Kirti Kote | Project & Content Workflow Mastery using Trello and Notion

## Exercise 1: Trello Board Setup for a Content Marketing Campaign

Scenario: As a **Project Manager** at a digital marketing agency, I managed a campaign for an **eco-friendly product launch**, which included blogs, social media, newsletters, and influencer collaborations using **Trello**.

Step 1: Trello Board Setup

**Board Name:** *Eco-Friendly Content Campaign*
Lists Created:

- Ideas

- Planned

- In Progress

- Review

- Published
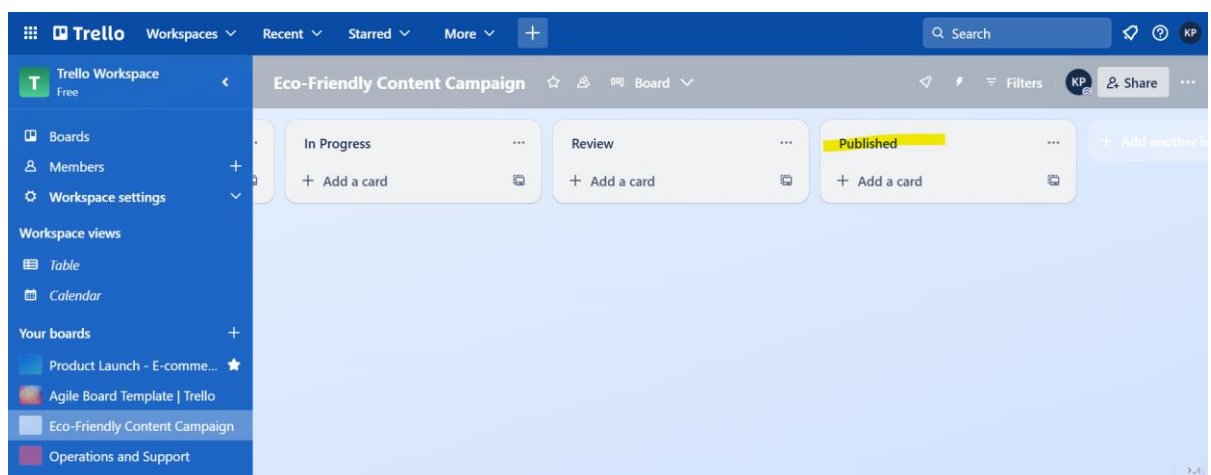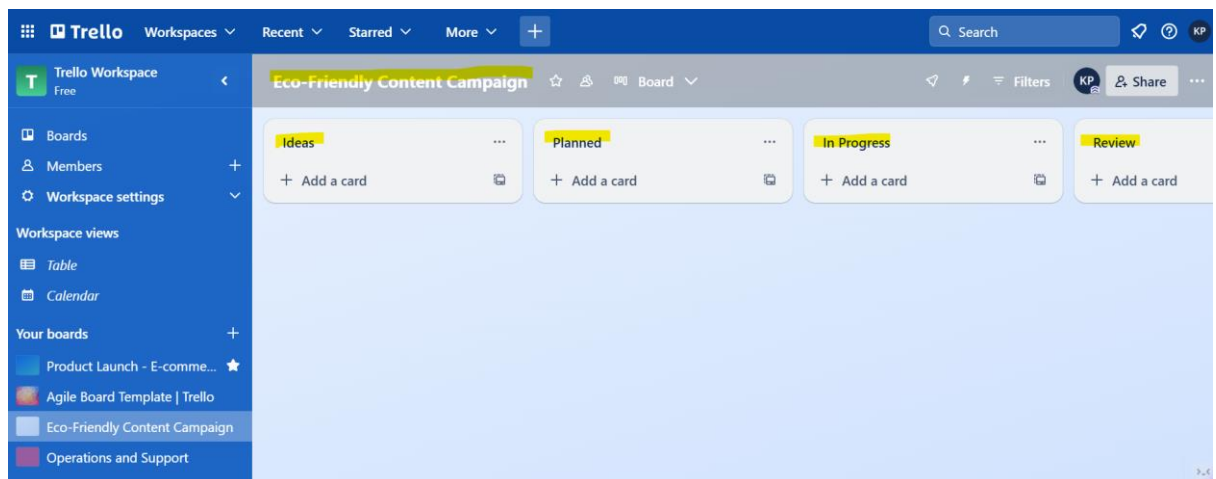
Step 2: Card Creation under "Ideas" List

Created the following cards to represent campaign tasks:

- Develop blog topics on sustainability

- Plan social media posts for a 30-day campaign

- Design templates for email newsletters

- Coordinate with influencers for product endorsements

- Create a video script for promotional content
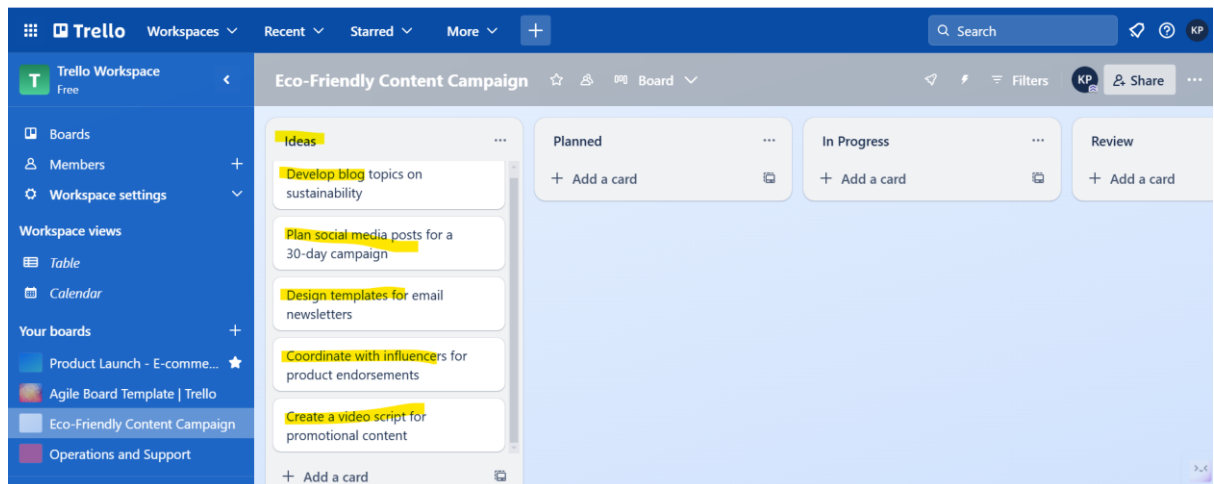
Step 3: Team Member Assignment & Deadlines

Assigned tasks based on team roles, with clear deadlines and reminders:

- **Develop Blog Topics on Sustainability** → *Kirti Kote (Content Strategist)*
  ↳ Start: Feb 21 | Due: Feb 24 | Reminder: 1 day before

Plan Social Media Posts → *Reet Official (Social Media Manager)*
↳ Start: Feb 21 | Due: Feb 26, 1 PM | Reminder: 1 day before
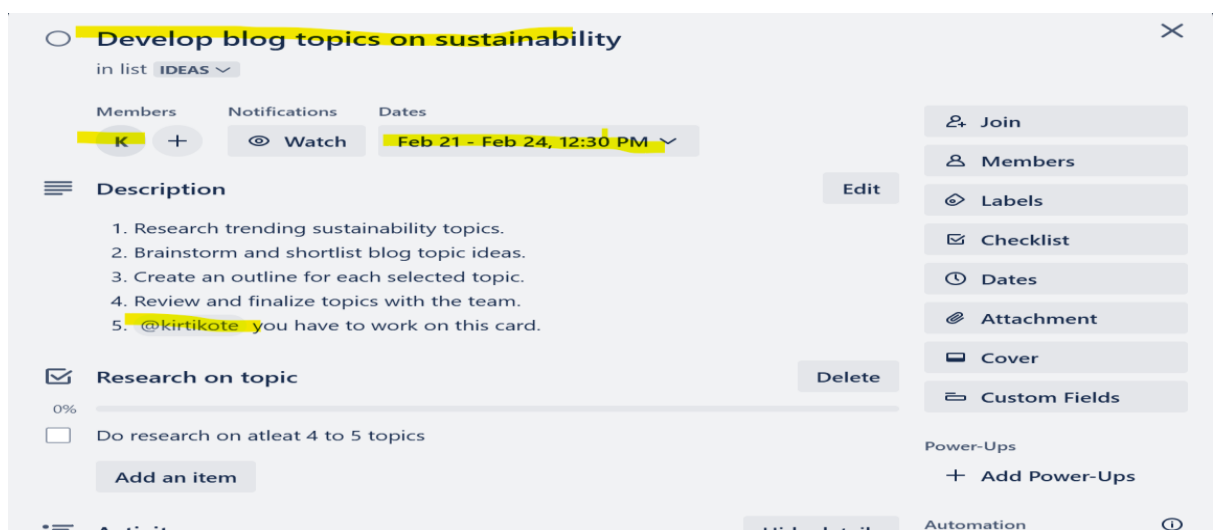
Coordinate with Influencers → *Reet Official*
↳ Start: Feb 24 | Due: Feb 27, 6 PM | Labels & description added

○ **Coordinate with influencers for product endorsements**   ✕

in list **IDEAS** ⌄

Members   Labels   Notifications
RO   +   Coordination with influencers   +   👁 Watch

Dates
Feb 24 - Feb 27, 6:00 PM ⌄

☰ **Description**   Edit

    1. Identify and reach out to relevant influencers for collaboration.
    2. Discuss campaign details, deliverables, and timelines with influencers.
    3. @reetofficial Complete this with your earlier task.

☰ **Activity**   Hide details

KP   Write a comment...

KP   **kirti pawar** set this card to be due Feb 27 at 6:00 PM
     just now

KP   **kirti pawar** added **Reet official** to this card

- 👥 Join
- 👤 Members
- ◈ Labels
- ☑ Checklist
- ⏰ Dates
- 📎 Attachment
- ▭ Cover
- 🗁 Custom Fields

Power-Ups
- + Add Power-Ups

Automation   🖉

Design Email Templates → *Kirti Pawar (Graphics Designer)*
↳ Due: Feb 21, 8 PM | Marked as Urgent

○ **Design templates for email newsletters**   ✕

in list **IDEAS** ⌄ 👁

Members   Labels   Notifications
KP   +   Urgent Task   +   👁 Watching ✓

Due date
Feb 21, 8:00 PM ⌄

☰ **Description**   Edit

    1. Create a layout and structure for the email template.
    2. Design visually appealing graphics and formatting.
    3. Ensure the template is responsive and mobile-friendly.

@kirtipawar   complete the given task by tomorrow EOD.

☰ **Activity**   Hide details

KP   Write a comment...

KP   **kirti pawar** set this card to be due tomorrow at 8:00 PM
     just now

- 👥 Leave
- 👤 Members
- ◈ Labels
- ☑ Checklist
- ⏰ Dates
- 📎 Attachment
- ▭ Cover
- 🗁 Custom Fields

Power-Ups
- + Add Power-Ups

Automation   🖉

Create Video Script → *Kirti Kote (Video Producer)*
↳ Due: Feb 24, 2 PM | Priority Label | Reminder: 2 hrs before

Step 4: Task Progress Simulation

Moved cards to simulate real progress:

- Moved "Develop Blog Topics" and "Plan Social Media Posts" → *In Progress*

Then:
↳ "Develop Blog Topics" → *Review*
↳ "Plan Social Media Posts" → *Published*
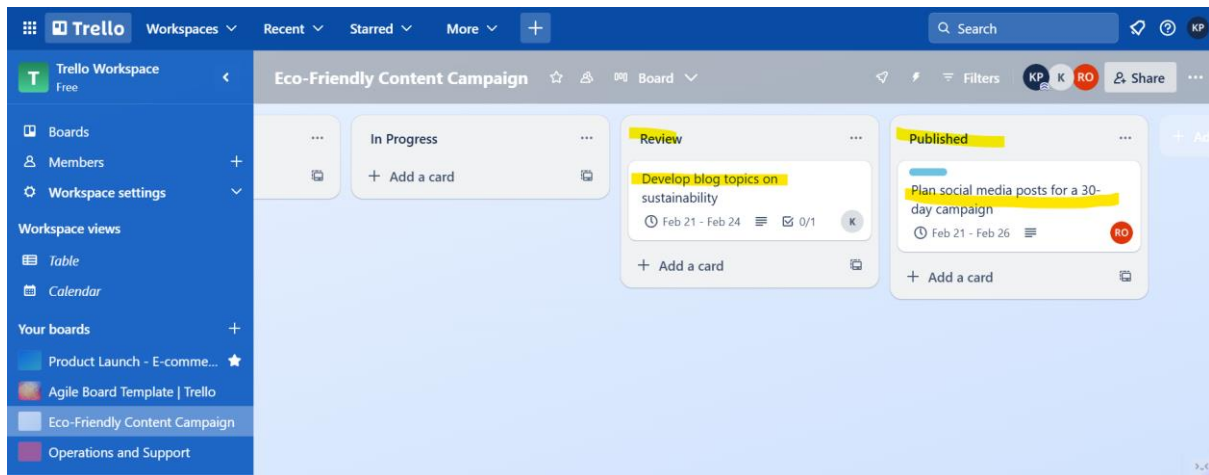
Step 5: Using Calendar Power-Up

- Enabled the **Calendar Power-Up** to manage deadlines visually.
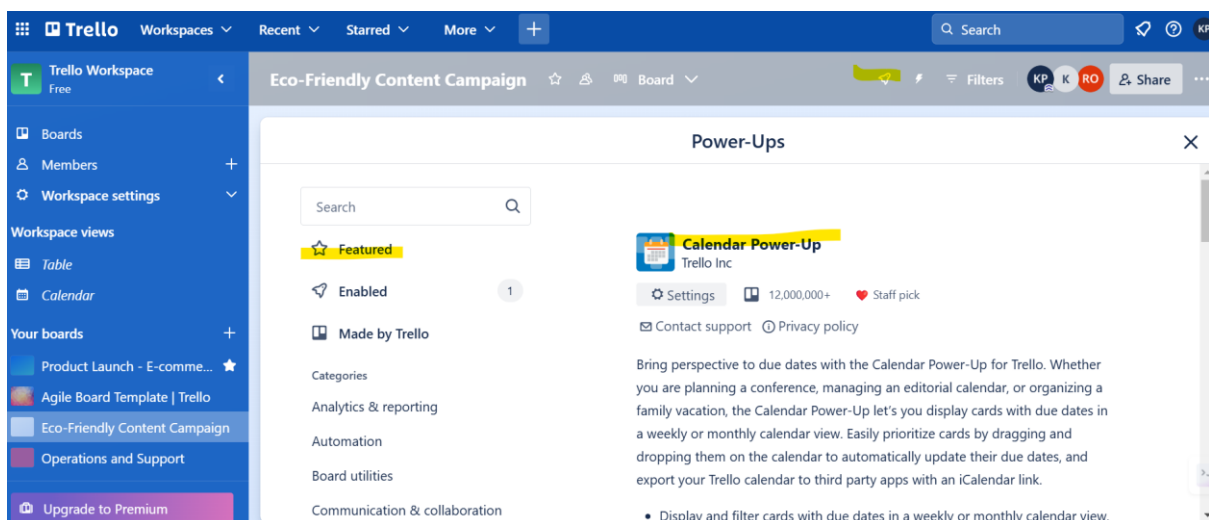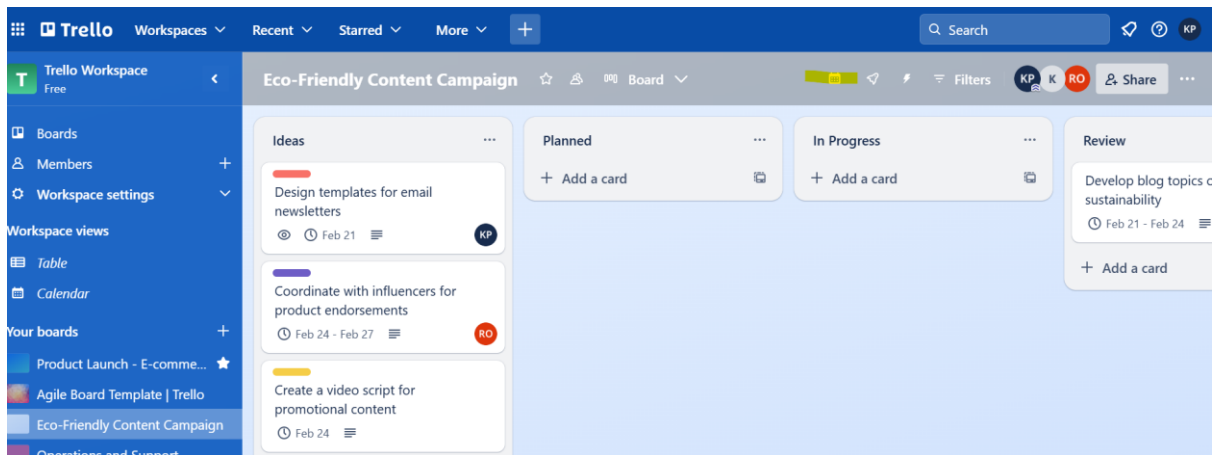
- All tasks appear in the calendar view, offering a clear monthly overview.
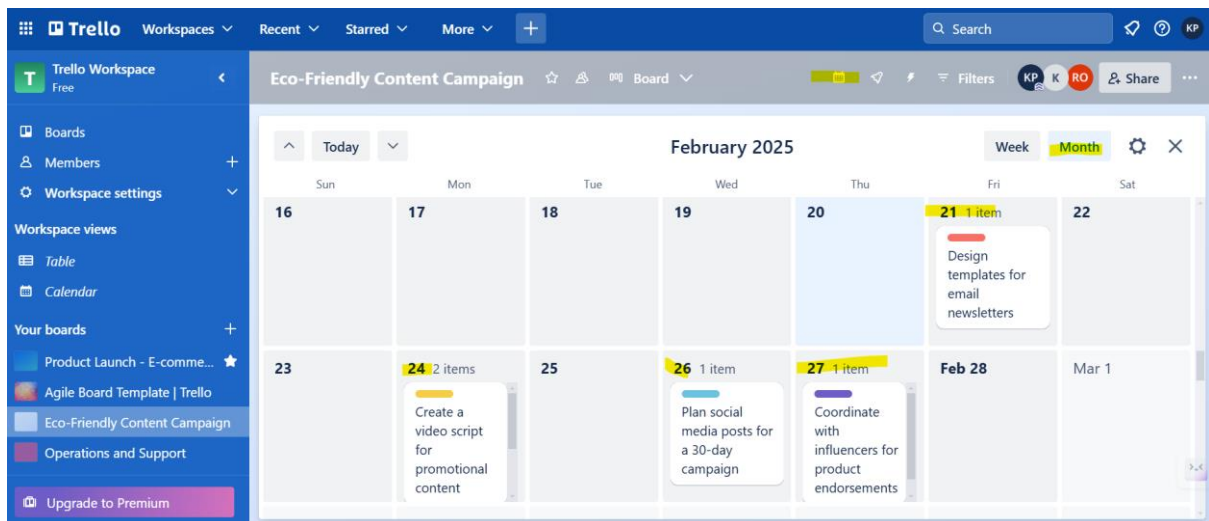
Summary: How Trello Helped in Project Management

Board Setup

- Created structured workflows using lists for each project stage.
- Improved visibility and clarity of task status.

Card Creation

- Documented all marketing-related tasks in one place.
- Enabled focused execution and accountability.

Team Assignment & Deadlines

- Assigned tasks based on expertise.
- Deadlines and reminders ensured timely delivery.

Progress Tracking

- Moved cards through lifecycle (Ideas → Published).

- Ensured the team stayed updated on task status.

Calendar Integration

- Enabled better deadline visualization.

- Boosted time management and planning efficiency.

Conclusion: This exercise showcases my ability to **plan, delegate, and manage content-driven projects using Trello**, emphasizing structured workflows, collaborative execution, and deadline-focused planning. It reflects not just tool proficiency, but also a strategic mindset essential for modern remote and cross-functional teams.

Exercise 2: Notion Wiki Setup for Organizational Documentation

Scenario: Tasked with creating a centralized **internal wiki for a startup using Notion**, serving as the main hub for project documentation, employee resources, and company policies.
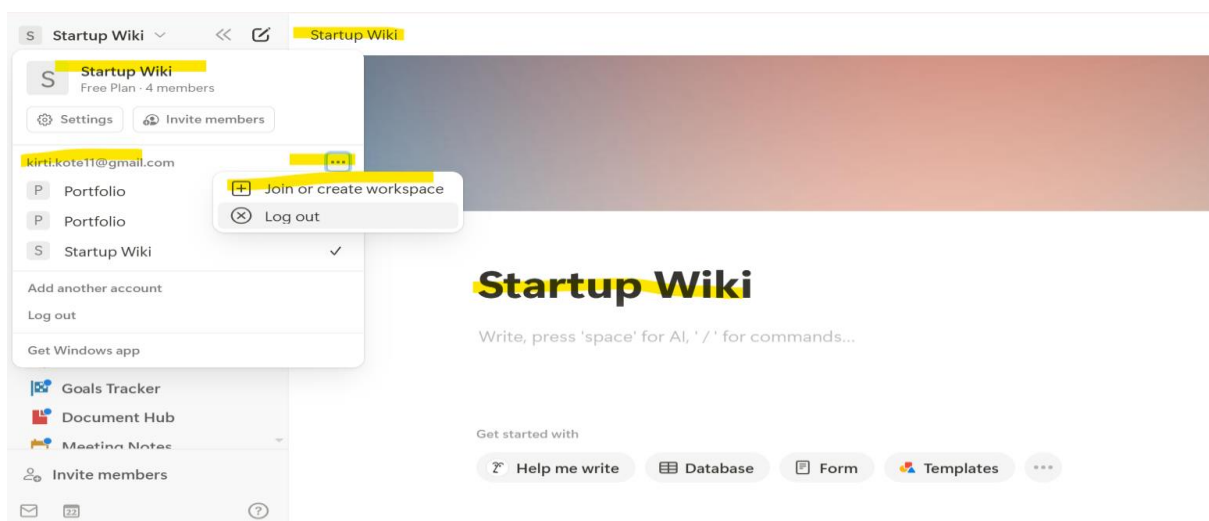
Step 1: Workspace Setup
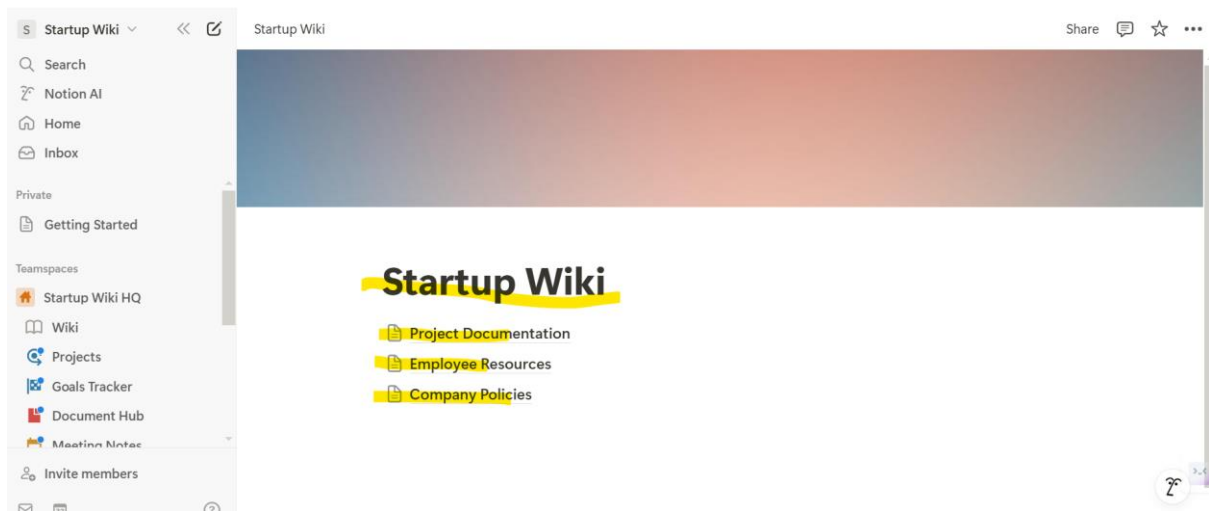
Workspace Name: *Startup Wiki*
Sections Created:

- Project Documentation
- Employee Resources
- Company Policies

Steps:

- Click the three dots in the top left of Notion.
- Select **Create Workspace** and name it *Startup Wiki*.
- Create a main page titled *Startup Wiki*.
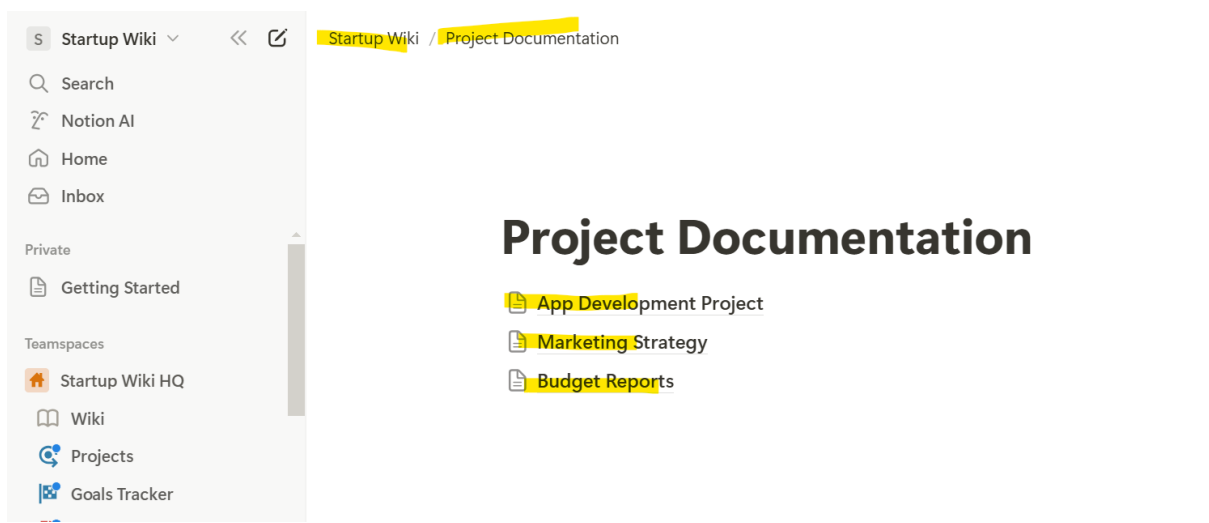- Use the slash command "/" to add subpages for each section under the main page.

Step 2: Creating Section Pages

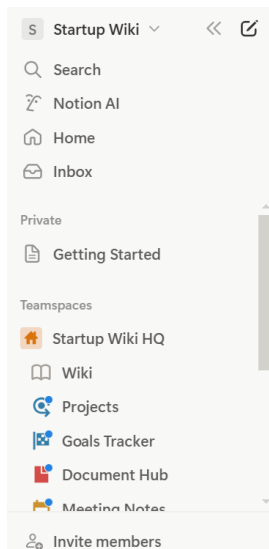Created subpages under each section to store detailed content.

◈ **Project Documentation:**

- App Development Project
- Marketing Strategy
- Budget Reports

◈ **Employee Resources:**

- Onboarding Guide
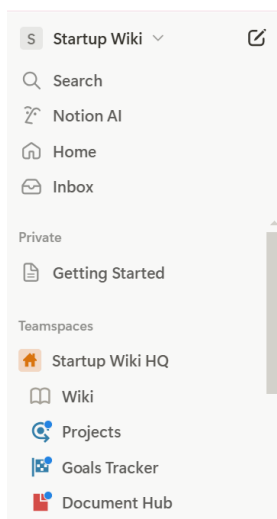- IT Support
- Training Programs

Employee Resources

📄 Onboarding Guide
📄 IT Support
📄 Training Programs
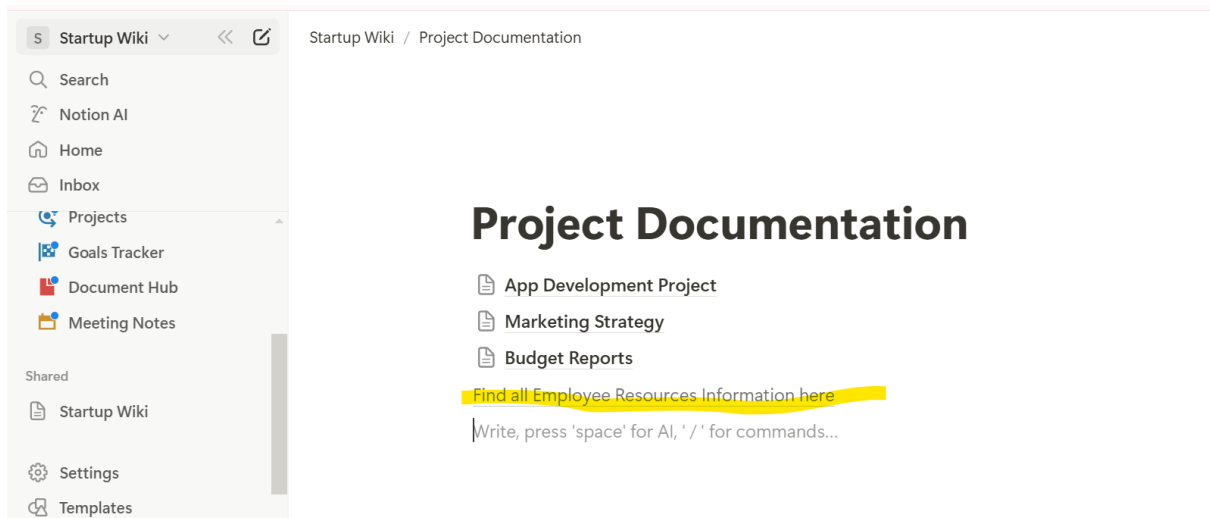
🔷 **Company Policies:**

- Remote Work Policy
- Expense Reimbursement
- Annual Leave Policy

Company Policies

📄 Remote Work Policy
📄 Expense Reimbursement
📄 Annual Leave Policy

Step 3: Interlinking and Tagging

- Copied the **Employee Resources** page link.
- Pasted it into the **Project Management** page with a custom title:
  "Find all Employee Resources Information here."
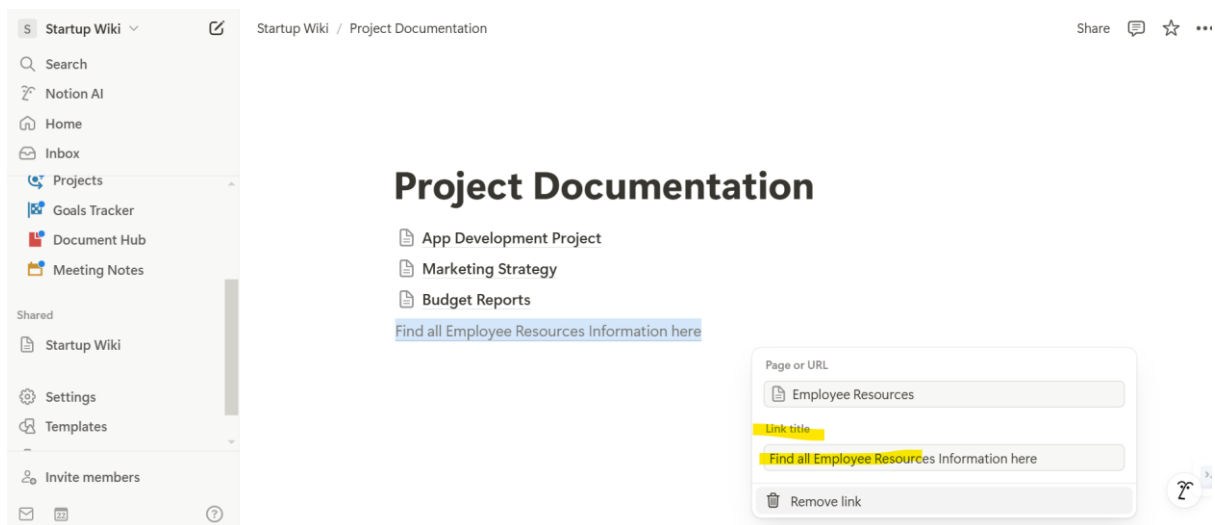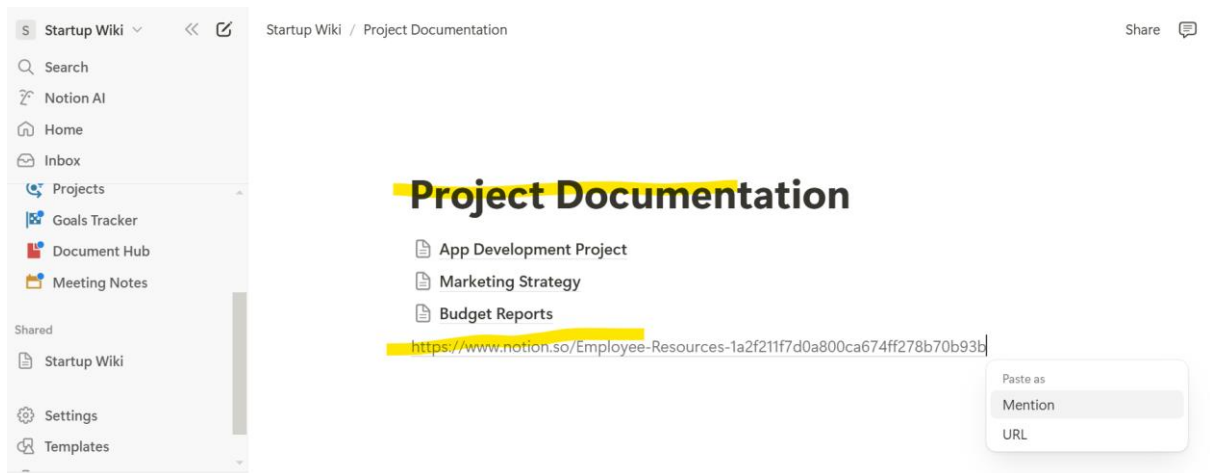
- Repeated the process for **Company Policies**, linking it as:
  "Find all company policies here."
- Used tags like **HR, Tech, Finance** to organize pages by department.

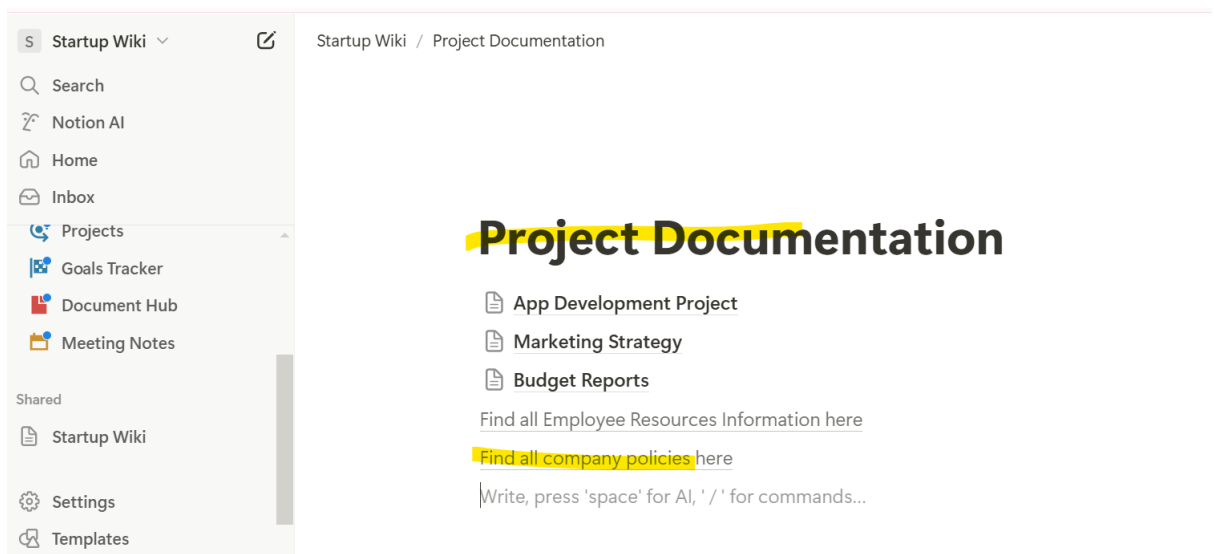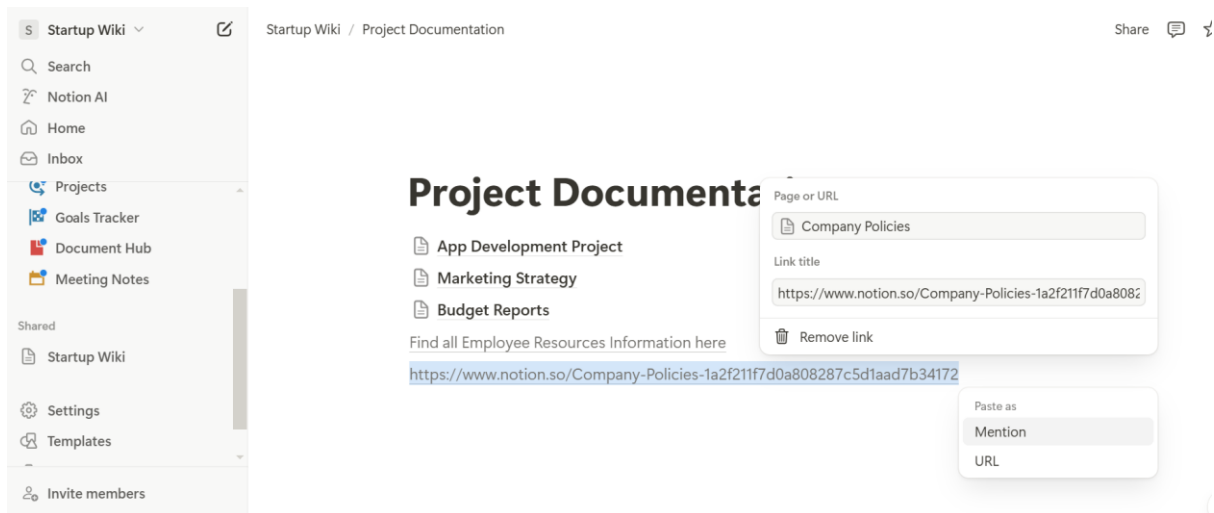**Step 4: Embedding Multimedia**

- In the *App Development Project* page, embedded a **Trello file**.
- Added relevant **images, media, and external links** for visual documentation.
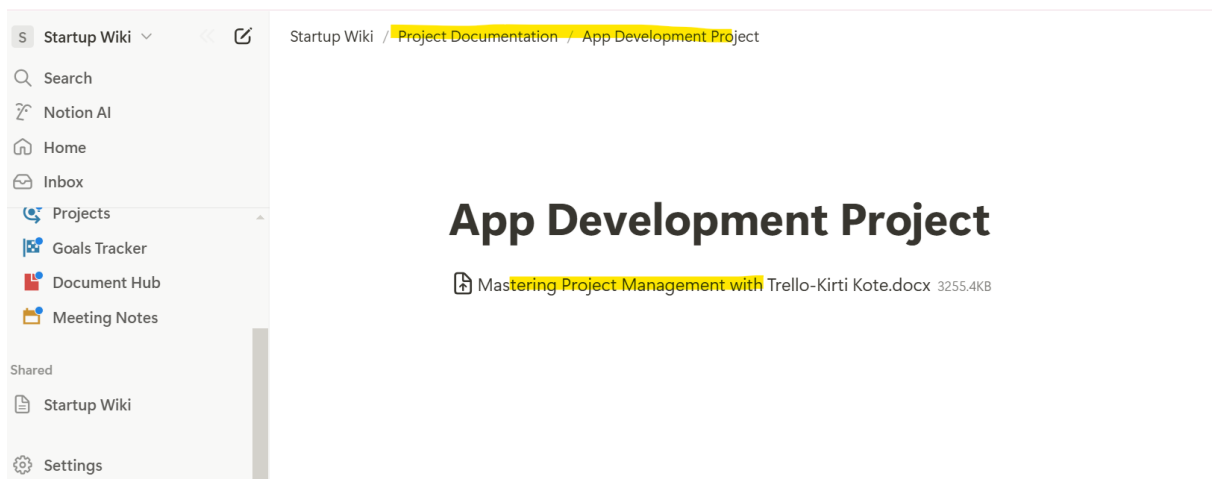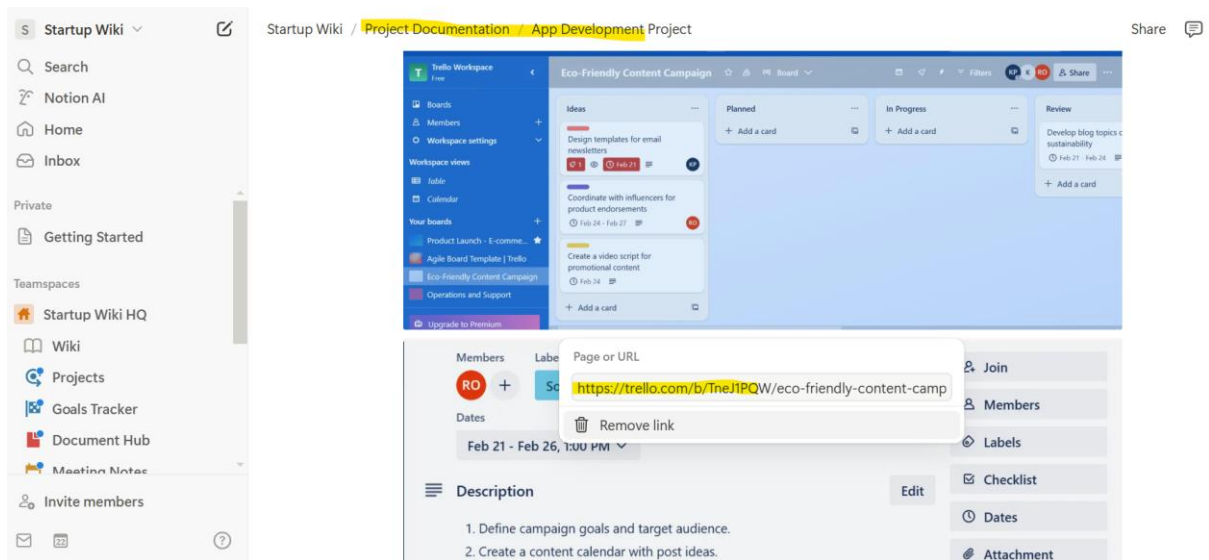
- Used **Gallery View** to display media attractively and tagged team responsibility.

- Embedded a **Calendar Slots** scheduling link using the **Button** block.
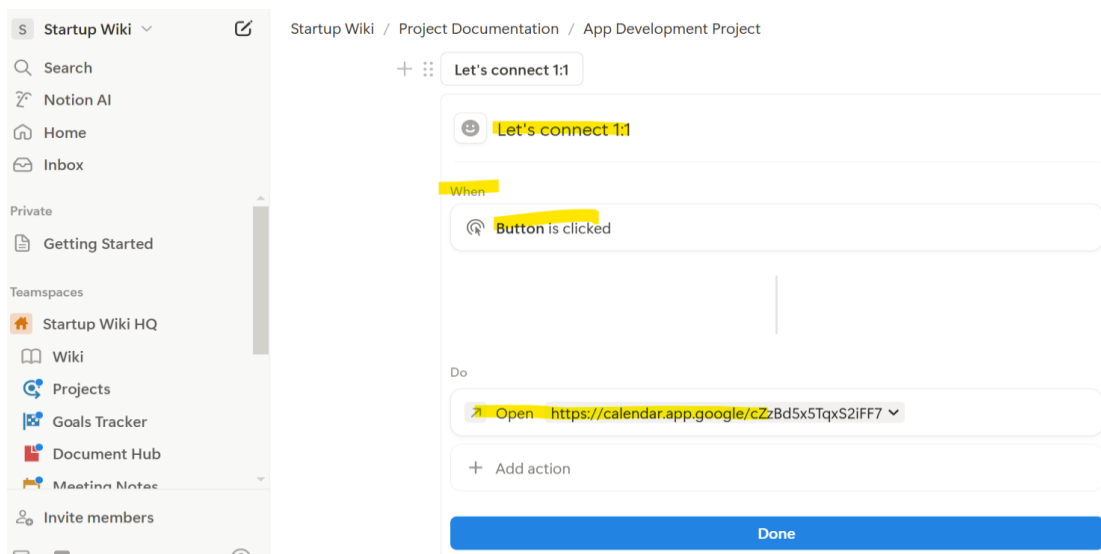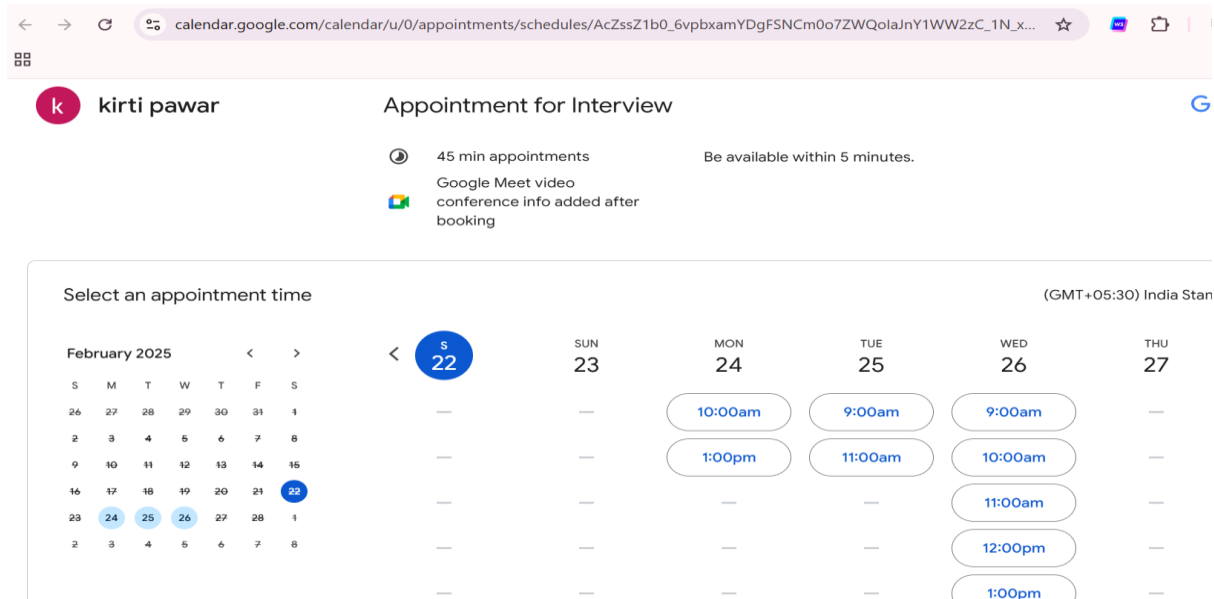
Step 5: Sharing & Collaboration Settings

- Clicked the **Share** button in the top-right corner.
- Invited team members via email.
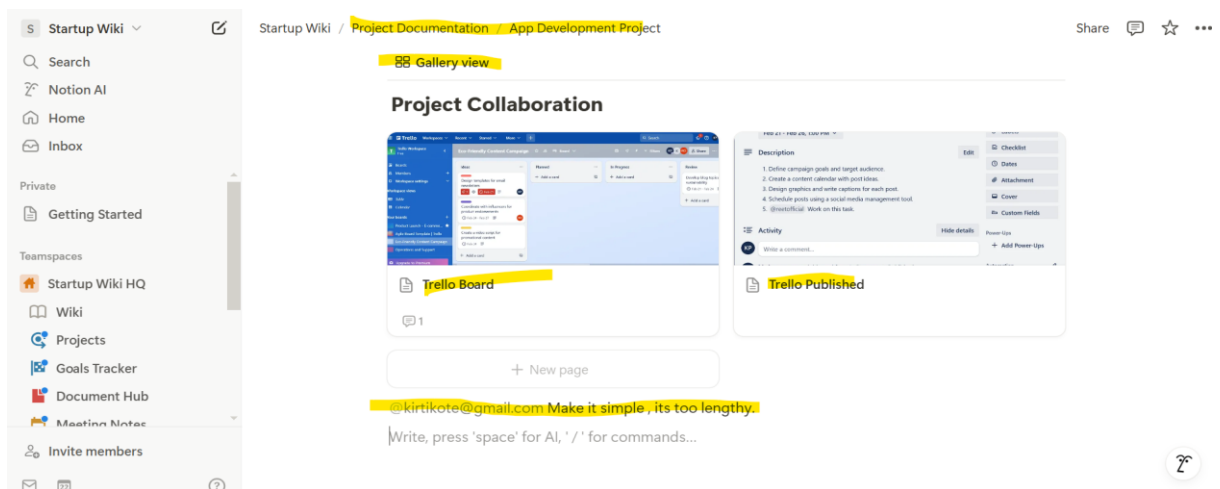- Configured access levels:
  - **Full Access** – Can edit, comment, and share
  - **Can Edit** – Can edit and comment, but not share
  - **Can Comment** – Comment-only permissions
  - **Can View** – View-only access
- Example: Invited officiareet4@gmail.com with **Can Comment** access.
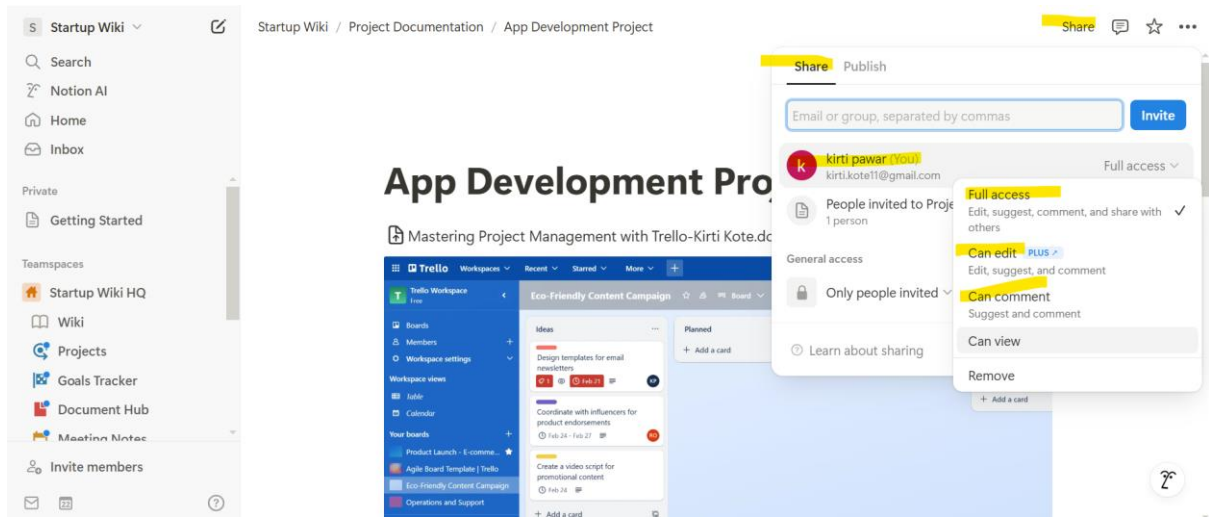
Summary: Key Outcomes Using Notion for Documentation

Structured Wiki Creation

- Created a centralized, easy-to-navigate internal wiki.
- Organized major areas like projects, HR, and policy management efficiently.
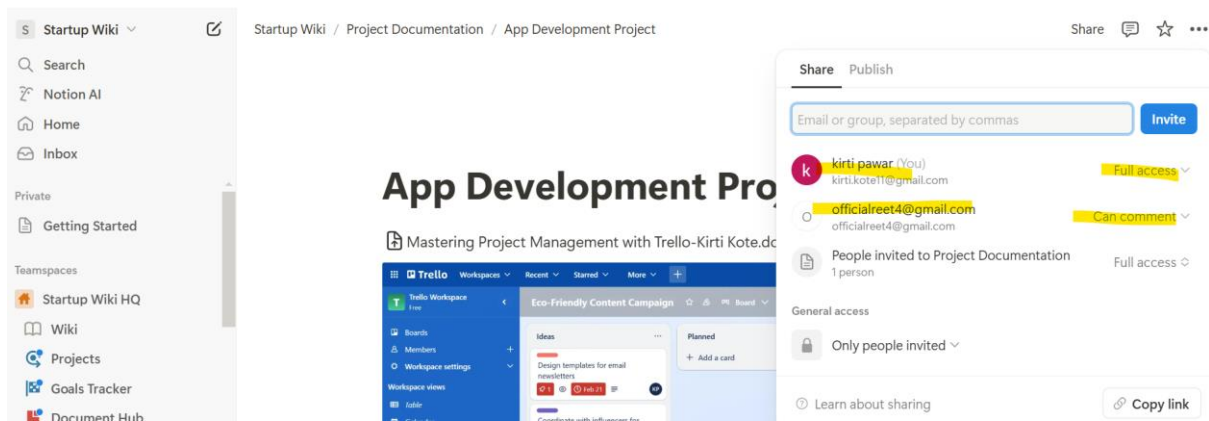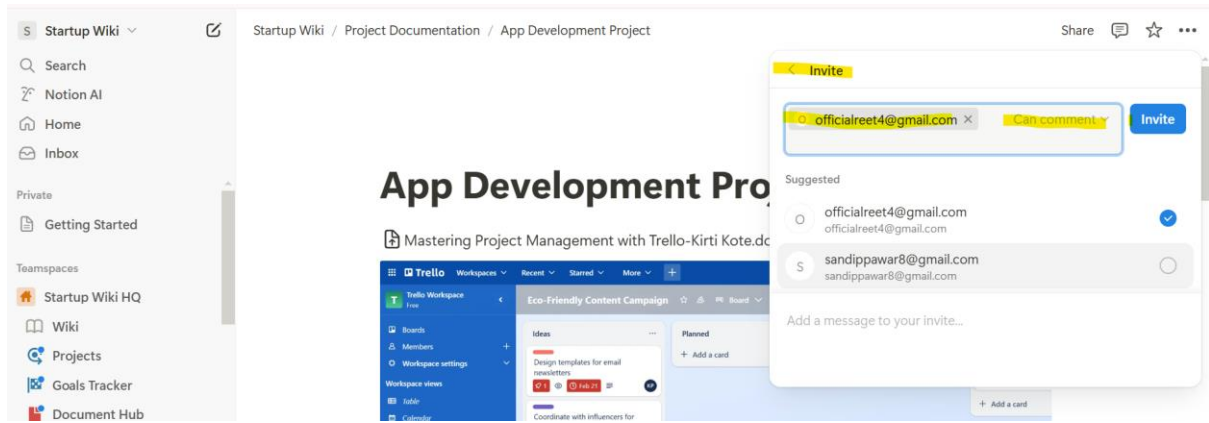
Collaborative & Scalable Design

- Allowed seamless team collaboration with defined permissions.
- Pages can scale as the company grows — great for onboarding, project tracking, and HR reference.

Visual & Interactive Experience

- Embedded media and tools (e.g., scheduling links, galleries) enhanced interactivity.
- Created a professional, user-friendly knowledge base.

Cross-Linking for Easy Navigation

- Interlinked relevant pages with descriptive titles.
- Improved content discoverability and user experience.

Conclusion: This Notion setup demonstrates my ability to build **structured, dynamic, and scalable documentation systems** for modern organizations. From clear content organization to collaboration workflows and embedded tools, this wiki acts as a single source of truth that drives efficiency and alignment across teams.