



 Trello

The 7-step Trello handbook to remote team management success

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Introduction

While a **majority of employers and employees** alike report that a remote model has proven successful, there's still work to be done. The fact is a lot of remote work policies were made quickly and meant to be temporary. And you probably weren't expecting to manage remotely for this long – let alone permanently. Now your team is facing burnout and ongoing communication struggles and looking to you for support.

And there's a lot to learn – whether that's maintaining effective communication, keeping team performance up to standards, or nurturing employee growth. But thankfully, transferring your managerial skills to a remote setting doesn't have to take months of training.

Grasp the basics of remote team management quickly with a simple seven-step handbook – drawn from the remote leadership team at Trello. Follow it, and you'll be well on your way to having a thriving team that's flexible, independent, and can get their work done from anywhere.



STEP 1

Create your team's remote home base

In an office, a designated section of desks, meeting rooms, and casual common areas (like the lunchroom) are the norm. Remote teams need a home base, too. They need virtual spaces where employees can work together, access team resources, and even indulge in some non-work-related banter.

Elements of a remote office you should incorporate into your team digital home base:

Messaging platform

A chat solution like [Slack](#) allows you to have a constant, real-time connection with your team.

Digital workspace

A shared place where work happens – like [Trello Enterprise](#) – provides visibility around project progress and work ownership.

Video meeting space

An integrated video tool, like [Zoom](#), works smoothly to give your team much-needed face-to-face interactions.

Open document storage

Avoid storing closed files on your computer. Instead, use a cloud-based shared document space – such as [Confluence](#) or [Dropbox](#) – where everyone has access to the files they need.

A common calendar

A team calendar that shows vacations, holidays, important deadlines, and shared meetings offers real-time insights into everyone's availability. With this information, you'll know who has the capacity and time to tackle upcoming assignments.

Establish remote team home base guidelines

Setting up the home base is just the beginning. You also need to set expectations for how the tools will be used. Guidelines should be clearly documented and revisited on an ongoing basis with your team.

Give direction like, “All action items need a due date and an assigned team member.” Or even outline **your remote team’s approach to empathy** and establish a culture of openness to keep remote work personable.

For example, the Trello Marketing team avoids using @all or @here in Slack because it disrupts productivity. Team members feel it’s the equivalent of standing up in an office and shouting for immediate attention.

Once you’ve defined clear expectations around how your team will use these tools, document all that information in an accessible place. That way, your team is always confident they’re using their tech stack efficiently to communicate, collaborate, and provide status updates.

Call it your remote team’s “communication charter,” and consider it a living, breathing set of group norms you revisit together on a quarterly basis. After all, processes and tools that worked last year may not work for you today or six months from now.

Use this **Trello template** to create a team resource center. The Trello board houses important team information, frequently asked questions, schedules, major project due dates, and more.

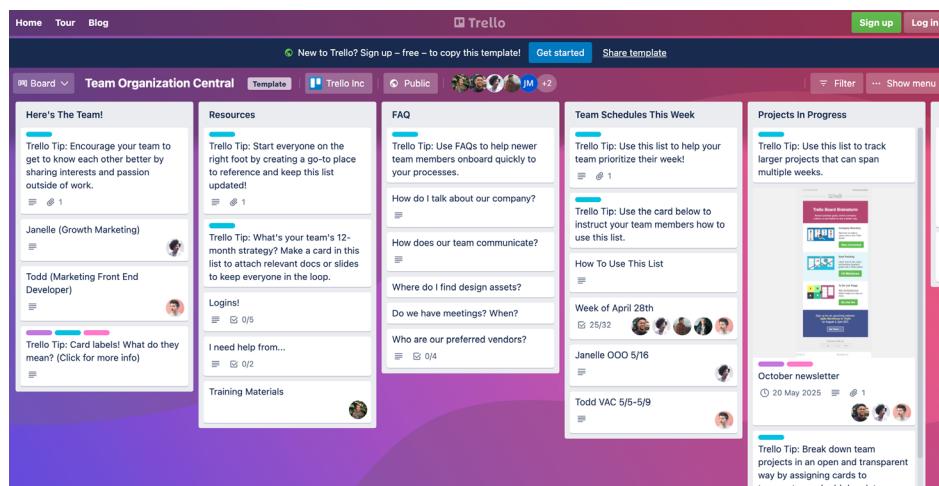


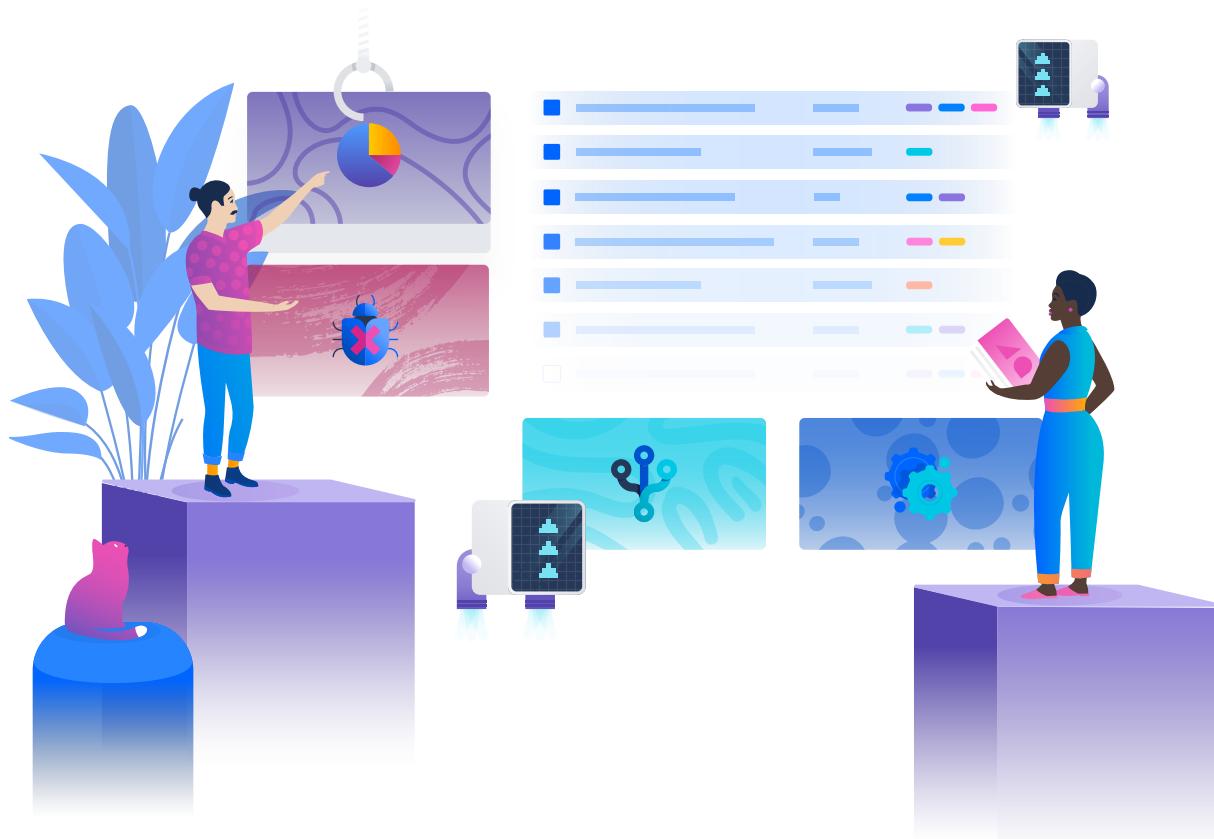
Image: [Trello template](#)

STEP 2

Set up recurring 1:1 meetings with remote team members

Trello managers anchor relationships with their team around weekly **1:1 meetings**. Set up a recurring half-hour meeting on your calendars, and reserve one hour per month for a longer discussion (if needed).

Yes, you should encourage the use of video during these meetings. Recurring 1:1s are your most valuable time for building your relationship and checking in on everything from professional highs and lows to quarterly goal progress.



Keep 1:1 conversations flowing with a designated Trello board

Stuck on what to talk about? Use a Trello board to manage your 1:1 meetings and keep both the work and conversations flowing. Helpful [lists](#) to add within the board include:

To discuss

Build an agenda all week long with a place to quickly add topics. The list gives you both a heads up on what you'll be talking about so you come to the meeting prepared.

Ongoing

Move discussion cards to this list once they're set in motion. Then, nothing gets forgotten along the way, and you can check back on progress as needed.

Growth

Put team member goals and areas of growth front and center. Then, you can talk about performance on an ongoing basis instead of formalizing reviews just once or twice a year. Plus, these conversations make reviews more natural because employees have an idea of what's to come based on those regular performance conversations.

Discussed

Keeping a record of past discussions allows you both to track your progress as a manager-managee unit, so you'll know just what wins to celebrate at review time.

As a manager, you'll see as team members add discussion items throughout the week and take the initiative to follow through on growth goals and ongoing items listed on the board. Regular updates help you remain in touch with their progress and well-being at work on a consistent basis.

Adopt this [Trello template](#) for 1:1 meetings. Then, create a recurring calendar invite with a Zoom link included. Be sure to put the board link in the calendar invite, so it's always readily accessible.



Image: [Trello template](#)

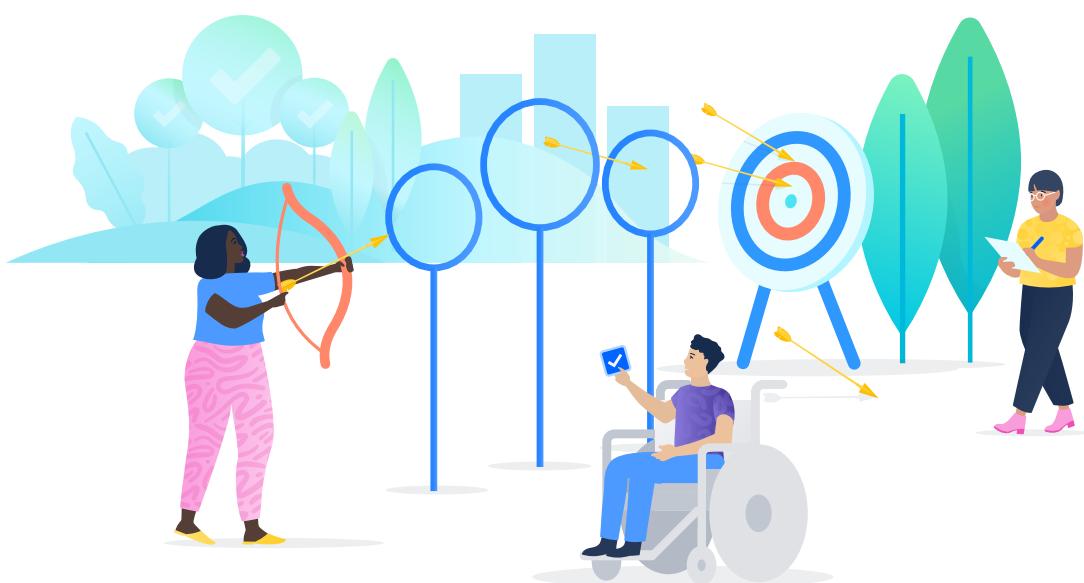
STEP 3

Host weekly all-hands team meetings

Just as you create those key 1:1 moments with team members, it's equally important to build in consistent facetime with your entire remote team to share bigger picture updates and discuss team goals.

Meeting frequency may ebb and flow depending on team availability and need. For instance, in times of crisis – such as project goals changing – your team may want more frequent interaction. At the same time, they may prefer fewer meetings when deadlines loom or work is flowing well. Since flexibility is one of the best parts of working remotely, don't be afraid to change up the cadence to suit your team's preferences.

However, with a regular, weekly all-hands meeting, it's simple for team members to map out their schedule around it. Just make sure the time is spent on important updates and meaningful discussions, so people actually want to show up and participate.



Get everyone involved in planning and running the team meeting

Enlist the entire team to prepare the meeting agenda and run the meeting. By giving team members an active role to play in these gatherings, they'll be more likely to engage and participate in discussions.

Consider assigning someone to take meeting notes – or record the meeting so people who can't attend can catch up later. And designate a meeting lead who can keep the conversation flowing and the team engaged.

Key items to include on your agenda include kudos for jobs well done, discussion around recent learning, and team thank-yous, so employees have plenty of opportunities to join in, share, and ask questions.

After some time, you'll start to see your team crafting meeting agendas without your “friendly reminders,” participating in lively discussions, and sharing thank-yous with each other in a group setting. No more working in silos.

This [Trello template](#) is a tried-and-tested remote team meeting agenda you can implement. Just schedule a recurring calendar invite with a Zoom link included. And add the board link in the calendar invite, so it's always on hand.

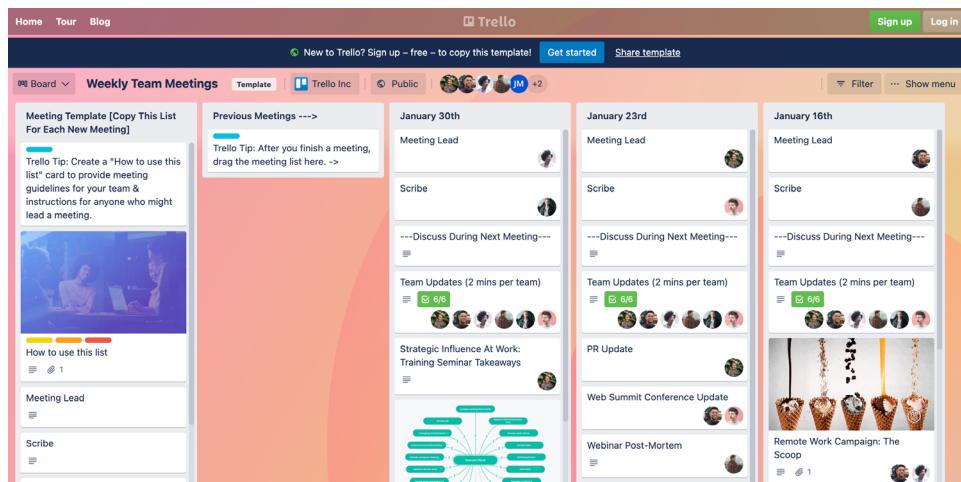


Image: [Trello template](#)

STEP 4

Establish workflows that help manage team workloads

PwC research found that an **increasing percentage of employees and employers** agree that productivity is higher now – working remotely – than it was before the COVID-19 pandemic. A key to productivity for any team, remote or co-located, is a manager who can properly protect and prioritize the work that comes to the team.

When unfiltered work requests start sliding into direct messages and the stress builds up, it can be easy to miss the signs an employee is overwhelmed by the extra tasks. It's important to establish one place where all requests are submitted, prioritized, assigned, and tracked to completion. An established workflow will streamline things significantly and give you peace of mind that nothing's slipping through the cracks.

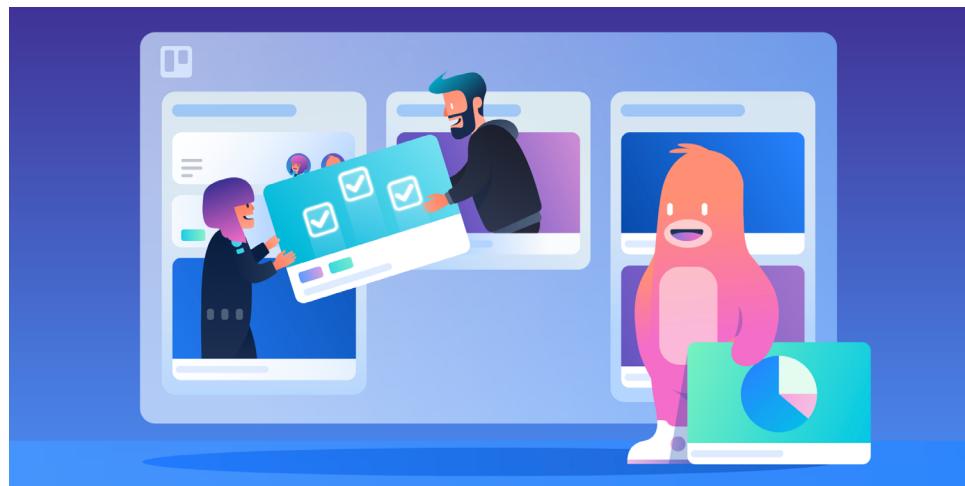


Image: Trello Blog, "[Kanban 101: How Any Team Can Be More Agile](#)"

Adopt an agile workflow process to manage productivity

To manage team workloads and reduce impromptu requests that hinder productivity, use a [kanban workflow](#) that allows for an agile process. The goal of a kanban is to visualize work and manage it accordingly. This method helps you prioritize work with your team by:

- Visually organizing the work in a shared place and scope the full amount at once.
- Limiting work in progress by having different stages that note the volume of work in each stage and their status, like Incoming, Up Next, Doing, Blocked, etc.
- Empowering your team to pace themselves and be transparent about their commitments, so you can prevent them from becoming overwhelmed.

With this workflow, you'll feel confident knowing everyone's work is seen and prioritized properly. Team members will start to direct people to submit requests to the central intake – and take on tasks in “Incoming” as they have the capacity.

Organize incoming requests from cross-functional teams with this [Trello template](#). Be sure to add a link to the Trello board to the description of your team's Slack channel. And direct stakeholders to ask questions and submit requests on this Trello board, so they can be triaged and assigned out.

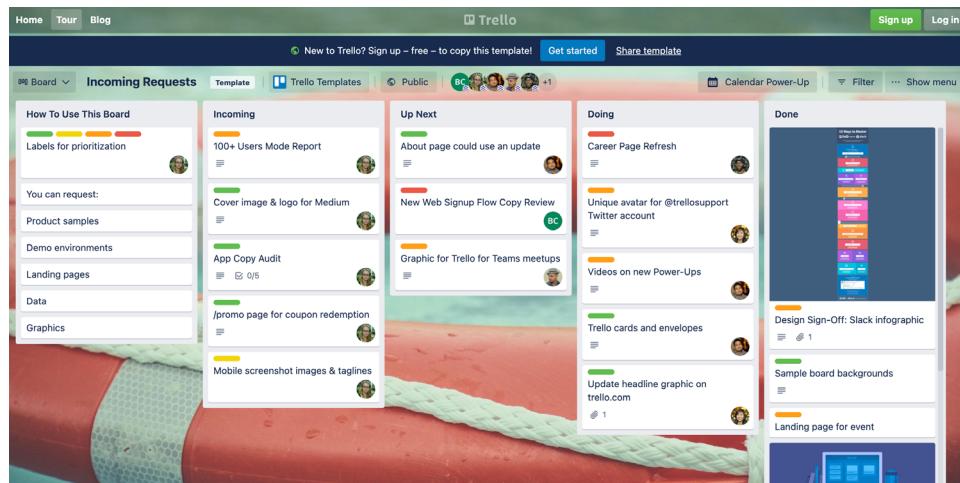


Image: [Trello template](#)

STEP 5

Encourage time for remote team bonding and fun

Chatting by the water cooler or going out for special team-building activities are common scenes in an office setting. While it's hard to replicate these team bonding opportunities in a digital space, it's not impossible. Plenty of opportunities exist to cultivate team connections virtually.

It's up to you to get your employees excited and comfortable with socializing remotely. People need and want connection. And your team is looking to you for permission and inspiration here.

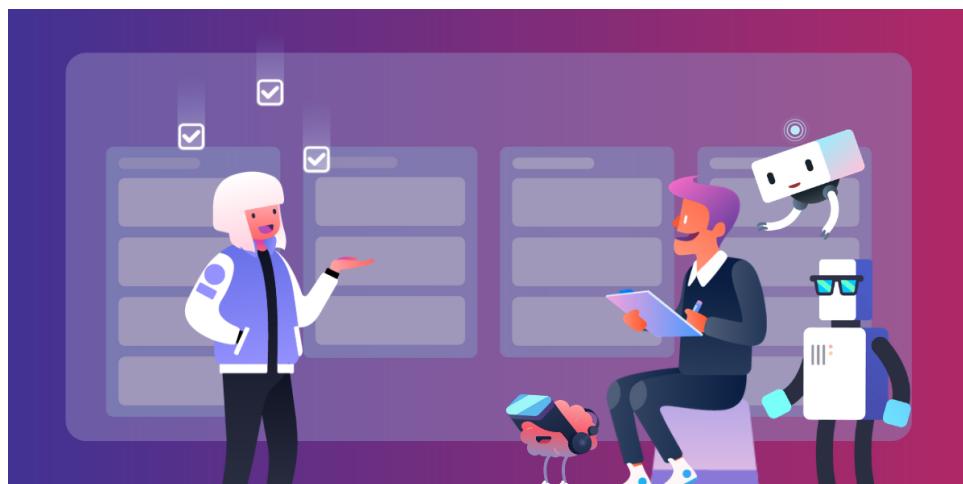


Image: Trello Blog, “[How Managers Can Utilize Trello To Boost Employee Engagement](#)”

Get the whole team involved in team-building

The more involved the team is, the more they'll feel invested in planned activities. After all, the most important thing is employees enjoy the events and want to show up.

Ask your team to brainstorm ideas for what they'd like to do or talk about. Maybe it's starting a Zoom book club or purchasing games, like Jackbox, to play virtually. You and your team can also draw inspiration from [these five fast team-building activities for video meetings](#).

You'll know your team-building efforts are working once employees interact with ease on social calls. Slack chatter will be a healthy mix of work talk, YouTube links, memes, and shared photos of weekend activities. And team members will let you know loud and clear if they need more or different social events.

Cultivate remote team bonding with Trello boards. Start with an overall new team-building board with lists for resources, planning, scheduled events, and more. Or form a social committee and let people add and vote on different ideas using the Trello [Voting Power-Up](#) integration. A vote allows you to gauge interest and get a sense of participation.

Once some programs – like a book or movie club – are set up, create separate boards to manage events that are linked in the shared board. For example, use an event-specific [template like this](#) – where remote employees share what they've used their activity stipend for.

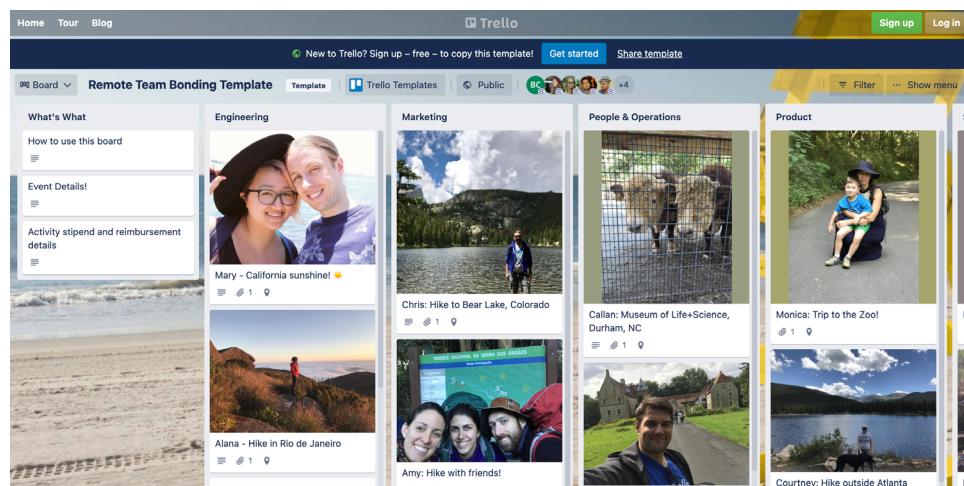


Image: [Trello template](#)

STEP 6

Build a cadence for team health and performance reviews

To keep remote team performance and health at its best, you need to consistently monitor it. You'll gain visibility into barriers to production, areas for management improvement, and tools and processes your team lacks. You just need to adapt your review system to a remote setting.

Take a look at your current performance review process. You'll quickly notice that none of the factors assessed in these reviews relate to how team members function in a physical office.

So adapting your review system to remote work won't be much of a lift. Just shift your meetings to video and your printed review letters to PDFs to continue your review cycle in a distributed setting. While individual performance reviews are vital, so are regular analyses of team health. Trello can help build a cadence for both.



Use Trello to manage team performance and health

When reviewing team performance, consider employee growth. Atlassian turned [growth plans into Trello boards](#) to make them accessible for all teams. (Just be sure to use your weekly 1:1s to regularly check in on goals, too.)

As far as team health goes, you could run a bi-annual or quarterly Team Health Monitor. This process allows you to assess how everyone is feeling about team issues and processes. You'll have consistent, up-to-date records of everyone's thoughts on their remote experience. And you can monitor progress on improving areas flagged as problematic, too.

Check out this [Trello template](#) for a Team Health Monitor. The [Atlassian Health Monitor playbook](#) will guide you through all the steps. Use the [Voting Power-Up](#) to have everyone upvote which status they feel applies to the health area – from having a shared mission to delivering value.

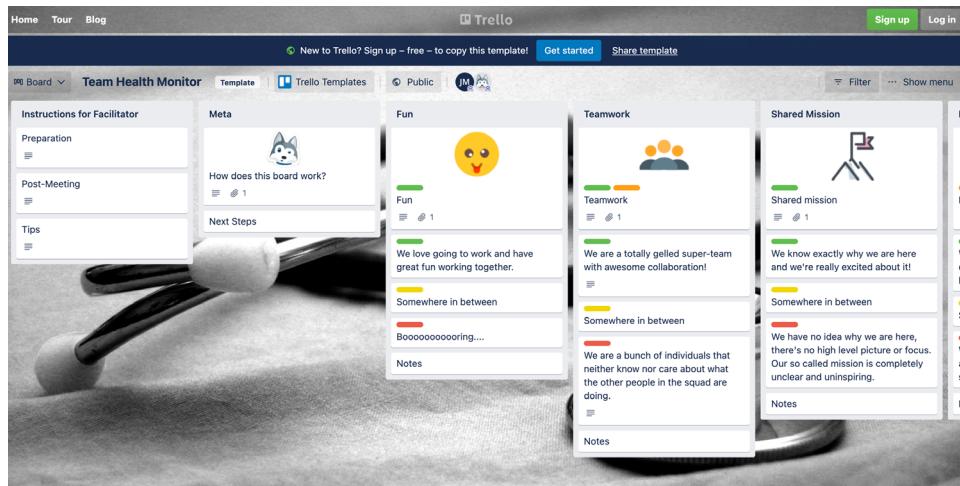


Image: [Trello template](#)

STEP 7

Hire and onboard remote team members to keep growing

Without face-to-face time, onboarding might be challenging for new remote employees and managers. After all, you're not there in person to walk new hires through company information or team processes. It's difficult to know where they are in the onboarding process without quick face-to-face check-ins.



But by setting clear onboarding goals for yourself and creating a documented process, it's easy to track progress and get new team members up and running smoothly.

GOAL ONE

Help your new hire settle into the role.

GOAL TWO

Provide company knowledge and understanding.

GOAL THREE

Empower new hires with the tools, info, and resources to thrive.

Onboard remote employees with ease using Trello

Atlassian provides every new employee – remote or otherwise – with a **90-day plan built from a Trello template**. You and your new report can share this board privately and use it as the map to their new environment. As new employees join the team, be sure adequate Trello permissions are in place in the **Trello Enterprise Admin Dashboard**.

With this system, your new hires will:

- Be in all the right Slack channels
- Have access to your remote team home base
- Have scheduled 1:1s with their manager and teammates
- Be embraced by the larger team from day one

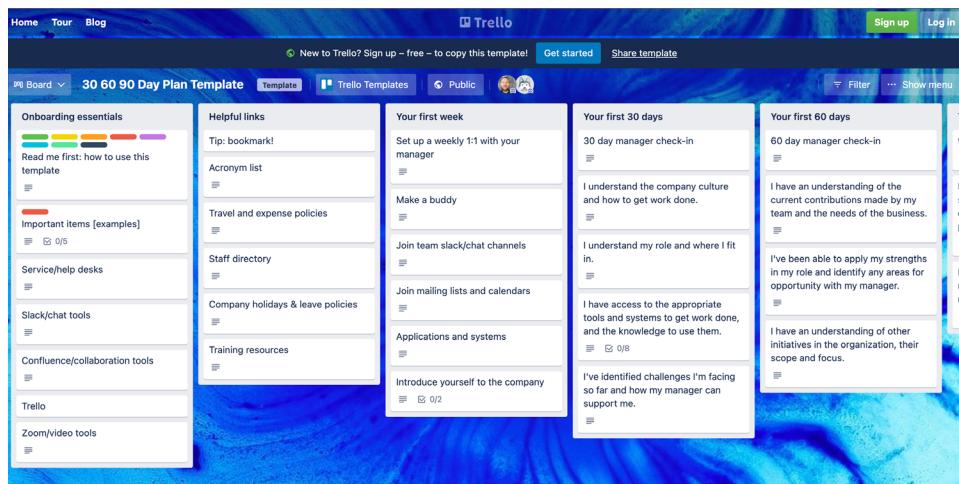


Image: [Trello template](#)

And you'll know exactly where new hires are in the onboarding process – and they aren't just waiting for someone to tell them what to do next.

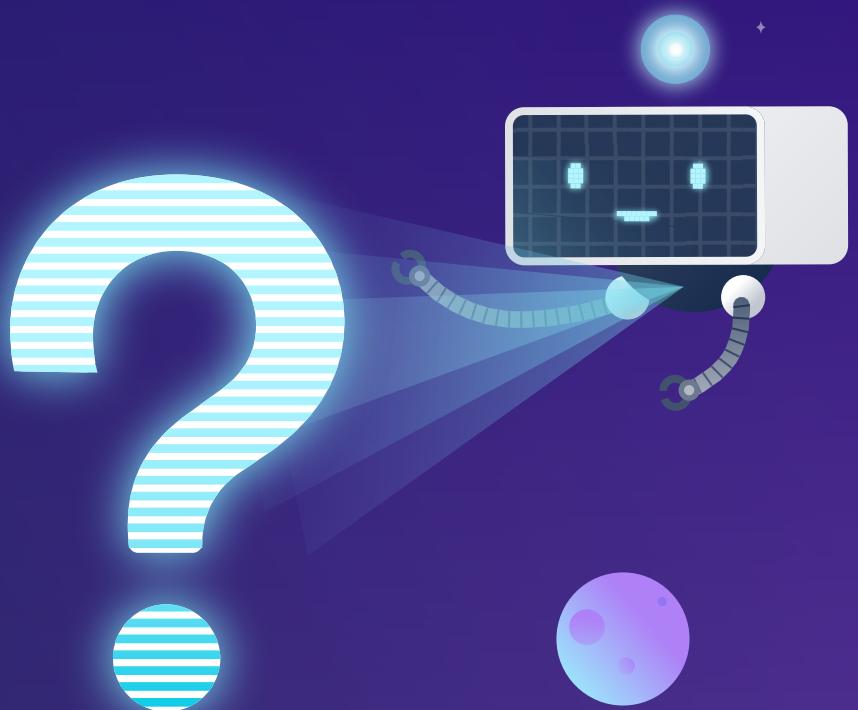
Start with this **Trello template** for a 90-day plan and build out the remote handbook for your next new hire. Have them assign due dates to each item so you can track their progress. And schedule daily video check-ins until they are ready to step into their new role with confidence.

Thrive in managing remote teams with Trello

These seven practical steps enable you to set up and manage a remote team that not only works together but thrives as a productive unit. And just as Trello Enterprise can support you in building a successful remote team, it can also help you maintain it.

With this enterprise solution, you'll be prepared to **overcome challenges that may come with remote work**. You'll have access to **integrations**, automation capabilities, and **views for better team management**.

And that's just the beginning of what Trello can offer your organization. Reach out to the **Trello Enterprise team** to see how you can use the tool to unlock the full potential of your remote team.



Learn more at
trello.com/enterprise