A HubSpot Partner's Guide:
Using Trello for Content Collaboration

What is Trello?
A simple collaboration platform used for project management. It provides a simple interface to brainstorm project ideas and move them from conception to completion.

Why Use Trello with HubSpot's Marketing Team?
HubSpot loves your content. We want to have visibility into what you're producing so we can help promote it. Using Trello will give us insight into what content's coming so we can help promote it at the right time.

Who Should Use Trello?
Anyone who is in charge of content development and deployment. This individual (or individuals) can follow the simple instructions below to help keep the HubSpot Channel Marketing team up to date with all upcoming content.

How Do I Use Trello?
The way you utilize Trello can be as simple or as complex as you wish. What follows is a simple walkthrough on how you can use Trello to keep the HubSpot Channel Marketing team informed about your content pipeline for promotion purposes.

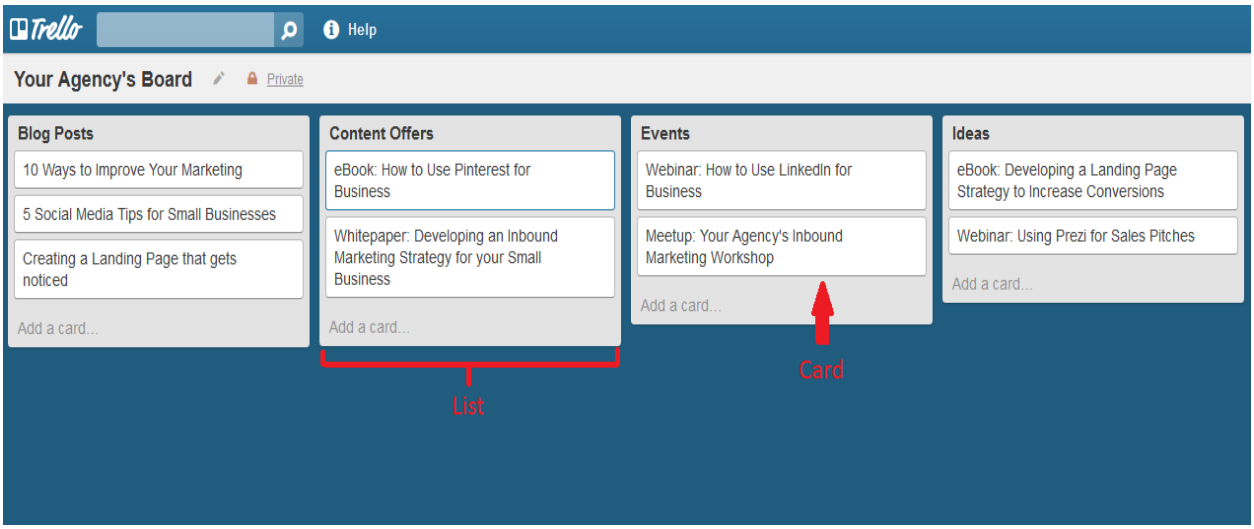
STEP 1 - Understanding Boards, Lists and Cards:

HubSpot's Channel Marketing team will set up the board structure for you, so all you need to do is understand how it's organized and how to leverage it. We'll subscribe to all the changes you make on the board, so no need to update us on the status of certain projects. It's our way of passively monitoring and promoting the content you're producing. However, if there's something you'd like to coordinate especially, please let us know via email directly.

Before diving in, it's important to know how Trello works. There are three pieces you'll want to be familiar with--**boards**, **lists** and **cards**.

1. First, you'll be working on a **board**. This **board** will have **lists** for each category of content we're looking to coordinate with your agency (*Blog Posts*, *Content Offers, Events* and *Ideas*).
2. **Lists** (*Blog Posts, Content Offers, Events* and *Ideas*) will be the areas where you'll develop **cards**.

3. **Cards** are where you'll note upcoming content that you're working on. **Cards** have lots of different functionalities that will help us keep track of your content. We'll get into specifics soon, but here's an example of what a board looks like, with **lists** and **cards**:



STEP 2 - Setting Up Your Board:

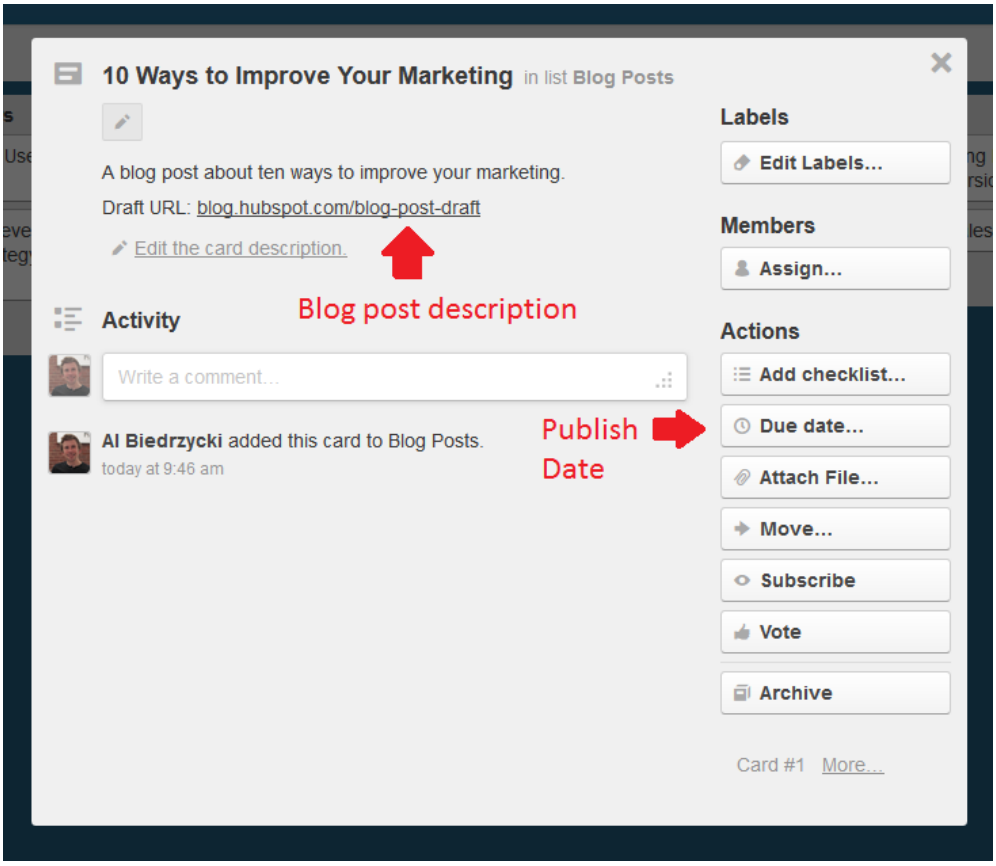
In order for us to be notified of all the content you're working on, we'll need to create cards for each deliverable. The HubSpot Channel marketing team will be notified daily with all the changes you make to your cards, so frequently contributing will ensure we help coordinate content promotion! Don't be shy.

What follows is a basic walkthrough on how to create and manage a Trello board for each type of content your agency is producing.

Creating "Blog Post" Cards:

Adding a blog card is easy. Simply click on "Add a card" in the Blog Posts list and add in the following details on the card menu:

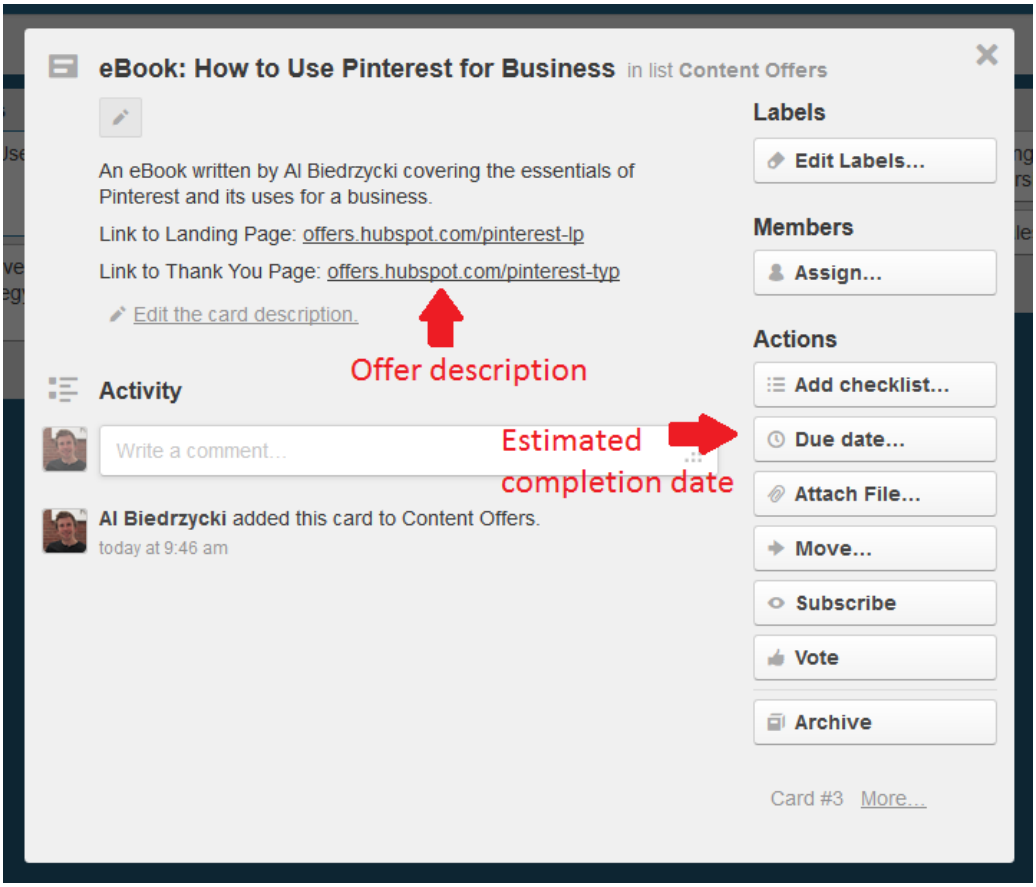
1. **Card Description**: Please include a brief synopsis of the blog post, the author and the draft URL (if applicable). Once the blog post is complete,
2. **Due Date**: Please specify the estimated publish date of the blog post so we can keep track of when it will go live. Once it goes live, please include the final URL in the description or in the activity feed.



Creating "Content Offer" Cards:

Creating a Content Offer Card is also quite easy. Simply click on "Add a card" in the Content Offers list and add in the following details on the card menu:

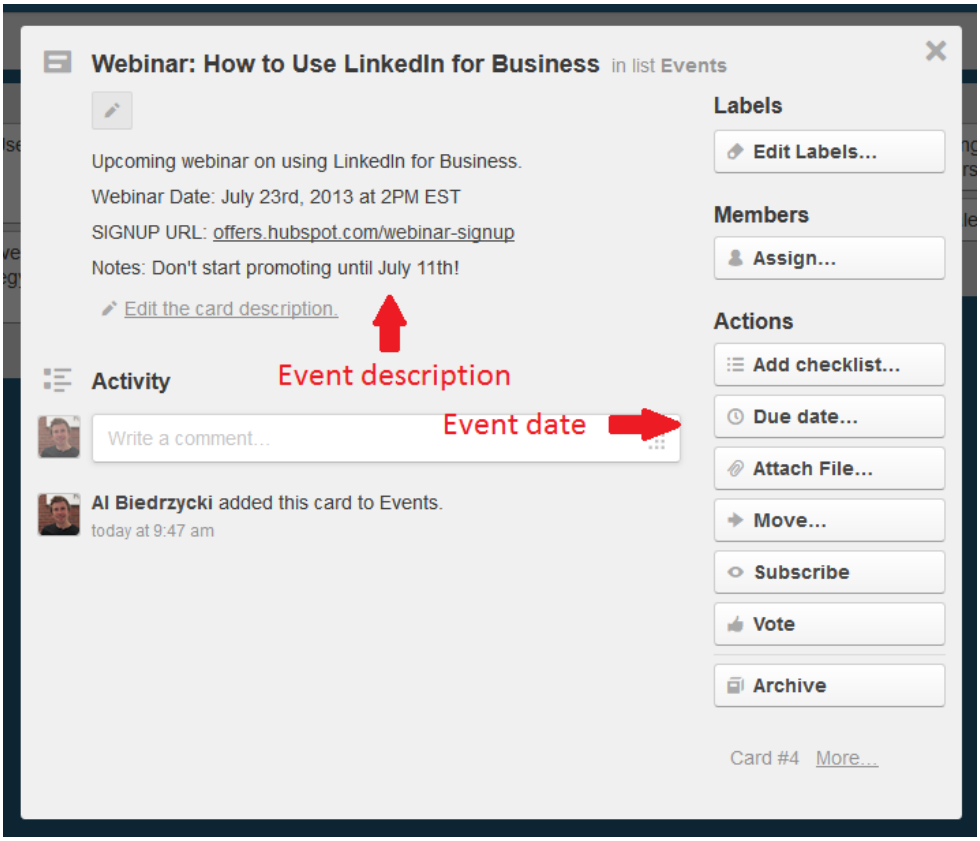
1. **Card Description**: Please include a brief synopsis of the content offer, the author(s) and links to the landing and thank you pages (when available).
2. **Attach File**: If you'd like to attach the content offer prior to launch, you can also do so on the card.
3. **Due Date**: Please specify the estimated publish date of the content offer so we can keep track of when it will go live.



Creating "Event" Cards:

Creating an Event Card is great if you're hosting an upcoming webinar or meetup. Simply click on "Add a card" in the Event list and add in the following details on the card menu:

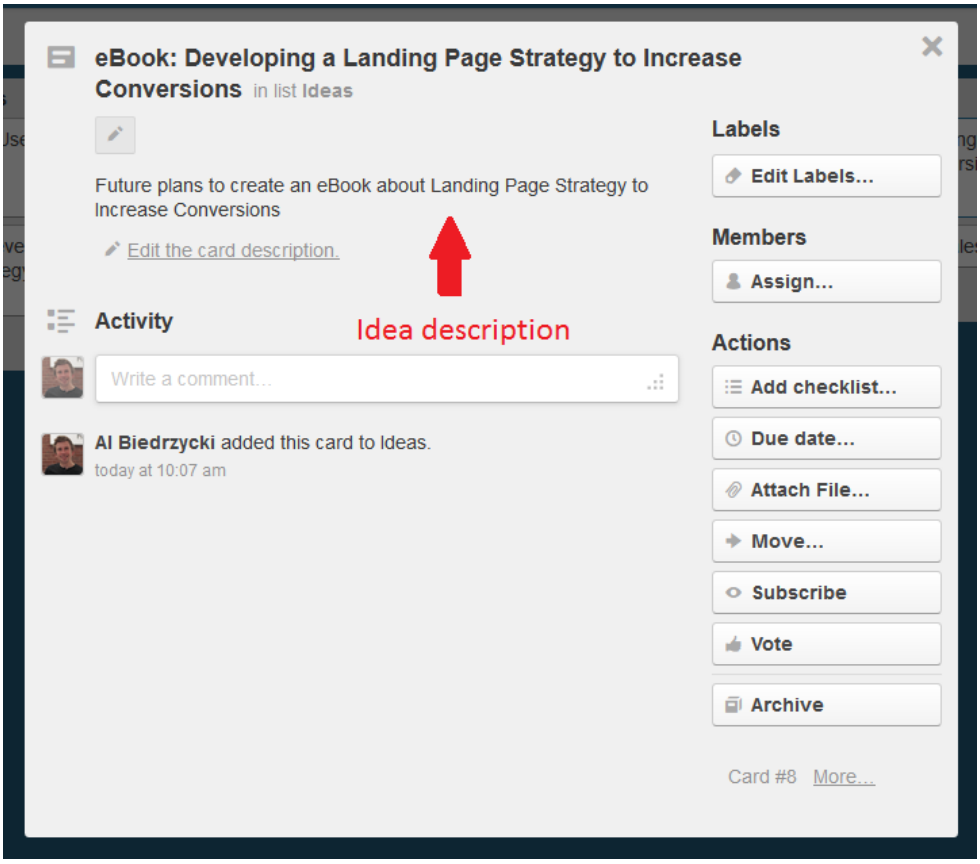
1. **Card Description**: Please include a brief synopsis of the event, the date it will be held, the link to signup for it and any other notes that we should consider.
2. **Due Date**: Please specify the event date so we can keep track of when it will occur.



Creating “Ideas” Cards:

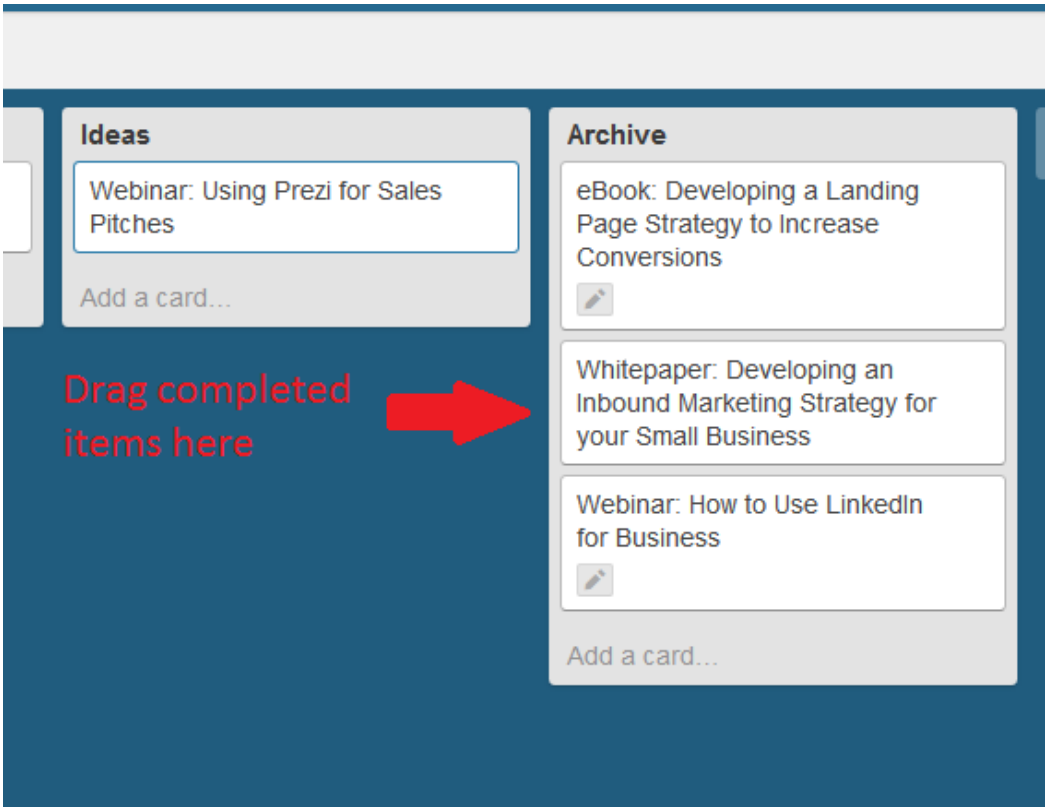
Adding an Idea card is easy. Simply click on “Add a card” in the Ideas list and add in the following details on the card menu:

1. **Card Description**: Please include a brief synopsis of the idea and anything else we should know about it.
2. **Be Creative**: Ideas are also a way to get feedback from us here at HubSpot. If you have any ideas that sound cool, we might just followup with you on how we can work together to make some remarkable content!



STEP 3 - Archiving Completed Content

In order to help build up our content library, we ask that you add completed items to the “archive” list on the main board. This will allow you to keep track of everything you created and help us easily add your content to our archive for future promotion.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