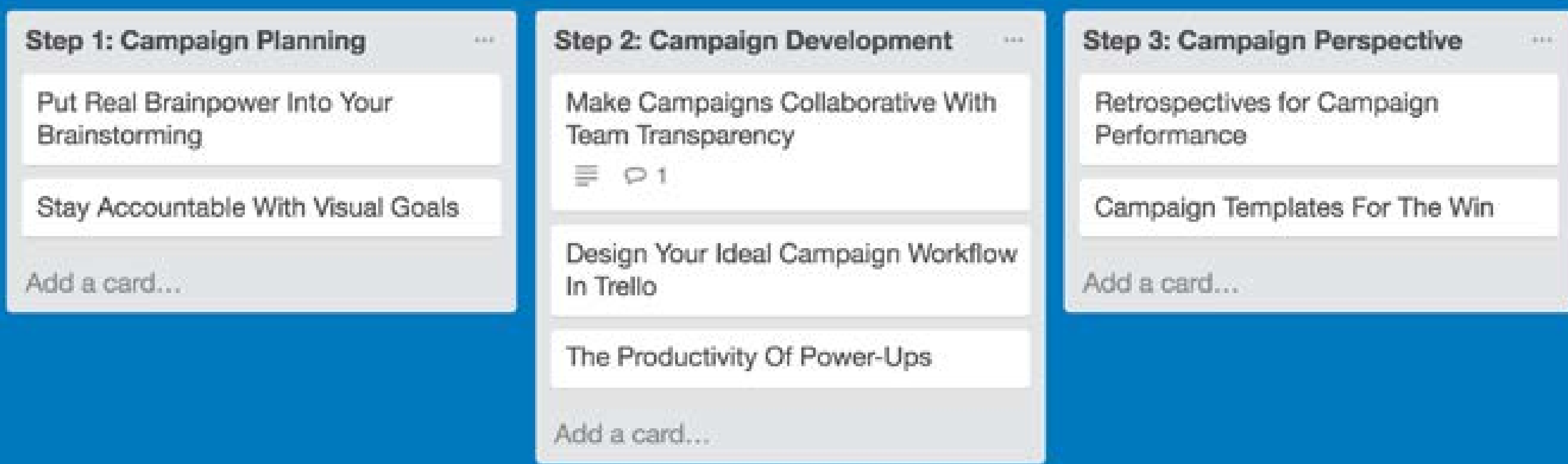
How to Master a Successful Marketing Campaign in Trello

A step-by-step guide for transforming campaign organization

Trello HubSpot

Table of Contents



Introduction

WHAT MAKES A MARKETING CAMPAIGN SUCCESSFUL?

Depending on who you ask within an organization, team or industry, this answer will vary. But whether you're here as a dedicated marketing professional or a multi-hat-wearing business extraordinaire, gaining perspective on the process and collaboration that backs any given marketing campaign is a surefire way to improve and achieve more results for your brand.

What kind of campaigns are we talking about? With Trello, you can plan marketing campaigns from start to finish, like:

- Promoting a new product launch or special offer
- Running a virtual conference
- Hosting a webinar
- Collaborating on a co-marketing event
- Launching a content campaign
- Whatever you can think of to design and plan!

Marketing campaigns are not just for special occasions.

Of course, you want to bring attention to major milestones, but the work you do to nail down an effective campaign workflow can apply to all of your marketing efforts. Think about it: if every marketing effort you make is given the planning, execution, tools and review worthy of a major campaign, you will inevitably learn more, accomplish more, and enjoy more success.

Why? Because the process of how you'll turn great ideas into valuable leads will be established and optimized, leaving more time for creativity, innovation and development.

In this ebook, we'll show you how to optimize your marketing campaign process with Trello, and:

- Establish a productive workflow for getting from start to finish that keeps your whole team involved and on track.
- Develop key channels of communication within your team and across teams in your organization.
- Gain perspective on success with visual retrospectives, accessible resources and a winning framework that can be recreated for your next awesome campaign.
- Achieve focus on that ultimate goal: More leads and more buzz for your business.

Keep in Mind

FREE FEATURES

Trello boards, cards, lists, teams, and a whole host of other features are always free. You can hire a million new marketing experts and add them to your Trello team. Our Business Class and Enterprise options give teams additional app integrations, security features, and support. We'll tell you if something we include in this guide requires a paid account.

CUSTOMIZE YOUR WORKFLOW

Trello is a horizontal tool that gives you the freedom to customize your workflow. In other words, it's like a spreadsheet or blank document that needs your input. Get creative! But don't worry - we'll give you samples of all our examples in this guide to copy and try.

BE PRODUCTIVE

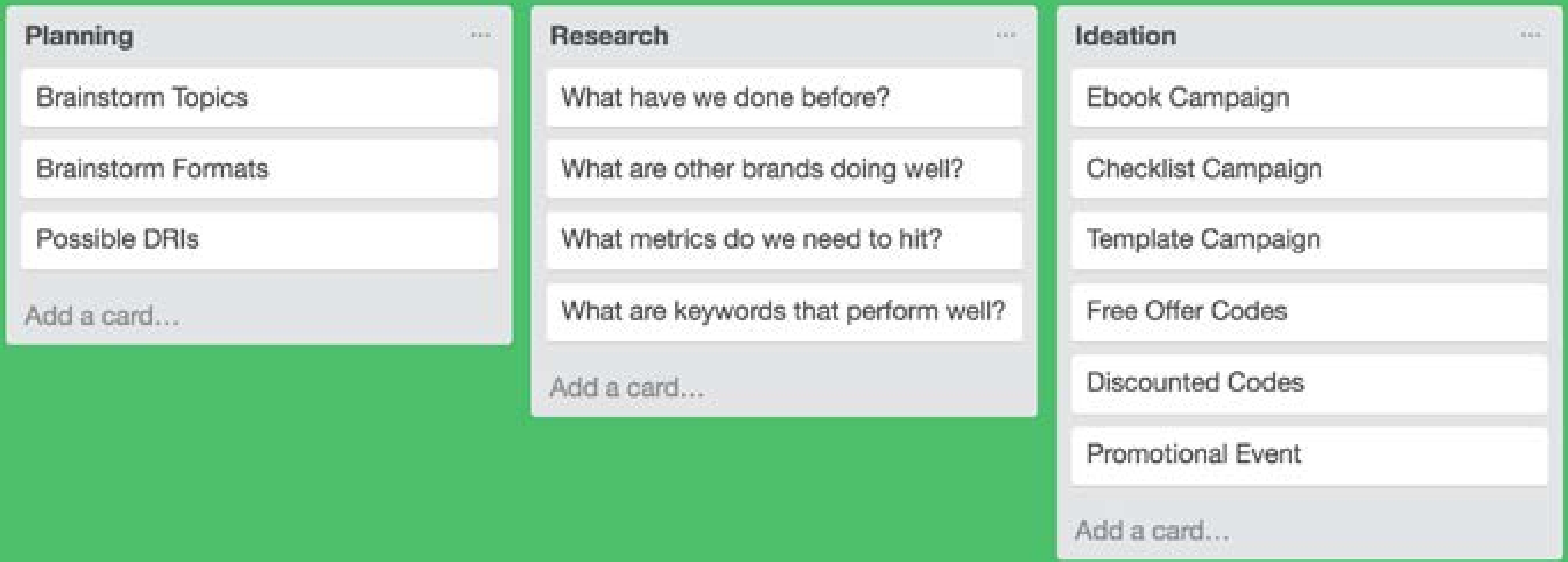
Trello is focused on helping you accomplish tasks and be productive. If you ever have any questions, visit our super-helpful Support community or reach out to us via Twitter.

It's a plan we use at Trello everyday to interact with our amazing 16 million users, and we're excited to share it with you.

Plus, it's a process we're always trying to improve. We've included special "Trello team takeaways" we've found especially successful in our marketing campaigns, and we hope they help your team too.

Time to start that campaign!

P.S. If you want to start with the basics, here are some **Trello board best practices** to get familiar with.



Step 1: Campaign Planning

WHAT COMES FIRST: THE IDEA OR THE PLAN?

When you discover the answer, let us know! In the meantime, you should have a planning, research, and ideation process that gives you the flexibility to brainstorm topics, identify opportunities, and create actionable plans out of that great idea that (inevitably) came to you in the shower. Here's how to build boards that nurture ideas, build goals, and put plans into action.

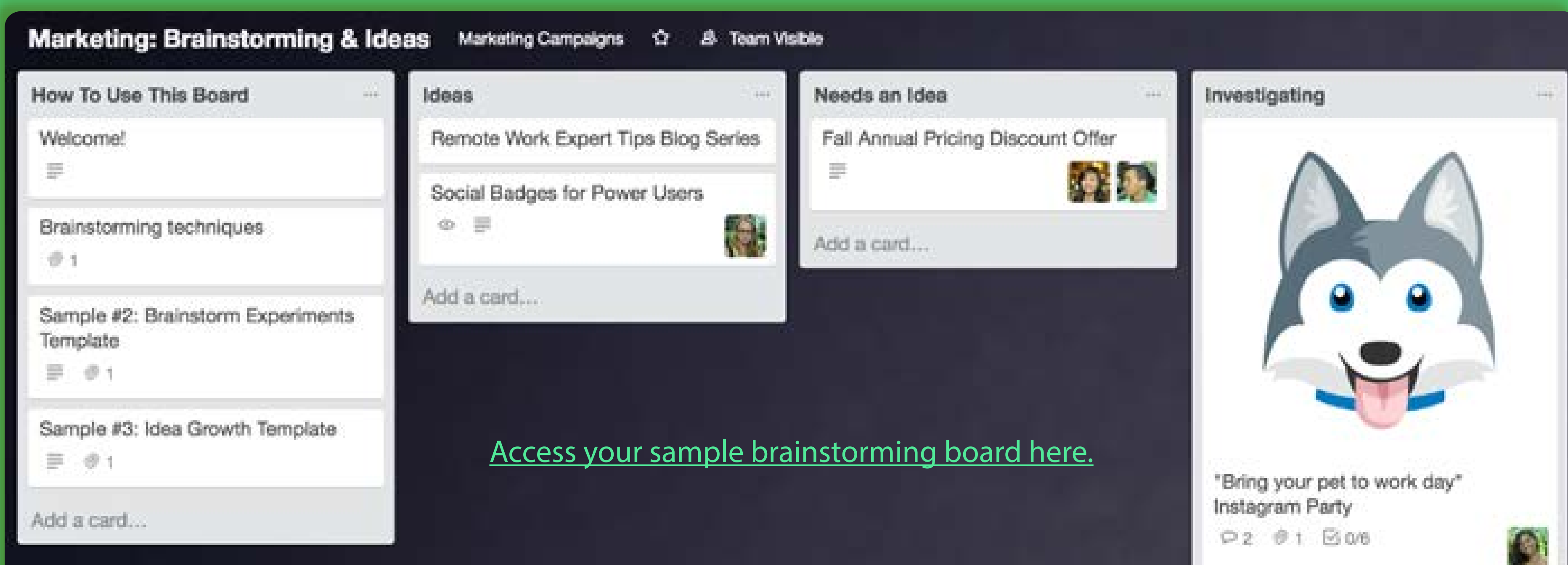
PUT REAL BRAINPOWER INTO YOUR BRAINSTORMING

A Trello board can house both your wildest ideas and your company's biggest marketing needs. Try some brainstorming techniques to inspire brilliant ideas—and then organize them. When you organize your ideas, you give them structure within your responsibilities as a marketer. And when you connect an idea with a business need, a campaign is born.

Without a clear connection, it's a much harder road towards convincing your boss that inflatable pizza pool toys are the best swag giveaways for your next conference. But seeing that idea connect with your company's goal of giving prospects a fun way to unwind after long sessions means that it is a viable idea for achieving the campaign objective.

Your brainstorming process shouldn't just capture ideas, it should take your ideas through an analysis process that either validates or eliminates them from the process at hand. This process not only keeps your campaign development focused, it gives each idea its deserved attention so no opportunities are missed.

Here's a brainstorming strategy that utilizes this idea-meets-need approach:



Access your sample brainstorming board here.

Ideas are placed into a list as they come in, and marketing needs can be placed in an adjacent list. All incoming ideas should be given their due diligence. If you see initial potential in an idea for your campaign, move it to the analysis phase.

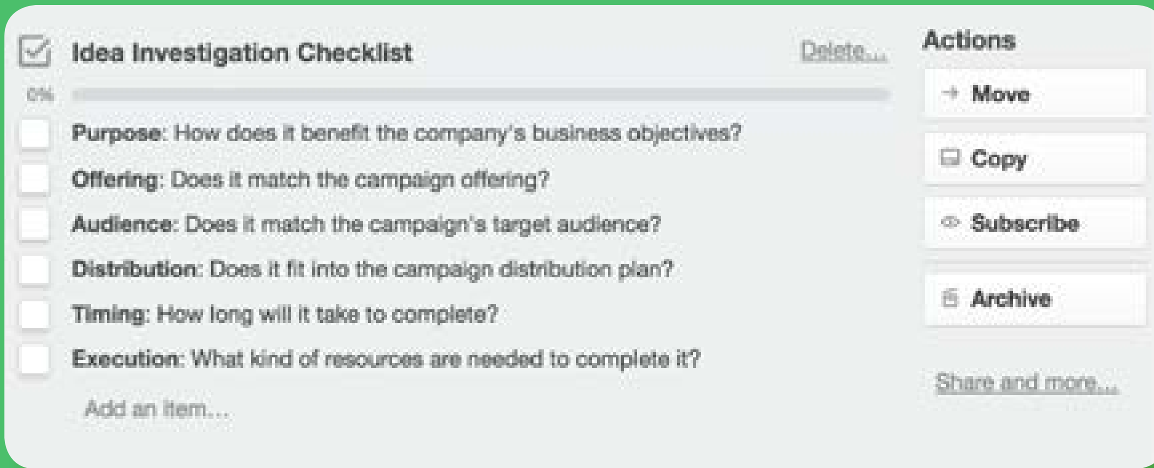
During analysis, identify how the idea fits the purpose and scope of the campaign. Within the first Trello brainstorming template above, you would move the idea into the "Investigating" list. You can ensure the idea stands up to all of your toughest criteria with a checklist that answers these vital questions:

- **Purpose:** Why is this idea beneficial for your company's business objectives?
- **Offering:** What is the basic concept of the campaign? Does this idea match the campaign offering?
- **Audience:** Who is this idea targeting vs. Who is the campaign targeting?
- **Distribution:** Where will the campaign be distributed? Does this idea fit into the distribution plan?
- **Timing:** When will it need to be completed and how long will it take to complete?
- **Execution:** How will it get developed and what kind of resources will you need?

Pro Tip

VALIDATION CHECKLIST

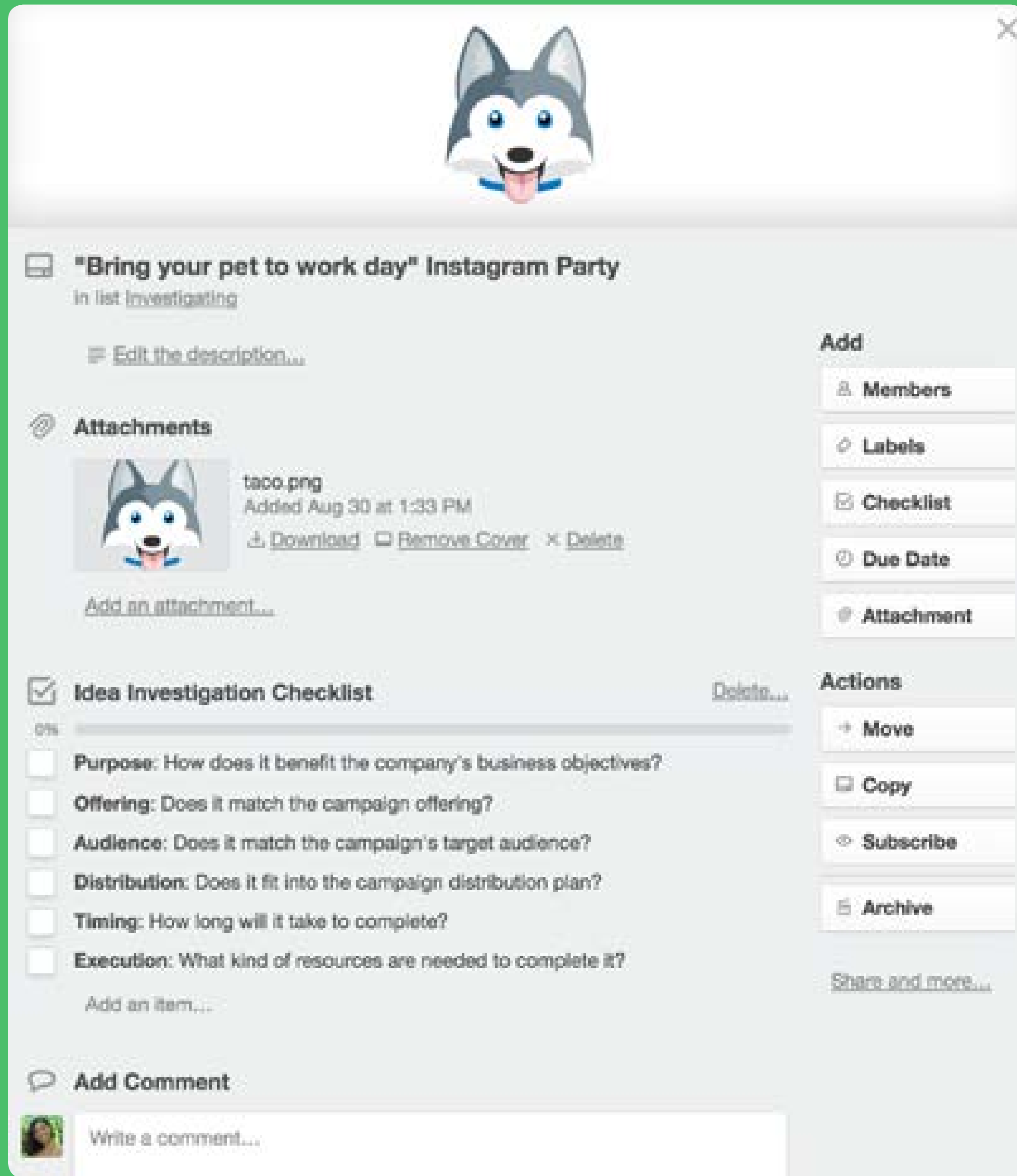
The validation checklist can be copied over to each new idea. To copy a checklist, click "Add Checklist" from the list of card Actions, click the "Copy Items From…" select box, and find the checklist you want to copy. Adding a title like "Idea Investigation Checklist" will help you locate the right one to copy from the list.



If the idea doesn’t pass validation, put its card on hold or onto a “Not for us” or “Rejected” list.

This keeps a record of what’s been covered, which can be especially useful for new hires or for that inevitable time the idea is pitched again and sounds... strangely familiar?!

If the idea is validated and moves off of the brainstorming board and onto an official campaign board, you can move the card into the “Development” list with a link to the card or board to where the idea has been placed so you can have transparent tracking of its progress.



Trello Team Takeaway

IDEAS SHOULD BE ACTIVE

Ideas are only useful if they are active, and history should only repeat itself with good reason. Give each potential campaign idea careful consideration and either move it into production or to a parking lot. Consider labeling your ideas as either "successful" or "not successful" after the fact. Don't let your board go stagnant.

And to give you that extra boost…

Why do so many of the best ideas come at the worst times? Setting up your brainstorming workflow for quick idea capture will ensure that your late-night or in-transit breakthroughs don't go unrecorded:

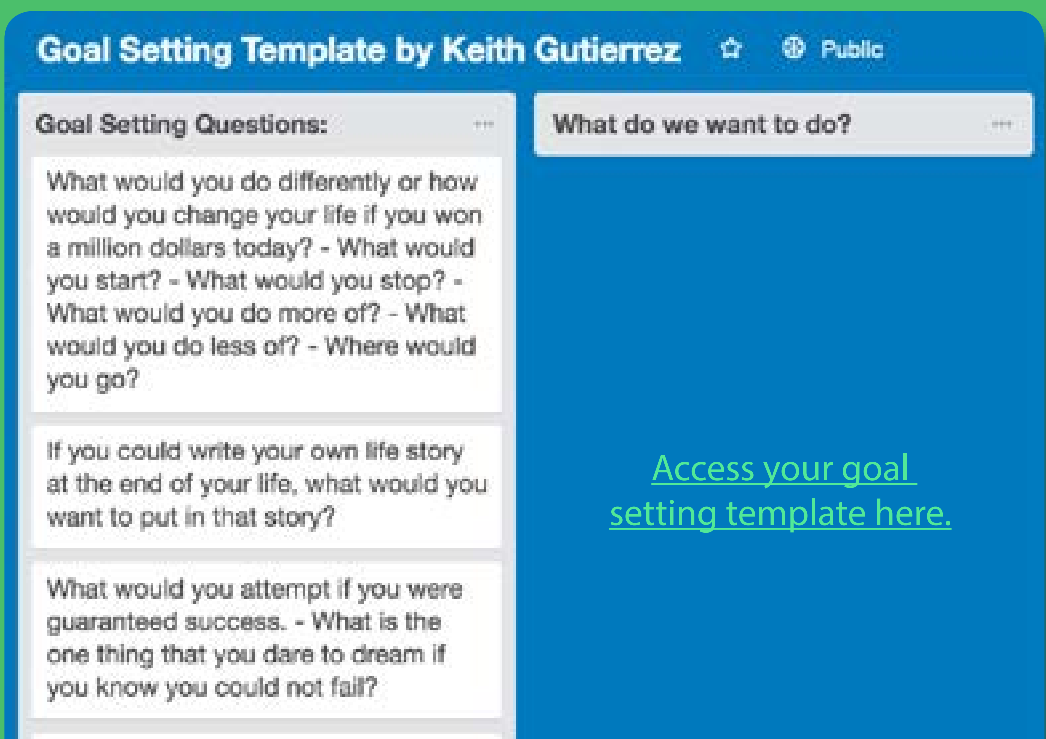
- Email-To-Board: Every one of your Trello boards has a unique email address meant just for you. Use it to create new cards and add comments to existing cards, right from your inbox. Designate an "Incoming" list on your board, and organize the cards (with all content from the email send included) the next time you're in Trello.
- Trello App for Slack: Collaborate with your team using Trello while still in Slack. Capture new ideas in the moment and turn conversations into actionable items in Trello, all in one click.
- Mobile Apps: Trello works seamlessly where you are. Get the apps for mobile to add ideas on the go. Real-time sync means your team members will see those updates just as fast as you add them. Even offline!

STAY ACCOUNTABLE WITH VISUAL GOALS

There are many great reasons to make goal setting a regular part of your campaign development. And, we admit, there's always a million more to distract us from setting goals in a thorough, systematic way. Keeping goals visual and clearly linked with campaign efforts is the best way to stay accountable to the reasons for launching that campaign in the first place.

There are a number of different goal-setting techniques you can try. Luckily, plenty of marketers have created goal-setting techniques with Trello boards that you can borrow. We asked a few of them to pass on their tips.

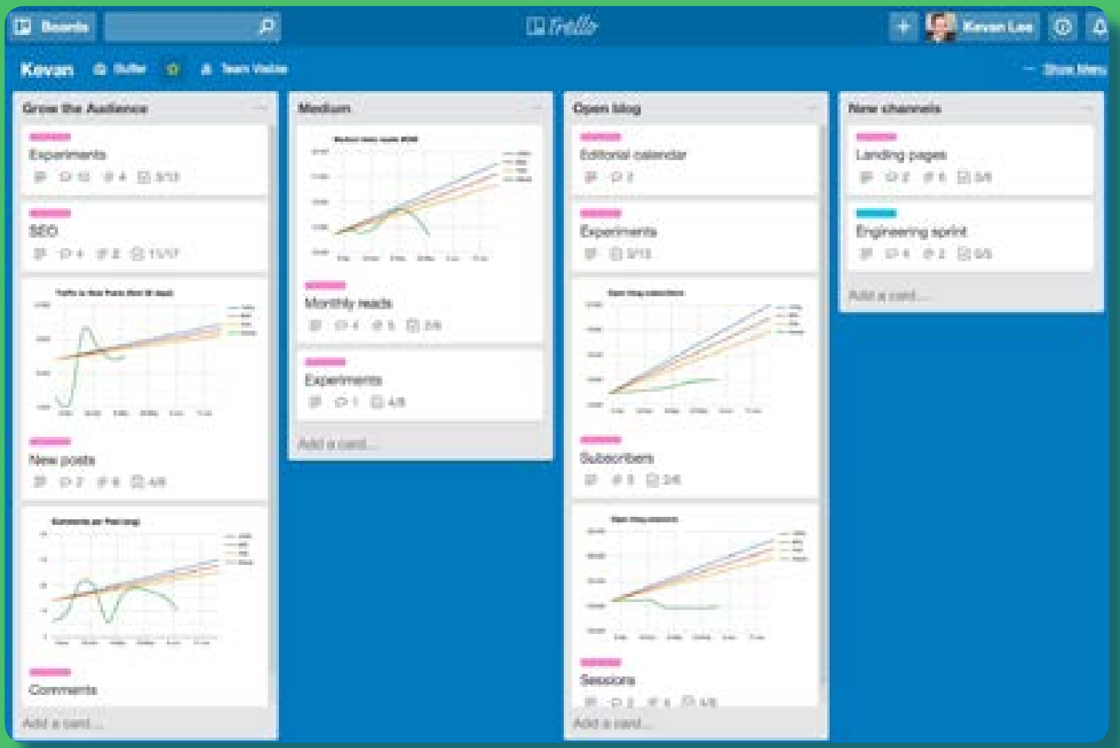
You may want to start with a goal setting template that asks high-level questions such as "What do we want to be?" and "What do we want to see?" This is the brainstorming of goals, where you visualise the outcomes you'd like to get from your campaign, regardless of the idea or method you end up choosing.



Access your goal setting template here.

> "Having positive present tense goals programs the subconscious mind and builds faith and conviction inside you, that the goal is realizable. The way you accomplish this is by writing and re-writing your goals, having the ability to carry them with you and reviewing them on a daily basis."
>
> -Keith Gutierrez, Co-Founder, Modgility

The **OKR method** identifies the desired Outcomes you want, tied with Key Results you measure along the way to make sure you stay on track. Use OKRs for quarterly or annual goals, and apply this framework for setting up campaigns that will reach those outcomes and results.



“There can be a lot to dig into with OKRs, though we’ve found that just these basics can be enough to get the ball rolling toward achieving great things:

1. Set ambitious goals with measurable results.
2. Place them into Trello.
3. Check-in regularly to see your progress.”

- Kevan Lee, Director of Marketing, Buffer

SMART goals are defined as Specific, Measurable, Attainable, Realistic and Time-bound. At the campaign-level, SMART goals can really help you focus in on exactly what you want to achieve. They are especially effective for setting clear targets for each person involved in the campaign. This SMART Marketing Goals template from Hubspot makes a great addition to your campaign board... coming next!

> Big goals are important. They give you and your team something to work towards. But small goals are important, too. Once an overarching plan has been established ("Let's work on increasing traffic to our website's blog," for example), it's time to set small, achievable tasks for everyone. These are called "SMART" goals. [...] Our team uses Trello checklists to track the progress of long-term projects."
>
> **- Lauren Marchese, Inbound Marketing Specialist, Mainstreethost**

Trello Team Takeaway

VISUALIZE GOALS

Take the time to visualize goals from the top, all the way down to the nitty gritty—goal setting isn't just about setting markers for success, it's the way you measure progress throughout your campaign to keep it on the right track.

Step 2: Campaign Development

START WITH A SMOOTH PROCESS

Developing a smooth campaign development process helps clear the way for making the campaign a success. We define a smooth process as one that has all required resources and team members available and working on the project as team time, using the best of their unique skills, without duplicating efforts

How will open collaboration help you nurture more leads? According to survey research, 86% of polled executives and employees blame a lack of collaboration or communication for team problems and failures. That's right: too much segmentation hurts productivity, profitability, and inter-office cohesion. So although the silo effect causes problems for companies, getting rid of silos altogether is not the answer.

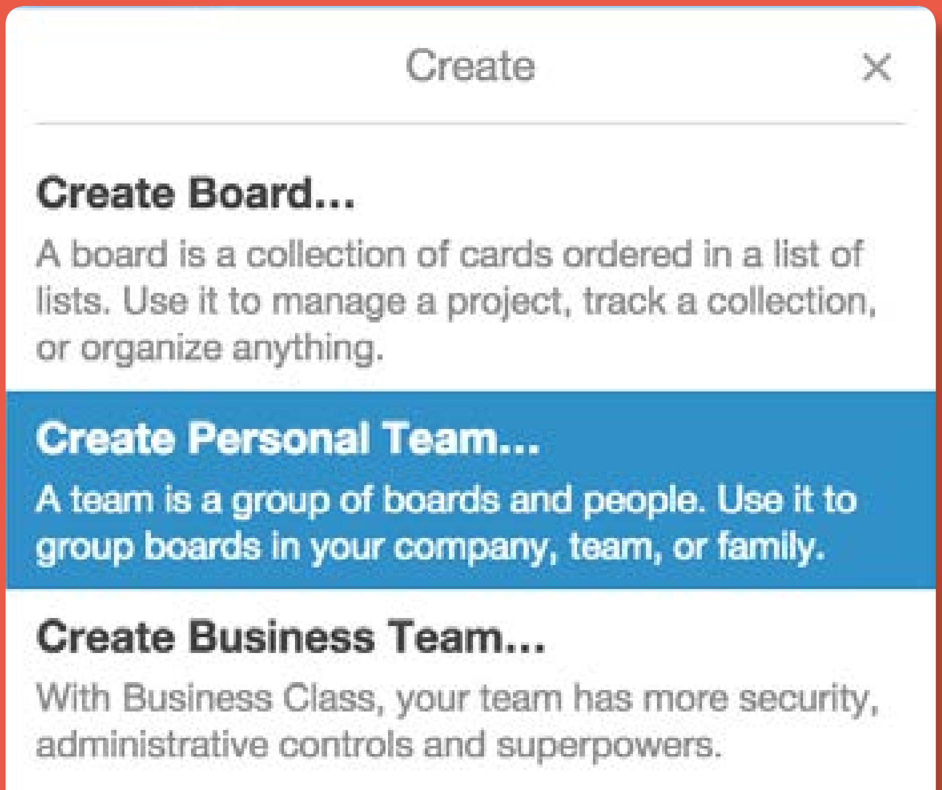
Instead, the key to campaign success lies in the power of teams, and teams are the core of an efficient Trello workflow.

MAKE CAMPAIGNS COLLABORATIVE WITH TEAM TRANSPARENCY

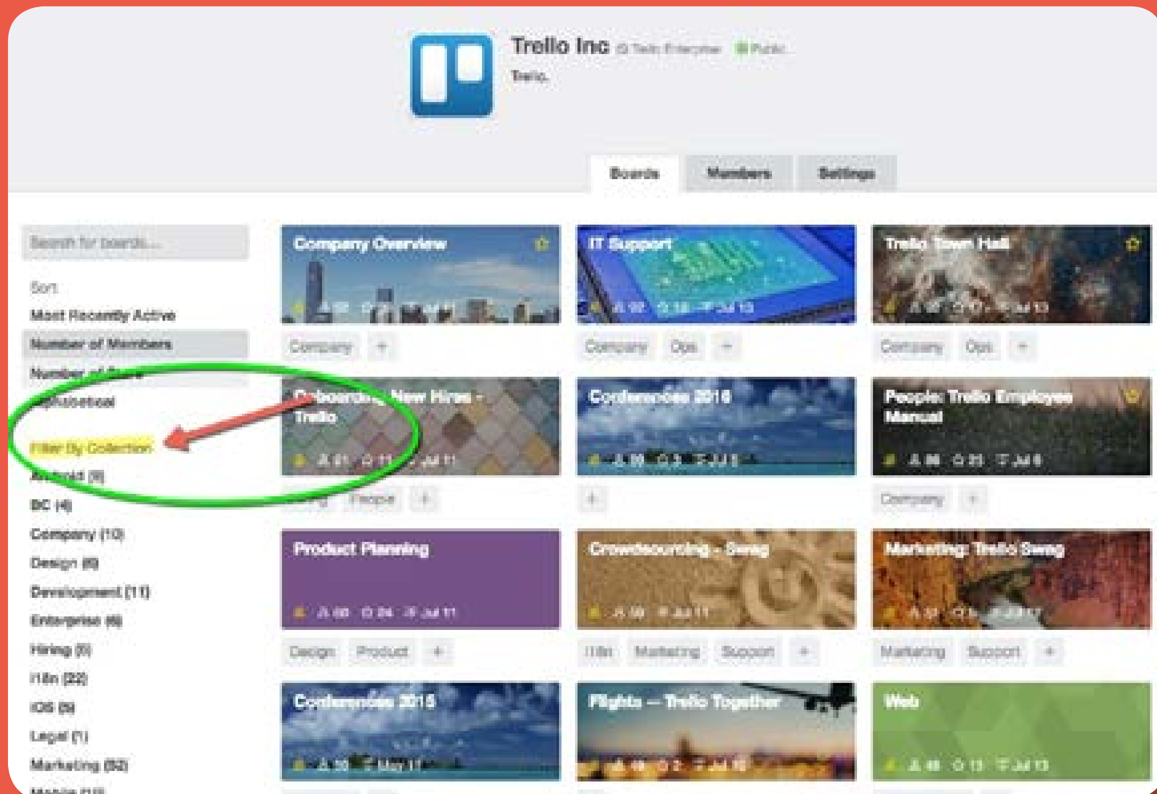
In Trello, working with perspective means you have complete transparency on the boards, campaigns, and activities that are most important to your team. Here's a quick primer on Trello teams:

- To begin grouping and collaborating on boards, you'll need to set up a team.
- The difference between a personal or business team is that a business team has Business Class, which is a paid subscription that provides additional tools for the team for greater control of boards, integrating with other apps, and organizing the boards on the team.

Your team page is where all your boards and campaigns will be visible. Custom sorting is done with Collections. Collections can be organized by department or groups of employees working on shared boards.



Your team page is where all your boards and campaigns will be visible. Custom sorting is done with Collections. Collections can be organized by department or groups of employees working on shared boards.



PRO TIP

STANDARDIZE YOUR NAMING STRUCTURE

You can even decide on a standard naming structure for key boards. For example, many of our Marketing team boards start with “Marketing: [Name] Campaign” so that we can easily locate them. The Trello Chrome extension makes it particularly easy to quickly locate boards from your browser’s address bar.

In the next section, we'll hook you up with your marketing campaign Trello board. Beforehand, here are a few team-first habits we recommend establishing for your board interactions in general:

Always assign one or more team members to each card in the campaign. They could be either the person directly executing the task, or the person who's managing that effort. You can assign multiple members, too. This ensures that every piece of the project is actively covered, and streamlines the "who do you ask about…?" process. That being said, assigning every team member to every card isn't a good idea either, you want it to be simple enough so people can tell who is working on what based on that card.

Beyond your individual campaign boards, have a Marketing Team board. Use it for records of vacation time, meeting agenda items, top-level projects in progress and team updates. You can also have breakdowns of team member roles and responsibilities. This way, anyone can step in as campaign manager and source members for tasks with the perspective of what other projects people are involved in.

Keep your campaign board on display during meetings and invite other teams to take a look. One of the best parts about Trello is the real-time sync of activity across views of the board. The other is the transparency across teams that a communal plan provides. Cut down on progress reports and solicit feedback right at the source by inviting others to check in regularly.

Trello Team Takeaway

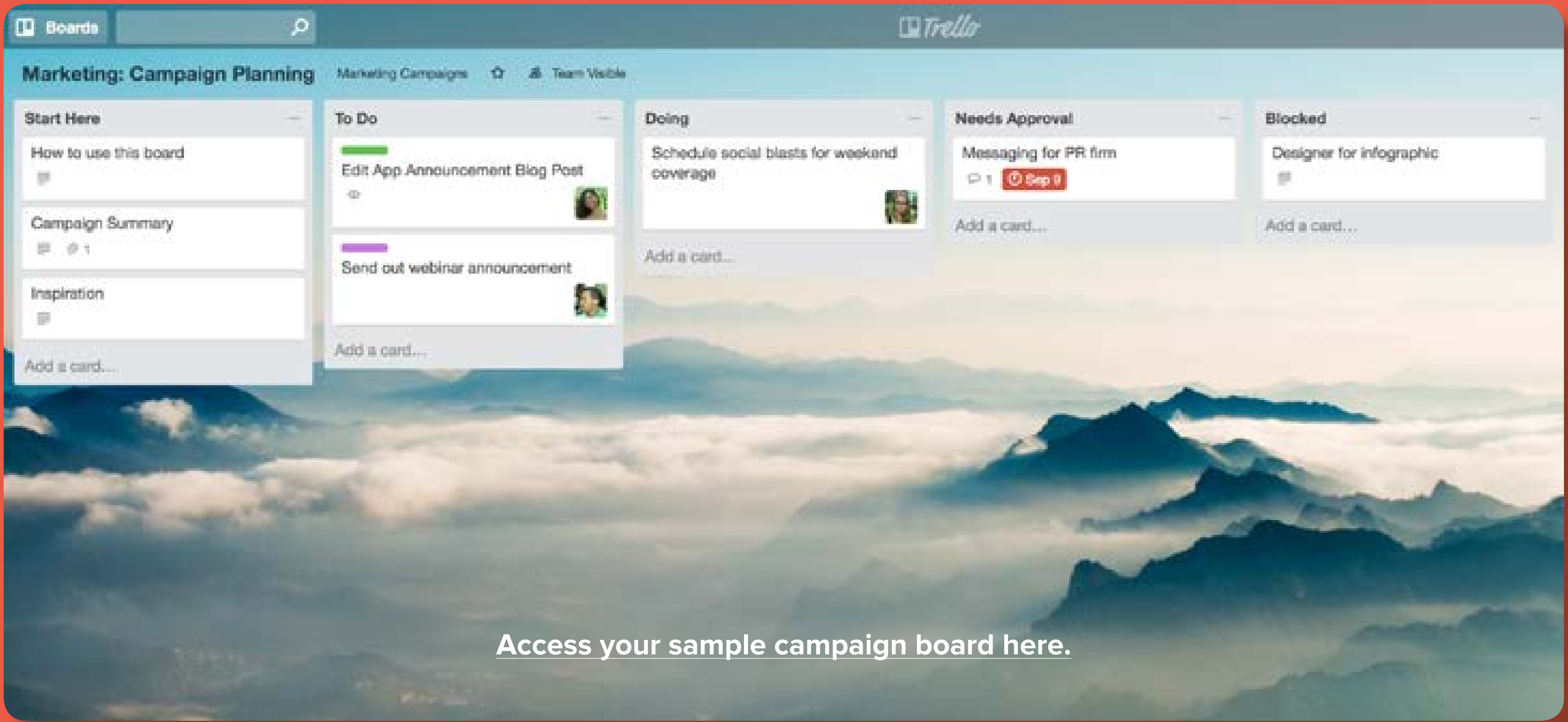
COLLABORATE ACROSS YOUR COMPANY

Don't be afraid to open your team's efforts to the whole company—you will benefit from the gained perspective and engagement with your projects!

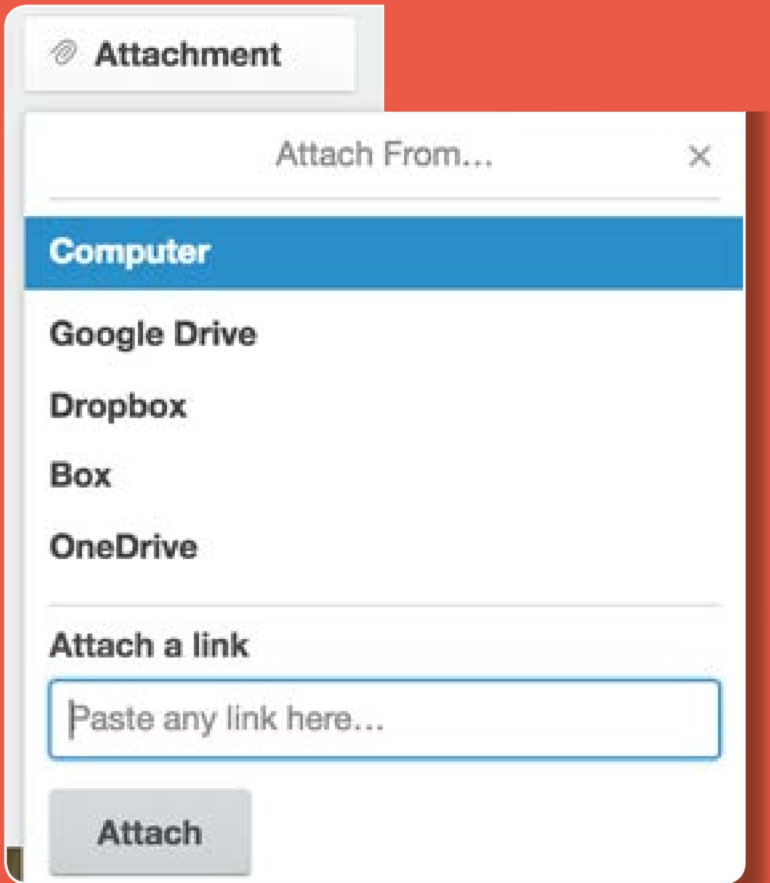
DESIGN YOUR IDEAL CAMPAIGN WORKFLOW IN TRELLO

You've got your ideas vetted, your goals established, resources at hand and your team on board. It's finally time to create your campaign plan—your home base for the development, launch and tracking of your next greatest marketing campaign.

It might take a few iterations to customize your ideal campaign workflow. Here is a sample board you can copy and work from for your campaign:



[Access your sample campaign board here.]



Pro Tip

CONNECT YOUR FILES

You can connect your preferred file management system, like Dropbox, Google Drive, or OneDrive to attach links to your files instead of uploading the file to Trello itself. This is especially handy if you have particular file permissions settings already set up on those platforms.

This board starts with the basics of Kanban, a system that visually organizes the campaign process with lists divided into stages of “To Do,” “Doing” and “Done.”

Work is managed simply by balancing outstanding tasks with the available ability to start new ones. All cards move from left to right as they get completed. The setup takes just a few steps:

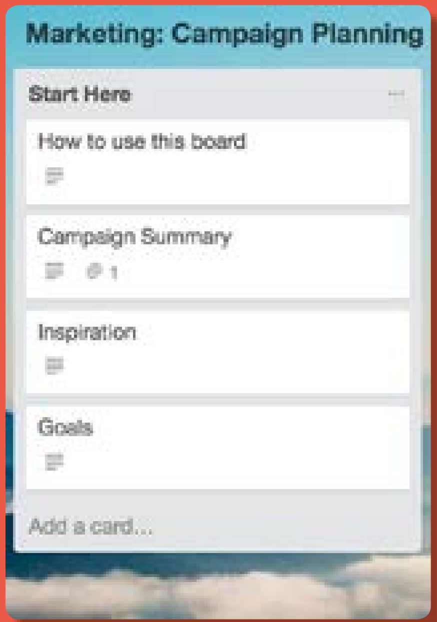
1. Start by listing all outstanding tasks for launching the campaign, each as a separate card.
2. Assign one or more team members to each card based on their roles and responsibilities.
3. Include relevant information and attach necessary files (just drag and drop) or link other boards/cards as needed.
4. Create a timeline by assigning due dates for when each individual task need.

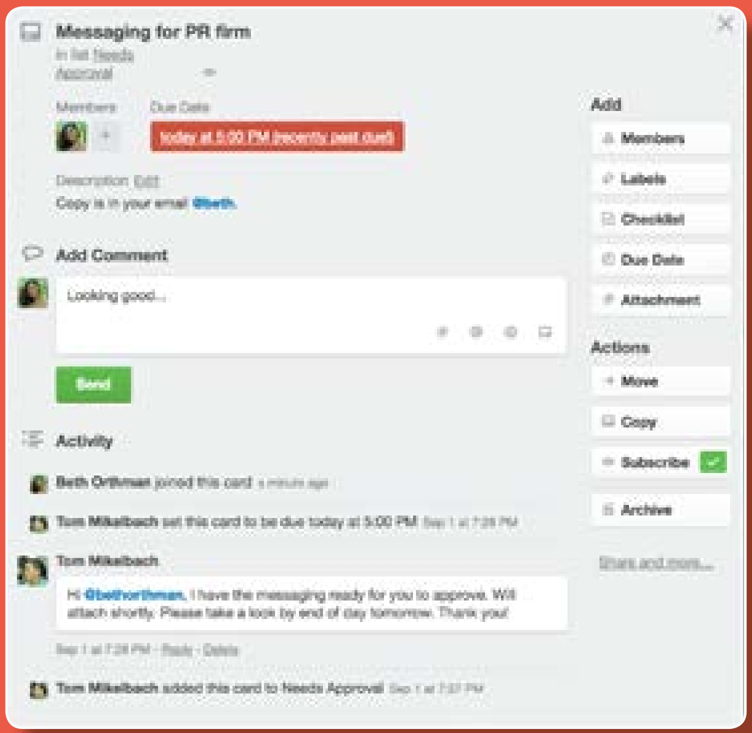
If all campaigns proceeded this smoothly, our job would be way too easy. There are additional steps of campaign development that need to be included:

5. The first "Start here" list should include a "How to use this board" card to guide members on workflows and best practices. This is where you can summarize the campaign ideas and goals you set before. You can also include links to things like inbound marketing resources that people might need. You want to get everyone on the same track with the same perspective on intended messaging and outcomes, as well as equip them with the tools they'll need.

6. A "Blocked" list is where team members can place cards that have hit a snag in production. Surfacing these issues to the whole campaign team can speed up finding a solution.

7. A "Needs Approval" list can be added if you have the project manager give a final OK on any assets or messaging. Have the person assigned to the card drag it into this list and add the manager onto the card so they are notified that it's ready to be approved.





8 A "Launched Final Assets" list is where all the materials and products created for the campaign move to as they are completed and released. This confirms their successful launch and organizes them in one location for reporting purposes.

The next level of campaign organization should prioritize productivity, transparency, and collaboration with your team. This might include adding elements like:

Labels: Completely customizable, you can use them to sort cards by type of campaign deliverable (content, social, webinar, newsletter, etc.).

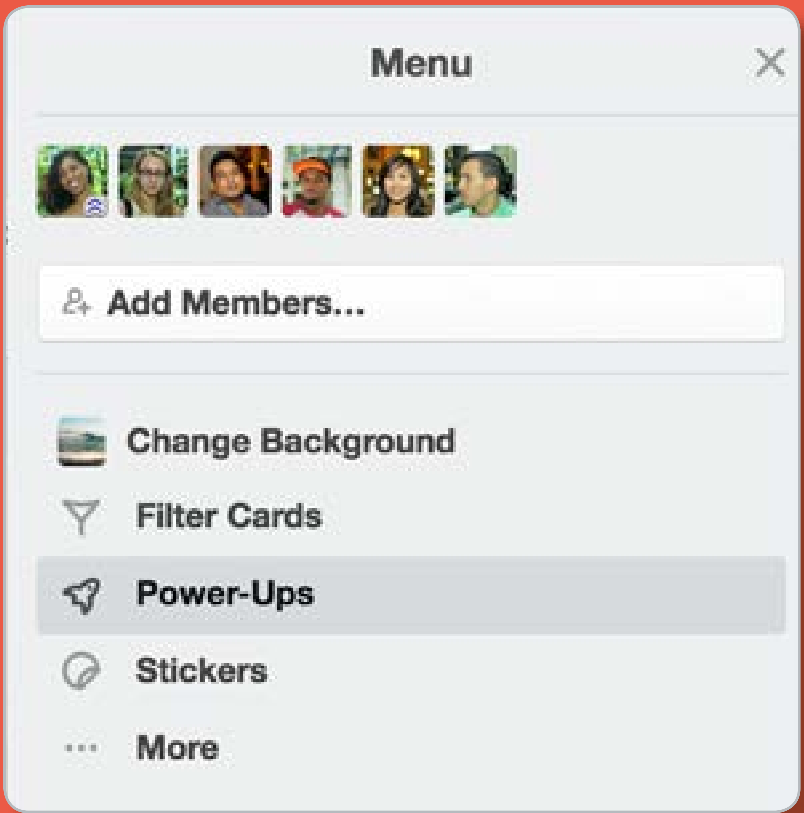
Checklists: Break down the cards into more detailed tasks to better track the progress of each card. A summary of checklist progress will be visible on the front of the card:

Power-Ups: The next section will go into more detail about the different integrations that can turn Trello boards into living applications customized with other tools and apps you use for your marketing efforts.

THE PRODUCTIVITY OF POWER-UPS

Context switching is one of the worst destroyers of productivity, and moving between different programs to complete a task is a surefire way of interrupting concentration on the task at hand. Think about parts of your current campaign process where required info or tasks slow you down the most, and outline the ways that your team should be using combining platforms and using tech to speed up efforts, rather than slow them down.

Trello's Power-Ups turn boards into living applications, helping teams meet their unique workflow needs. You can see a full list of Trello Power-Ups here, but here are some of the top options for marketing campaigns:

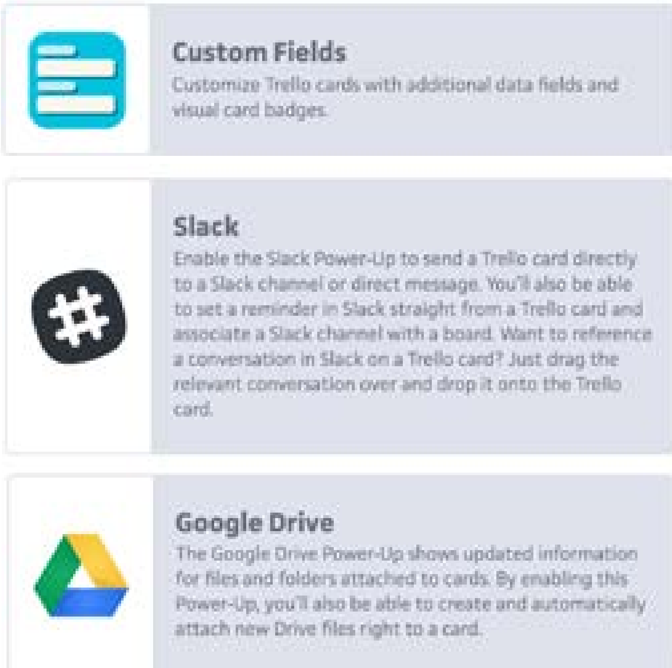


Calendar: Visualize all cards with due dates on a calendar right in Trello. You can change due dates by dragging cards onto different dates directly in calendar mode and view cards on a weekly or monthly format.

Custom Fields: Customize Trello cards with additional data fields and visual card badges. Try fields for things like "budget approved," "focus keyword" for content, "contacted?" for PR outreach and more.

Twitter: Attach tweets directly to cards for your Community Manager to respond to, or to share in a company update about the campaign's progress. They'll show all relevant info so you can reference them without having to leave Trello.

Check out the full list of Trello's Power-Ups here.



There's also the small detail of communicating about your campaign. Trello uses Slack regularly for this and other company communications, so we developed the Trello app for Slack to keep productivity at its peak. It allows you to add, update or generally do all Trello things right in Slack. For example, attach relevant discussions to relevant campaign cards and never miss an idea again. Trellobot is capable of some pretty amazing things!

Publicate: Enable Publicate on your Trello cards and see a quick preview of any attached publications. You can also jump right into Editor mode from the card back. This way, your curated content (maybe for tracking media mentions of your campaign!) can exist within a Trello workflow.

Card Aging: Cards that haven't gotten attention lately with either fade or, in Pirate mode, tear and yellow like an old pirate map. Highlighting inactive cards on a brainstorming or campaign board will ensure all added cards can stay relevant and updated.

Evernote: Attach notes right to your Trello cards—they'll automatically update when you make edits. You'll be able to access and attach your Evernote notes directly from the card back. It's great for catching campaign ideas on the fly, or for notes from vendor calls or events where you meet that important influencer.

Trello Team Takeaway

DON'T SETTLE FOR BASIC

Don't settle for a basic campaign workflow. Customize your process according to the steps your team takes to get tasks from start to finish, and consider how to integrate your different apps and platforms to save time and keystrokes.

Step 3: Campaign Perspective

OVERSEEE ALL THE MOVING PIECES OF A CAMPAIGN

If you haven't noticed already, Trello is all about perspective. Being able to oversee project planning, development and team collaboration is an important part of implementing boards into your marketing campaign process. But perspective also comes from taking the time to reflect on your campaign efforts, goals and results. Continual testing and proving of results over time is how you turn process into success. Here are some steps to take to gain valuable perspective on your marketing campaigns and their lead generating successes:

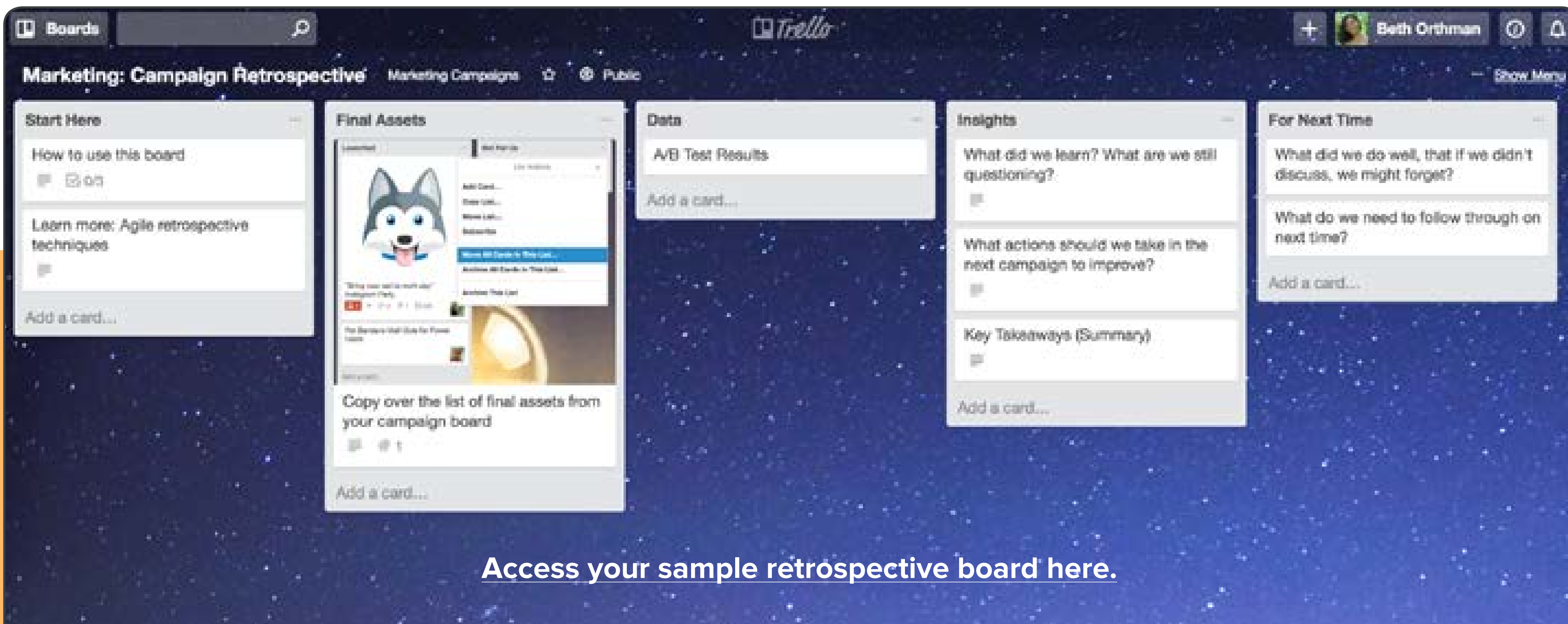
RETROSPECTIVES FOR CAMPAIGN PERFORMANCE

A standard procedure within Agile teams, the "retrospective" is a meeting during which the team reflects on what happened during their work within that period of time. Most importantly, they identify what went well, and what didn't. Agile retrospectives are great to adopt within a marketing campaign workflow, because campaigns have a start and end date not unlike a sprint.

In order to wrap up your campaign and gauge its success, you'll want to:

GATHER DATA

First, you'll want to dig into the nitty gritty details of campaign performance. Whether it's visitors, time on page, open rates, click through maps, or A/B testing subject lines, maximizing all of these metrics is crucial to understanding audience engagement. Choose the data that best answers your campaign goals and objectives and aggregate it into your campaign retrospective board.



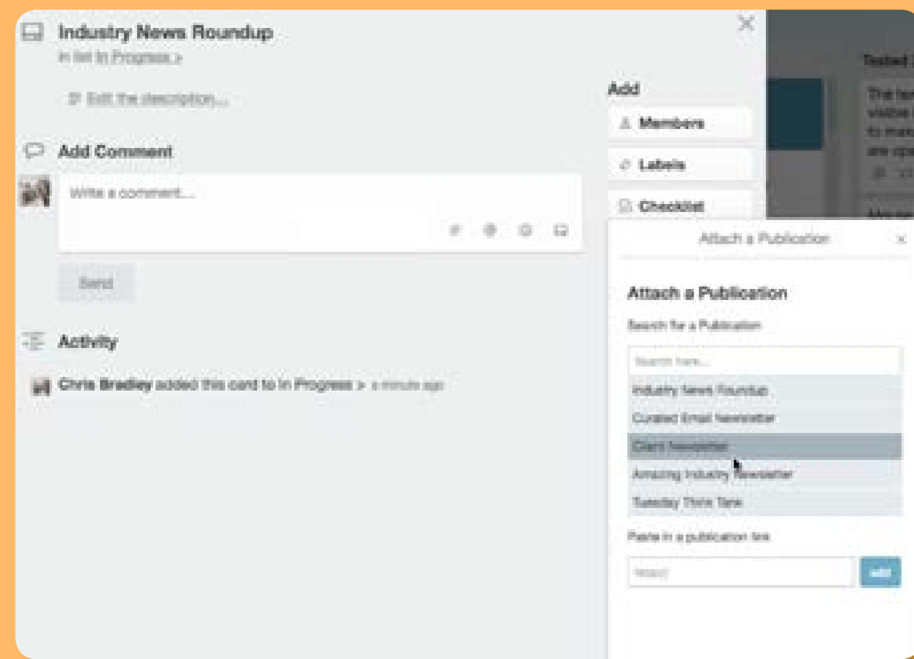
Access your sample retrospective board here.

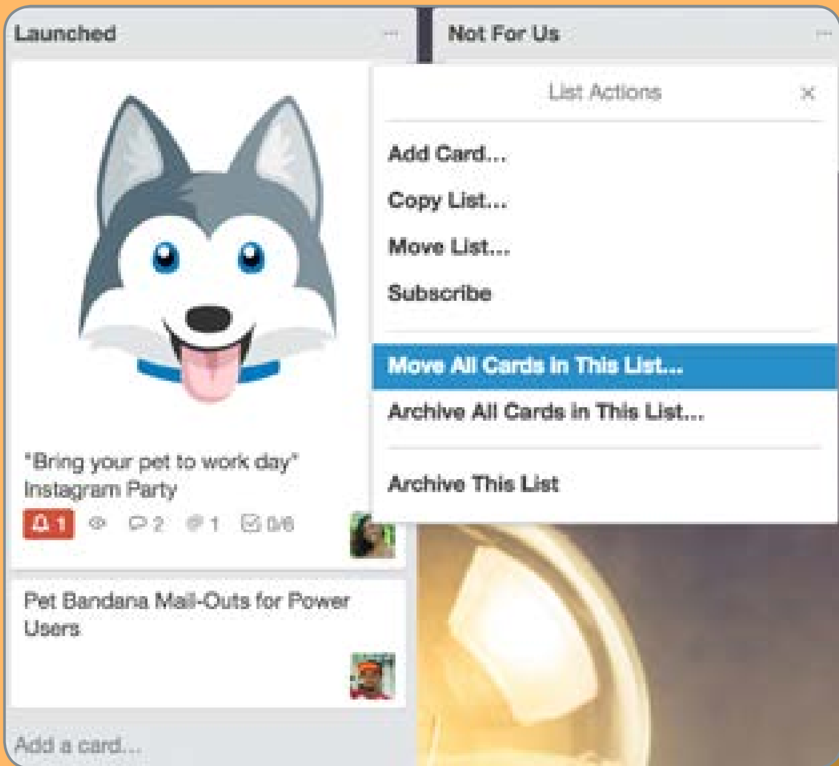
The next level of campaign organization should prioritize productivity, transparency, and collaboration with your team. This might include adding elements like:

To be as productive as possible, source the most seamless ways to get your data into Trello. Here are some ideas to get you started:

- Set up zaps with Zapier and Trello to funnel spreadsheet data from Google Sheets to Trello.
- Use drag and drop screenshots of charts or Hubspot Analytics data: Turn traffic charts into card covers for at-a-glance performance perspective.
- Build your own analytics input with our API.
- Use Power-Ups or integrations we already have in place, if they fit with your providers.

For example, Trello's Publicate Power-Up embeds your publications and makes it easy to edit, curate, and plan out your publications





Pro Tip

RETROSPECTIVE SCRIBES

Appoint a team member as the retrospective "scribe", with the task of taking meeting notes and summarizing group discussion under each card as you go through them during the meeting.

Valuable stats like the list size, the open rate, and the click through rate are all right on the card, where you can then discuss the successes and pain points with your team in the comments section.

GENERATE INSIGHTS

This is when you'll want to come full circle with your campaign efforts and see how you succeeded (and succeeded some more - let's be optimistic!) at meeting your goals and objectives. Copy or move your goal cards or lists from your campaign board and review them against the aggregated data.

This will make it easier to identify successes and pain points. Include commentary from the group right in the success and pain point cards. To see a quick summary of how each element performed, labels can make it as simple as "Exceeded," "Met" or "Missed" targets.

DECIDE WHAT TO DO NEXT TIME

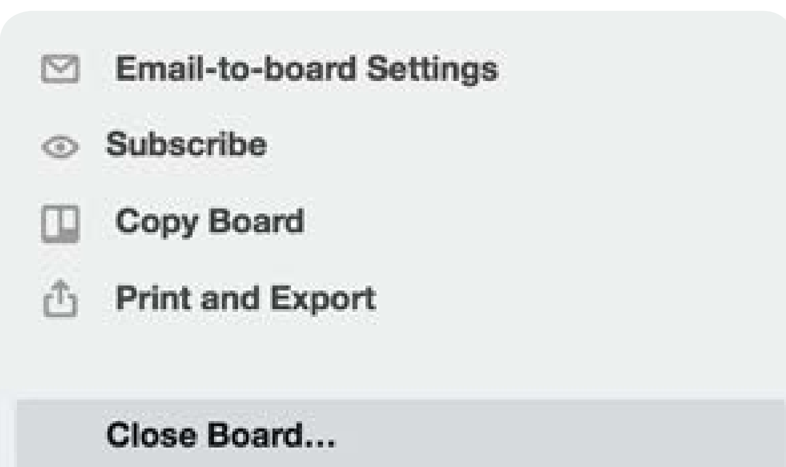
This may be the most important step in conducting a campaign retrospective. It's easy to pat your team on the back for a job well done, clear the slate, and move on to the next project. But setting intentions to improve your process can make a big impact for the success of your next campaign.

Make cards for key action items and things to keep in mind during the next campaign. If they are changes to make to the process and boards themselves, assign someone during the meeting to make those updates right away.

File important reminders under the "Start here" list on your Marketing campaign template board (more on that next), and add/remove lists in your template right away. You can even create a card on the template to document what changes have been made to the board process over time.

Take care, however, to have a distinct reason for making such changes. A complete overhaul of your process each time can lead to more confusion. Instead, it's better to move forward to the next campaign with a few key focal points of improvement to test and work on.

Head back to your campaign board and copy over your final assets list and other relevant cards, like your brainstorming summary. The retrospective board then becomes a full history of the campaign objectives, assets, results and takeaways. It also makes a great presentation framework to surface to the rest of the company!



Pro Tip

CLOSE INACTIVE BOARDS

After copying key information over to your retrospective board, feel free to close out the campaign board itself. This keeps your campaign boards collection streamlined to only display what's active. Trello never fully deletes any board, so you can always reopen it later if necessary.

CAMPAIGN TEMPLATES FOR THE WIN

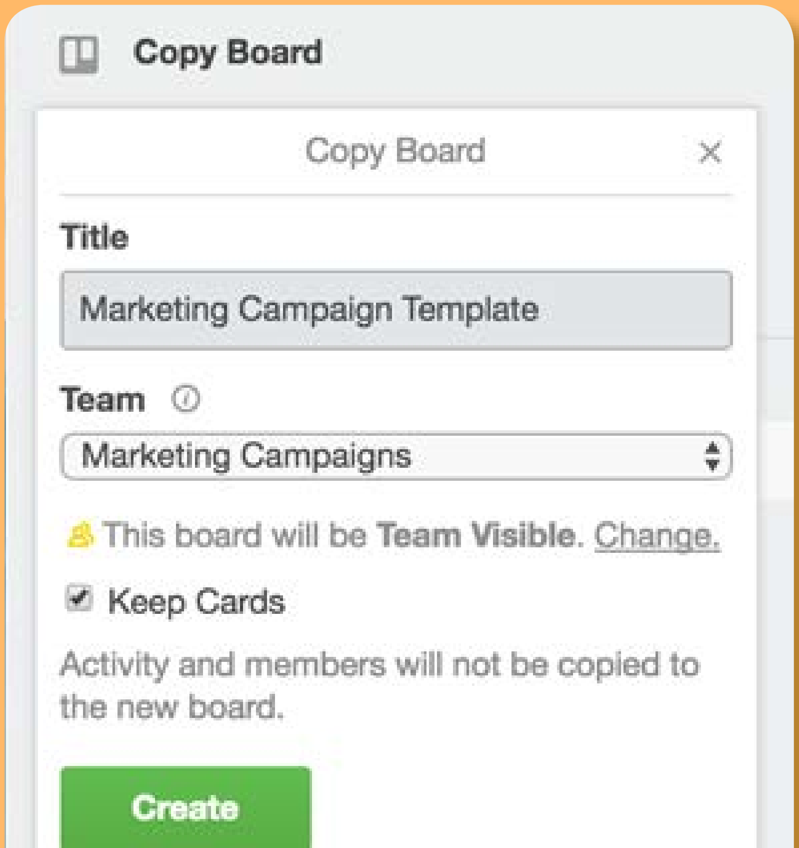
Keep a template board with a skeleton of all evergreen cards and lists that can be copied for new campaigns. Anytime you learn something new, add a resource, or make a change to the workflow, add it to the template immediately. That way, any future campaigns will inherit the updates. Plus, it's really simple to copy a board. Simply expand the "More" options from the Menu and choose Copy board.

On your Trello team page, create a collection for "Marketing Campaigns" where you can house all of your frameworks and retrospective boards. Segmenting them from your regular Marketing boards will keep your everyday view from getting cluttered.

Trello Team Takeaway

DON'T DO NOTHING

Trello's CEO, Michael Pryor, has a simple saying that he reiterates during all company meetings: Don't Do Nothing. It's pretty self explanatory: If you see a problem that needs to be addressed, make a decision about what the next steps should be. We apply this mentality to our marketing campaign process so that we never waste valuable time and resources making the same mistakes twice.



CONCLUSION

ALL YOU NEED IS PERSPECTIVE

The secret to turning your marketing campaign process into a powerful business growth tool is really no a secret at all—it's simply a matter of perspective and organized project management. By keeping an active focus on how your team succeeds best at each stage of developing, executing and tracking marketing campaigns, you will inevitably discover, establish, and repeat successful methods of generating meaningful results for your business.

Trello is a tool that can help you with this pursuit of process power. But mastering process isn't the end goal itself, and it shouldn't consume your team efforts. Process should serve the purpose of focus. Keep focused on the successes you want to reach as a marketer, a team, and a company, and we're certain you'll achieve them!

Learn more about using HubSpot's tools to build successful marketing campaigns.

Book a free demo today -no strings attached!

Book Now

Are you ready to learn more about Trello Business Class?

- **Turn Trello boards into living applications with Power-Ups:** Meet your team's unique business needs with unlimited integrations for tools like Salesforce, Slack, GitHub, Google Drive, and many more.
- **Get a bird's-eye view:** Stay up to date on team activity and categorize boards so you know where to find relevant information.
- **Manage your team's security:** Make sure sensitive company information stays private with advanced administrative controls.

Yes, I want a demo!

Trello
BUSINESS CLASS