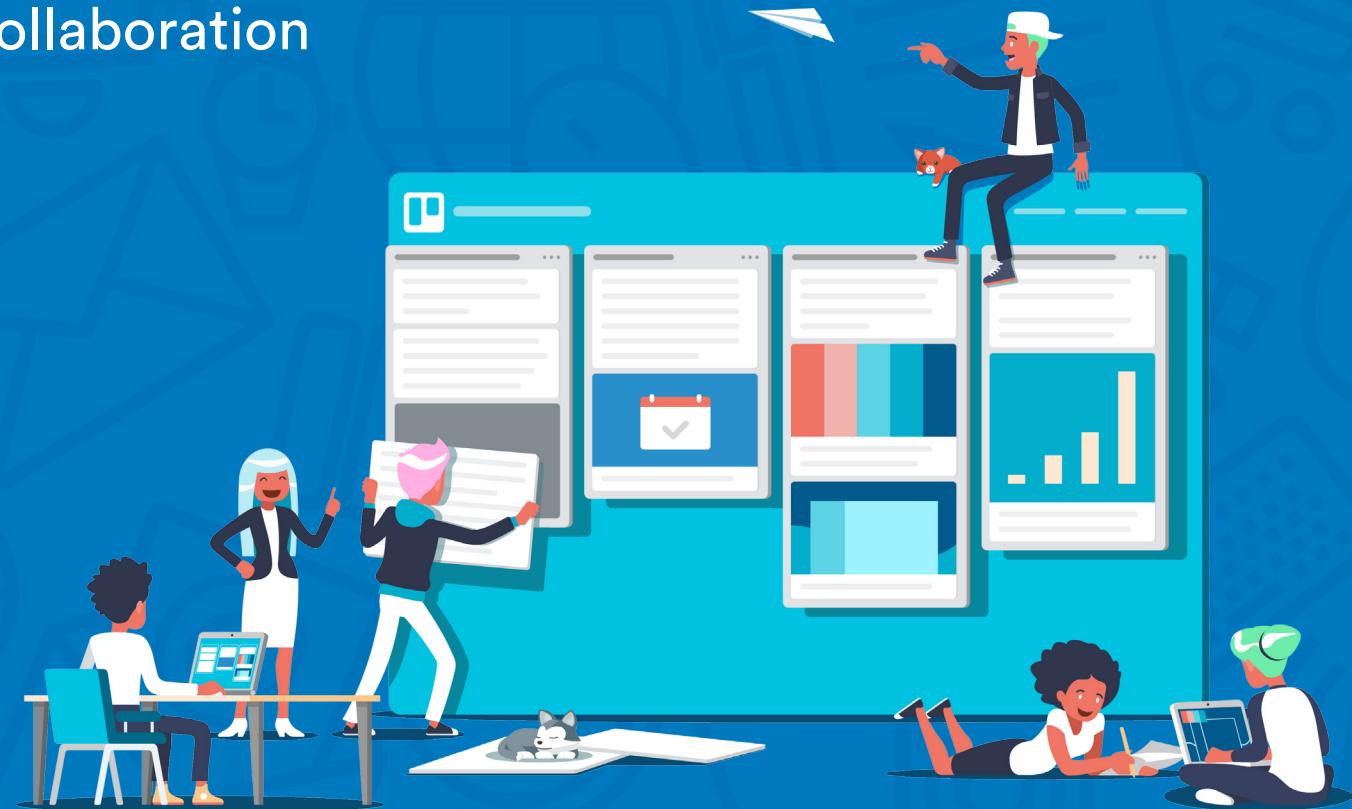




# The Productive Team Blueprint

A tried-and-tested plan for sustainable,  
successful team collaboration



# **Index**

**3 Introduction**

**4 Team Communication**

**15 Team Direction**

**24 Team Evolution**

**27 Building Your Team's Blueprint**

# Introduction

**At Trello, we don't take successful team collaboration for granted. With 1 in 3 team members working remotely from locations all over the world, exceptional teamwork has to be the core of our company work culture.**

Over the years, we've curated hard-won lessons from our day-to-day experiences working in distributed teams and invaluable advice from leading productivity experts. The result—all of our best resources for how teams can work better together—is what you'll find in this ebook.

Productive team collaboration can be broken down into three unique parts:

- Communication
- Direction
- Evolution

Whether your team is distributed across multiple locations or sitting all together in an open concept office, this blueprint will give you the resources and tools you need to build a solid foundation for your team's future success. Ready to get started?

**Let's go.**

# Team Communication

**Effective communication is what binds strong teams together. Before we look at how to build good team talk, it's important to recognize what happens when team members aren't talking.**

Poor communication creates a “silo effect” where each individual is working furiously on their list of to-do’s without a perspective of their team’s big picture impact. This situation is bad for two reasons: First, the silo effect often creates situations where teammates repeat each other’s work or have conflicting projects that slow down productivity and success. Second, it causes constant interruptions and check-ins for everyone to get on the same page.

If your team is struggling to communicate effectively, it may be time to set up some team talk basics.

## The Dangers of the Silo Effect

- Transparency is nonexistent
- Collaboration goes out the window
- Redundancies are on repeat
- Timelines aren’t met
- Expectations are wrong



# Team Talk Basics

Interruptions are one of the ultimate productivity killers. Studies show that when a person is interrupted from deep work, it can take them as long as 25 minutes to get back into the zone. 25 minutes. That's a lot!

**Team talk basics are about knowing what types of communicators are in your team, when it's best to initiate communication with them, and how to best do so.**

Interruptions will always happen. Questions have to be asked and answered in order to increase productivity, after all.

But the truth is there are good ways to do this... and there are bad ways.

It's essential to define collaborative team talk guidelines to enable authenticity and bonding while also knowing how to make the most of team communication assets—the **Who, When, and Where**—in order to encourage productive discussions while minimizing distractions.



## A Manager's Calendar

- Back-to-Back Meetings
- Planning
- Reporting
- Cross-Team Collaboration



## A Maker's Calendar

- Deadlines
- Creative Work
- Research
- Testing & Launches



# Who

To establish great team communication, we first have to talk about who is doing the talking.

Paul Graham, a renowned computer scientist and co-founder of Y Combinator, established a concept called the Maker vs. Manager.

The difference between the two affects how a team should be communicating.

The first type of team member is the maker. Makers are people like developers, designers, and writers.

**Makers need long, uninterrupted time to go heads down and create work without any distractions.**

Managers, on the other hand, are people who coordinate across teams, move teams towards goals, and manage projects.

**Managers need effective meetings and good, consistent systems for getting status updates.**

## **While the Manager vs. Maker concept is pretty easy to understand, it isn't always clearly defined in organizations.**

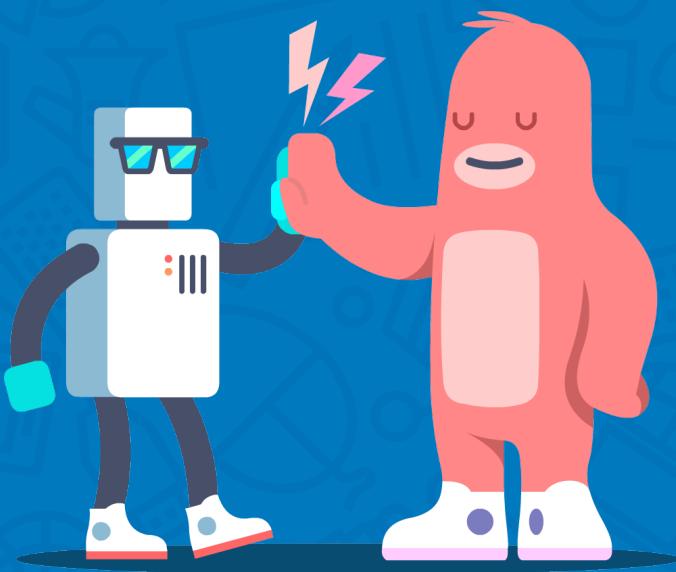
However, understanding who the makers and managers are can dramatically improve everyone's productivity because it helps establish the needs of different roles.

Have team members determine whether they are:

- A maker
- A manager
- A combination of both

And then assess whether their current schedules and work environments are optimized for their role.

When working together effectively, makers and managers form the perfect team balance because both roles ensure everything gets done well and deadlines are being met.





## Trello Team Tip

• • •

If you're a Maker, try blocking out a recurring "No Meeting Day" on your calendar for deep work. Establish expectations about your creative needs, but also communicate with your team. Let them know how long you'll be offline and when they can expect you to return.

# When

Once you've established the Maker and Manager roles on your team, you can start to understand how to manage interruptions and meetings more effectively on an individual basis. Here's what that might look like:

## When Makers Are In The Zone...

- Availability is limited (or nil!) on chat apps and email
- No expectation to provide immediate answers to questions
- Creative time is blocked out and visible on shared calendars
- Meetings are never scheduled during creative time
- Even "quick questions" will have to wait!

Interruptions will prevent Makers from being their most productive selves. This comes at a cost to both the company and the individual's creative flow. It is important that Makers have the respect and authority to set their own boundaries for development time.

## When Managers Are In The Zone...

- Availability is open on chat apps and emails unless otherwise noted
- Systems are in place for access to approvals, answers, and guidance
- Important meetings are flagged as “do not disturb”
- They don’t have to chase down regular updates from Makers
- Agendas, tasks, and plans are clear and defined

Managers are also clearing away roadblocks for a team’s Makers. In other words, plan to communicate with Makers during times when they’re not heads down and use the rest of your availability to meet with other Managers. We have more tips for leading a team effectively here.

**Learn More About Managing  
With Makers →**



### Trello Team Tip



Managers, make sure to schedule a weekly 1:1 with your Makers on days when they’re not heads down. Ask your Makers what schedule helps them work most effectively, and plan your communication with them around their needs.



## Trello Team Tip

• • •

If you're not on a chat app like **Hipchat** or **Slack**, get one. While email is still a necessary workplace communication tool, it should be reserved for longer, more static, conversation.

# Where

Next, using the right methods and tools in the right context will help you establish guidelines for "where" your team should communicate with each other.

## Quick Communication

If you're co-located in an office, it can be tempting to use quick questions as an excuse to stretch your legs. However, it might be more effective to take regular walks around the block for exercise and rely on a chat app for short messages instead.

Chat apps are a great way to enable quick communication among your teammates. If you have a quick note, just shoot someone a message in your chat tool. It's best to have questions and answers written down to have a record to come back to later—especially if it's something your whole team should be aware of.

**Learn More About Chat  
App Etiquette →**

# Deeper Discussion

If you work remotely or aren't co-located with all of your teammates, establishing which communication methods to use for deeper discussions is vital. This also applies to in-office for knowing when a group meeting is necessary (or just a waste of time).

Chat apps are transformative for teams that aren't already using them, but they aren't as great for getting into in-depth debates. Instead, any time your team is having a discussion that requires more thought and planning than a quick question, move to a meeting.

**Learn More About Video  
Meeting Etiquette →**



## Trello Team Tip

**Zoom, Google Hangouts, appear.in or Join.me** are all good video meeting tools for getting multiple people onto one screen for face-to-face chat. Just remember our golden rule: If one person is on video, everyone is. It is difficult to be the lone video screen in a room full of people!



## Trello Team Tip

• • •

**Trello** gives our whole company a shared perspective on projects, plans, and everything in between: Tasks, progress, questions, materials, due dates, and more for any team or project. With Trello boards, the sky's the limit for how you can structure your team communication.

## Plans & Status Reports

Whenever your team needs to document the status of projects in digestible, accessible formats, don't put all of this information in an email or chat app where information quickly gets buried and archived. Instead, use a team collaboration platform to:

- Manage projects
- Document status reports
- Plan meeting agendas
- Organize key information

It should be asynchronous, meaning that any teammate can hop in and easily locate what they need, when they need it.

**Learn More About Building  
Team-Friendly Boards →**

# Effective Meetings: #NoSnoozeFests

Chat apps, email, and productivity tools like Trello aren't enough. Meetings are the cornerstone for setting up these lines of communication—if they are effective.

There's nothing worse than a boring, overly long meeting. From the perspective of your bottom line, having multiple people you're paying in an hour-long meeting is expensive as it is. Any time a group of people is zoning out or distracted because the time isn't structured, your team's productivity drags.

Avoid time-wasting snooze fests by sticking to a specific structure and making other, intentional opportunities for off-topic conversations.

**Get A Sample Trello Board To Plan  
Your Next Team Meeting →**



## Trello Team Tip

Use a Trello list for your team meeting agenda. Team members can add agenda items as cards to the list and log meeting notes on the card. Post-meeting, assign the agenda cards needing follow-up as tasks to the designated team member and project board!

## The 4 Essential Elements of Effective Meetings

**An agenda:** Every meeting should have an agenda to avoid misused time and to keep meetings productive. That said, every agenda should involve a democratic process where each team member can submit items to be discussed prior to the meeting to ensure that everyone's voice is being heard.

**A meeting lead:** To organize meetings most efficiently, all meetings should have a designated lead who sets the final agenda, runs a timer to make sure all agenda items stay within their allotted time, and mediates off-topic conversations.

**A scribe:** Whether some meetings have a conflicting meeting, or you have team members out on vacation, make sure to designate someone to take notes during the meeting so everyone on the team knows what happened and can follow up.

**A plan of action for discussed items:** Meetings are pointless unless agenda items discussed have a result. Make sure your meeting lead or scribe follows up on all action items to ensure someone is taking responsibility for seeing them through. Follow up can be as simple as a summary of to-do's sent via chat app.

Learn More About How We Run Meetings At Trello →



# Team Direction

**Having a defined direction for your teamwork lays the foundation for maintaining consistent productivity as a team.**

**L**e't's pretend for a second that your company is a rowing team. If you're all rowing in different directions, you won't go anywhere fast, let alone reach the finish line. If some team members are rowing hard to get where they want to go, while others are slowing down because they don't have a clear direction in mind, the whole effort creates a pretty frustrating race.

That's why being able to get everyone going in the same direction, at the same pace, makes a big difference to your company.

A Geckoboard survey from 2016 found that small and medium-sized businesses in the US who set and track key metrics are two times more likely to hit their targets than those who don't.

**If you're not already defining, setting and tracking your team goals and metrics, it's time to start.**

# Mission Statement

Before you can set actionable goals that are attached to quantitative metrics, you have to first define the “why” for your team. Your mission statement is the big picture of why your team is working together day in and day out. Maybe the mission statement is based on a specific pain point or perhaps it’s a based on a long-term goal.

Reaching a goal like increasing new customer growth by 20% will be much more attainable if your team understands and agrees on how your product solves a customer’s pain points, why it’s an important addition to the industry, and how each individual employee is making an impact through their work on it.

No matter where it comes from, your mission statement should be original and authentic, straightforward and concise, and it should provide clarity and focus for making decisions. Your team should own it, know it, and be motivated by it.

**O**ur mission statement is now very special to us, because we all had a hand in writing it. It is our compass for every project we think of taking on. Thanks to our mission statement, we can gut check that each new project proposal represents the core of what Trello is, provides key benefits for our audience, and speaks to what we love about what we do.



A cartoon illustration of two diverse individuals, a Black woman with curly hair and a white man with a green headband, sitting cross-legged on the floor. They are looking at a tablet screen displaying a wireframe of a building. The woman is writing in a notebook, and the man is pointing at the screen. The background is a blue gradient with faint, overlapping icons related to business and technology.

# How To Craft A Team Mission Statement Together

- 1** Bring the idea to your whole team so everyone has input and a stake in the purpose of your mission.
- 2** Pose the high-level questions to your team: What is our product? What are its benefits? Who does it help? Why do we love it? Where do we want to be in five years?
- 3** Have each team member write a paragraph answering these questions and including anything else that they deem important.
- 4** Workshop all the answers to find similarities and differences, organizing and discussing them within a one-hour time limit.
- 5** Designate a team member to write up a synthesis of the team's contributions and tweak it until it smacks of mission statement success!

# Goal Setting

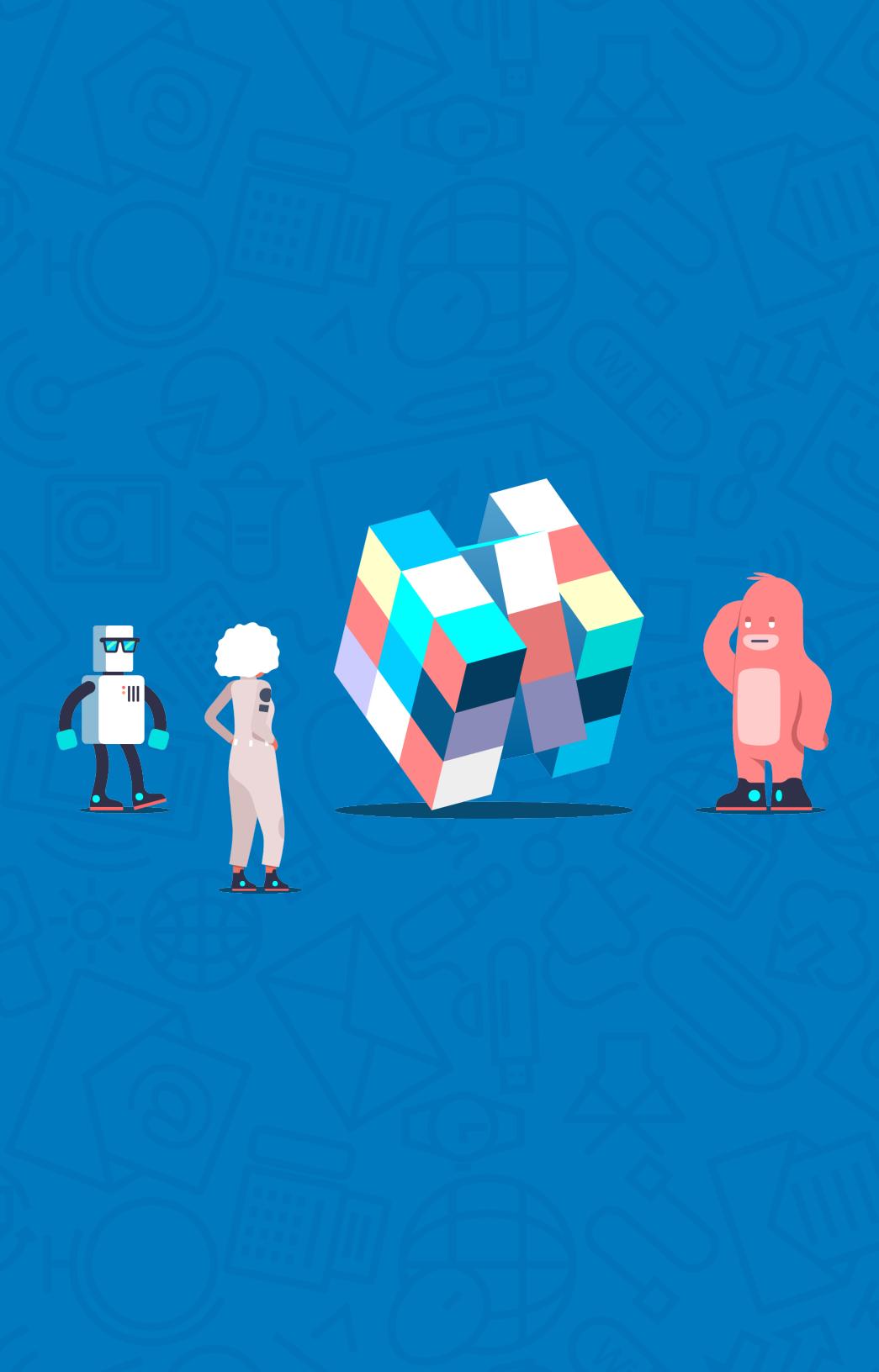
In the first section of this ebook, we talked about how poor communication can lead to a silo effect under which team members work too independently and decrease productivity.

When productivity is at peak, it should feel like your team (and every team in the company) is working towards well-defined, shared goals that everyone agrees on. However, making sure everyone is aligned around the same goals and metrics takes some work.

There are three major parts to keeping goals on track at the team level:

- Setting them
- Organizing them
- Tracking and updating them





# Team Goal-Setting Exercises

At Trello, we set goals on a quarterly basis by making it a fun and special part of our company's routine:

- If you can, arrange for a special offsite event where your team can step away from the normal day-to-day workflow.
- If not, the most important thing is to not rush the process.
- The goal is to clear away the small daily distractions that can get in the way of productive big thinking.
- Avoid the pitfalls of group brainstorming, such as evaluation apprehension (fear of being judged), social loafing (groupthink), and prioritizing extroverts—but if your team talk basics are in place, you should be more aware of these!

No potential goal is off limits at the beginning. For every one that is proposed, check it against your organization's mission statement and top-level company goals. Find consensus in your team that it is worth pursuing. Be passionate about what you're working towards!

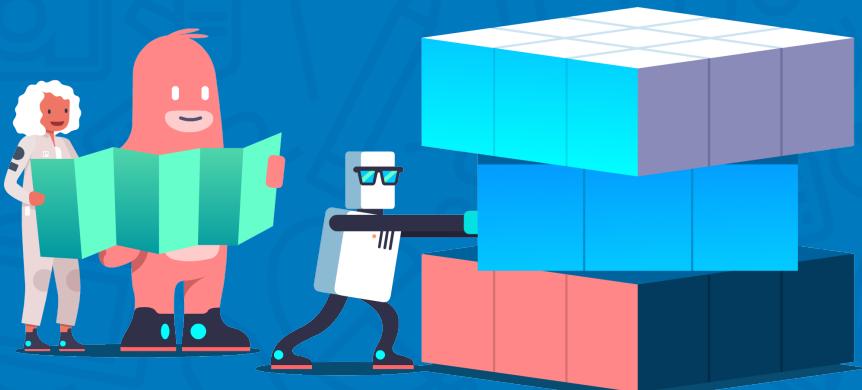
**Learn More About Goal  
Setting As A Team →**

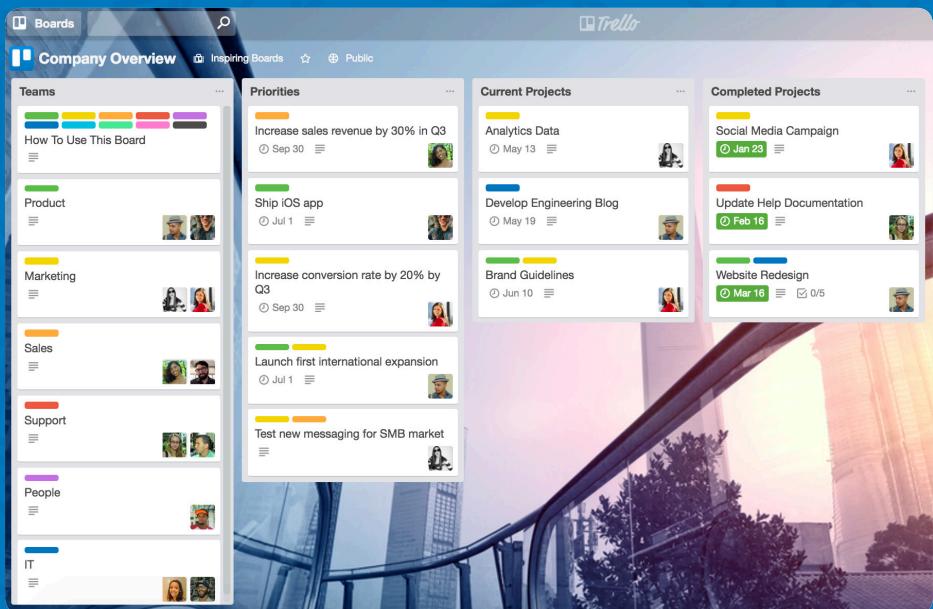
# Get Team Goals Together

In most organizations, there's one ultimate goal that's broken up into several smaller goals for individual teams to focus on.

A company might have a production team, a sales team, and a management team. Together, the teams work together to generate revenue for the business. But to do that, each team has their separate goals of making the product, selling the product, and enabling the employees at the company to get the job done. You can see why organizations tend to be structured how they are.

In your own organization, it's important to make sure that your team's goals are aligned with the company's overall goals and with the goals of other connected teams.





Having a shared place where you track goals is a great way to create cross-team collaboration. At Trello, we do this with a **Company Overview** board:

- Lists are organized by high-level company goals
- Each team organizes their top goals and projects as cards in the appropriate list
- Cards include context and links to project boards, stakeholders and more
- Weekly progress updates are posted on each card

Every team member can then see goals, project status, and more. Bonus points for linking your card updates to your chat app for automatic circulation into your team's group chatroom!

**Learn More About Setting Up A  
Company Overview Board →**

# Tracking As A Team

Once your team goals are set and organized, make sure you create a way to track progress as a team. It's easiest to follow a standard framework, and then tweak it to suit your team's needs.

Let's use the OKR (Objectives and Key Results) framework popularized by Intel and Google as an example.

For every objective (or goal) we set, we determine a list of key results (or actions) that we can take to reach that goal. OKRs are generally plotted over a company's quarter time. That's three months, or 90 days, if you're counting—so be ambitious, but also realistic!





**OKRs:**  
A co-created team to-do list  
plotted over a 90-day work  
period.

Don't expect to reach all of your OKRs. If you do, they're not hard enough! You should expect to score at approximately 70% of your objectives and key results. However, OKRs are most successful when:

- They are co-created with other teams in the company on which you rely for materials or help. These are known as "Dependencies."
- They are checked against the top-level company goals and are justified to fit.
- The key results are SMART goals. In other words, they are specific, measurable, action-oriented, realistic and time-based within the quarterly time frame.

Once we set our OKRs, we record them all on Trello cards, where we can indicate which actions are in progress, blocked, or completed throughout the quarter. We even assign team members to actions so everyone has a clear (and balanced) list of projects to work on over the next 90 days.

It may seem like a lot of structure, but essentially OKRs become a co-created team to-do list that can be plotted over a 90-day work period. You can be confident as a team that you'll make a positive impact on the company. Doesn't that sound nice?

**Learn More About Using  
Trello To Track OKRs →**

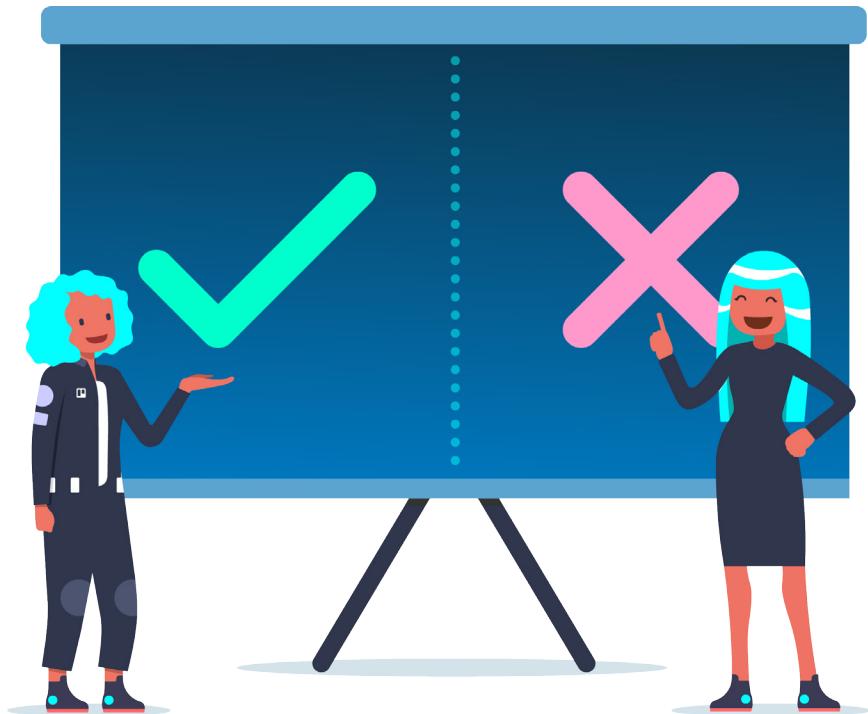
# Team Evolution

**As with all things worth reaching for, setting team goals is only half the battle. For your team to be effective, you have to track your performance against those goals over time. Enter, the retrospective.**

If you're going to set goals as a team, you're also going to want to review the results as a team.

Good teams evolve into better teams when they make an effort to value the processes and dynamics that work well, and to discuss and change the ones that don't.

Take the time to look back, to celebrate the wins and learn from the misses. It just might make the difference for your team!



# Retrospectives

Retrospectives are dedicated meetings where teammates discuss the good, the bad, and the ugly post-project or at the end of the quarter's OKRs. Retrospective exercises are healthy for team productivity because they encourage honesty with the intent to improve.

## Here are five ideas for creating room on your team for productive retrospectives:

**1** Take a quick temperature gauge with your team once a month. Ask people to draw out (or assign an emoticon) as a “weather” report of how they think the team is working together. Get creative with it! Try using a survey software like Typeform or SurveyMonkey if anonymity is appropriate.

**2** View the data: If you have quantitative goals set for your team, this should be relatively straightforward. Once a month, create a document or report that goes through the metrics your team has set. Don’t just track whether or not goals were hit. Instead, encourage team members to answer the “why or why not” questions.

**3** Ask for open-ended feedback from teammates. When you do so, look for common themes or insights. For example, did three out of five people talk about communication preferences? That insight might be something to pay attention to.

**4** Decide what to do: What do you all agree to try differently or keep doing the same next time? Try using polling software, like Tiny Pulse, if a new process or project needs to be put up to vote.

**5** Have some fun! Celebrate team wins and find fun ways to let off some steam before you gear up again for the next set of goals. If you just finished off the worst project ever, it’s OK to bond over the struggle so long as you cap it off and clear the plate at the end of the bash sesh.

**Learn More Steps For Better Team Retrospectives →**

# Making Changes

Your team's communication and direction will inevitably change over time. Rather than try to force the same processes to work forever and a day, think about how and when you can innovate your teamwork through new experiences, technology, or structure.

Ultimately, making regular updates to fit the needs of your team will make all team members more productive.

Whether you're a team manager or a maker, every team member should have a stake in holding the team accountable for improvements over time. In fact, research shows that the most productive teams hold themselves accountable rather than relying on a manager to set the pace.

**Here a few Trello Team tips for regularly evaluating your teamwork:**

**1 Write down your team process.** As your team grows, it will be helpful for new teammates to have a place they can go to understand current team processes. Jot down notes in a document or use a Trello Board to structure your team's resources. Having processes in writing makes it easier to evaluate how the ideal differs from reality.

**2 Fresh eyes are valuable.** Encourage all new team members to give insight into how well processes work as they learn to adjust to the new team. Give room for team members to give new suggestions for making a process work better for your team.

**3 Uphold the right to call for a retrospective.** When things feel off or more clunky than necessary, give each team member the right to call the team together to evaluate and discuss what is working well and what is not.

**4 Give credit where credit is due.** Any time a team member has a suggestion for a new process, encourage that team member to take the lead on establishing the process for the rest of the team. Their enthusiasm is what change is all about.

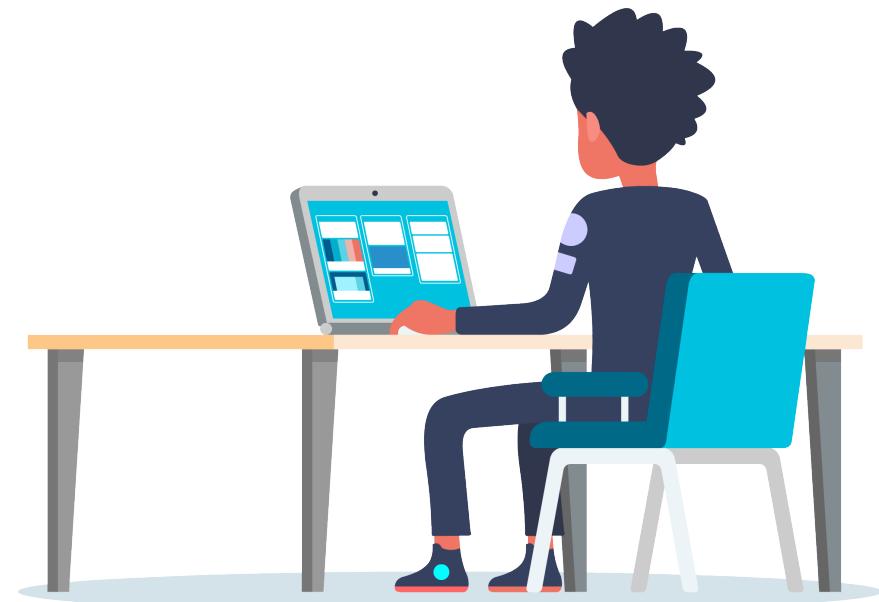
# Building Your Team's Blueprint

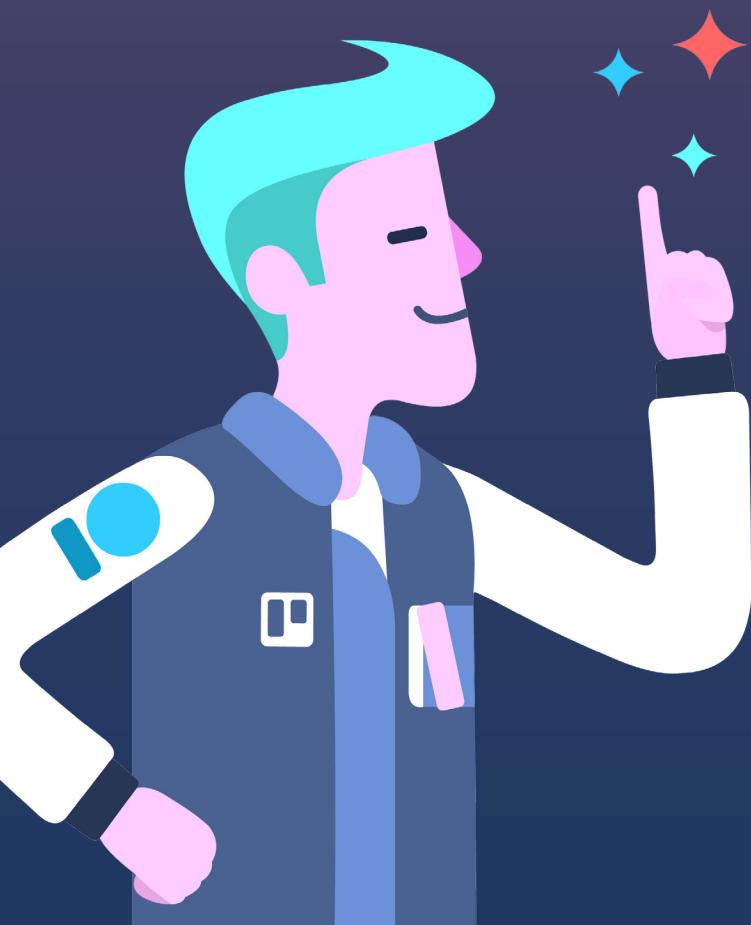
Your team's productivity blueprint is unique, dynamic, and most of all, exciting! It just feels good to work day-in, day-out with a group of people who feel engaged and inspired when collaborating and communicating with each other.

There are many things to remember when planning for your team's communication, direction, and evolution:

- Know your team member's roles and what they need from the team to be productive.
- Keep communication clear with the right tools, the right times, and the right types of meetings.
- Make a mission and set goals as a team to keep everyone focused on the same initiatives.
- Review processes on a regular basis, and don't be afraid to make changes.

Most of all, empower everyone to take ownership of the team as a living, breathing entity and encourage it to thrive. Sustainable, successful team collaboration is, after all, the key to your company's success.





## Trello BUSINESS CLASS

The perfect fit for teams who want advanced administrative controls, priority support, and app integrations to work better, together.

**Upgrade Your Team →**

- Everything you love about what's free in Trello
- Unlimited Power-Ups with top business apps
- Organize and protect your teams with admin controls
- 1-Day email support with real humans