organizations to sign onto, legislative meetings, coalition calls, and public outreach.

A screenshot of a Trello board titled 'Inclusive Education in Georgia'. The board is set to 'Private'. It contains four lists: 'Coalition sign on letter draft', 'Legislative meeting 2/19/16', 'Coalition Calls', and 'Public outreach'. The 'Coalition sign on letter draft' list includes a note about a draft letter to the state of Georgia, a checklist with 1 item completed (0/3), and a button to 'Add a card...'. The 'Legislative meeting 2/19/16' list includes items like 'Elevator speech', 'Fact sheet for senator', 'Practice session at organization meeting', 'Tips to remember', and a note about what to do once at the meeting, with 4 items completed (0/4) and a button to 'Add a card...'. The 'Coalition Calls' list includes a note about a coalition call on 2/9/16, a checklist with 1 item completed (0/1), and a button to 'Add a card...'. The 'Public outreach' list includes items like 'Media call 2/11/16' and 'Op-ed pitch to Atlanta Journal Constitution draft', with 3 items completed (0/3) and a button to 'Add a card...'.

Lists can be dragged and re-organized with the click of a computer mouse. For example, if we wanted to move the coalition sign on letter draft from the left side of the board to the right, we could just click on it and drag it over to the right.

The image shows a digital whiteboard interface with a blue header bar. The header includes a star icon, a private mode indicator, and a 'Private' label. Below the header, there are three main sections represented as cards:

- Legislative meeting 2/19/16**: Contains cards for "Elevator speech", "Fact sheet for senator", "Practice session at organization meeting", "Tips to remember", and "Once at the meeting:  0/4".
- Coalition Calls**: Contains a card for "Coalition call 2/9/16" with a count of 1.
- Public outreach**: Contains cards for "Media call 2/11/16" (with a count of 0/3) and "Op-ed pitch to Atlanta Journal Constitution draft" (with a count of 0/1).

A fourth card, titled "Coalition sign on letter draft", is shown being moved. It contains the text "This is a draft of our coalition letter to the state of Georgia" and a count of 0/1. A hand cursor is visible over the card, indicating it is being dragged. The card also has a link labeled "Checklist for what still needs to be done with the coalition letter" and a count of 0/3.

## Cards

You can add “cards” to Lists. A card is a place to talk about a specific step in a list, or a place to talk about a smaller part of an idea. Usually, each list will have several steps or smaller ideas. You should give each step or idea its own card. For example, let’s look at the board advocates created about Georgia.

In list 2, the advocates are planning for a visit to their state senator. In list 2, they list all the different steps they need to take to get ready. Each step has its own card. There is a card for writing the elevator speech, writing the fact sheet to give to the senator, a practice session at their meeting before meeting the senator, tips to remember at the meeting, and a checklist for what they need to do at the meeting.

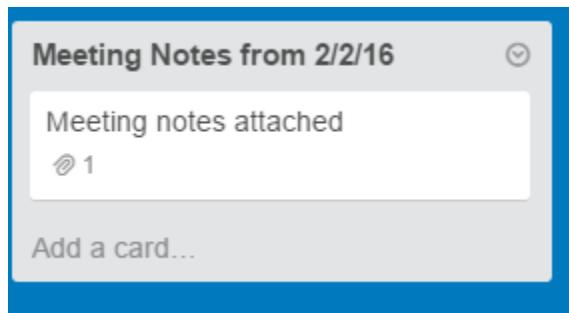
This image shows a digital whiteboard interface with a blue header bar. The header includes a star icon, a private mode indicator, and a 'Private' label. Below the header, there is one main section represented as a card:

**Legislative meeting 2/19/16**

- Elevator speech
- Fact sheet for senator
- Practice session at organization meeting
- Tips to remember
- Once at the meeting:  0/4

At the bottom of the card, there is a button labeled "Add a card...".

A different group of advocates in Georgia is using their board to share information on inclusion in school. They are using their board to organize an idea. Each list is about a different part of the idea. In list 1, they post an update after every meeting. Each update gets its own card.



To add a card, there will be an option to “add a card” under the list topic or existing cards. For example, if we wanted to add a new update to list 1, we could just click on list 1 and click the “add a card” option when it comes up.

## Things you can do with cards

Since cards are a place to talk about specific steps in a plan or specific parts of an idea, they have a lot of features. These features can make it easier to keep track of things. Some of the things you can do are:

- add documents
- add comments
- tag people
- set deadlines
- make checklists.

**Media call 2/11/16** in list Public outreach X

Due Date  
**tomorrow at 12:00 PM (due soon)**

[Edit the description...](#)

**Attachments**

talking points.docx  
Added a minute ago [Download](#) [Delete](#)

[Add an attachment...](#)

**Prep** [Delete...](#)

0%

Talking points  
 List of questions they might ask  
 Practice session at organization meeting

[Add an item...](#) [Share and more...](#)

**Add Comment**

KM  @ Smiley face More options

**Save Comment**

**Add**

Members  
 Labels  
 Checklist  
 Due Date  
 Attachment

**Actions**

Move  
 Copy  
 Subscribe  
 Archive

## Adding documents

First, let's learn how to add a document. Adding documents can be helpful if you have a document you want everyone on your team to read. It is hard to write long things on Trello, so adding a document can be easier.

For example, if the group working on inclusion in schools wanted their group to read a letter from the Department of Justice about inclusion, they could attach it to the card with the most related update.

Adding documents is a multi-part process. First, you have to go to the card you want to add a document to, and click "add attachment." Then, you have to find the document on your computer or wherever else you put it. Select the document, and click attach.

This is a card. Drag it onto "Tried It" to show it's done.  
in list Stuff to try (this is a list)  
  
Edit the description...  
  
Add Comment  
KM Write a comment...  
Save Comment  
  
Activity  
KM KIT MEAD removed Checklist from this card just now  
KM KIT MEAD added Checklist to this card 2 minutes ago  
Trello added this card to Stuff to try (this is a list) Jan 9, 2015 at 1:37 PM  
  
Add  
Members  
Labels  
Checklist  
Due Date  
Attachment  
  
Attach From...  
Computer  
Google Drive  
Dropbox  
Box  
OneDrive  
  
Attach a link  
Paste any link here...  
Attach  
  
Tip: With Business Class you can attach conversations from Slack, pull requests from GitHub and leads from Salesforce.

## **Adding comments**

You can also add comments to a card. Comments can be a good way to update other people about the step or idea you are working on for that card. For example, in Card 3, the group is trying to write an elevator speech for their visit with the state senator. Person adds a comment to the card to share their idea for a speech.

The screenshot shows a card titled "Elevator speech" in the list "Legislative meeting 2/19/16". The card has a "DOCX" attachment named "elevator speech.docx" added just now. A comment is being typed by user "KM": "I really think this is on the right track. I would add a brief introduction to who you are before you start talking about everything else." Below the comment input field are "Save Comment" and "Cancel" buttons. To the right of the card are "Add" and "Actions" panels. The "Add" panel includes options for Members, Labels, Checklist, Due Date, and Attachment. The "Actions" panel includes Move, Copy, Subscribe, and Archive options. The "Activity" section shows a recent action by "KIT MEAD" attaching the document. The "Share and more..." link is visible at the bottom of the activity list.

To add a comment, go to the card you want to comment on. Scroll down to the section that says "Add a comment." Type in your comment, and then click "save comment."

A close-up view of the "Add Comment" input field from the previous screenshot. The text "I really think this is on the right track. I would add a brief introduction to who you are before you start talking about everything else." is visible in the input area. Below the input field is a "Save Comment" button.

## Tagging people

You can also tag people on a card. "Tagging" someone lets them know when you're mentioning them or talking about something you want them to see. If several people in your group are working on the same topic, you might want to tag them all on the same card. For example, Person A, Person B, and Person C are all working on inclusion. Person A tags person B and person C so that they can see everything that gets said on the card.

The screenshot shows a digital workspace interface with a card titled "Elevator speech" in a list "Legislative meeting 2/19/16".

**Attachments:** A DOCX file named "elevator speech.docx" was added 5 minutes ago. It has download and delete options.

**Add:** Options include Members, Labels, Checklist (checked), Due Date, and Attachment.

**Actions:** Options include Move, Copy, Subscribe, and Archive.

**Add Comment:** A comment from user KM says: "I really think this is on the right track. I would add a brief introduction to who you are before you start talking about everything else. @Person B and @Person C, can you do that?" There is a "Save Comment" button.

**Activity:** User KIT MEAD attached "elevator speech.docx" to this card 5 minutes ago. User KIT MEAD also added this card to the Legislative meeting 2/19/16 an hour ago.

**Share and more...**

To tag a person, you can do three different things. One way to tag a person is to click on the card you want them to see, and then add a comment. When you add the comment, you can type the "@" symbol and then their email address. Or, you can click the "@" symbol manually where it is located at the bottom of the comment box.

The screenshot shows a digital workspace interface. On the left, there's a card titled "Add Comment" with a message from user "KM": "I really think this is on the right track. I would add a brief introduction to who you are before you start talking about everything else." Below the message are several small icons. To the right of the card is a vertical "Actions" sidebar with options: Move, Copy, and Subscribe. At the bottom of the card is a green "Save Comment" button. To the right of the card, a modal window titled "Mention..." is open, containing a search bar with placeholder text "Search members..." and a message "No matching members". Below the search bar is a list of users. On the far left, under the "Activity" section, there are two recent events: one where "KIT MEAD" attached a file and another where they added the card to a meeting. The background of the workspace is dark blue.

The other way is to click the part of the card that says “members.” Start typing in their email address, and add them when they come up.

This screenshot shows a similar digital workspace interface. A card titled "Elevator speech" is displayed, listing an attachment named "elevator speech.docx" added 5 minutes ago. There are download and delete buttons for the attachment. Below the attachment section is a link to "Add an attachment...". Under the "Add Comment" section, a message from "KM" is shown: "I really think this is on the right track. I would add a brief introduction to who you are before you start talking about everything else." The "Actions" sidebar on the right includes Move, Copy, Subscribe, and Archive. A "Share and more..." link is also visible. The "Activity" section shows the same recent events as the previous screenshot. The overall layout is identical to the first screenshot, with a dark blue background.

## Adding deadlines

You can also give cards deadlines. If a certain step in your project needs to be done by a certain date, you can put that date on the card in order to make sure it gets done in time. For example, if there is a hearing about inclusion in school, you might need to prepare your groups' testimony by a certain date. You can make the card remind you about when the date is.

**Tasks to do before then**

in list [Legislative hearing just scheduled today, 2/2/16, for 2/23/26](#)

Due Date  
[Feb 19 at 12:00 PM](#)

[Edit the description...](#)

**Testimony draft** [Delete...](#)

0%

- Testimony outline
- Full draft of testimony
- Practice session

[Add an item...](#)

[Add](#) [X](#) [▼](#)

**Add**

- Members
- Labels
- Checklist
- Due Date
- Attachment

**Actions**

- [Move](#)
- [Copy](#)
- [Subscribe](#)
- [Archive](#)

[Share and more...](#)

**Add Comment**

KM Write a comment...

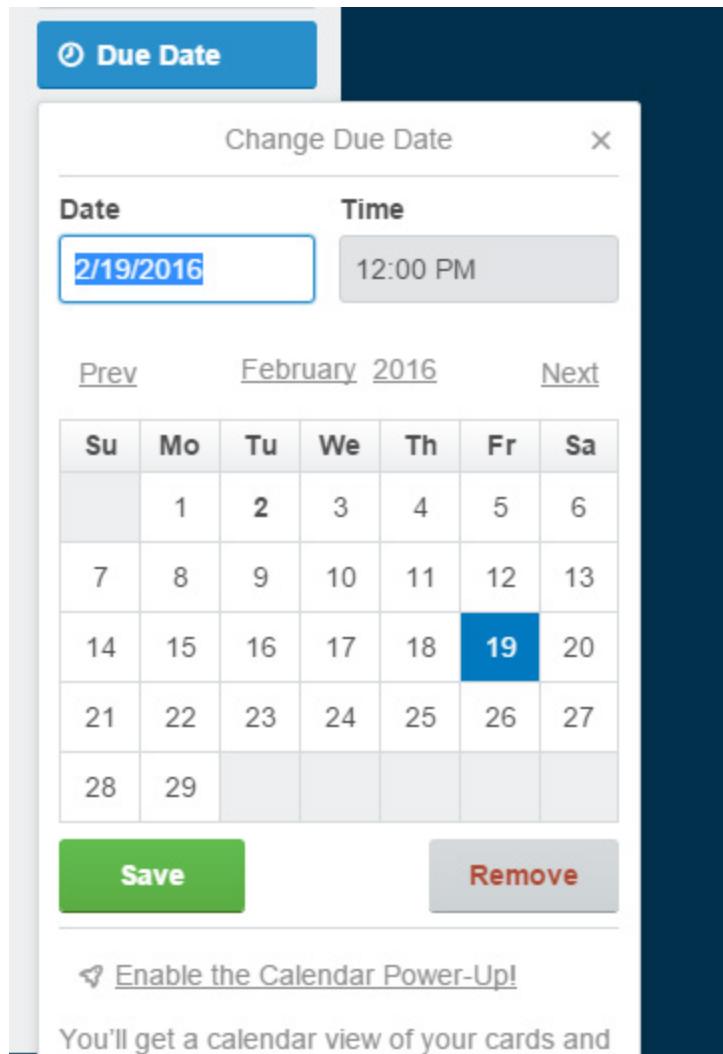
[Save Comment](#)

[Activity](#)

KM KIT MEAD added Testimony draft to this card a few seconds ago

KM KIT MEAD added this card to Legislative hearing just scheduled today, 2/2/16, for 2/23/26 2 minutes ago

To give a card a deadline, click on the card and then click on “due date.” Click a button and then click “save.”



## Adding checklists

The last thing you can do with a card is make a checklist. This is useful if there are a lot of parts of a step or an idea that you need to keep track of. For example, before the Georgia self-advocacy organization can go to their legislative meeting, they need to make sure they are prepared. On the card for the meeting, they can create a checklist of everything they need to do before the meeting. As they do things, they can cross each item off, so they can see what has been done and what still needs to be done.

**Progress made before meeting** in list [Legislative meeting 2/19/16](#) X

[Edit the description...](#)

**to do list** [Delete...](#)

0% [progress bar]

Elevator speech  
 Fact sheet  
 coalition letter  
 practice session

Add X (dropdown menu)

**Add Comment**

KM Write a comment... (comment icons)

Save Comment [Share and more...](#)

**Activity**

KM KIT MEAD added to do list to this card a few seconds ago

KM KIT MEAD added this card to Legislative meeting 2/19/16 a few seconds ago

**Add**

- Members**
- Labels**
- Checklist**
- Due Date**
- Attachment**

**Actions**

- Move**
- Copy**
- Subscribe**
- Archive**

To add a checklist to your card, click on the card you want and then click “checklist.” First, you will have to give your checklist a title. Then, you will be able to type in each item on the checklist you want. After you type in an item, click “add” to move on to the next one.

