The Productive Team Blueprint

A tried-and-tested plan for sustainable, successful team collaboration.
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 in one handy ebook.

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

- Communication
- Security
- Direction
- Evolution

By having these four mechanisms running together like a well-oiled machine, your team will be more productive than ever before. So 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!
It happens to the best of us—communication within your team is fragmented which creates a “silo effect” where each individual is working furiously on their list of to-do’s without a full perspective of their team’s big picture impact. No one knows who’s responsible for what and it’s difficult to find information when you need it to get your job done.

This silo effect creates situations in which teammates repeat one another’s work or have conflicting projects. Basically, everyone is out of touch with what’s actually going on and constant check-ins to get on the same page delay the entire team from reaching project milestones. Fragmented communication and lack of communication are the two ingredients that lead to poor team communication and dwindling productivity levels.

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

Paul Graham, a renowned computer scientist and cofounder 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 ensures everything gets done well and deadlines are being met.
When

In order for the Maker vs. Manager roles to actually work, it’s essential for team members to map out when they are heads down in creative work or tied up in meetings.

**When Makers Are In The Zone...**

It’s important for Makers to block out chunks of their daily schedule or even an entire day to focus on deep work. Interruptions will prevent Makers from being their most productive selves. It is important that Makers have the respect and authority to set their own boundaries for development time.

**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 Managers Are In The Zone...
Makers also need structured schedules to alert their team when they’re available for meetings or when they need time to focus on clearing roadblocks for the team’s Makers. Makers are at their peak productivity when they set time when they are available on chat apps and emails and when they don’t have to chase down Makers for regular updates. Systems are in place for access to approvals, answers, and guidance. Agendas, tasks, and plans are clear and defined. Win win! Makers have the respect and authority to set their own boundaries for development time.

TRELLO TEAM TIP
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Learn More About Managing With Makers
Where

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

Quick Pings and Updates
Makers also need structured schedules to alert their team when they’re 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 and it leaves a digital paper trail—especially if it’s something your whole team should be aware of.

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.

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.

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Stay Connected To All The Moving Parts
With Trello Enterprise, you can easily keep tabs on all the activity and chatter happening across Trello boards with Highlights. With Highlights, you can understand who people are, what they’re working on, and what’s going on in any given moment with tasks and projects. This allows you and your teammates to quickly identify gaps and new opportunities.

When there’s a lot going on, it’s easy for things to go a little haywire. Trello Enterprise has another feature to save time and keep things organized: Collections. Collections is a way to group related boards so you can quickly see all the projects associated with a particular department or broader initiative.
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. In order to be productive, your team needs information and resources accessible to their digital fingertips as quickly as possible.

Instead of relying on chat apps or email, use a team collaboration platform to:

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

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

TRELLO TEAM TIP

Trello gives your 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.
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 truly effective.

There’s nothing worse than a boring, overly long meeting (that could’ve been an email update).

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.

**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.

How To Finally End Time-Wasting Meetings
Set Up Secure Collaboration

When your team is tapping into their most productive hours and truly moving the needle within your organization, they shouldn’t be concerned with security, data breaches, and compromising intellectual property.

Without secure collaboration and systems in place, your team will be more focused on what they can or can’t do than actually getting the work done. Cue productivity nightmare.

Secure access is one of the biggest threats to companies today. Gartner predicts that about 30% of corporate data traffic will bypass regular security measures and flow directly from mobile and portable devices to the cloud.

Information is not only your company’s most important asset but also one of your largest, potential liabilities. It’s incredibly important, and difficult, to ensure that you have the right internal controls in place to ensure the security of your company data.

And to top it off, if you don’t have clear guidelines in regards to which tools employees should use and how they should use them, you have no way to ensure that they’re not compromising sensitive company information.
**Best-In-Class Security**

When it comes to your collaboration platform and tools, look for these features to proactively keep your company safe. Here are the top security features in Trello Enterprise:

- **SSO Sign-On**: Your team can sign on with a single click (and avoid security headaches) thanks to available Single Sign-On for all SAML IdPs.

- **Permission Restrictions**: Set access restrictions at both the team and board levels. Specify who can create public, team-visible, and private boards—as well as who can be added to each—and ensure that your teams can collaborate easily, while still keeping sensitive work private.

- **Attachment Restrictions**: Prevent file sharing chaos by locking in your preferred file sharing systems: Only approved file share links can be included on Trello cards.

- **Phone and Priority Email Support**: Have a question or concern? Jump to the front of the line and chat with our Trello experts via phone or email.
Team Direction

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

When a triathlon starts with the swim leg of the race, all the athletes rush into the water at once, stirring up sand and sediment until the ocean is a messy, brown version of its former clear self. Wading into the waters of goal setting as a team often feels the same way—rushed and murky.

The entire point of establishing clear objectives is to clear the way and identify markers of success that build purpose and plan for what work matters most. They should serve to motivate and focus team efforts so distractions are kept to a minimum and everyone can be allowed to contribute at their best.

We believe setting team goals start with three fundamental facts about how a team approaches setting goals together:

1. Make it collaborative.
2. Make it easy to update.
3. Make it your own.

If you’re not already defining, setting, and tracking your team goals and metrics, it’s time to start.
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. A holistic view of each department’s goals and activities brings more visibility into these typically disjointed channels.

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!
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!

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?
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 emoji) 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 TINYPulse, 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 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.
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 are 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 members’ 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.
• Collaborate securely so your team has the freedom to work without fear of compromising important data or information.
• Set clear goals and keep everyone accountable with OKR tracking.
• Review processes on a regular basis, and don’t be afraid to make changes.
• Bring all your work into one view with a collaborative platform so your team has instant access to everything they need to do better, faster, and more informed work.

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.
Essential Power-Ups and Integrations For Your Team

Trello Enterprise integrates with the tools your team already loves to use.

SLACK
No matter where your sales team is working, the Slack Power-Up for Trello makes it simple to keep your communication and collaboration apps connected so that no important deal updates or activities fall through the cracks.

CALENDAR
Whether you are planning a conference or managing an editorial calendar, the Calendar Power-Up lets you display cards with due dates in a weekly or monthly calendar view.

TEAMGANTT
The TeamGantt Power-Up gives you the ability to view your cards in a beautiful timeline. You can organize cards from multiple boards into a single, beautiful gantt chart inside Trello.

GOOGLE DRIVE
The Google Drive Power-Up for Trello brings your files and folders to Trello cards. Search Google Drive right from Trello and attach relevant files and folders.

DROPBOX
The Dropbox Power-Up for Trello brings your files and folders to Trello cards. The file picker lets you search Dropbox right from Trello and attach relevant files and folders. See real-time details and live previews, with links to take you right to Dropbox.
**ONEDRIVE**

The OneDrive Power-Up lets you navigate OneDrive right from Trello to attach relevant files. Copy and paste links to OneDrive folders onto Trello cards to attach folders. See previews and latest details, with links taking you directly to OneDrive to work on documents and access files.

**ZAPIER**

Automate repetitive tasks so you can focus on your most important work. The Zapier Power-Up allows you to Set up time-saving automations in a few clicks to move info and get things done between all your favorite apps.
Create a central productivity hub for all of your team’s projects—accessible from any device, anywhere. With Trello Enterprise, your team can easily navigate users, security, and privacy settings through a single dashboard.

Trello Enterprise is flexible enough for all teams to build productive, customized workflows that encourage collaboration.

- Everything you love about what’s free in Trello
- Unlimited Power-Ups and 100+ app integrations to efficiently leverage all your teams’ top tools.
- Advanced security such as hourly data backups, data encryption, and Single Sign-On (SSO).
- Enterprise-wide permissions to control who can do what within your Trello boards