

Trello & Asana for Project Management — Workbook

This workbook turns the course into two live project systems. Work through one section per module: pick the right tool and build the basic structure, design a kanban workflow that matches your team, add dates and dependencies and lay them on a timeline, then automate the busywork and stand up a weekly reporting habit. Fill the worksheets directly as you build in Trello and Asana, run each step on a real project, and by the end you will have a working board in each tool, a reusable automation rule library, and a status routine your stakeholders trust.

Foundations: Boards, Lists, and Cards

Choose between Trello, Asana, and a list, then build your first board and first project with sensible structure.

Exercise: Tool-Selection Decision

For one real project you are about to run, answer each prompt in a single line. If most answers point to flow and a small team, build it in Trello; if they point to many tasks, dependencies, or reporting, build it in Asana; if there is no workflow at all, use a spreadsheet.

- In one sentence, is this work better described as a pipeline things move through, or a plan with milestones and a deadline?

- How many people will actively touch the work, and how many distinct projects does it span?

- Are there real ordering dependencies (X cannot start until Y is done), and will you need to report progress to leadership?

- Based on your answers, which tool wins, and what is the one feature that decided it?

Worksheet: Workflow Stage Map

Before creating any lists, define the stages your work passes through. Name each as a state the work is in, not a person or department. You will create one Trello list or one Asana section per stage, left to right in workflow order.

Project name

Stage 1 name (where work enters, e.g. Backlog or Ideas)

Stage 2 name

Stage 3 name

Stage 4 name (and 5 or 6 if needed)

Final stage name (e.g. Done, Published, Live)

Any wait point worth its own column (e.g. Ready for Review)

One sentence: how a piece of work knows it is finished (definition of done)

Checklist: First Build Checklist (Trello and Asana)

- [] Trello: create a board, add one list per stage in workflow order, and name it clearly
- [] Trello: add 3 to 4 real cards with verb-first titles to the first list
- [] Trello: open one card, set a description, due date, member, and a colour-coded label
- [] Asana: create a blank project, add sections matching your stages, default to List view
- [] Asana: add real tasks under sections, each with an Assignee and a Due date
- [] Asana: switch to Board view and confirm the same tasks appear as draggable cards
- [] Both: confirm every card or task has exactly one owner and a clear title

Kanban Workflows That Match Your Team

Design columns and swimlanes, apply work-in-progress limits, and keep the board low-effort with templates.

Worksheet: Columns, Swimlanes, and WIP Planner

Plan the structure that mirrors how your team actually works. Keep swimlanes to four or fewer and set a starting WIP limit of roughly the number of people in a column plus one. You will encode the limits in list or section names.

Columns in order (split any column where a wait happens)

Swimlane dimension (by team, priority, client, or workstream)

Swimlane values (max 4)

Expedite lane marker and its single-item rule

In Progress column WIP limit and the headcount it is based on

Review column WIP limit

Power-Up or naming convention you will use to show the limit

Exercise: Pull-System Standup Rehearsal

Run one standup using the pull rule and capture what you observe. The goal is to practise finishing before starting. Answer each prompt after walking the board right to left.

- Which column is at or over its WIP limit right now, and what single card would you finish to free a slot?
 - Which is the oldest, least-moved card in each column, and what is blocking it?
 - What work did the team start this week that it should not have, given the limits?
 - What is the one item the whole team should rally to unblock or finish today?
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Checklist: Templates and Recurring-Work Checklist

- [] Identify one work type that recurs and build a template card (Trello) or template task or project (Asana)
- [] Put your definition of done on the template as a checklist
- [] Set due-date offsets on template items so dates auto-calculate from a key date
- [] Asana: set one predictable task (e.g. weekly report) to repeat on the right cadence
- [] Trello: note which recurring card you will create later with a Butler scheduled command
- [] Create a single prioritized Backlog column or section, top item first
- [] Book a recurring 15-minute weekly backlog grooming slot

Dates, Dependencies, and Timelines

Add dates and custom fields, capture dependencies and blockers, and lay the project on an editable timeline.

Worksheet: Custom Field Setup Sheet

Define the structured attributes a column cannot capture, then add them as custom fields in Asana or via the Trello Custom Fields Power-Up. Keep the set small; four fields is plenty to start.

Priority field values (e.g. High, Medium, Low)

Effort or Size field type and scale (e.g. 1, 2, 3, 5, 8)

Status flag values (e.g. On track, At risk, Blocked)

Client or Workstream values (if one board serves several)

The one saved filter you will use most (e.g. my High-priority due this week)

Which field will trigger an automation later (e.g. Priority = High)

Worksheet: Dependency and Critical-Path Map

List the must-happen-in-order tasks for one project and chain them. Then trace the longest chain to find the critical path, the tasks with no slack that you must watch most closely.

Task A (and what it is waiting on, if anything)

Task B and its predecessor

Task C and its predecessor

Task D and its predecessor

The longest dependency chain, written in order (this is the critical path)

Which task, if it slips one day, slips the whole project

Blocker marker you will use and how you will name the blocker

Exercise: Timeline Re-Plan Drill

Build the timeline (Asana Timeline on Starter+, Trello Premium Timeline or a Power-Up), then rehearse a what-if. Every task needs a start and a due date to appear. Answer each prompt from the timeline view.

- Which person has two or more overlapping bars in the same week, and how will you rebalance it?
- If your earliest critical-path task slips three days, does the end date still hold? What did the timeline show?
- Which task could move without affecting the end date (has slack), giving you flexibility?
- After dragging one task, did any dependency conflict flag appear, and how did you resolve it?

Checklist: Scheduling Readiness Checklist

- Every task that must happen by a time has a due date
- Tasks that span days have a start date so they appear on the timeline
- Custom fields for Priority, Effort, and Status are added and populated
- True ordering dependencies are marked (Asana waiting-on, or a Trello Power-Up or Blocked label)
- The critical path is identified and its tasks are flagged for closer watching
- Timeline view is enabled and shows the full project on one screen
- You have rebalanced at least one instance of one person being overloaded

Automation, Reporting, and Team Habits

Automate repetitive moves with Butler and Rules, build a dashboard, and lock in a weekly status routine.

Worksheet: Automation Rule Designer

Design four automations across Trello Butler and Asana Rules, writing each as when-this, do-that. Favour the move you make many times a day. Mind Trello's free quota of 250 command-runs per month. You will build these in the Automation or Customize menu.

Rule 1 trigger (e.g. card moved to Done)

Rule 1 action(s) (e.g. mark due complete, add Shipped label)

Rule 2 trigger (e.g. task added to Review section)

Rule 2 action(s) (e.g. assign QA lead, set Status In review)

Rule 3 (a one-click Card Button or Asana handoff rule)

Rule 4 (a scheduled command, e.g. create Weekly status card every Monday 9am)

Estimated monthly runs for the busiest rule (watch the 250 quota)

Worksheet: Weekly Status Template

Draft the fixed template you will post in the same channel at the same time each week, sourced from your dashboard and saved filters. Keep it to four short parts so people read it without a meeting.

Overall status (green, amber, or red) and one-line why

Done this week (from a Done-since-last-week filter)

At risk or blocked (item, one-line reason, next action)

Next week's focus (top 2 to 3 items)

Link to the board or Asana project for detail

Day, time, and channel you will post it every week

Checklist: Reporting and Board-Health Checklist

- Build a dashboard: Asana Dashboard widgets, or Trello Dashboard view per list, label, and member
- Set up a status breakdown chart (On track, At risk, Blocked) or equivalent saved filters
- Asana: post a colour-coded Status Update; Trello: prepare a Blocked and a due-this-week filter
- Agree team norms: every task has an owner and due date; cards move when state changes, not on Fridays
- Run a standup walking the board right to left, finishing-side first
- Escalate any blocker that has not moved in two days
- Confirm the board reflects reality so it can replace the status meeting

Your Action Plan

1. Choose Trello or Asana for one real project using the Tool-Selection Decision, and write down the feature that decided it.
2. Map your workflow stages, then build a board in Trello and a project in Asana with one list or section per stage.
3. Add 4 to 6 real cards or tasks to each, every one with a single owner, a verb-first title, and a due date.
4. Design columns and up to four swimlanes, set starting WIP limits (headcount plus one), and encode them in list or section names.
5. Build one template (with your definition of done) and set one recurring task, then create a single prioritized backlog.
6. Add Priority, Effort, and Status custom fields, mark true dependencies, and identify the critical path.
7. Lay the project on a timeline, fix one case of overload, and rehearse a what-if by dragging a task and reading the conflict flags.
8. Build four automations (Butler and Asana Rules), starting with the move you make most often, and watch Trello's run quota.
9. Stand up a dashboard and write your fixed weekly status template, then post it in one channel at a set time.
10. After two weeks, review WIP limits, automations, and status colours, and adjust the numbers to what the boards actually showed.

