TRELLO BOARD TEMPLATE

Delegate Better, Grow Faster

Sales & Customer Service

GET NUVA

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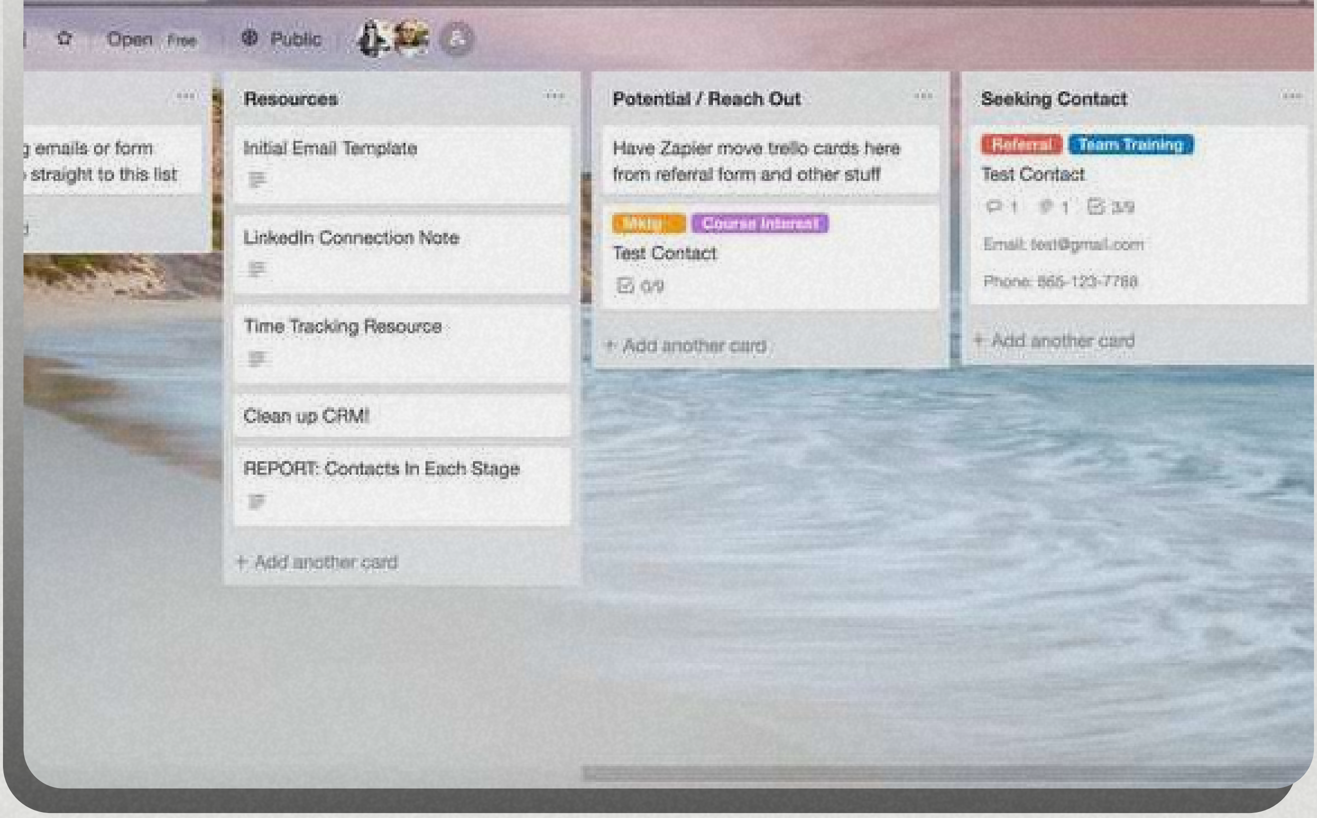


WELCOME & OVERVIEW

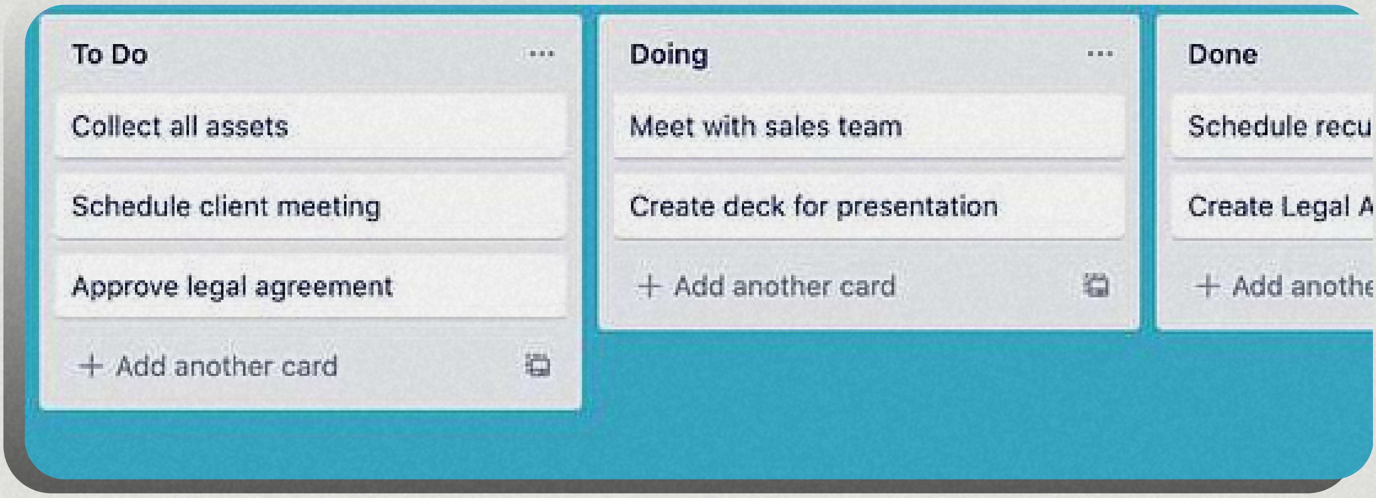
Welcome to your Delegation & Growth Board! This Trello board is designed specifically to help business owners delegate tasks more effectively, streamline your customer service and sales processes, and accelerate growth. Here, you'll have clear visibility over task assignments, progress updates, and outcomes.

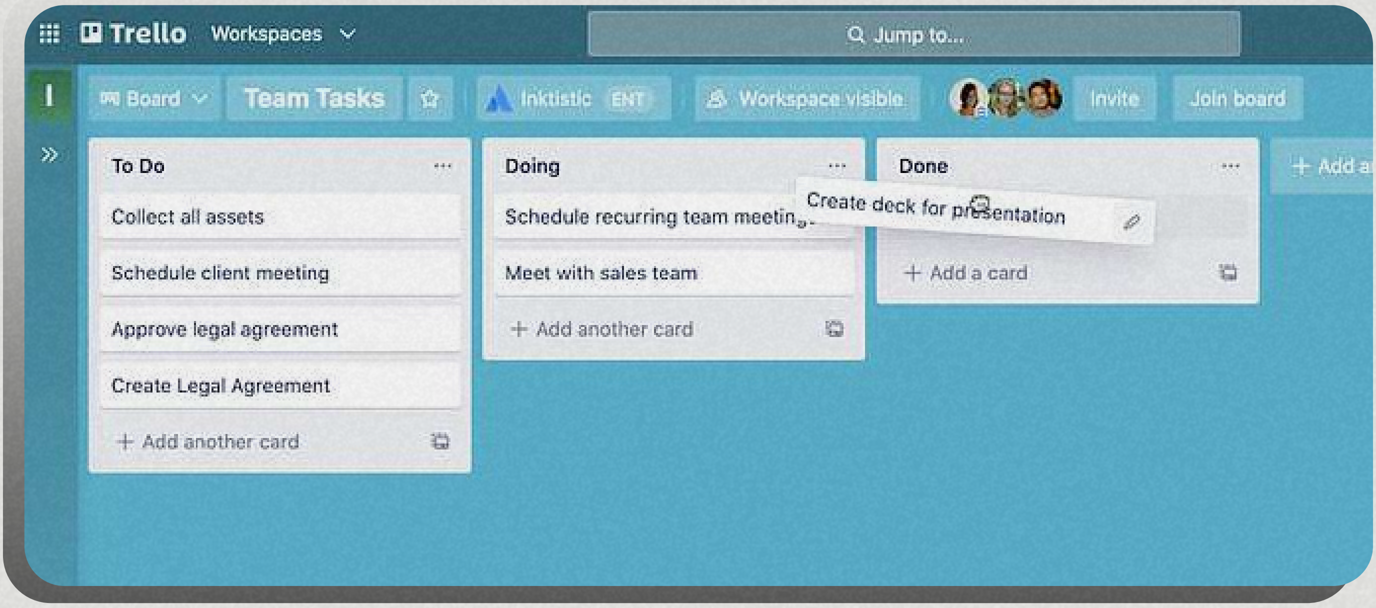
How This Board Helps Delegation:

- Clear Communication: Centralize instructions, updates, and task statuses.
- Task Management: Easily track tasks from assignment through completion.
- Efficiency: Quickly onboard your team with structured guidelines and resources.

Usage Instructions:

1. **Add new tasks (cards)** under the " New Tasks & Requests" list.
2. **Move cards** to appropriate lists (Delegated: Sales, Delegated: Customer Service) to assign.
3. **Monitor progress** via the " In Progress" list.
4. **Review completed tasks** in " Review & Approval."
5. **Finalize** tasks by moving to the "Completed" list after approval.



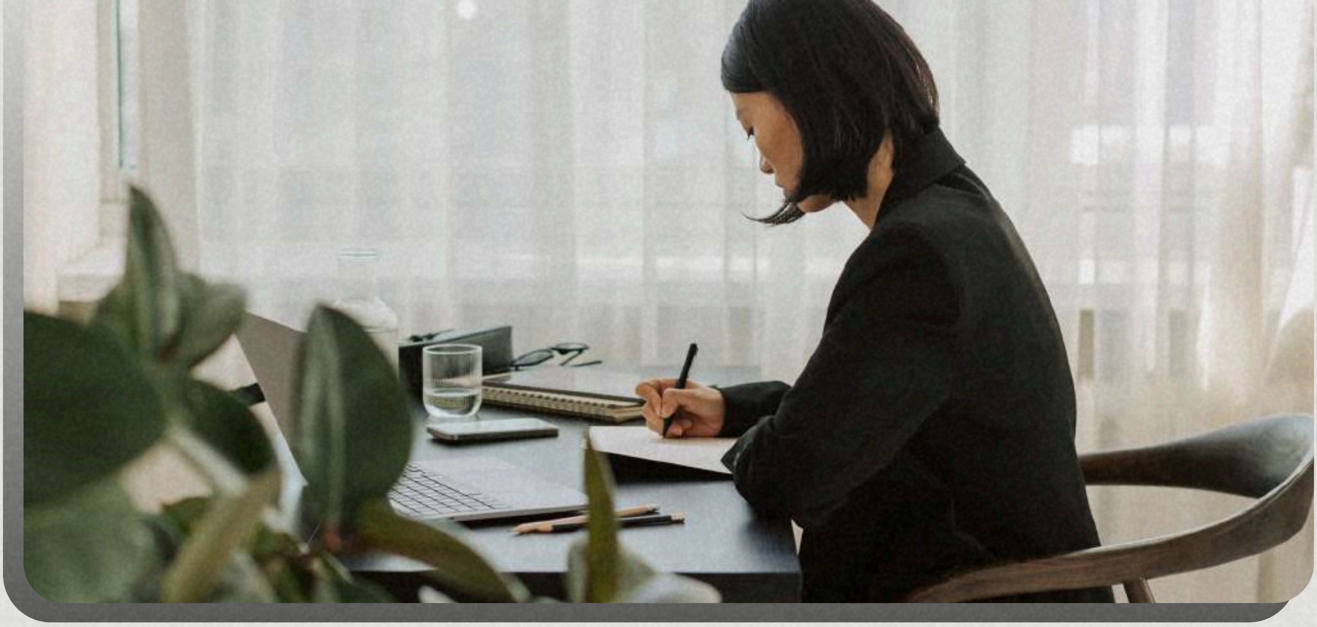


DELEGATION BEST PRACTICES

To ensure effective delegation, please adhere to the following best practices:

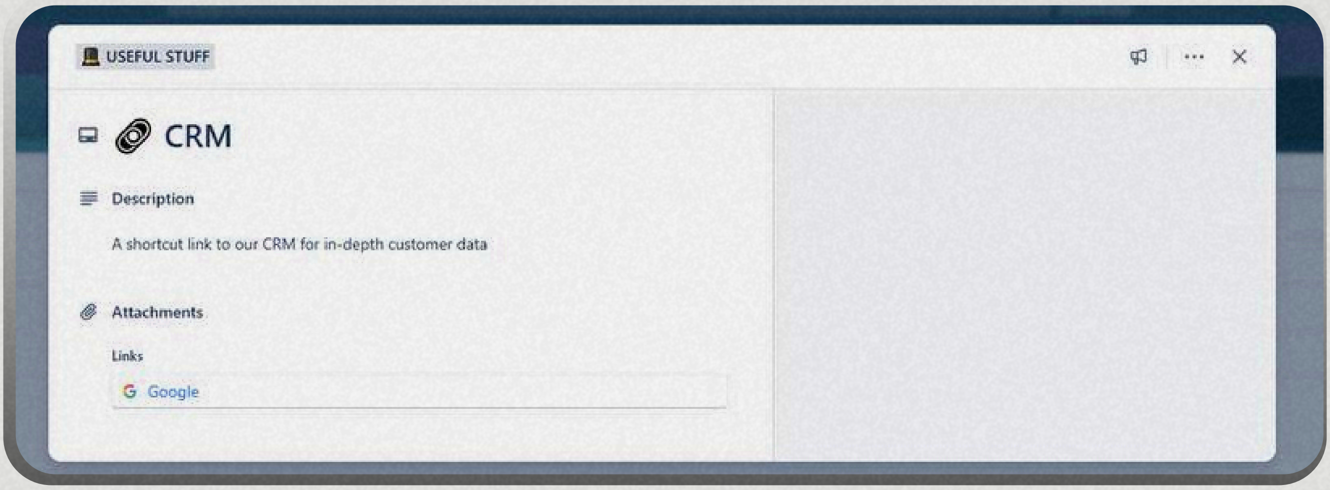
- Clearly define task descriptions, objectives, and expected outcomes.
- Set realistic deadlines and clearly communicate them.
- Identify and communicate who is responsible for each task.
- Regularly check in and provide constructive feedback to ensure tasks are progressing smoothly.
- Utilize checklists on cards to outline necessary steps clearly.

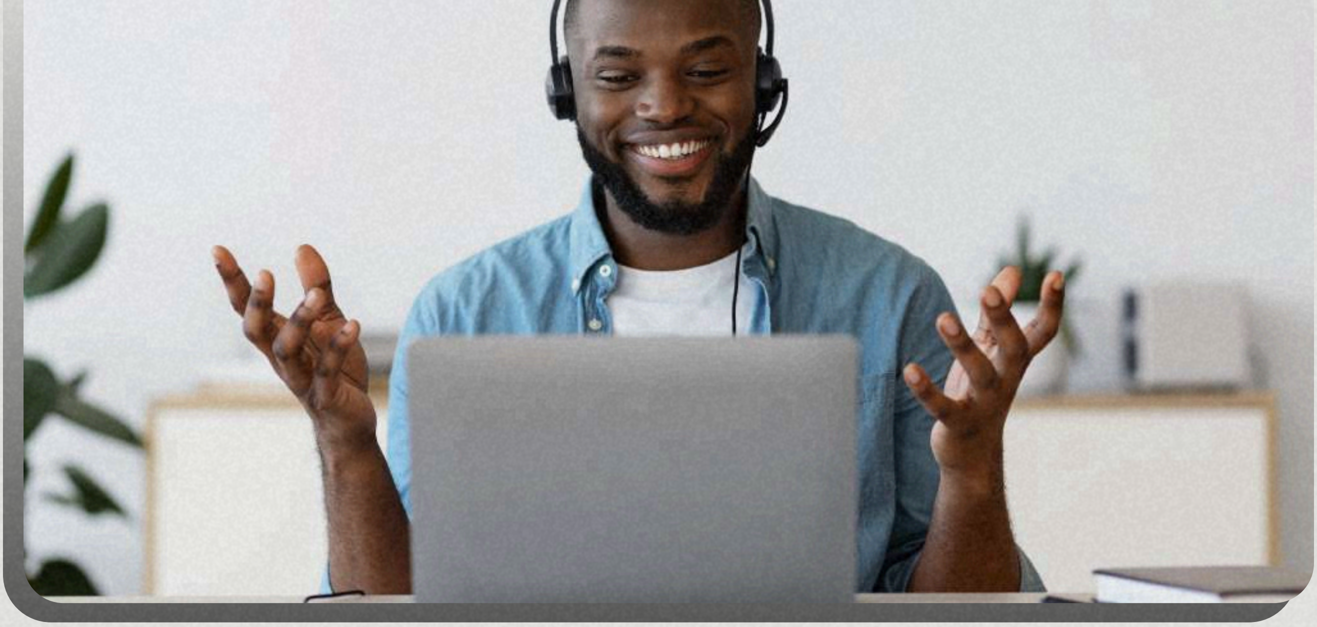
Following these guidelines will foster clarity, responsibility, and productivity within your team.



NEW TASKS & REQUESTS

Initially, business owners should add new tasks and requests here. Clearly detail each task with a brief description, expected outcomes, and desired completion date. Once tasks are clearly outlined, move them to the appropriate delegation lists (Sales or Customer Service). This ensures tasks are structured and clear before assigning them to your team.





DELEGATED: SALES

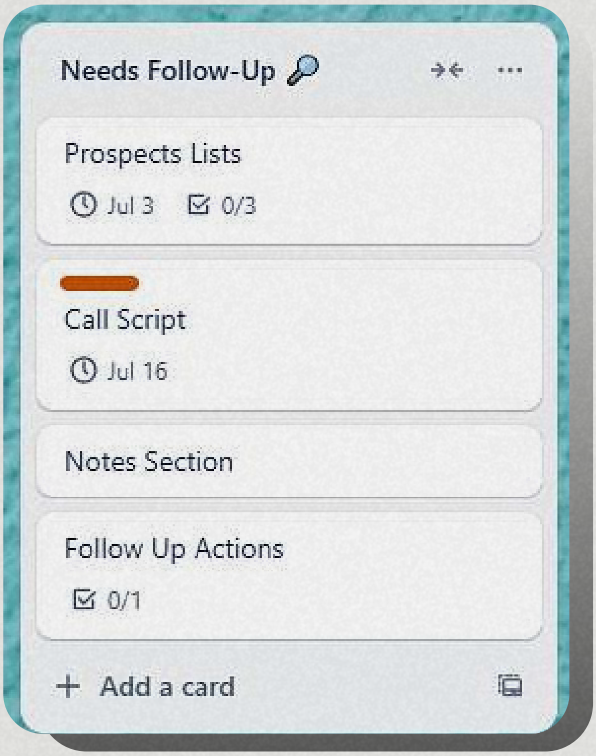
SAMPLE CARD: FOLLOW-UP CALLS

Reach out to prospects from recent campaigns.

Checklist:

- Prospects list
- Call script
- Notes section
- Follow-up actions
-

Due Date: [Add realistic deadlines]

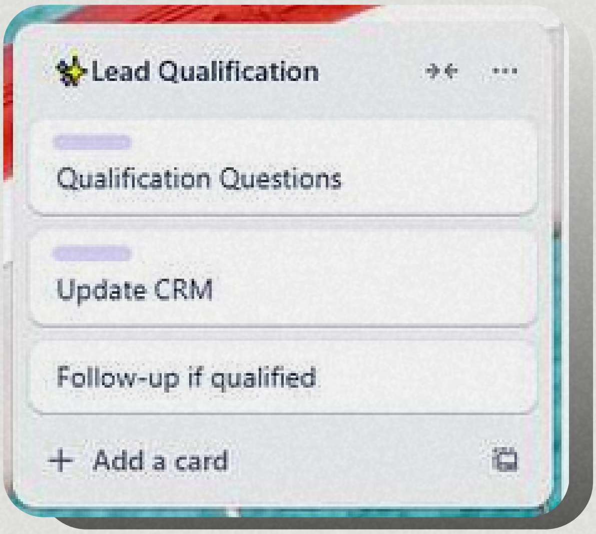


SAMPLE CARD: LEAD QUALIFICATION

Qualify leads using the provided criteria.

Checklist:

- Qualification Questions
- Update CRM
- Follow up if qualified

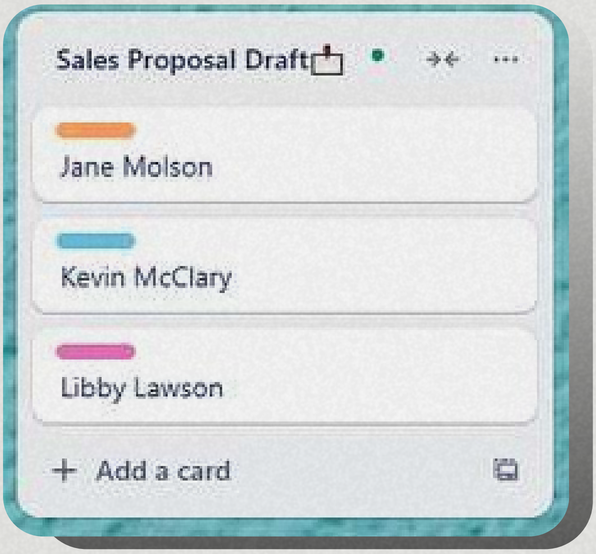


SAMPLE CARD: SALES PROPOSAL DRAFT

Prepare proposals from templates.

Checklist:

- Client details
- Pricing customization
- Proposal review
- Send to the client

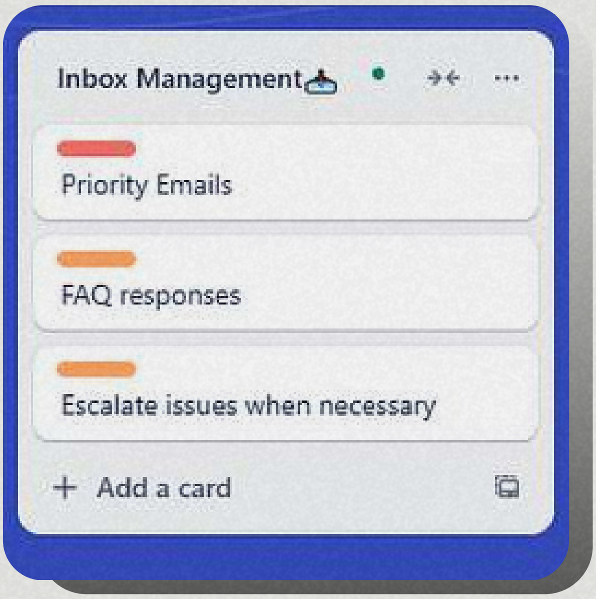


DELEGATED: CUSTOMER SERVICE

SAMPLE CARD: INBOX MANAGEMENT

Monitor and reply to incoming emails daily.

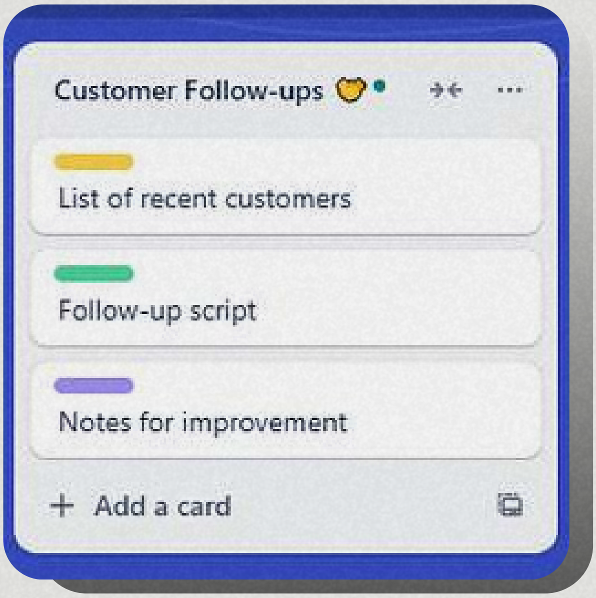
Checklist:
- Priority Emails
- FAQ responses
- Escalate issues when necessary



SAMPLE CARD: CUSTOMER FOLLOW-UPS

Reach out to recent customers for feedback or review requests.

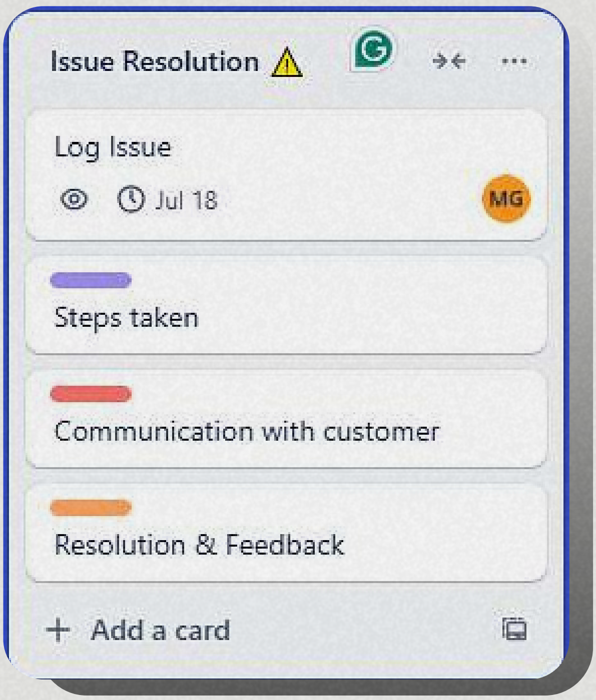
Checklist:
- List of recent customers
- Follow-up script
- Notes for improvement



SAMPLE CARD: ISSUE RESOLUTION

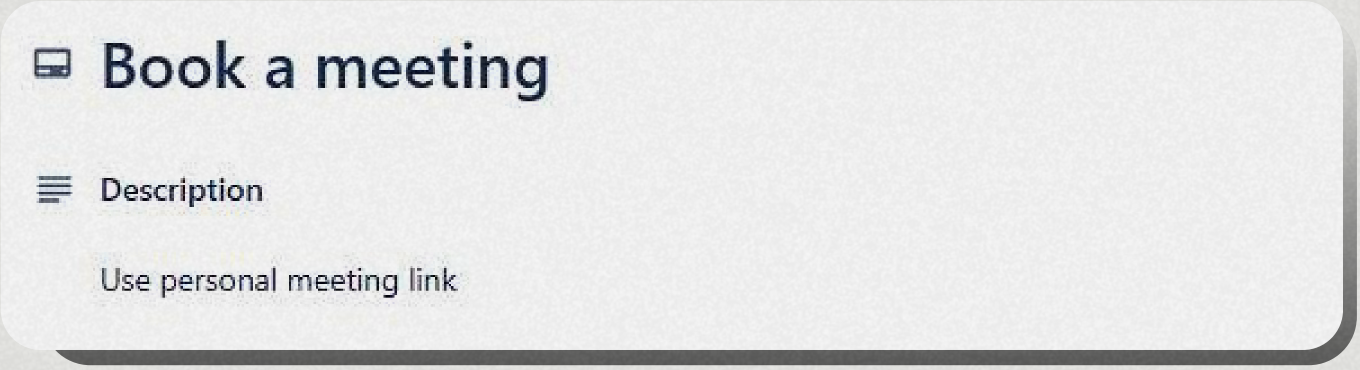
Track and solve reported customer issues.

Checklist:
- Log Issue
- Steps taken
- Communication with the customer
- Resolution & Feedback



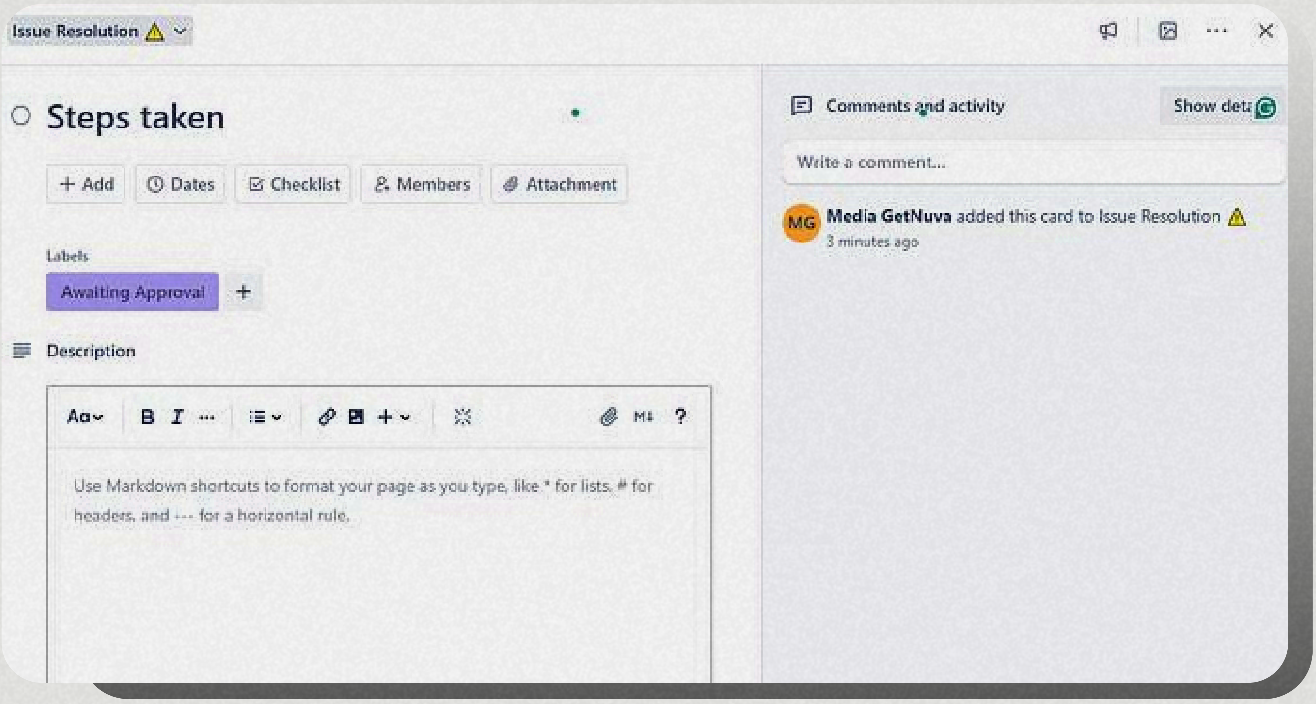
IN PROGRESS

Cards that are actively being worked on by team members. Keep this list updated to clearly reflect ongoing tasks and their current statuses.



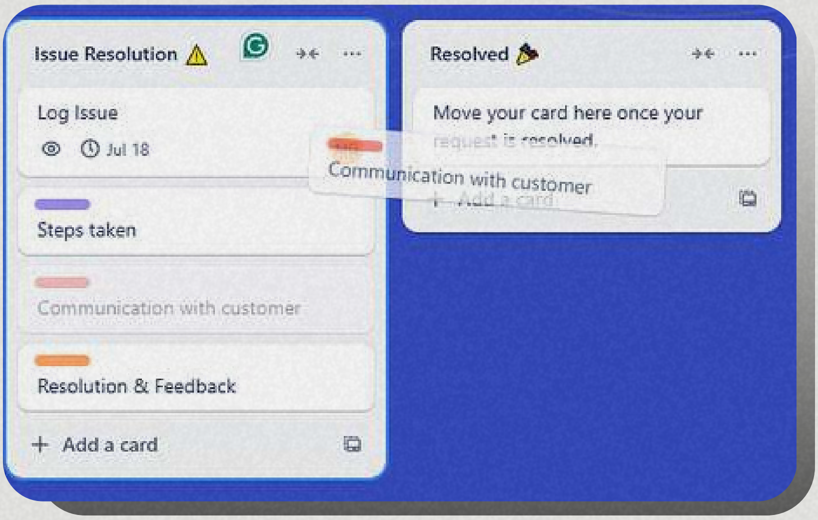
REVIEW & APPROVAL

Tasks completed by team members that require review and approval by the business owner or supervisor before marking as complete.



COMPLETED

Tasks that have been successfully delegated, completed, reviewed, and approved. Move cards here once tasks are fully concluded.

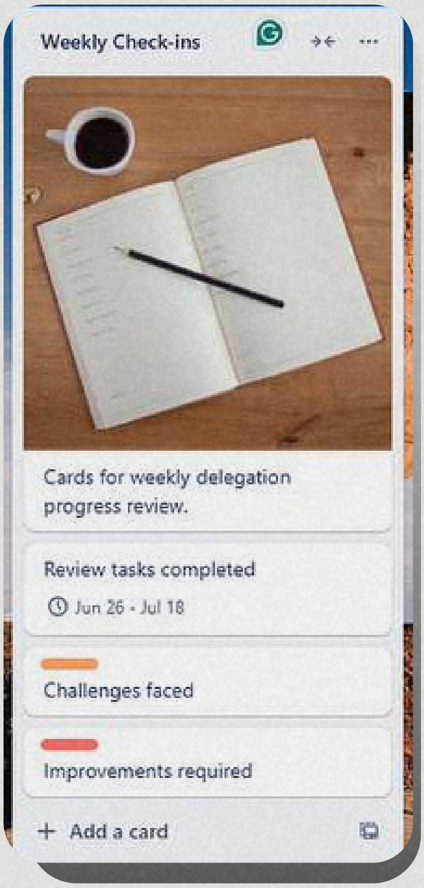


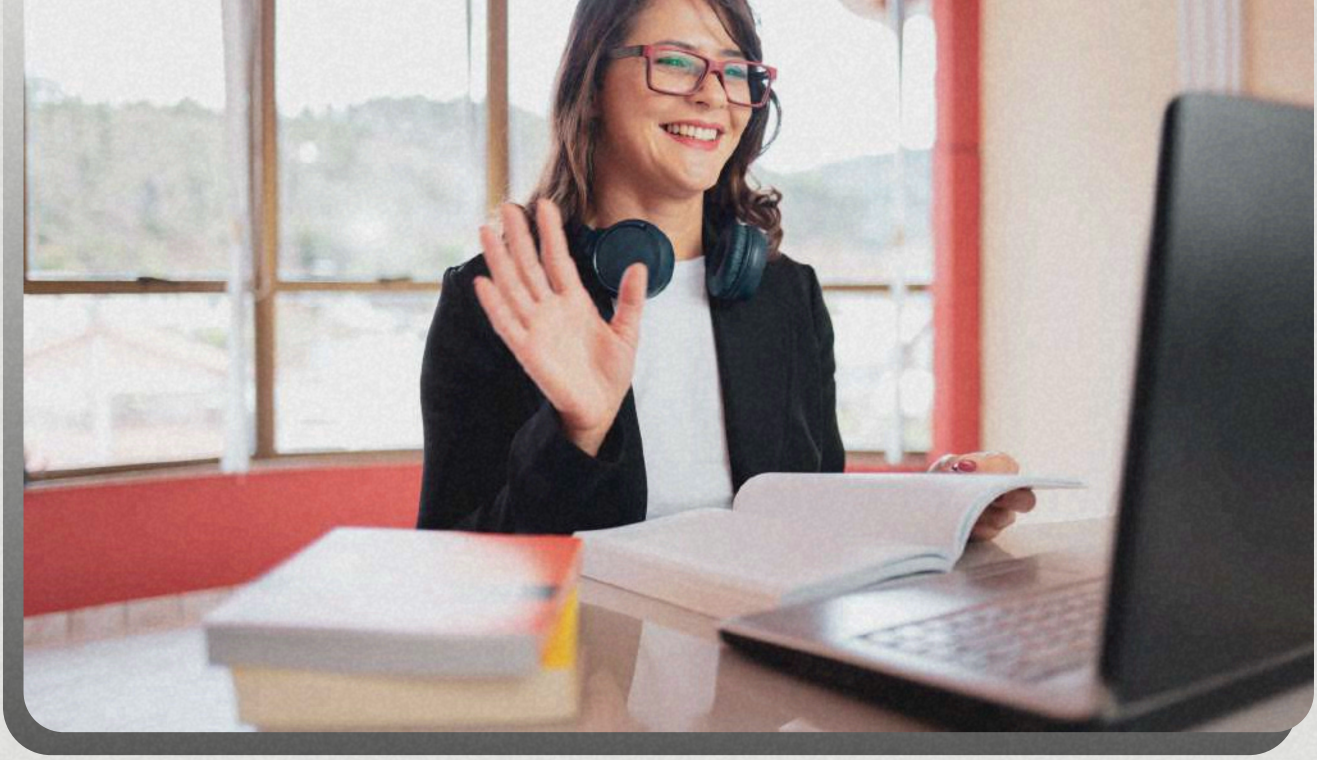
WEEKLY CHECK-INS

Cards for weekly delegation progress review.

Checklist:

- Review tasks completed
- Challenges faced
- Improvements required





CONCLUSION

Thank you for utilizing the Delegation & Growth Board! For additional resources, feel free to explore and leverage the extensive templates provided by the **Trello community**. These templates offer diverse and proven approaches to streamline your business processes and foster team productivity and growth.

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