Set up one column for pledged legacies, one for legacies that you have been notified that the legator is deceased and are in progress, one for complex cases which need detailed notes and one for legacies that have paid and concluded.

Move the 'cards' between columns as actions happen. For example when you are notified that one of your pledgers has passed away, move the card with their details into the 'in progress' column. If an 'in progress' legacy becomes complex, move it to that column and so on.

If there are multiple people working on legacies, they should assign the card to themselves so everyone knows who is responsible. Each time they have a conversation or something significant happens the owner needs to be sure to add a note on the card, and use the calendar to diarise follow ups.

If the owner is going to be away they can reassign items in the calendar to whoever is covering so they get notified when key dates occur.

You can create rules and automations on trello- click on the 3 dots at the top of each column to set them up. So for example every time a new card is added to the 'in progress' column, it can automatically have a checklist. For a straight forward legacy you could have something like the following on the checklist:

- ☐ Notification received
- ☐ Will Received
- ☐ Accrued
- ☐ Finance made aware
- ☐ Legacy income received
- ☐ Thanks and appreciation sent

You could also add an automation such as when the card is moved to the legacy received column or it could email someone to make contact and send thanks, or send a notification to finance.

If you would like more information about improving your workflows and administration using Trello please contact victoria@keepaceconsults.com