M&E with Trello/Asana Workflows Training Course

Professional Development Training Course Outline

Category	Monitoring and Evaluation	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s fast-paced project management and monitoring landscape, leveraging Trello and Asana workflows has become critical for efficient Monitoring & Evaluation (M&E). This training course equips professionals with the skills to streamline M&E processes, enhance data-driven decision-making, and optimize project tracking using modern workflow automation tools. Participants will learn to design, implement, and manage workflow systems, track project milestones, and generate insightful reports that improve program accountability, transparency, and impact assessment.

M&E with Trello/Asana Workflows Training Course integrates practical exercises, real-world case studies, and interactive workflow simulations to provide a hands-on experience in managing M&E projects. By combining Trello and Asana best practices with M&E standards, participants will master how to monitor performance indicators, manage tasks efficiently, and collaborate across teams. It is designed to empower organizations and professionals to achieve higher efficiency, minimize delays, and improve evaluation quality through structured and automated workflow solutions.

Programme Curriculum

M&E with Trello/Asana Workflows Training Course

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10 days

Course Objectives

By the end of this course, participants will be able to:

1. Design M&E workflows using Trello and Asana for project tracking and reporting.
2. Implement task automation to improve efficiency and reduce human error.
3. Utilize Kanban boards and task dependencies for streamlined project management.
4. Apply data-driven decision-making techniques in monitoring and evaluation.
5. Create custom dashboards and visual reports for program insights.
6. Integrate collaboration tools for team coordination and accountability.
7. Apply SMART indicators to measure program performance accurately.
8. Develop risk management and mitigation strategies in M&E workflows.
9. Conduct real-time monitoring using workflow automation and notifications.
10. Optimize resource allocation and workload management.
11. Implement continuous improvement processes in project evaluation.
12. Generate impact-focused evaluation reports for stakeholders.
13. Apply lessons learned from case studies to practical M&E workflows.

Target Audience

- M&E Officers and Specialists
- Project Managers and Coordinators
- Program Evaluators
- Non-Governmental Organization (NGO) Staff
- Data Analysts and Research Officers
- Team Leads in Development Programs
- Government Program Officers
- Consultants in Project Management and Evaluation

Course Modules

Module 1: Introduction to M&E Workflows

- Key concepts of M&E in project management
- Importance of workflow automation in evaluation
- Overview of Trello and Asana features
- Differences and strengths of both platforms
- Case study: NGO project tracking efficiency

Module 2: Workflow Design Principles

- Mapping project processes into workflows
- Defining tasks, milestones, and deliverables
- Assigning roles and responsibilities
- Setting deadlines and notifications
- Case study: Multi-stakeholder project coordination

Module 3: Trello Basics for M&E

- Creating boards, lists, and cards
- Task assignments and labels
- Using checklists for monitoring indicators
- Tracking deadlines and progress
- Case study: Health program M&E using Trello

Module 4: Asana Basics for M&E

- Task and project creation
- Dependencies and timelines
- Portfolio and milestone tracking
- Collaborating with team members
- Case study: Education project workflow setup

Module 5: Advanced Trello Features

- Power-Ups for enhanced functionality
- Automation with Butler
- Integrating Trello with Google Sheets/Slack
- Workflow templates for recurring projects
- Case study: Humanitarian project monitoring

Module 6: Advanced Asana Features

- Rules and workflow automation
- Reporting and dashboards
- Integrating Asana with reporting tools
- Templates for evaluation projects
- Case study: Government program evaluation

Module 7: M&E Indicators and Metrics

- Selecting relevant indicators
- SMART objectives alignment
- Visual tracking of KPIs
- Linking tasks to measurable outcomes
- Case study: Impact assessment using dashboards

Module 8: Task Prioritization and Scheduling

- Identifying critical tasks
- Using calendars and Gantt charts
- Task dependencies and risk mitigation
- Time management for M&E officers

- Case study: Donor-funded program scheduling

Module 9: Team Collaboration and Communication

- Setting up team roles and responsibilities
- Commenting, tagging, and notifications
- Managing remote teams
- Sharing documents and reports
- Case study: Multi-location team coordination

Module 10: Reporting and Data Visualization

- Custom dashboards in Trello and Asana
- Exporting and presenting data
- Visual charts for M&E reporting
- Data storytelling techniques
- Case study: NGO annual performance report

Module 11: Workflow Automation

- Automating repetitive tasks
- Notifications and reminders
- Conditional rules for task updates
- Reducing manual errors
- Case study: Automated program progress tracking

Module 12: Risk and Issue Management

- Identifying project risks
- Linking risks to workflow tasks
- Mitigation strategies and alerts
- Reporting delays and bottlenecks
- Case study: Emergency response project management

Module 13: Resource Management

- Allocating human and material resources
- Tracking task completion and workloads
- Forecasting capacity and performance
- Adjusting resources for project needs
- Case study: Community development project

Module 14: Continuous Improvement and Feedback

- Monitoring workflow efficiency
- Collecting feedback from team members
- Iterative improvement of workflows
- Lessons learned documentation
- Case study: Iterative improvement in donor-funded projects

Module 15: Case Studies and Capstone Project

- Real-life M&E workflow scenarios

- Hands-on project setup in Trello/Asana
- Team collaboration simulations
- Evaluation and reporting of project outcomes
- Case study: Presentation of capstone workflow project

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price

23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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