

Trello Goal Tracking: OKRs, KPIs, and Dashboards

Review Trello goal tracking for OKRs, KPIs, dashboards, linked work, progress updates, permissions, and reporting limits.

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TL;DR Trello can hold a lightweight OKR or KPI workflow. A goals board carries objectives as cards, key results as checklist items or linked cards, and progress as a custom-field percentage. Premium Dashboards display goal progress; Power-Ups (Goal Tracker, OKR Board) add structure. The honest gap against dedicated OKR tools is automated rollup from linked work — Trello does not natively recalculate a parent objective when child cards close. For company-wide OKRs with formal cadences, evaluate Quantive, Lattice, 15Five, or Weekdone alongside Trello. For small teams running quarterly goals, Trello plus a Power-Up is usually enough.

How Goal Tracking Works in Trello

A goals board treats objectives as cards. Key results are checklist items or linked child cards; progress is a custom-field percentage updated manually or by Butler.

The convention that works on Trello: one board per goal cycle (quarter, year), one card per objective, key results as either advanced checklist items or as linked cards. Owners are the objective owners; due dates are the cycle close dates.

- **Objectives** — cards on a Goals board.
- **Key results** — advanced checklist items (Standard plan and above) or linked child cards.
- **Targets** — numeric custom fields on each key result.
- **Manual vs linked progress** — manual updates work for small teams; Power-Ups roll up linked work for larger ones.
- **Plan availability** — works on Free; richer on Standard (custom fields, advanced checklists) and Premium (Dashboard for goal reporting).

The trap is over-modelling. Five objectives with three key results each is enough for most quarters. Thirty objectives with eight KRs each is not a goal-tracking system; it is a punishment.

Five objectives, three KRs each, quarterly. Anything more is a planning artefact masquerading as goals.

OKRs, KPIs, and Team Alignment

OKRs are aspirational quarterly objectives; KPIs are ongoing operational metrics.

Trello can hold both — separate boards for each — but the workflows are different.

- **OKRs** — quarterly cycle, three to five objectives, two to four KRs each. Updated weekly; graded at quarter-end.
- **KPIs** — continuous metrics that signal operational health. Updated weekly or monthly; reviewed in operating reviews.
- **KPI dashboards vs OKR workflows** — the KPI surface is a Premium Dashboard; the OKR surface is a goals board with check-in cadence.
- **Company / team / individual** — three boards in a Workspace, linked via card mirroring or labelling.

The most useful single-board convention: company goals live in one Workspace board, team goals link to company KRs via card-link, individual goals live in personal boards. Aggregation across boards is a Premium feature.

OKRs and KPIs need different cadences and different boards. Don't mix them on the same surface.

Dashboards for Goal Reporting

Premium Dashboards count cards by status and aggregate custom fields. For goal-specific dashboards, use Power-Ups like Goal Tracker or pipe data to a BI tool.

- **Progress charts** — count by status (On track / At risk / Off track) per objective; sum of KR completion percentages.
- **Blockers** — "Blocked" label or status count.
- **Weekly notes** — comment thread on the objective card holds the narrative.
- **Stakeholder summaries** — Premium Dashboard exported to PDF; or a recurring status card with the week's grades.
- **Export needs** — CSV from the goals board; share to Confluence, Notion, or Google Slides for the board review.

The cleanest reporting habit: every Friday, each objective owner updates the percentage and writes a one-paragraph status comment. The dashboard reads itself at the next steering committee.

Weekly check-ins via comments. The dashboard reads itself when owners maintain discipline.

Connecting Goals to Work

The hard part of goal tracking is the link between strategy and execution. Trello does it with card-link references — KR cards link to project cards on other boards, and Butler keeps the references current.

- **Projects, tasks, portfolios** — goal cards live on Goals board; project cards live on Project boards. Cross-board links connect them.
- **Owners and review cadence** — every objective has one owner; every KR has one

owner; cadence is weekly check-in, quarterly grading.

- **When goals become vanity metrics** — when KR's are output measures (cards closed) instead of outcome measures (customer activation, retention, revenue), the goal system is broken.
- **Avoiding over-modelling** — every linked card is a maintenance cost. Link only when it materially changes the goal grade.

The honest test for a KR: would the team change its behaviour if the KR moved? If not, it is a vanity metric. Cut it from next quarter's cycle.

Outcome KR's change behaviour. Output KR's measure activity. Tell them apart and drop the latter.

Best Practices and Alternatives

Start with three to five measurable goals. Avoid stacking ten metrics on a dashboard. For company-wide formal OKR's with org-wide rollups, evaluate a dedicated tool alongside Trello.

- **Start small** — three to five objectives per quarter, two to four KR's each.
- **Avoid metric overload** — a dashboard with twelve KR's is not a focus tool.
- **When dedicated OKR software is better** — formal annual OKR's with monthly check-ins, company-wide alignment, automated rollups. Quantive, Lattice, 15Five, Weekdone.
- **Stay with Trello when** — team is under 50 people, the cadence is informal, and the goal board is the operating cadence rather than a separate one.

The pragmatic test: would a CEO open the goals board weekly without prompting? If yes, Trello is enough. If no, the company has a goal-execution problem more than a tool problem.

Trello suits small-team quarterly goals. For company-wide formal OKR's, layer a dedicated tool.

FAQ

Can Trello track OKR's?

Yes — a goals board with objectives as cards and KR's as advanced checklist items or linked cards works for small teams. For company-wide OKR's with formal cadences and automated rollups, evaluate dedicated tools like Quantive, Lattice, 15Five, or Weekdone alongside Trello.

How is goal tracking different from project tracking in Trello?

Project tracking is the work; goal tracking is the outcome. A project ships a deliverable; a goal measures whether the deliverable moved the metric. Goals boards run quarterly; project boards run on the project's own cadence.

How do I link goals to projects in Trello?

Card-link references: a KR card on the Goals board links to the active project cards on the Project boards. Butler can comment on the KR when a linked card moves to "Done". Power-Ups

like Goal Tracker formalise the linkage.

How many goals should a team have per quarter?

Three to five objectives, two to four KR's each, is the workable range. Ten objectives per team almost always becomes a list of activities rather than a focus mechanism. Cut ruthlessly at the start of the quarter, not at the end.

Should I use OKRs or KPIs in Trello?

Both, on separate boards. OKRs are aspirational quarterly objectives; KPIs are ongoing operational metrics. Mixing them on the same dashboard tends to dilute both — readers stop knowing what to focus on.

Full article: <https://trtracker.net/trello-goal-tracker>

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