

Project Management Technology Briefing

Tool: Trello

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For: Celestial Gems Proposal Team

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Purpose

In order to assist Celestial Gems in managing and organizing the tasks associated with their Point-of-Sale (POS) and e-commerce upgrade, this briefing presents Trello, a web-based project management tool. Our project team will be able to assign tasks, monitor progress, stay on schedule, and communicate better thanks to it.

Because it doesn't require extensive training sessions or sophisticated tech knowledge, this tool is useful for small teams or co-op businesses like Celestial Gems. Trello is easy to use and adaptable to various workflows. This tool will help the team stay focused and monitor every aspect of the project in real-time as Celestial Gems move toward a more digital business model.

Organization Overview

Celestial Gems is a small, local jewelry co-op that sells handmade items through an in-person gallery. Currently, they do not have a reliable way to track sales or manage inventory. Their website is limited, they don't offer online sales, and they have little to no social media presence. Our project aims to modernize their operations with a POS system, an e-commerce site, and a clear digital plan.

Why a PM Tool is Needed

Our project includes multiple steps such as researching and choosing the right POS and website platform, designing a user-friendly site, developing a training plan, and syncing inventory. With several moving parts and group members handling different roles, we need a tool that allows us to lay out the plan, assign responsibilities, and avoid confusion.⁹

What is Trello?

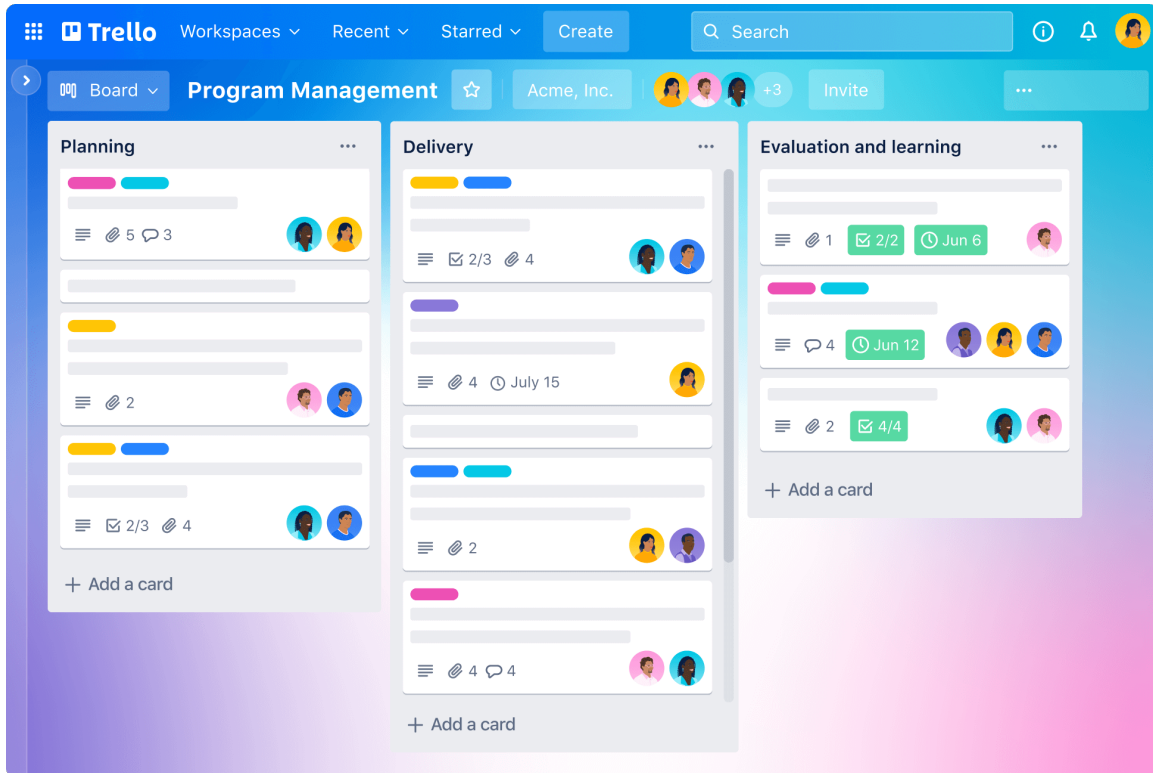
Trello is a flexible and user-friendly task management tool that uses boards, lists, and cards to organize projects. It's visual, easy to learn, and works well for tracking progress. Each "board" is like a project, each "list" is a step in the process, and "cards" are individual tasks that can include due dates, checklists, attachments, and comments.

Users can drag and drop cards between lists as they move through different project stages.

Each card can be customized with comments, checklists, attachments, and member tags.

Trello also allows you to create automation rules (called Butler commands) that reduce repetitive tasks. For example, you can automate setting due dates or moving cards when

tasks are marked complete (as seen in the picture below).



Key Features

- Visual Boards & Lists
- Due Dates & Reminders
- Labels & Checklists
- Team Collaboration
- Mobile App
- Templates
- Power-Ups

Cost and Value

Trello offers a free plan that includes most features needed for this project. The paid plans (starting at \$5 per user/month) offer advanced views like Gantt charts, dashboards, and more storage. For a small team and short-term project like ours, the free version should be enough.

Trello's free version allows up to 10 boards per workspace, unlimited cards, and unlimited users, which is more than enough for the scope of our project. For future projects or a growing business, the paid versions add more control, security, and integrations with tools like Slack, Google Workspace, and Microsoft Teams.

How Trello Matches Our Needs

Trello helps with task tracking, team collaboration, file sharing, and real-time progress updates. It is especially useful for visual learners and small project teams like ours.

Who Else Uses Trello?

Trello is used by many small businesses, nonprofits, and schools, especially those with remote or part-time teams. It's often chosen for its simplicity and flexibility. Even companies like Google and Kickstarter have used Trello for internal team projects.

Because it works across industries, Trello is also used by creative professionals, educators, software teams, and marketing agencies. It is especially favored by startups and freelancers who want a visual way to keep track of multiple priorities. This flexibility makes Trello a long-term option for Celestial Gems even after this initial digital transformation project is completed.

Implementation Plan

1. Set up a shared Trello board for the Celestial Gems project.
2. Create columns for stages: Research, Planning, Implementation, Testing, Launch
3. Add team members and assign cards with deadlines
4. Use checklist features to break tasks into smaller steps
5. Schedule weekly check-ins using Trello notifications and comments
6. If needed, add Power-Ups like Calendar View or Google Drive integration.

The Trello board can be customized using colors, labels, and icons that match Celestial Gems' brand identity. Cards can be organized for tasks like POS system research, inventory input, product photo uploads, and social media planning. Team members can leave comments or ask questions directly on each task card, making it easy to stay updated without sending tons of emails. This way, even non-technical staff can feel comfortable using the tool.

Final Recommendation

Based on our project's scope and Celestial Gems' size, Trello is an ideal project management tool. It is free, easy to use, and meets all of our current needs without overwhelming the team. It will allow us to stay organized, communicate better, and deliver a smoother experience for our clients. I strongly recommend Trello as our main project management tool.

If Celestial Gems continues using Trello beyond this project, it can become a central hub for future inventory tracking, order fulfillment planning, and even seasonal product launches. Because of its flexibility and low cost, Trello can grow with the business and continue adding value long after our proposal is finished.