

USING TRELLO FOR YOUR BUSINESS, AN EASY GUIDE

THE BUSINESS OF WEDDINGS



DECEMBER 2020

What is Trello?

Trello is a brilliant online tool for managing projects and tasks.

It is perfect to use if you are planning weddings and events so this month we will take a deeper look into Trello.

Most of you probably use Google Docs for your businesses unless you have a paid CRM system such as 17 Hats but keeping overheads down particularly when you first start up is important.

Trello is also super easy to learn, it does not take hours of trying out tech things and throwing your laptop out the window in frustration!

It is also a brilliant collaboration tool, use it with your team or clients.

All your documents for a wedding client can be loaded onto Trello without the need for constant emails with attachments.

Your clients have access to their personal Trello Wedding board and can check into it at anytime to see any updates. They also get notified if you make changes to their board, one less email for you to do.

You will notice the reduction in emails straight away in your business so it is definitely worth trying this out before the next wedding season.

In this introduction to Trello I am going to set up a clients board and show you with screenshots how I create boards and manage them for weddings.

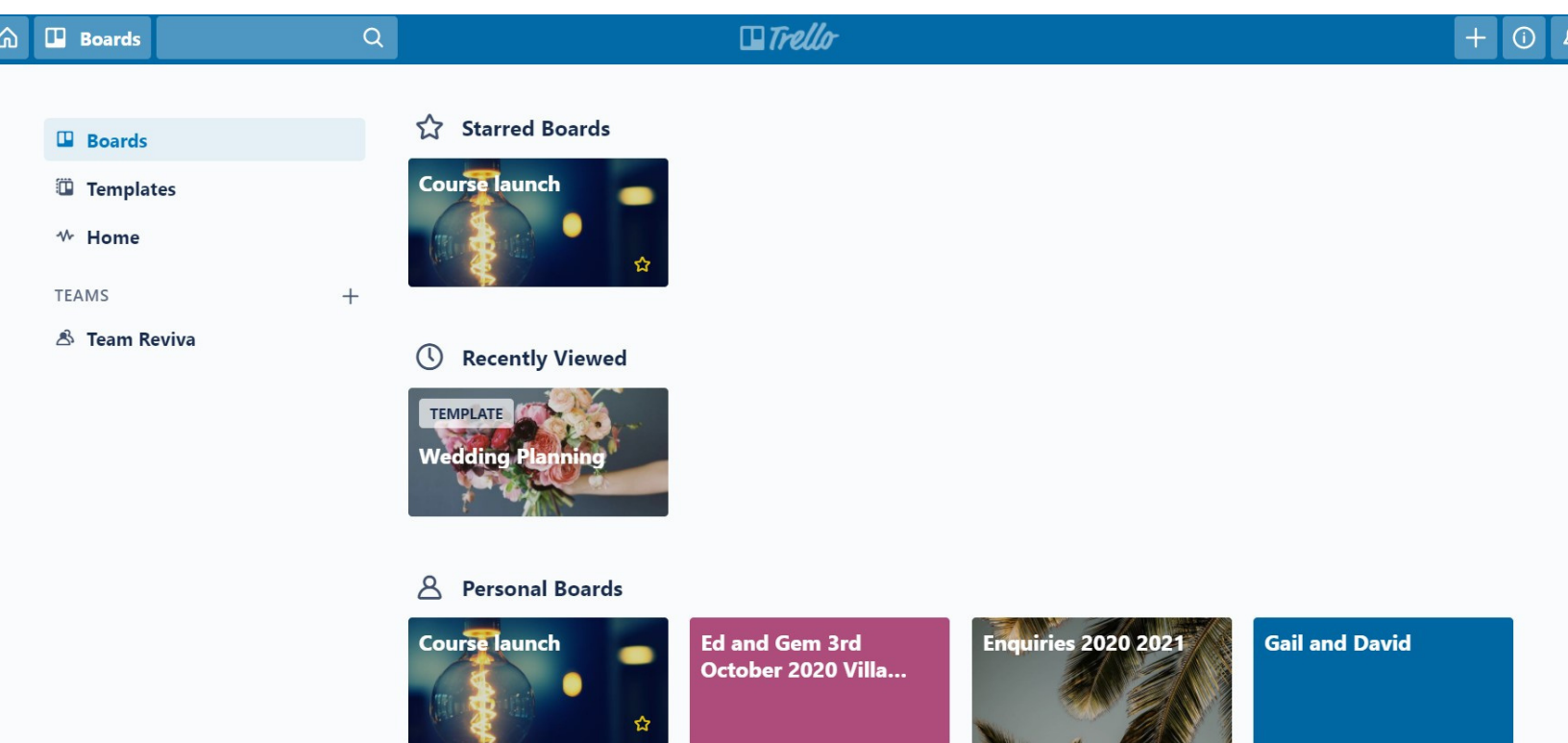
It is also a great tool to use for your personal lists, as much as I love a notebook and pen, Trello is also brilliant for making To Do Lists and even better sharing them with your team.

Do note I haven't used this for a year so it is rather outdated at the moment due to the pandemic but soon it will be full again of weddings and team boards.

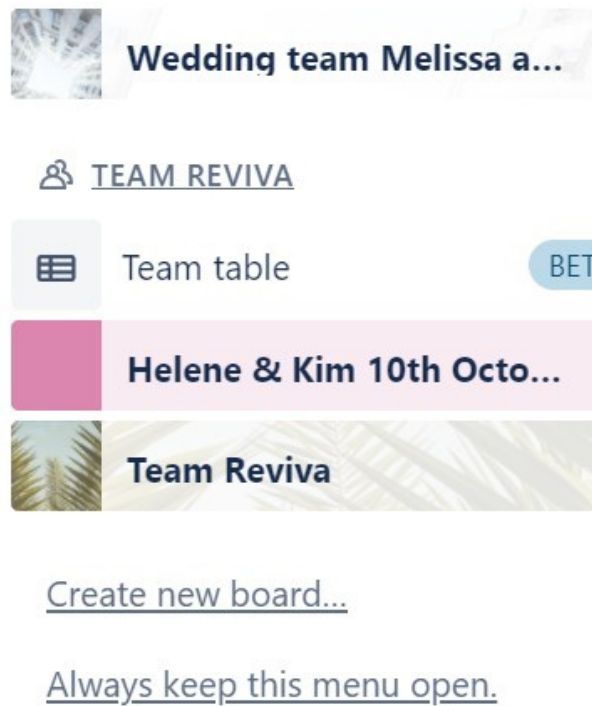
This is my Trello account and you will see here I have quite a few boards, there are a load more below this image of weddings that are now on hold until next year.

Start by creating a Trello account, if you plan to use it for business use your business email address to create your account and not a personal email address as your clients will be notified of changes you make to their boards via email from whichever email address you signed up with.

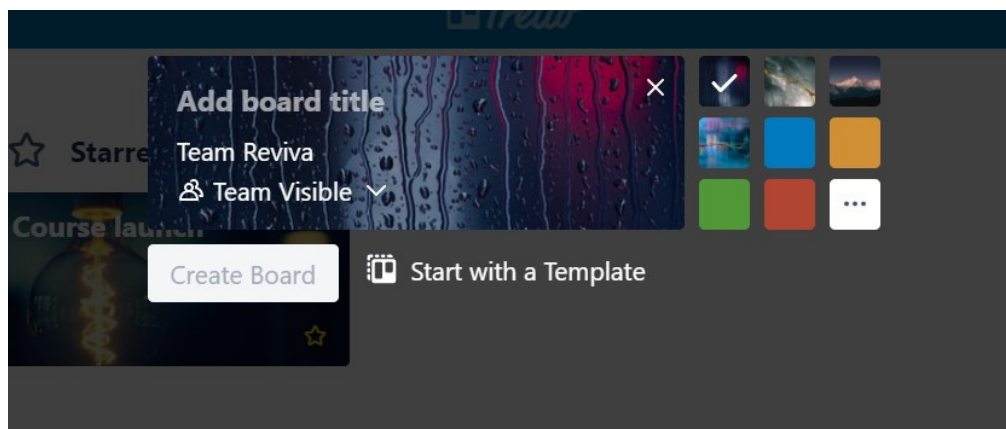
Once you have created your account you will see options along the top and really the only one you need right now is boards.



Click on boards and you will see an option to Create New Board. I am going to create one here for you to show you how to organise a board for clients.



At the bottom of the boards options you will see a create new board.
Click on this.

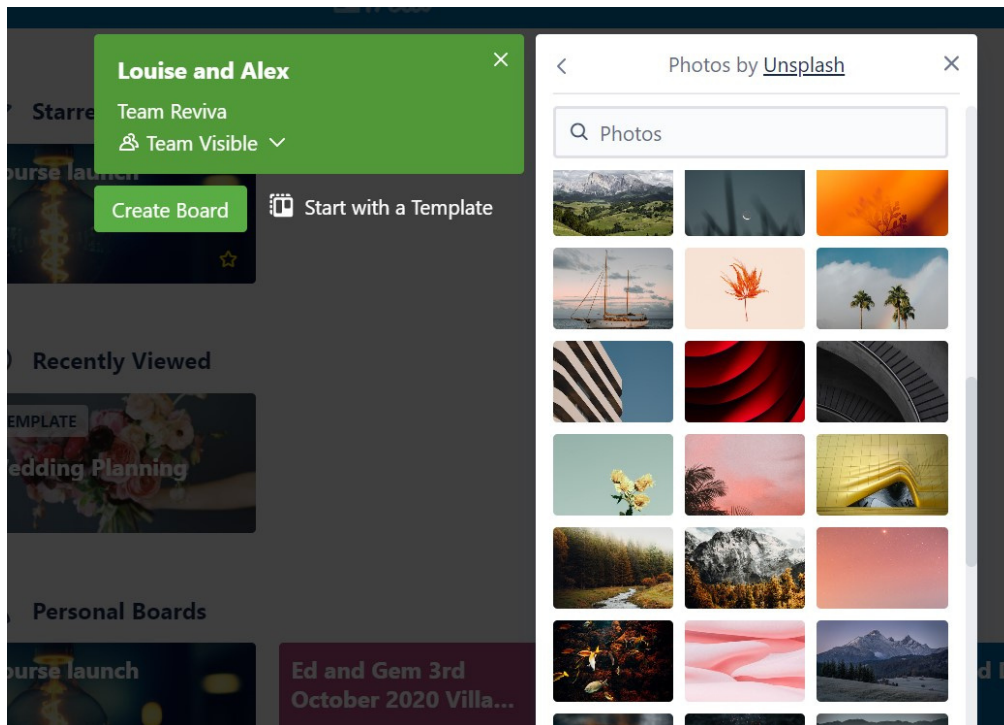


This is what you will see come up, so you add a Board Title.
If it is for a couple I put their names and wedding date.

You can also choose a template but you don't need this yet,
just get to know how it works and if you like it first.

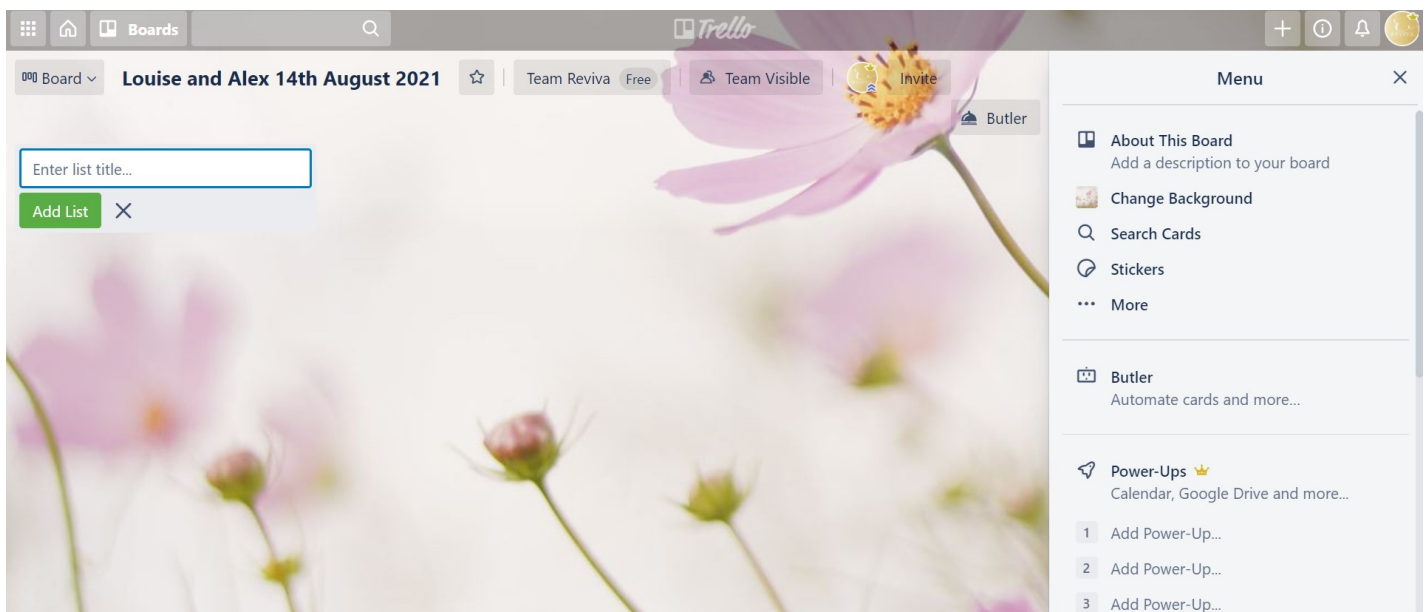
You can choose a colour or background for your board by selecting the options
on the right.

CREATING A TRELLO BOARD



Here I have created a board for a new client, I can amend it at anytime but I have selected photos to choose a background and also added their wedding date.

You will see the Team Reviva, and Team Visible I will explain this later.
Here is my new clients board so now we will start adding lists.



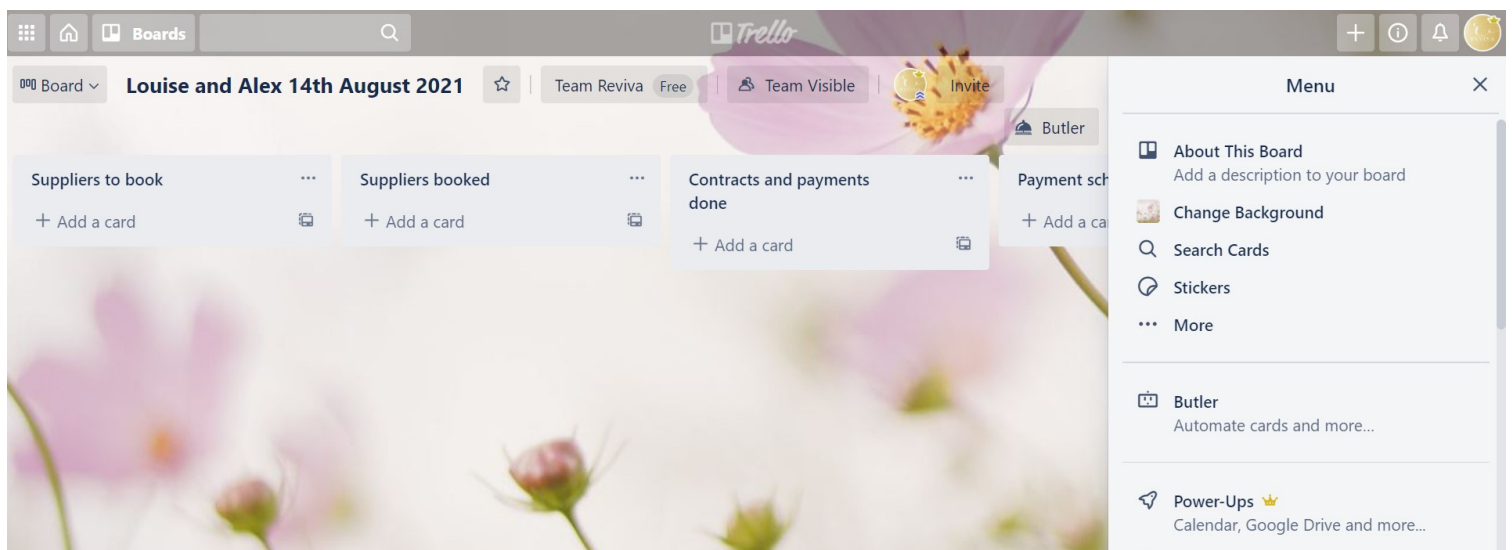
At the top you will see Enter list title.

Depending on how you wish to work you start to plan out columns.

As an example I have created a few lists for you to see how it works. Suppliers to book, Suppliers booked, Contracts and Payments Done, Payment schedules to do.

You can also add in all sorts of list titles for example order the lists under each category so often for weddings I have a Venue list, Entertainment list, Decor list and all the relevant subjects, invoices and paperwork are filed under each list.

Once you have created your first list just click underneath it Add list and it will create a new one to the right. You can move the lists around once they are created too just by dragging them along so they are in the right order or you need to change them and make the priorities show first. This will become relevant as you move from the booking suppliers to finalising the wedding day details.



The Team Reviva means that all my team members have access to this clients board

You simply add them in with their email addresses and invite them to be a team member on the board so they can also add changes, load up information and make comments.

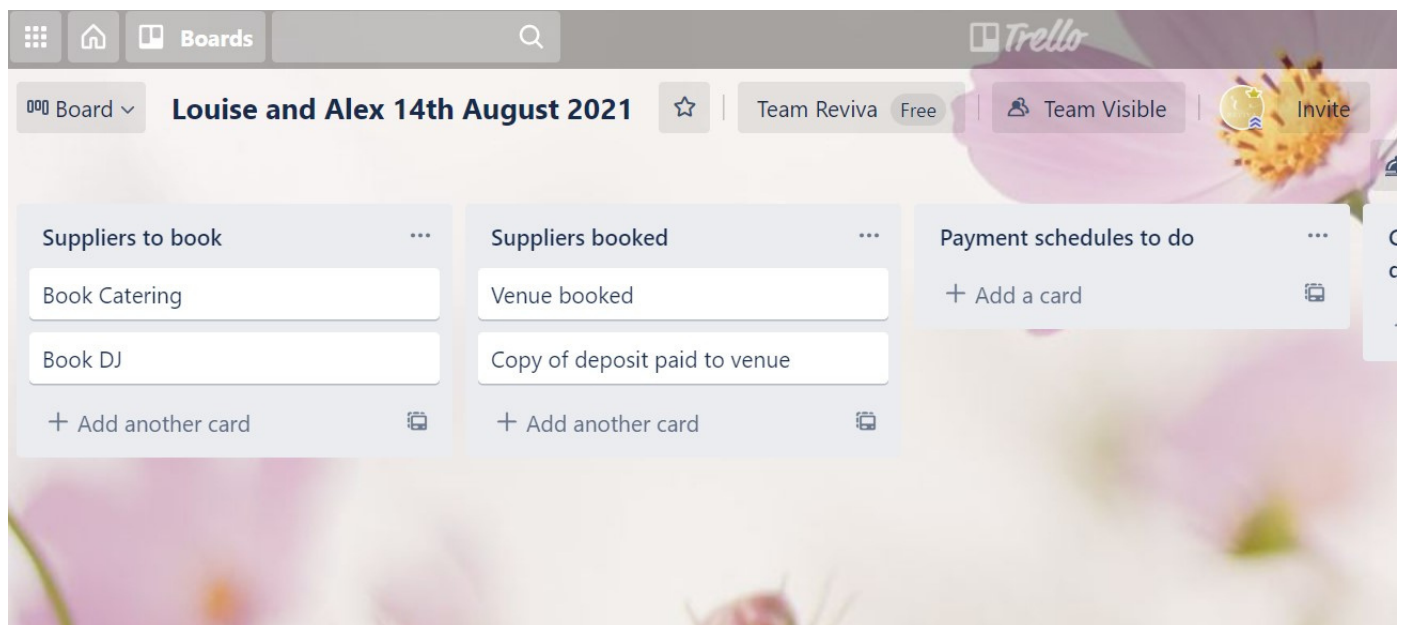
Team visible means they can see it, if you want a private board then you change this to Team Private and only the invited members can see this. This is useful if you have just one or two members of your team working on a particular wedding.

Now your lists are created we are going to start adding cards to each list.

Click add card and write a description of the tasks you or your client need to do under each list. Here I have just created a few examples, such as catering to book, DJ to book. Then I have added Venue already booked and I will show you how to add the venues contract and payments made.

You can design your own Trello boards to what works for your weddings but this is just an example based on a wedding planning management.

If however you are a photographer, cake designer, entertainer or caterer you can use your lists as clients folders and keep all the relevant information for that client in there. It maybe they have sent you images, you want to keep a copy of their contract or track deposits made.

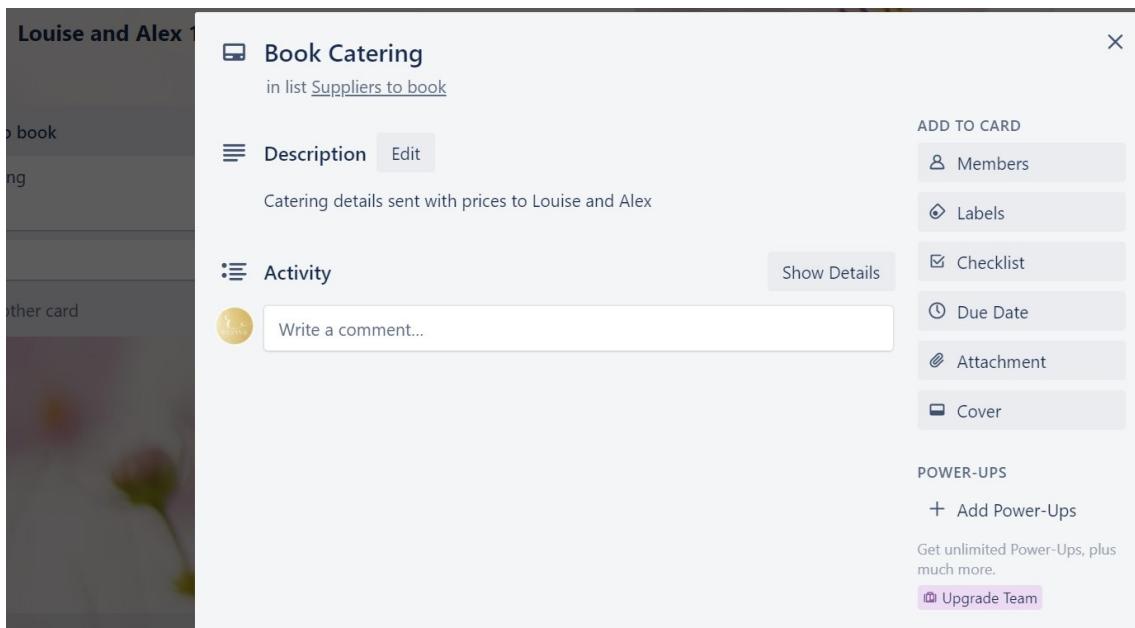


If you offer wedding styling, are a florist or stylist you could use boards to make shopping lists of all the items you will need for their wedding. This will be a private board you create just for you.

Trello allows you to tick things off the lists or move them to a done list.

It is far easier than checking through clients folders on your laptop or checking through pages of notes you may have written but your Trello board is only good if you keep it updated and make sure you are using it properly.

Once you have created cards you can start to add in other details, so next I have gone into the catering card and just added Catering details sent to client.



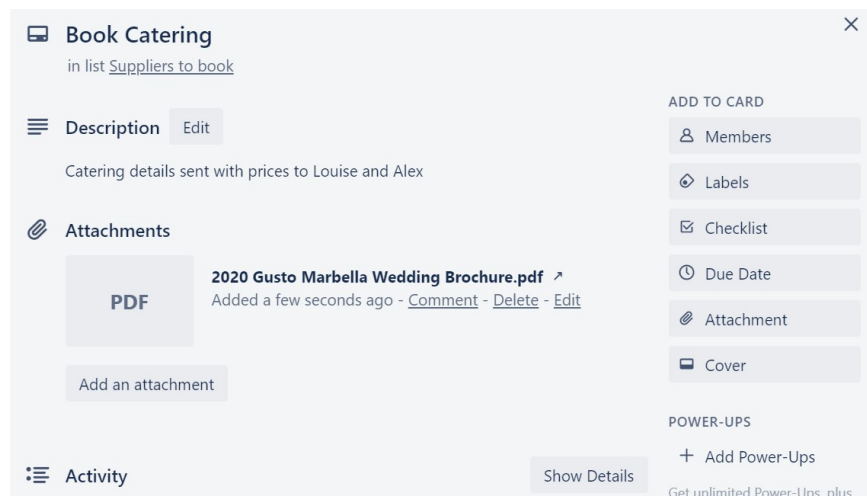
On your cards you will see a menu to the right.

Members are everyone who can see and collaborate on this board, you may wish to add the caterer to this particular once this is booked so they can see any updates and conversations.

Labels I will go into but you can colour code labels and mark up the lists.

Add a checklist, due date and a great tool is being able to upload attachments.

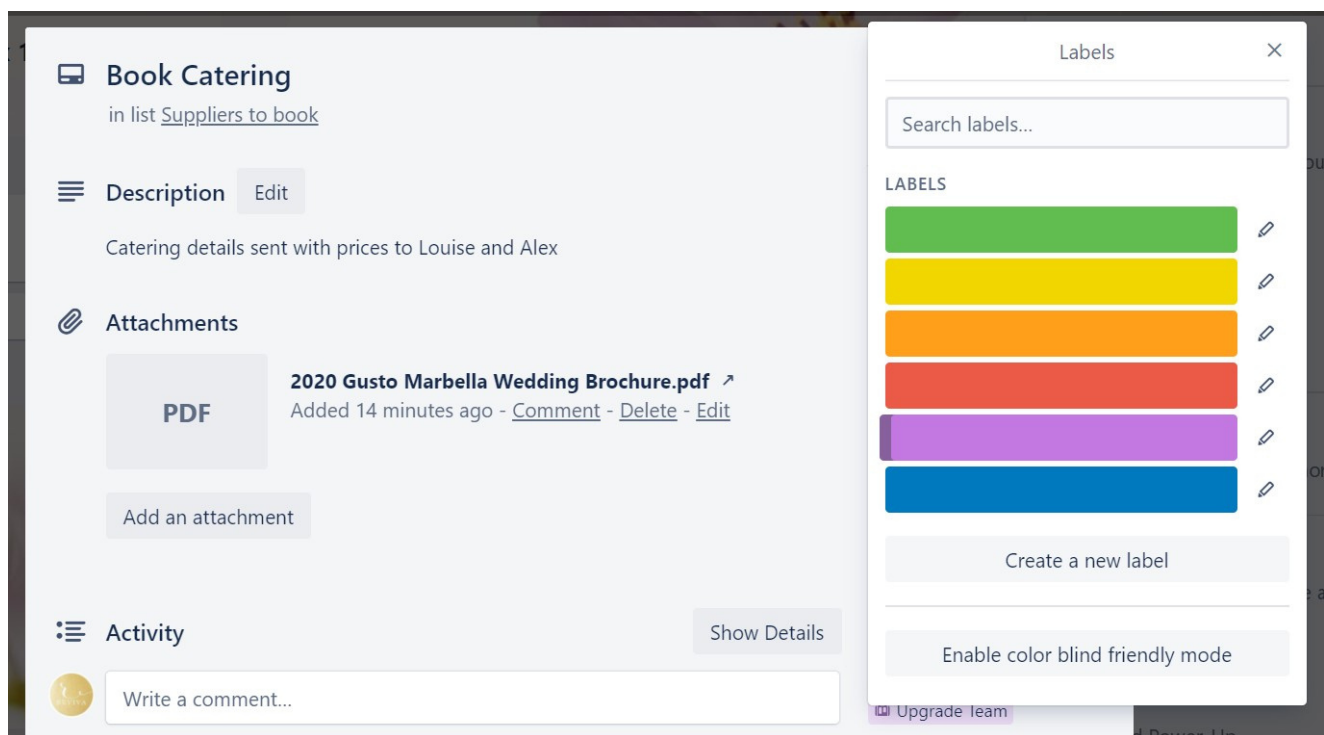
So if you have sent your clients the catering details on email or are just using Trello without email then you just add the catering details here. The image below shows the attachment now on the list as a PDF of the catering sent to that client.



USING A TRELLO BOARD

Can you start to see the difference in reducing your email time is just with these few tips? You don't have to email the clients details, you just load the information onto the relevant board and they will receive a notification via email that the board has been updated.

You don't have to email suppliers, you can add them to a card so they can see updates. By all means email clients and suppliers as well if you want to be super efficient but I can guarantee this will cut your email workload down by half.

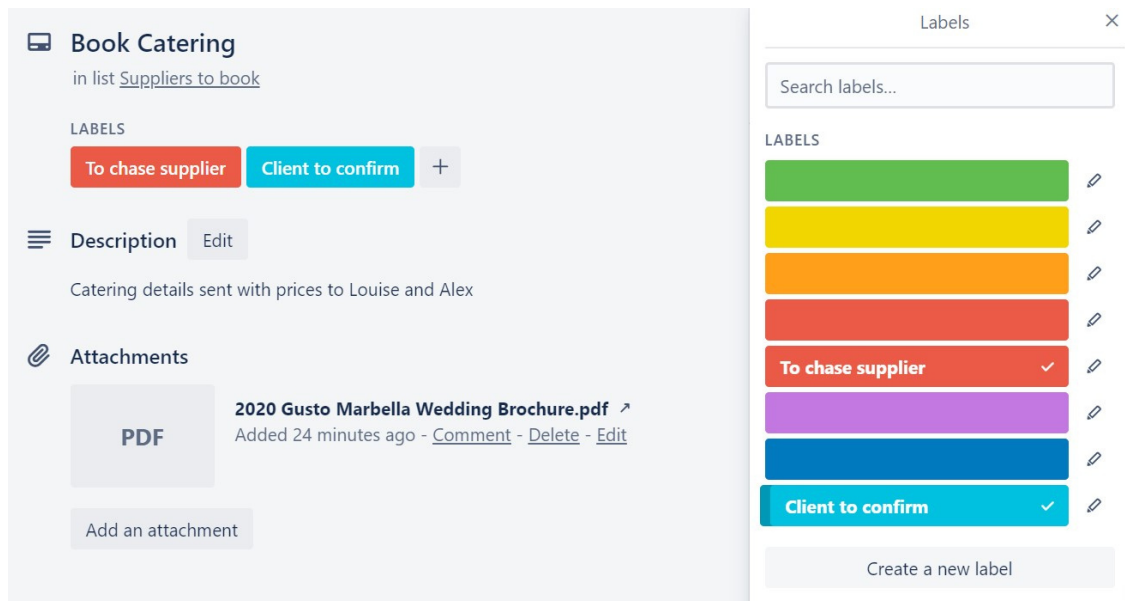


Once you have created a card you can add labels which is really useful. I use these to assign tasks and current status,. Which would be supplier contacted waiting response, details sent to client awaiting response so here I will add a few labels so you can see how you could use them to mark up the status of your cards.

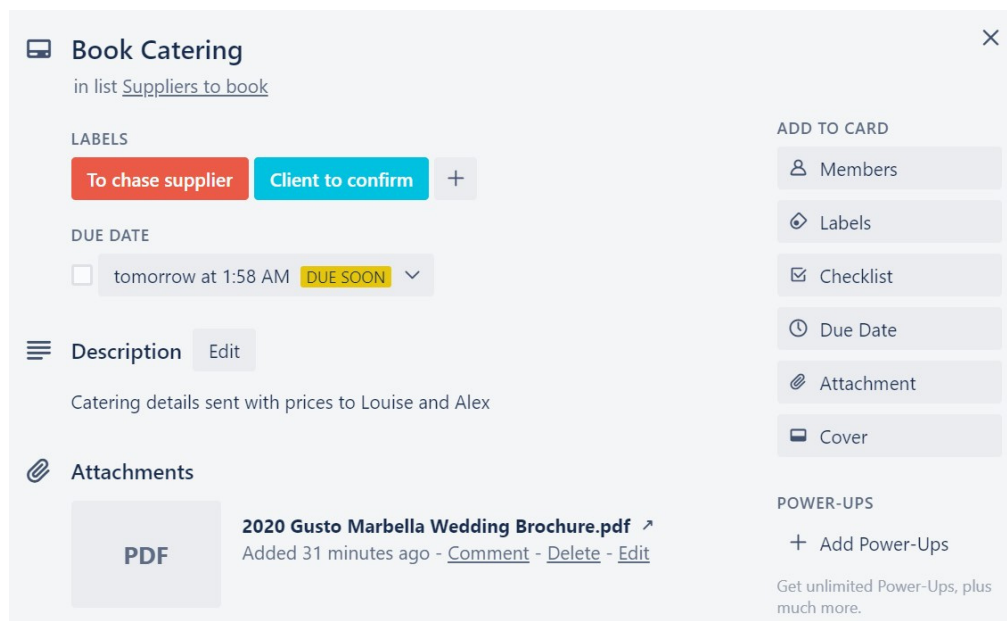
In the image above you will see the option to create a new label, click on this and choose a task or comment and make sure you use the same colour for each comment.

As an example 'chase supplier' mark as a red label.

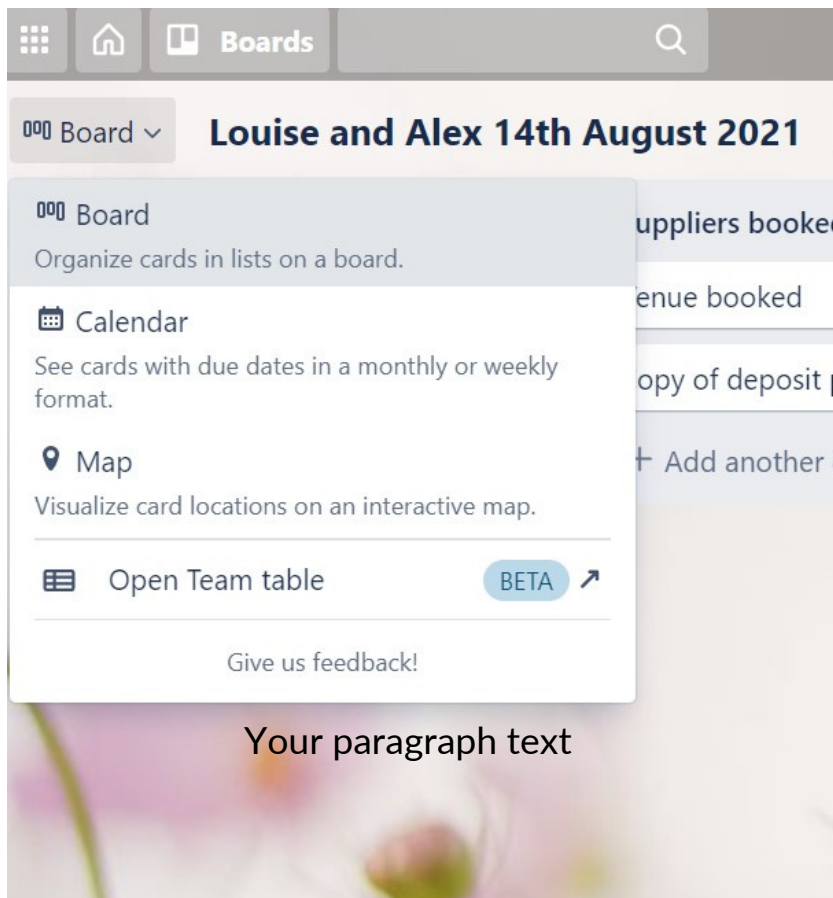
You can quickly add labels instead of emailing clients to explain the status of each task. A huge time saver and clients can see any progress of their wedding without you having to report in all the time if their Trello board is being updated.



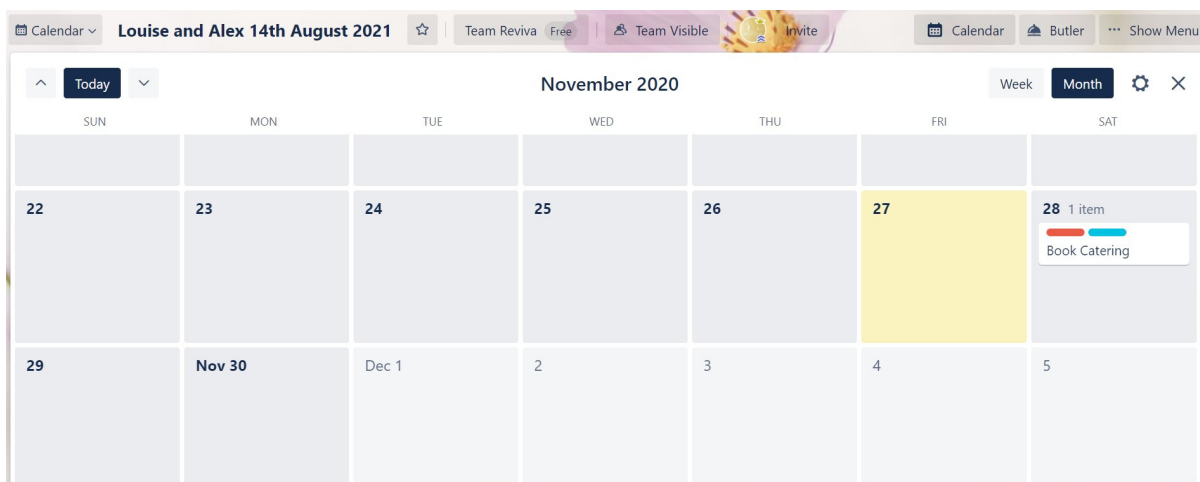
You can also add due dates to tasks, here we have added a due date to the catering card and you can check the calendar within Trello for anything that is due to be paid or completed by you or the clients. Click on Due date on the right and add the date this card needs to be completed by.



When you add due dates you can check the calendar in Trello, go to board and click and you will see the calendar option.



If you want to check what is due, tasks, payments, calls, etc and you have added due dates onto your cards they will show up in the Calendar on Trello. Just click on the link in the calendar and it takes you straight to the card with the details on it.



A SUMMARY OF TRELLO

I hope you enjoyed this introduction into Trello, it really is a brilliant tool for both business and personal use.

It is free, I don't believe in over complicating things and everything can be housed into one platform.

You can create individual clients boards that are easy for them to use too without causing overwhelm if you have busy clients they prefer this and the more tech challenged are often able to navigate Trello.

It literally cuts your email time in half, just popping invoices, statements, comments and updating each clients board takes maybe 30 minutes a week without having to constantly be sending them emails to say hello and explain what you are doing.

Clients can see you are working on their wedding even if you just pop a few labels on there such as chasing the supplier for updated quote.

We all know how many hours it takes chasing in quotes and answers from suppliers and by using Trello clients can see you are being productive.

You can also download the Trello app to your phone so even when you are out of the office attending to weddings you can quickly update the boards on there or answer clients questions without having to use your email.

