

Trello KPI Tracking: Dashboards, Goals, and Reports

Track KPIs in Trello with dashboards, goal links, templates, reporting cadence, metric ownership, and limits to verify.

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TL;DR Trello can host a KPI dashboard for small-to-mid teams: one card per metric, custom fields for target/current/owner, the Premium Dashboard summing those fields. The shape works for operational KPIs (open tickets, on-time delivery rate, customer NPS). It does not match BI tools for trend lines, multi-dimensional drill-down, or auto-refresh from a warehouse. Pair with a BI tool for executive dashboards; keep Trello for the operational cadence. Avoid the trap of tracking 30 KPIs — five to ten is the workable range.

What KPIs Trello Can Track

Project, team, and operational KPIs sit naturally on cards. Strategic KPIs (revenue, market share, NPS) sit better in a BI tool with auto-refresh from a warehouse.

- **Project KPIs** — milestone hit rate, time-to-done, scope creep count.
- **Team KPIs** — throughput, blocker frequency, on-time delivery rate.
- **Operational KPIs** — open tickets, customer response time, escalation rate.
- **KPI vs OKR** — KPIs are ongoing operational metrics; OKRs are time-bound aspirational goals. Different boards.
- **Metric ownership and cadence** — every KPI has a single owner who updates it weekly.

The discipline is restraint. Five to ten KPIs per team is the workable range. Thirty KPIs is a wall of charts that nobody reads after month two.

Five to ten KPIs per team. Strategic metrics belong in BI tools, not Trello.

KPI Templates and Setup

One card per KPI. Custom fields for current value, target, RAG status, last-updated date, owner. Card description holds the definition.

- **Fields for targets, owners, status** — Current (number), Target (number), Status (Green/Yellow/Red dropdown), Owner (member), Last updated (date).
- **Choose fewer high-signal KPIs** — every KPI should change behaviour when it moves. If not, it is noise.
- **Department examples** — Sales: pipeline coverage, win rate, ARR per rep. Support: response time, resolution time, CSAT. Engineering: deployment frequency, change

failure rate.

The template that works: a KPI card with the metric in the title, current/target in custom fields, definition in the description, and a comment thread for the weekly update.

One card per KPI; weekly update as a comment; status as a custom field. The dashboard reads itself.

Dashboards and Reporting Views

Premium Dashboard counts cards by Status and sums numeric custom fields. For trend lines, export to a BI tool or use a reporting Power-Up.

- **Charts for progress and blockers** — count by RAG status; oldest-not-updated card by owner.
- **Goal links** — link KPI cards to OKR cards across boards via card mention.
- **Export or sharing** — PDF export from the Dashboard; CSV from the board; Butler post a Slack message every Monday with the dashboard link.

For executive review, a one-page screenshot of the Trello Dashboard often beats a 12-page BI report nobody reads. Match the format to the audience.

Snapshot dashboards beat 12-page reports for executive review. Match format to audience.

Automation and Data Quality

Butler reminds owners to update their KPI weekly. Stale KPIs flag automatically. Manual data is the main risk; pipe from systems of record where possible.

- **Reminders for metric updates** — Butler rule that mentions the owner if "Last updated" is older than 7 days.
- **Manual data risks** — stale KPIs, off-by-one inputs, missed updates. Discipline + automation flag both.
- **Integrations for source-of-truth data** — pipe KPI values from a CRM, support tool, or BI dashboard via Zapier/Make where possible.

The honest framing: Trello hosts the operational KPI conversation. The numbers should come from systems of record where they exist. Manual entry is a stopgap, not the long-term plan.

Pipe values from systems of record. Manual entry is a stopgap.

KPI Tracking Limits and Alternatives

For trend analysis, drill-down, and auto-refresh, BI tools win. For OKR-grade alignment, use a dedicated OKR tool. Trello fits the operational middle.

- **When BI tools are better** — Looker Studio, Metabase, Tableau, Power BI for trend lines and attribution.
- **When OKR software is better** — Quantive, Lattice, 15Five for formal OKR cadences.

- **Avoiding vanity metrics** — the test: would the team change behaviour if this metric moved? If not, cut it.

The pragmatic pattern: Trello hosts the weekly KPI conversation; BI tools host the monthly trend review; OKR tools host the quarterly alignment cycle. Three cadences, three tools.

Weekly KPI = Trello. Monthly trend = BI. Quarterly OKR = dedicated tool.

FAQ

How many KPIs should a team track in Trello?

Five to ten is the workable range. Twenty or more becomes noise; thirty is a wall of charts nobody reads after month two. Every KPI should change team behaviour when it moves; if not, it is a vanity metric.

Can Trello show KPI trend lines?

Not natively. Dashboard widgets show current values. For trend lines, use a reporting Power-Up (Blue Cat Reports, Screenful) or pipe Trello data to a BI tool such as Looker Studio or Metabase.

Should I track OKRs and KPIs on the same Trello board?

Separate boards. OKRs are quarterly aspirational objectives; KPIs are ongoing operational metrics. Mixing them dilutes both — readers stop knowing what to focus on.

How do I keep Trello KPIs from going stale?

Butler rule that mentions the owner if "Last updated" is older than 7 days. Weekly KPI review meeting with the dashboard open. Quarterly retro to retire KPIs that no team member checks anymore.

Can I import KPI values from a CRM into Trello?

Yes via Zapier or Make — a trigger on a CRM update writes the value back to a custom field on the Trello KPI card. Power-Ups for HubSpot, Salesforce, and Pipedrive also support this pattern with varying depth.

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

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