Your Trello Tour and How To Upload Your Tasks

Hi! this is Katerina from Get it Done for Me Virtual services. This is your overview of Trello. This is how we do our board management and our client task management.

This is a free tool that you can get and when you sign up to use our services then you will be given a link to your own Trello board. Now, this is what Trello looks like before you've signed up and before you've logged in.

What's going to happen is you're going to be sent a link and email from our staff and in that email there's going to be a link to your trello board and I want to make sure that you use that link because that way we will always know what username is going to be attached to your board.

Some people have signed up for Trello a couple of times maybe in the past and they've forgotten about it. They forget their usernames and we're going to have issues with getting you on the right board which then is going take more time to resolve.

For the fastest (best practices) way, if you'll just wait until you get your email from us it will have a link to your Trello invite with that email. Now, if the email you gave to us is the same one that you have signed up with Trello before in the past, you still may not able to access your board if you have not confirmed your email address with Trello.

What's going to happen: you'll first get an email from us with the Trello link and it's going an invite to Trello link you're going to click on that.

You're going to create your free account.

You never have to pay for anything in Trello as of the time of this recording anyway.

Then after that we’re going to attach you to a board.

This is what trello looks like without you being signed in.

The main thing to remember is when you have it you have to confirm your email address to make sure you're not a robot or a spammer or a spambot or something like that.

After you signed up, go back to your email and look for the email from trello and click on the one called “confirmation”.

This is what that looks like now.

What's going to happen is you're going to sign up your trello will look like your trello which will be different than my Trello.

I'm going to show you what my Trello looks like right now.

This is with a lot of boards on the Trello application already. I have lots of different kinds of boards and that can go on forever. You can have as many boards as you want. We just have lots of different boards here for different things. I use it for personal use, and for business and everything.

If you've never use a trello before, you will only see your board. So you only see one of these little boards. These are called boards. Everyone of these rectangles that you see is called a board. If I click on it, it will open up into more things.

So for instance, if I click on let's say my 30 day SEO challenge here is a business and so if I open this up this is what an inside of a board looks like. Now each one of these columns here, trello calls those lists but to me they don't look like lists so I call them columns.

These columns can be dragged to where ever you need them to be. See I can take them and drag them around with just my mouse you see that.

And on each list there are cards so I can open up a card and then I can add more information to the card. I can also take the card and move it. If I don't like it there then I can move it over here or maybe it's a task and I want to put it under my done file.

I'm going to show you what a board looks like when you first get started or when we're working on it. You're going to have a card called “feedback”. This is the most important thing for you to remember on what to do.

Once you have your board and you want to give us a task you will go to this feedback column on your board.

Then you're going to click: add a card and you're going to put a task on it.

Let's say you're going to do a lead magnet page. Let's just say the title of the lead magnet "Top ways Chiropractic helps you to relieve pain or relieve headaches quickly."

I'm going to put as much information, then I'm going to click add.

Now I'm going to go back because you haven't given us the task yet you've only written it.

So now, you're going to click on it, it's going to open up and here is where you can add whatever the task entails.

Maybe you have a bunch of images to use so you'll add your Dropbox link here or google drive that's how you can get your links.

You can use Dropbox link or you can use Google drive links just make sure we have access.

You're going to click save so this way it saves it every time.

You're going to come down here and add whatever else you might want.

Let's say "I want you to use my branding colors that are on my homepage at you know," give the URL.

You're going to write down as many instructions as you can then you click save.

Now you're going come over here to the comment. "This is a new task I need this done this pay period..."

Then what's going to happen you're going to click save but before you do that you're going to tag everybody involved.

I can't see me because I'm in here. You can't see yourself. You can't tag yourself. Click close.

I get your notification in my email, I will get a notification on my desktop and I get notified on my phone.

So we will always know very soon after so that we can take care of your request as quickly as possible.

Hopefully within the following business day we can assign it to wherever it needs to go.

So, that is how you give us the task. Please rewind it if I went too fast you can stop the video now, rewind it and you could practice along so you can make sure you learn how to add your feedback column.

Please refrain from going into another one of these columns to leave notes unless we specifically ask you a question in there.

The reason for that is because we don't always get, we know that when you tag us we need to go to feedback column.

We're all trained to go look on feedback.

If you're tagging us in other columns and other cards we may not get it, just remember that.

Sometimes there's necessity if we're working on something specific like a color and the brand and maybe that's not in the feedback column it can overlap a little bit but that's a conversation that we're starting and we're going back and forth with you on. But if you're initiating it please always do it on the feedback card.

The next thing that I'm going to show you are some different boards. I'm going to show you here, this one is for a podcaster. This is a podcaster that we work with and this is kind of how the workflow goes and I wanted to show you kind of what that looks like. So this is all the login information we need for everything else.

This is in-house so our log-ins we will apply to all the different sites that you're using or if you're hiring us for SEO for all the sites we need to use for you.

If you don't have a site that we use don't worry about it because we will create one for you. You don't have to go around creating them we will do that for you saving you a lot of time.

The next one is current information- that's for internal purposes.

This is the column you want to pay attention to, your output. Your output column: what happens is after we get your task, we create a task for the VA's to do.

We go down all the way here to the bottom we all see that these are our current tasks and our current pay period which has just started so we haven't done all of these things yet.

These are tags with different colors but you don't need to worry about those are just signifying the different VA departments we have.

But you do want to know about is this medium blue that you see that means the task was completed.

Blue means the task was completed and that's how you get to see how you're task flow is moving along and also see what’s been accomplished.

We like to have transparency with our clients and we want you to understand that we want you to be involved.

Of course we don't want you to micromanage and you need to be going out selling, doing the high level tasks but because you might be working on a funnel or maybe an email autoresponder program or maybe you are a realtor and you have a listing that needs to be marketed. You might want check and see how we're coming along with that.

We don't send emails with updates. One of the reasons we get to keep our costs down is by using these kind of systems to save a lot of time and hours otherwise a lot of your hours would get eaten up with people doing admin tasks and you don't want that.

Then we have different outlays for different important things, here's feedback, and you'll see there's a lot of feedback going on there.

We also have a column for all of your invoices. So every time you pay we take a screenshot mark the pay period and then add it to your invoice column so you can come in and print it for taxes or whatever purposes that you need it for.

When we're working with a lot of graphics like media files and things like that we will create columns just for those and they will be linked to your output cards.

You can always come and see and know what we're doing and what's going on so these are a lot of things that we're working on. So that's for a podcaster.

I'll show you now for a board for this is for a business coach. Actually she coaches creatives, she coaches people like singers, website designers, designers, clothing designers, actors, and photographers, people like that.

So again we've been working for a while and she does lot of Facebook lives. Again we have her login column and we have her output column.

Output column again you can see as we go along that the tasks are being done. With her, we have a lot of visuals and we have a lot a specific content that we need divided up.

Here we have Facebook live backlogs and then her current Facebook lives because we went through before she had a VA.

She had all the work that was from all the times she did Facebook lives before she met us.

So we have all of that going on and then she has her current Facebook lives going on and of course her feedback and she's very good coach.

If you ever need a coach and you are a creative, she's excellent.

Another one, I am showing you another board and this one is for a real estate agent.

If you're a real estate agent or broker we have the same information going on; doesn't matter what niche you're in. We're going to have a lot more visuals because real estate of course is very visual.

So this client orders a lot of hours from us to maintain her website, to do SEO for her, pinterest, listing marketing, Facebook marketing, twitter marketing.

We do a lot of SEO for her, a lot of website work; so there's a lot going on in here as you can see. Again, on this column were we have a lot of these visuals showing so she can just click it and go through and see what we're doing.

So there we go, that's how we do that.

That's a tour of your trello.

Hopefully that shows you how much we can do for you.

There are many many different tasks we can do.

You can see we do SEO, Pinterest, Facebook, twitter, and linkedIn as well. We do listing marketing for her, we do youtube, SEO, specific SEO projects and so on and so forth. So there's a lot that we can do for you and help you in your business.

Go ahead and leave a comment below. If you want to share this with your friends and send this referrals I would love that.

Again, if you have any questions, text me at 561-502-1577. If you're international you can message me on Facebook Messenger. Just text me, let me know how you heard about me and text me your phone number and text me your email address.

Ready to get started? Take the next step…

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