

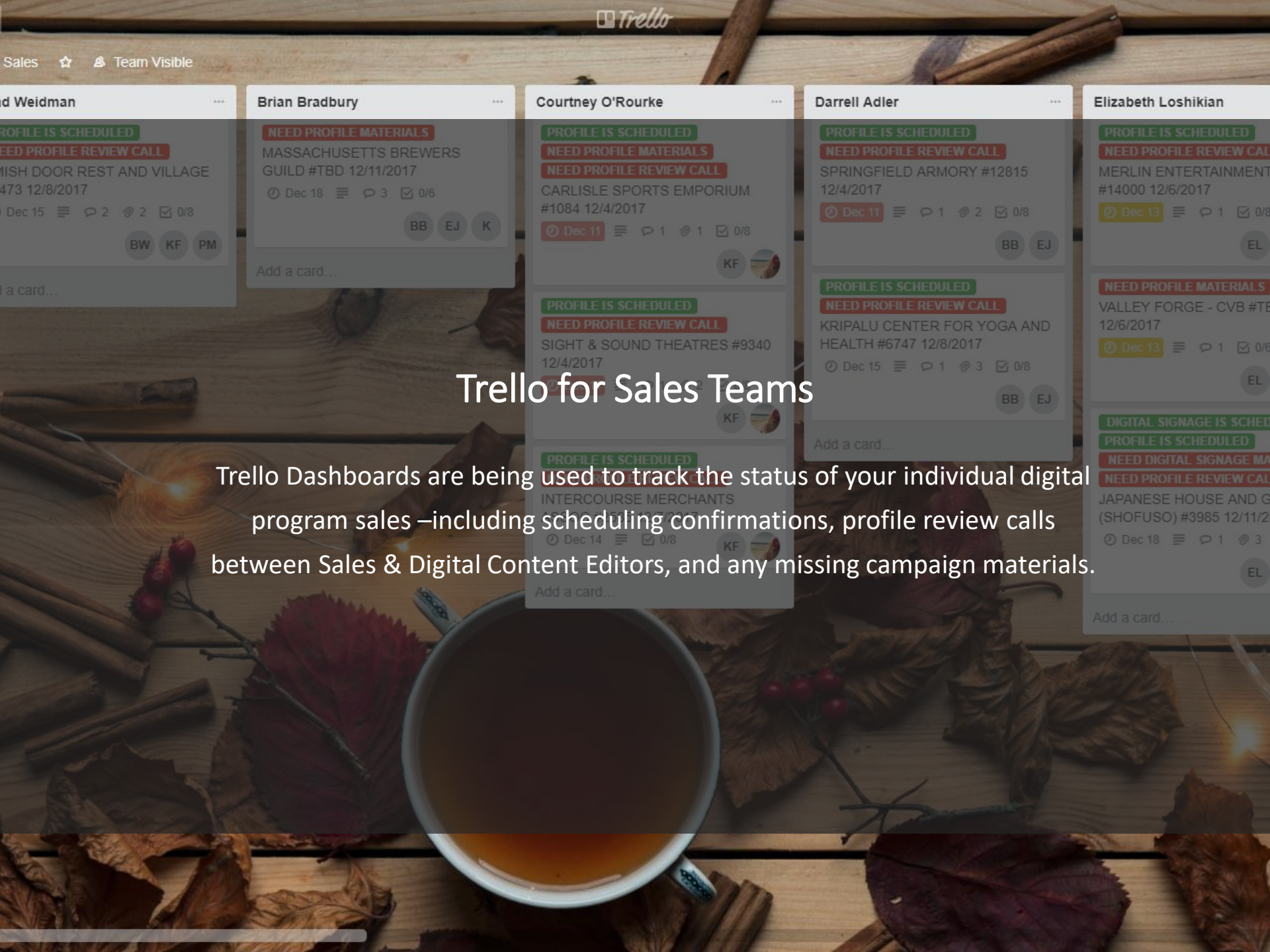


## What is Trello?

Trello is a collaboration tool that organizes projects into dashboards.

In one glance, Trello tells you what's being worked on, who's working on what,  
and where something is in a process.





**David Weidman** ...

PROFILE IS SCHEDULED

NEED PROFILE REVIEW CALL

WISH DOOR REST AND VILLAGE #473 12/8/2017

Dec 15 2 0/8

BW KF PM

**Brian Bradbury** ...

NEED PROFILE MATERIALS

MASSACHUSETTS BREWERS GUILD #TBD 12/11/2017

Dec 18 3 0/6

BB EJ K

Add a card...

**Courtney O'Rourke** ...

PROFILE IS SCHEDULED

NEED PROFILE MATERIALS

NEED PROFILE REVIEW CALL

CARLISLE SPORTS EMPORIUM #1084 12/4/2017

Dec 11 1 0/8

KF

PROFILE IS SCHEDULED

NEED PROFILE REVIEW CALL

SIGHT & SOUND THEATRES #9340 12/4/2017

Dec 14 0/8

KF

Add a card...

**Darrell Adler** ...

PROFILE IS SCHEDULED

NEED PROFILE REVIEW CALL

SPRINGFIELD ARMORY #12815 12/4/2017

Dec 11 2 0/8

BB EJ

PROFILE IS SCHEDULED

NEED PROFILE REVIEW CALL

KRIPALU CENTER FOR YOGA AND HEALTH #6747 12/8/2017

Dec 15 1 0/8

BB EJ

Add a card...

**Elizabeth Loshikian** ...

PROFILE IS SCHEDULED

NEED PROFILE REVIEW CALL

MERLIN ENTERTAINMENT #14000 12/6/2017

Dec 13 1 0/8

EL

NEED PROFILE MATERIALS

VALLEY FORGE - CVB #TE 12/6/2017

Dec 13 1 0/8

EL

DIGITAL SIGNAGE IS SCHEDULED

PROFILE IS SCHEDULED

NEED DIGITAL SIGNAGE MATERIALS

NEED PROFILE REVIEW CALL

JAPANESE HOUSE AND GARDEN (SHOFUSO) #3985 12/11/2017

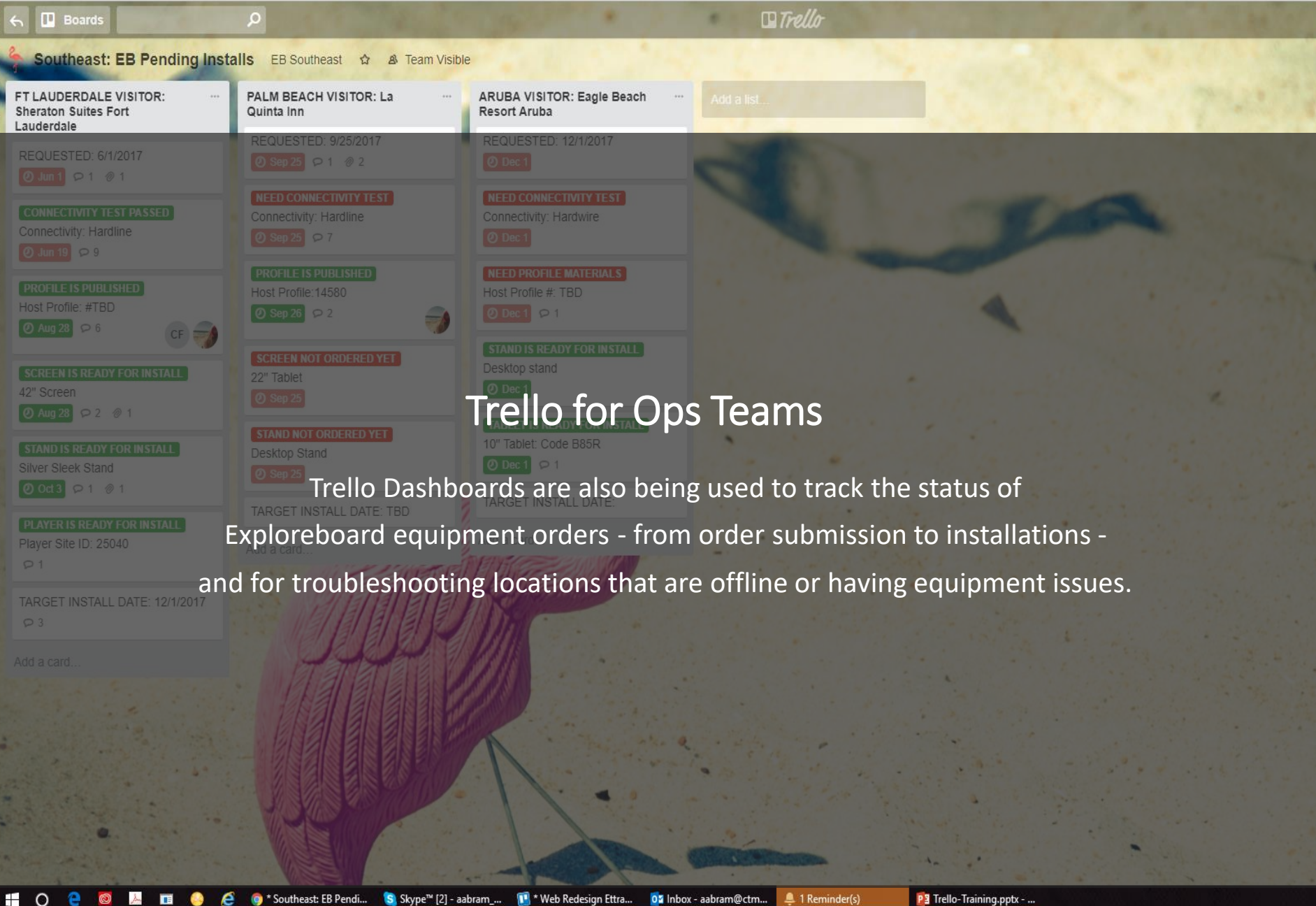
Dec 18 1 0/3

EL

Add a card...

# Trello for Sales Teams

Trello Dashboards are being used to track the status of your individual digital program sales—including scheduling confirmations, profile review calls between Sales & Digital Content Editors, and any missing campaign materials.



# Trello for Ops Teams

Trello Dashboards are also being used to track the status of Exploreboard equipment orders - from order submission to installations - and for troubleshooting locations that are offline or having equipment issues.

# Accessing Trello



## Trello Can be Accessed Many Different Ways

Trello is easily accessed through your preferred technology and synchronizes information automatically, so you're always connected to the latest status of your projects.

View current options here: <https://trello.com/platforms>



### Website | Trello.com

Sign in to your account and view your projects and tasks through your favorite browser including Chrome, Firefox, Internet Explorer or Safari just by visiting [www.trello.com](http://www.trello.com).



### Mobile | Apps

Download the Trello app from the Apple Store or on Google Play.



### Desktop

If you don't always want to have your browser window open to a Trello tab, simply download the Trello app for your desktop.



# Navigating Trello

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## 1 Boards

Think of a Trello **board** as a dashboard or bulletin board where teams collaborate on projects or shared goals.

Active Trello boards have names like:

- EB Issues
- EB Pending Installs
- December 2017 Digital Profiles
- Visitor Fun Article Ideas

## 2 Lists

With an overall project/scope or end goal in mind, we need to break down tasks into some “to-do” lists:

A **list** is a way to organize all the “to-do” tasks into groups or smaller bite-size projects on a board.

Inside a **list** (which is essentially a title or theme for a grouping of tasks) individual **cards** will be assigned.

## 3 Cards

**Cards** are the engine of each Trello board and where all the action is.

Each **card** holds all the details and communication records for each “to-do.” Cards are where we can track all the details, timelines and progress related to each task in a single **list**.

Inside an individual **card** we communicate with associated team members on timelines, specific tasks, checklists and even include attachments like PDFs, screen shots or photos.

## 4 Teams

To access content on a specific company board, which are set up for specific teams (not for general public access), you will need to be added as a **member** of the team assigned to the board/project.

You *will* need an activated Trello.com account to be added to a team board. Let the board administrator know your e-mail address or trello name associated with your profile so they can add you to a team.

If you are logged in properly and assigned to a Team, you should have full access to the tools available inside each card.

# Trello Board for Sales Teams

1

## Boards

The name of this board is:  
**DEC 2017 DIGITAL PROFILES**

2

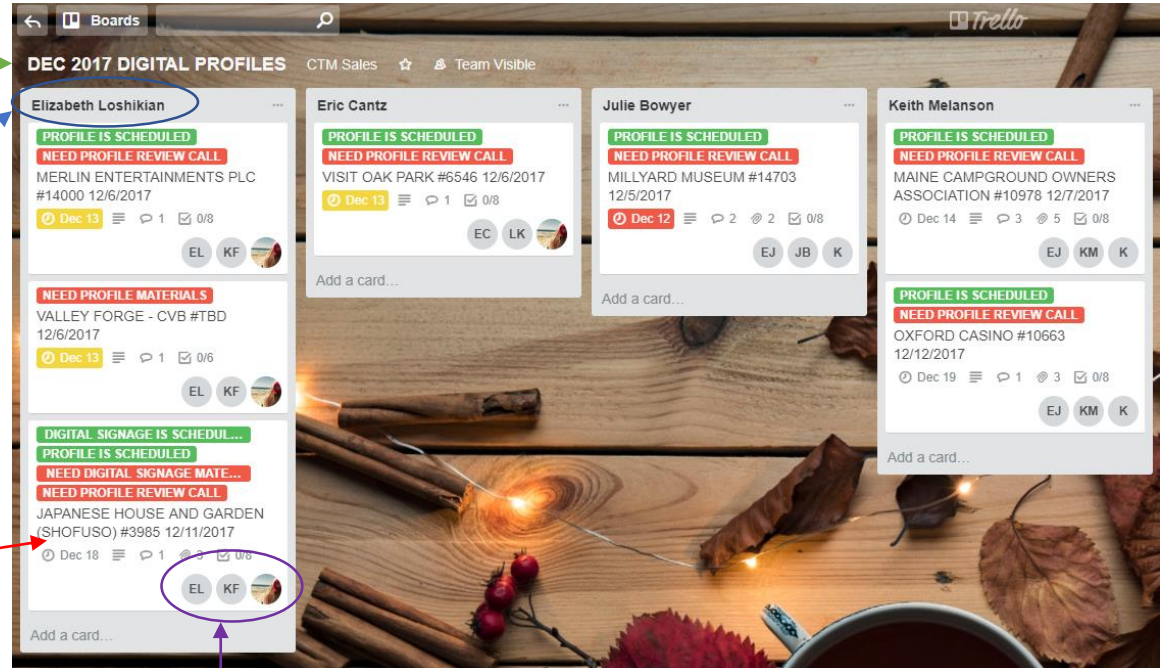
## Lists

Each Salesperson has their own List of Cards based on their contracts converted during that month.

3

## Cards

Each digital contract converted during the month has its own card, where all the details of the sale and the current status of the campaign can be viewed when clicked/opened.



4

## Team Members

Individual members of the team can be assigned to a card to follow all progress and receive e-mail alerts and/or push notifications on important updates.

# Trello Board for Ops Team

## 1 Board

The name of this board is:  
**CANADA: EB Pending Installations**

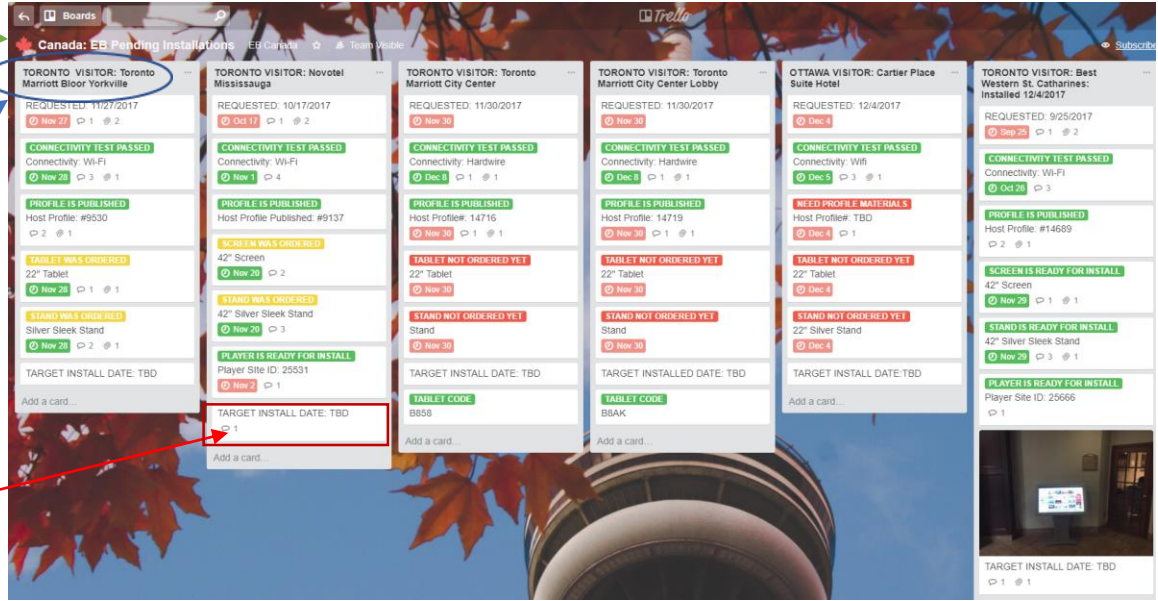
## 2 Lists

Each new Host Location has their own **List** of **Cards** based on all the tasks required prior to an EB installation

## 3 Cards

Each required task has its own **card** assigned to the list.

This is where all the details of the equipment orders, connectivity testing, host location profile creation and the current status of each item are stored and available for viewing when clicked.



# Trello Cards

## 1 Card Title

A card's title is what appears on the dashboard under each list when the card is closed.

## 2 Members

Team members assigned to the card are listed here and will be subscribed to all comments and updated related to the card.

## 3 Labels

Color-coated labels appear on the dashboard and inside each card. These labels are board-specific and quickly indicate any action items and the status of a project. *(Do not create new labels or variations of existing labels without approval of the board administrator. Labels are also used for project reports and are usually standardized.)*

## 4 Description

A more detailed description (including actual contract dates, Salesforce ID and the programs purchased) can be added for easy reference.

## 5 Due Dates

Assign deadlines for individual tasks. Reminder notifications will be sent as deadlines approach.

## 6 Comments

Comment fields are your chance to add your updates, notify your teammates of new developments and upload photos or other attachments.

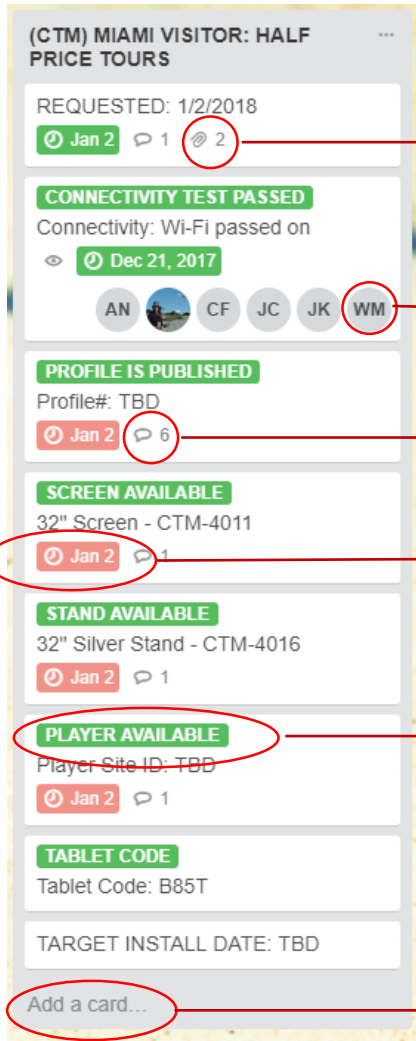
**Attachments can be loaded to a card using the paper clip icon in the comments section.**





## Communicating With Team Members

### Peek at What's Going On Inside A Card:



A paperclip icon indicates how many attachments are added to a card. Click the card to view them (and even download a copy of them!)

Users who have been assigned to a card, are subscribed to receive all updates/notifications that come through for the card as they happen.

The text balloon indicates how many comments are inside the card. Click the card to view comments and follow the discussions.

Deadlines may be assigned to a specific card. These will change colors and send reminders as they approach (or are met or missed.)

Colored labels can be assigned to cards to easily identify the status of a task from your dashboard at-a-glance. To see the actual label names, you will need to install a plug-in for your preferred browser (Chrome, Firefox, Safari, etc.) See FAQ page.

**IMPORTANT! Do NOT add comments to an existing conversation by adding a NEW card.** Keep all your notes/activity INSIDE the existing cards so team members can follow the discussion. A new card should only be created if you are adding an entirely separate/unique project to the list.

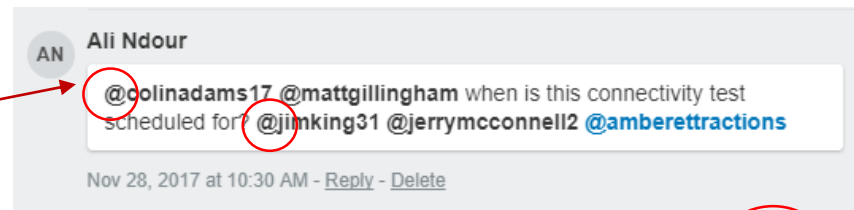
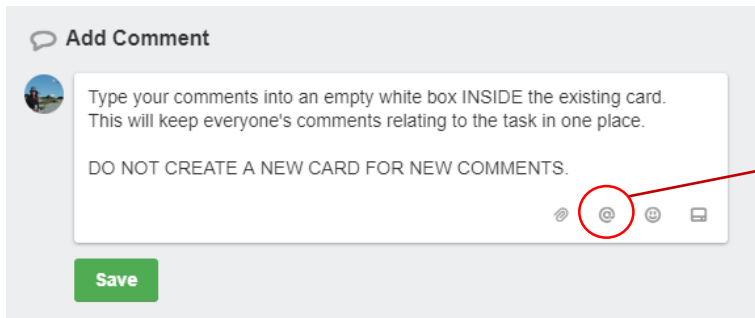
## Communicating With Team Members

### Commenting on Cards:

Click to open any existing card on the dashboard and view all activities and comments related to each “to-do” item.

To start or continue a conversation related to a specific card, just click to open up a card and start typing in the blank box in the section marked “Add Comment.” Use the paper clip icon inside the comment box to add any photos, images or documents to your message.

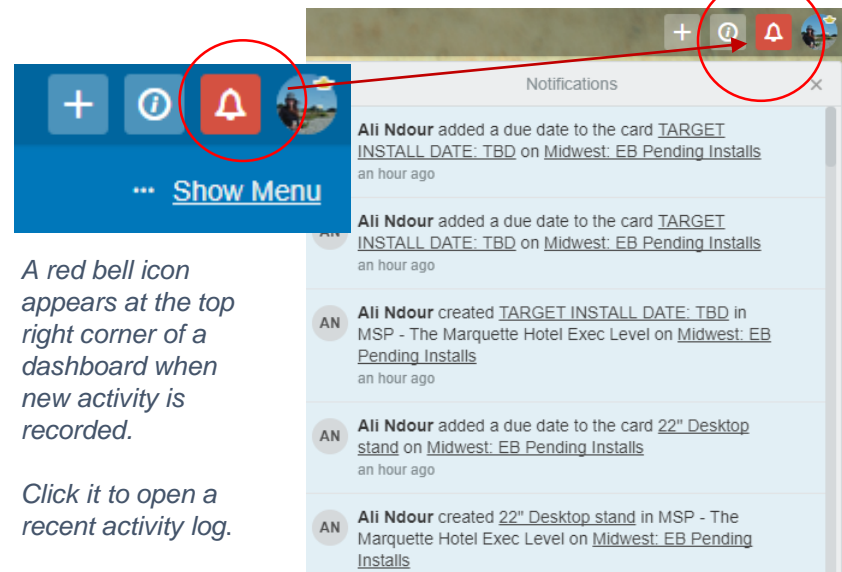
DO NOT ADD A NEW CARD IF YOU ARE ADDING COMMENTS TO AN EXISTING CONVERSATION.



### @ Mentions

You can mention people in comments by using "@" followed by the user's name or by clicking the @ icon below the comment input field then selecting the members you would like to mention.

The mentioned user(s) will get a notification about your comment by e-mail and a push notification on their phone if using the Trello app.



*A red bell icon appears at the top right corner of a dashboard when new activity is recorded.*

*Click it to open a recent activity log.*

# SALES: Digital Campaign Workflow

## Sell a Digital Campaign

A contract converts and is recorded in Salesforce.



## Card Assignments & Confirmations are Made

Ettractions Team reviews the contract, assigns members and appropriate labels on the contract card for next steps.



## Campaign Optimization

Each profile is reviewed based on the checklist inside the card.

Engagement reports, screenshots, recommendation notes, and next steps are documented and assigned to designated team member(s) to ensure best results for client.



## Ettractions Confirms Sale & Creates A Trello Card

The following business day, a contract card is added to the Trello board in the list associated with this sale.



## 7 Days From Contract Conversion

Maximum window for a profile review with Salesperson and Content Editor to occur.

For NEW profiles, we expect basic materials to arrive within 7 days of conversion and that Salesperson and Content Editor will review all new profiles as soon as they go live.



## Green Means Go!

All card labels set to "green" indicate profile is optimized for top performance and scheduled properly.



# OPERATIONS: EB Order Workflow

**Place an EB Order for New Host**  
Manager uses order entry system on visitorfun.com to request a new host location.



## Connectivity Test

Local Ops perform the connectivity test and documents the results on site to confirm the internet connection.



**Equipment is Ordered**  
Screens, stands, tablets and players are set up as separate tickets. Purchase orders, shipping information, receiving documents and CTM part numbers are all tracked.



## Ettractions Approves EB Order & Creates Trello List

Once approved by Ettractions, a new list will appear in Trello creating individual cards for connectivity testing, equipment orders, the host profile status and all other related tasks for a successful installation.



## Host Profile Created & Approved

Sales sends in host-approved materials to create a profile including the host logo. Digital Content Editor publishes the profile, so the Ettractions Network team can set up a player or tablet for the location.



## Green Means Go!

All card labels set to "green" indicate profile that tasks are completed for a successful install!.



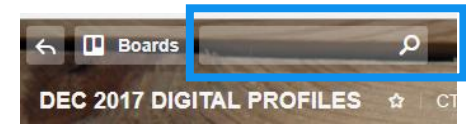
## FAQs



### Can I Search Trello?

Absolutely! There is a search box on the top right corner above the dashboard name where you can type in keywords to find the card you are looking for. For this search feature to work, it is important that everyone is spelling everything the same way, so please avoid typos, abbreviations and use consistent language so your search results pull up everything that is related.

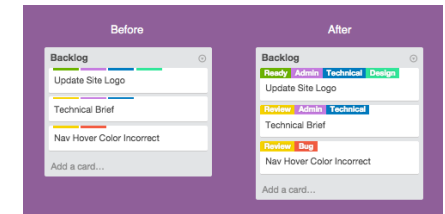
Example: You say DoubleTree, I say Double Tree. I say Fort Lauderdale, you say Ft. Lauderdale, etc.



### Trello Plugins & Extensions

Trello connects to a ton of other software platforms and many customizations are offered to set Trello up with your own preferences. Depending on your browser preference (Firefox, Chrome, Safari etc.) you can search online to find lots of options. We recommend the one that shows the label name on the dashboard home screen.

<https://chrome.google.com/webstore/detail/card-color-titles-for-tre/hpmobkglehlfhlaefmfajhbdnjmgim?hl=en>  
<https://addons.mozilla.org/en-US/firefox/addon/card-color-titles-for-trello/>



### Deleting Cards | Archiving Cards

Because Trello is a shared space, please don't DELETE anything or mess around with the board settings or labels that your Board Administrator has established. If the board is getting cluttered with too many old tasks that no longer *need* to appear, but may need to be referred to another time, your Board Administrator can ARCHIVE a card or an entire list. ARCHIVING takes the card or list off your current dashboard, but still stores all information and allows your cards/lists to be searched in the search field and re-activated if necessary.



### Wonderful. ANOTHER software system and password that I have to remember?

The CTM Way is all about teamwork, embracing change, and providing amazing service to our hosts, clients and fellow team members. Clear communication and feedback helps us all continuously improve and achieve our goals. Ignoring Trello and simply not participating creates additional work for your colleagues who have to track you down for information and updates. Participating in conversations helps build stronger teams and connections between team members. Support teams can quickly pivot and act quickly when they are alerted to important priority tasks.