CoSchedule

An Agency's Guide To CoSchedule Marketing Calendar



In This Guide

Chapter 1: Manage All Your Clients In One Marketing Calendar

Chapter 2: Set Up Your Calendar For Multiple Clients

Chapter 3: Add Client Projects To Your Calendar

Chapter 4: Create Reusable Workflows For Recurring Retainer Projects

Chapter 5: Create & Publish Social Campaigns For All Of Your Clients

Chapter 6: Build Professional, Easy-To-Understand Social Media Reports For Clients

Chapter 7: Provide Real-Time Project Updates With Your Clients

CoSchedule

CH 1

Manage All Your Clients In One Marketing Calendar



In This Lesson

Intro To Marketing Calendar For Agencies & Freelancers

Benefits Of Using Marketing Calendar As An Agency Or Freelancer



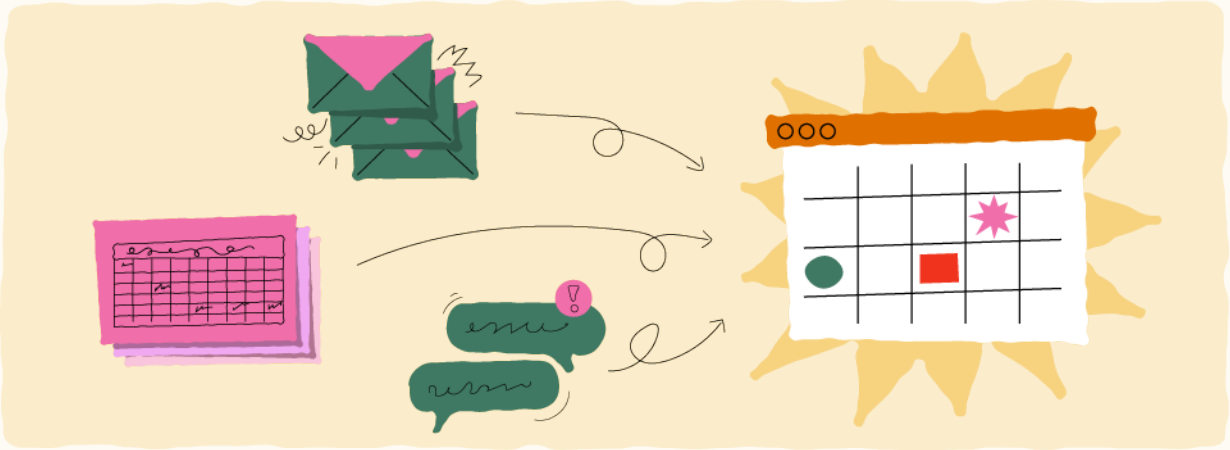
Marketing Calendar For Agencies & Freelancers

As an agency or freelancer, you probably have multiple clients, each with their own set of projects, social accounts, brand information, and more.

Aside from actually executing marketing initiatives for each client, organizing each client can be a chore in itself.

But it doesn't have to be.

Instead of managing client work in spreadsheets, email threads, & other single-function tools that are unique for each project, you can bring it all together in CoSchedule Marketing Calendar.



What is this guide? This guide provides agencies a roadmap for using CoSchedule Marketing Calendar featuring best practices & tips specifically for agency teams.

Who is this guide for? Marketing Agencies & Freelancers that need a better way to coordinate, organize, & execute their client work.

Benefits of Using Marketing Calendar As An Agency or Freelancer

Manage multiple clients in one solution without missing deadlines.

CoSchedule Marketing Calendar allows you to manage your clients' projects, deadlines, social profiles, and project communication all in one place. No more flipping between excel sheets or searching through your email trying to find key details or next steps.

Understand your capacity to take on more work.

With your Marketing Calendar, you'll have a big picture view of what you need to be working on right now. This helps you decide if you have the bandwidth to take on another project or if it's better to wait until your calendar gets a little less busy!

Coordinate projects from start to finish.

In your Marketing Calendar, it's easy to plan tasks centered around project prep, execution, and wrap up. Interact with other team members, like designers, social media managers, interns, or directly with your client, throughout the whole project.

Confidently manage social media strategy for multiple clients.

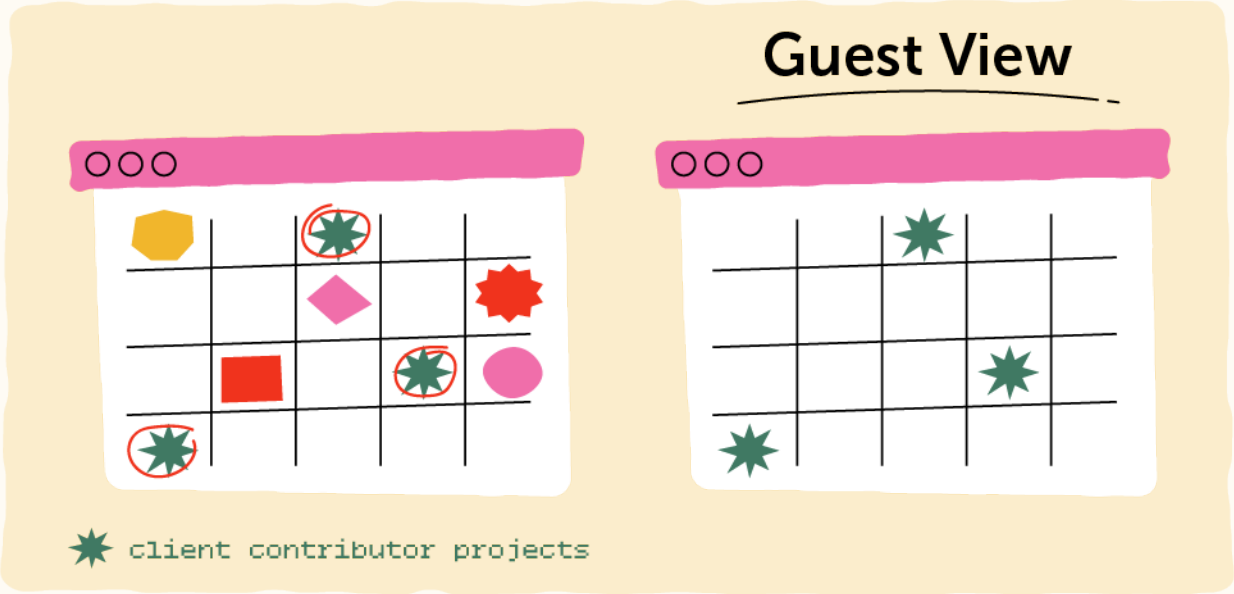
Easily connect all your clients' social media accounts, schedule posts & campaigns, and track their performance all within your Marketing Calendar.

Share project updates with clients in real-time.

Keep your clients in the know by easily sharing read-only links to projects or social campaigns.

Or if you'd like your clients to collaborate with you in your CoSchedule calendar, you can invite your clients to join as a Guest.

They will not be able to see any other projects you have created for other clients. They would only see projects where they are listed as a contributor.



Create & deliver high-quality social media reports.

Build reports based on platform, client, or performance metric. Easily share these custom reports with your clients, so they can understand their social media performance.



Manage All Your Incoming Messages From A Single Inbox

With Social Inbox, you can follow-up with the latest comments, direct messages, and mentions from all of your Facebook, Instagram, & LinkedIn accounts from one place.

Never Miss A Chance For Engagement

Discover new and incoming opportunities to join customer conversations. Increase loyalty and brand buzz by connecting with your audience in real-time.

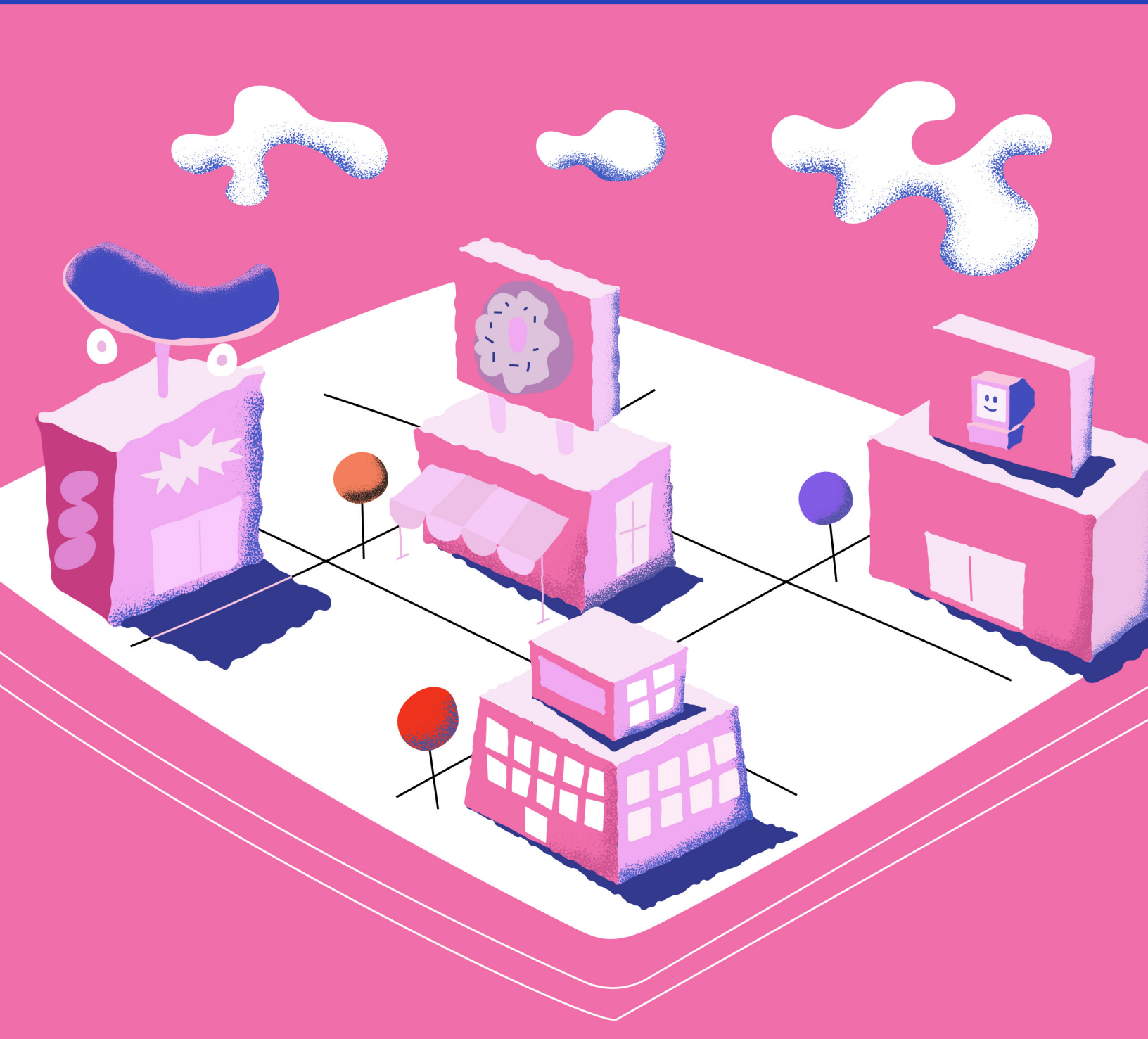


You'll learn how to best set up your CoSchedule Marketing Calendar for multiple clients in Chapter 2: Set Up You Calendar For Multiple Clients.

CoSchedule

CH 2

Set Up Your Calendar For Multiple Clients



In This Lesson

Organize Your Projects By Client Using Color Labels

Add Tags For Specific Initiatives & Goals

Connect Your Clients' Social Media Profiles For Social Publishing

Connect Your Clients' Email & Blog Integrations

Create A Custom Calendar View For Every Client



Organize Your Marketing Calendar

As an agency, you can use CoSchedule Marketing Calendar to organize your client work (alongside your own). But before you start adding projects, you should update your settings & workspaces to seamlessly coordinate everything in one place.

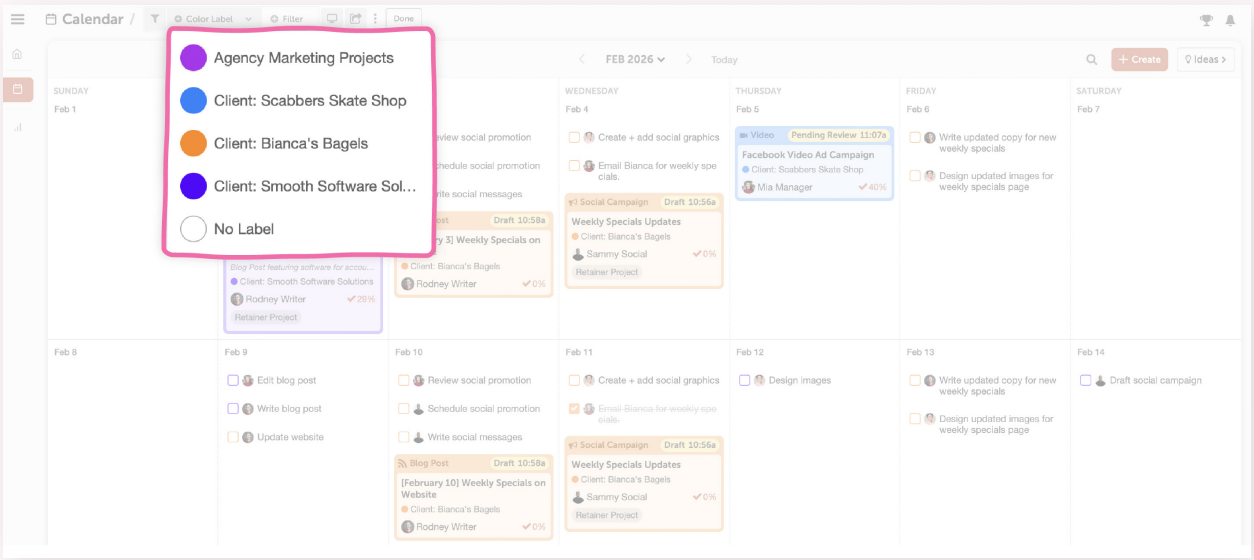
In this Chapter, you'll get step-by-step recommendations on how to set up your Marketing Calendar for managing multiple clients.

What is this guide? This guide provides agencies a roadmap for using CoSchedule Marketing Calendar featuring best practices & tips specifically for agency teams.

Who is this guide for? Marketing Agencies & Freelancers that need a better way to coordinate, organize, & execute their client work.

Organize Your Projects By Client Using Color Labels

In your Marketing Calendar, Color Labels are the most powerful way to visually organize your client projects.



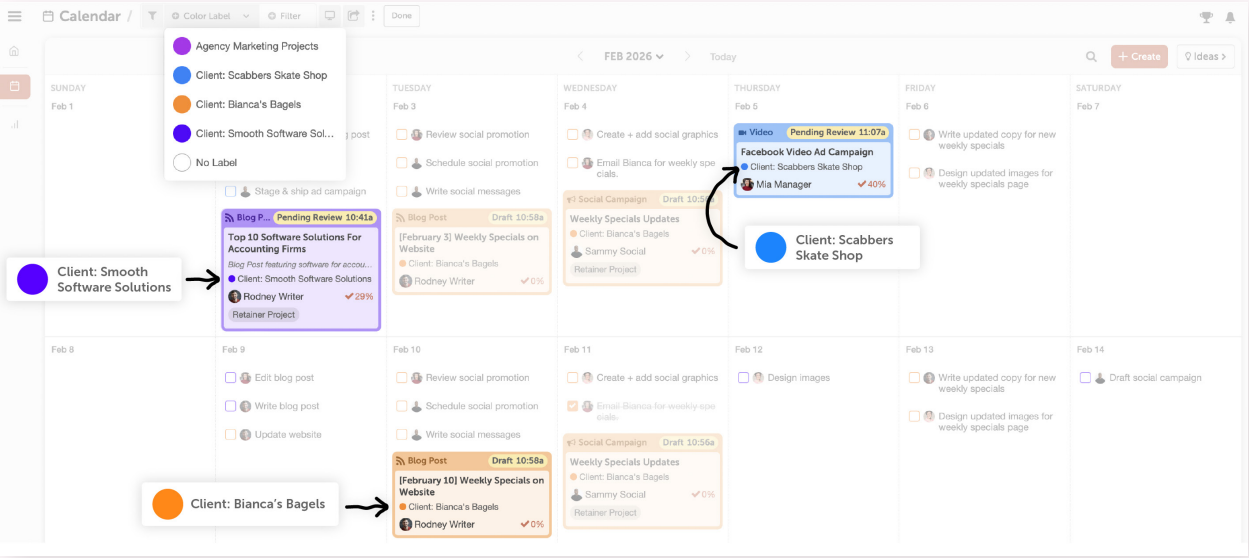
Create a Color Label for every client & another for your internal marketing projects. This gives your entire team visibility into what your team is working on for clients & when in a glance.

This makes it easy to identify your available capacity to take on new client work, identify needs for hiring new staff or contractors, & ensure client projects are finished on time.

Apply Color Labels To Your Marketing Calendar

To set up color labels:

1. Click the Settings button in the left-side panel.
2. Select Color Labels from the menu list under Settings.
3. Assign a color label for each client
4. Now you can create projects/social messages and assign the corresponding color label.
5. Now with your new Color Labels, you are successfully able to view specific projects based on the color correspondence. Whether you are distinguishing reports, saved views, or social messages, color labels are here to help you and your team stay organized.



Add Tags For Specific Initiatives & Goals

Color labels are just one way you can organize your client projects.

Marketing Calendar has other metadata you can use to further filter & segment your projects for clients.

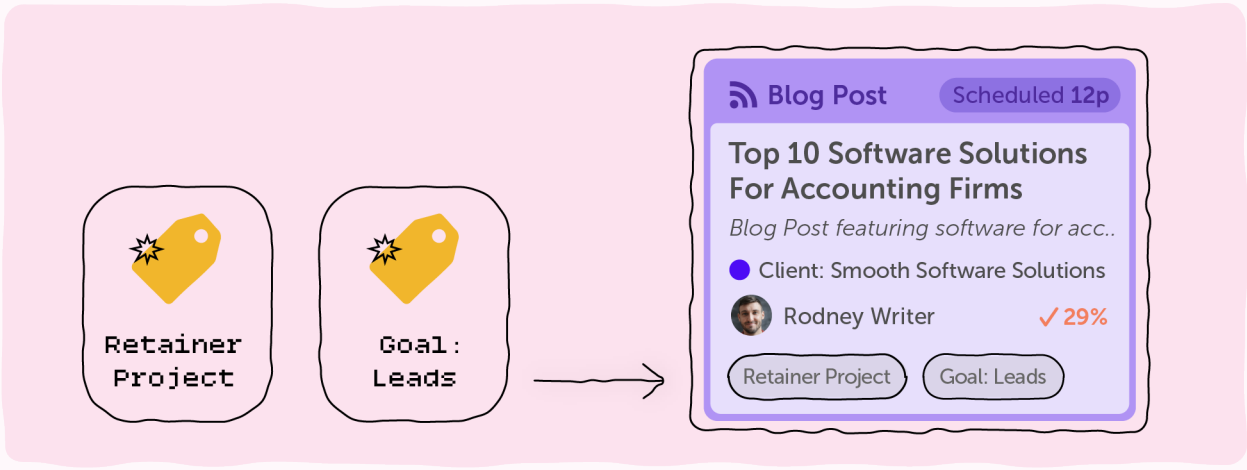
Create & use tags as another way to categorize your client projects.

Add tags to visualize other key important project details including:

- Target Audience
- Goals
- Objectives
- Regions
- Billable vs. Non-Billable Projects
- And more!



Tags are visible on every project card which can give you more context about a project from your Calendar.



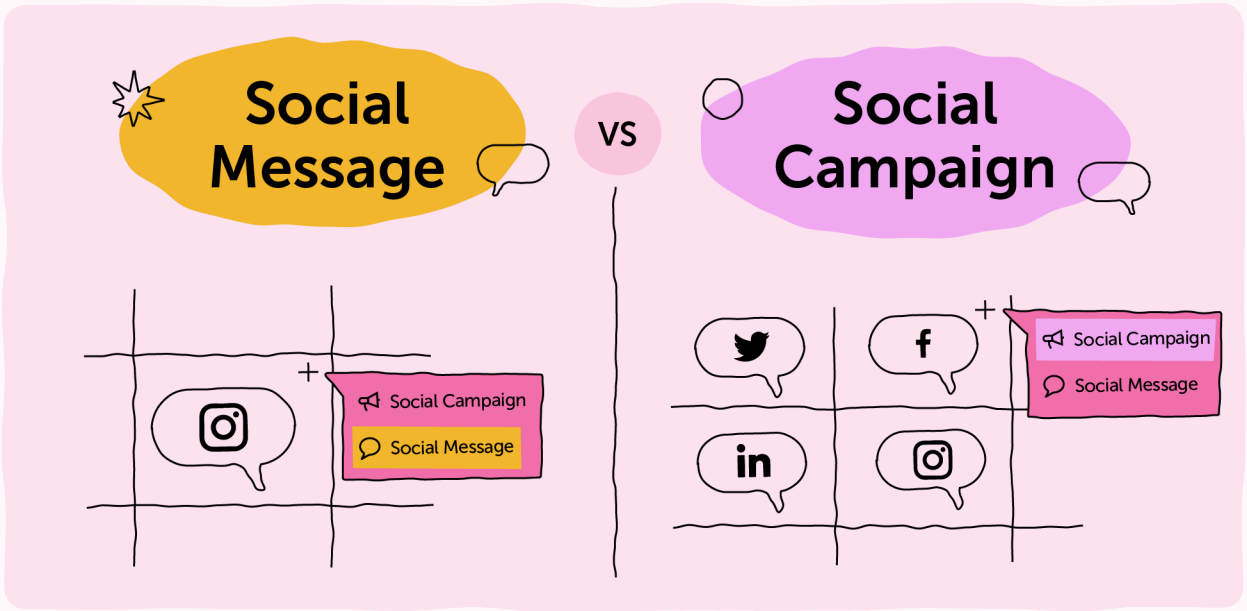
Plus, you can use tags as a filter to create Saved Views, Reports, & more.

You'll learn how to create these reports & Calendars in future chapters.

Connect Your Clients' Social Media Profiles For Social Publishing

If your agency manages social media for clients, Marketing is the perfect way to plan, create, publish, & report on campaigns.

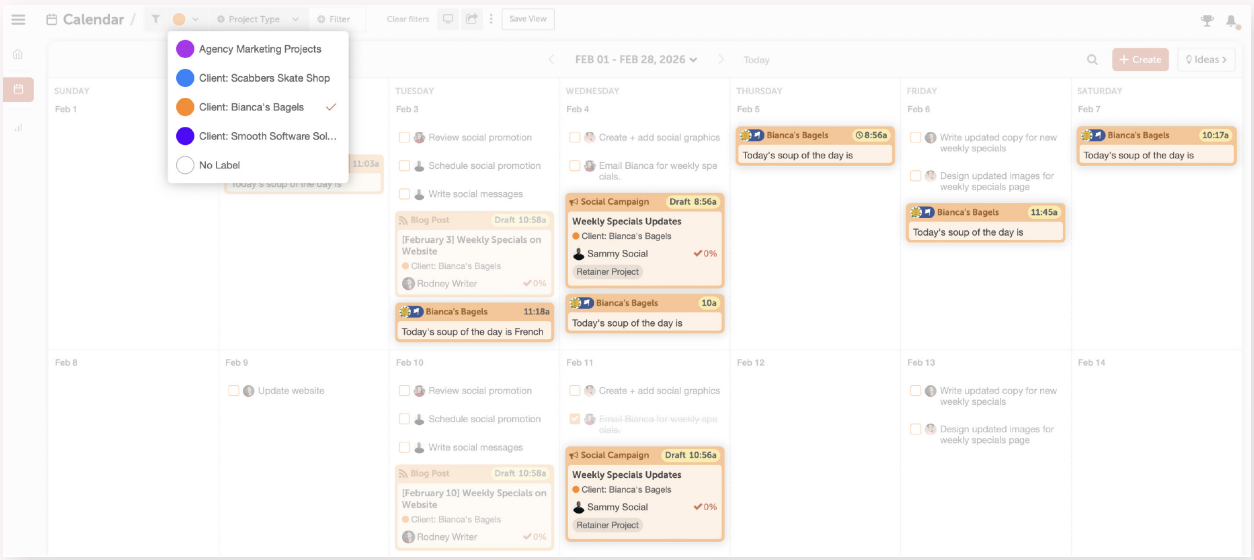
You can create standalone social messages or build out entire social campaigns on your Marketing Calendar. But first, you need to connect your client's social profiles.



How To Connect Social Media Profiles

1. Go to your Settings
2. Select Social Profiles from the top menu
3. Click + Connect Social Profile

Once social profiles are connected, messages published to those social profiles sync to your Marketing Calendar (if they are published using your Calendar or not).



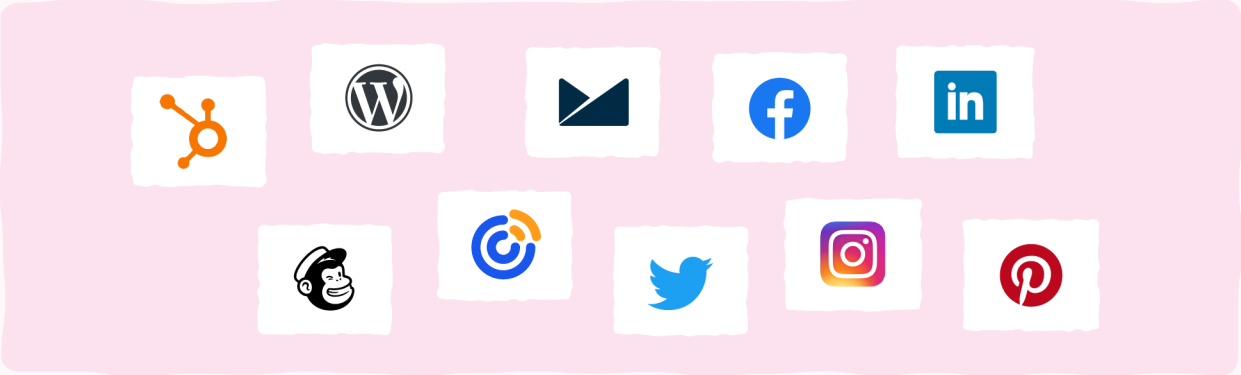
This gives you total visibility of your clients' published social messages for each day, week, & beyond on the Calendar.

Connect Your Clients' Email & Blog Integrations

If you write & publish emails or blog posts for clients, connect their email & blog integrations. This syncs content created in outside tools to your calendar - which means you don't have to duplicate work.

Here are a few popular integrations you may want to connect:

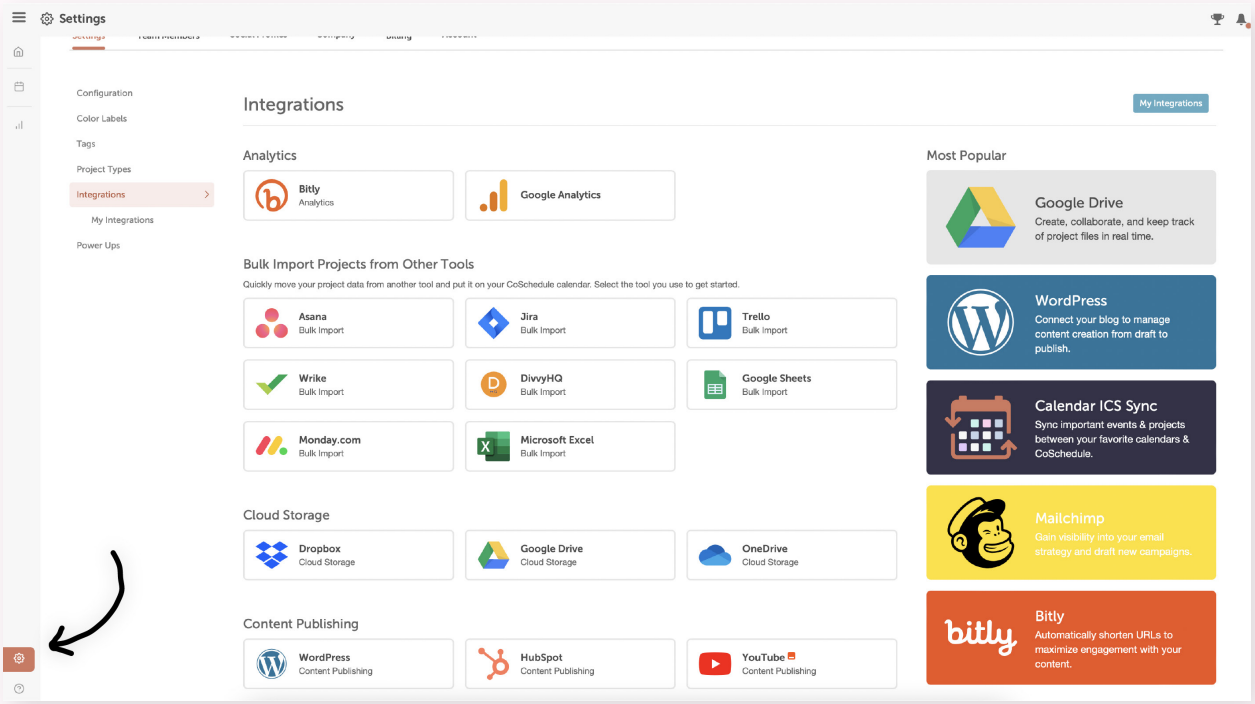
- **WordPress & HubSpot** - Whenever someone creates a new blog post in WordPress or HubSpot, it will automatically appear on your Marketing Calendar.
- **Email Marketing** - Whenever someone creates a new email in Mailchimp, HubSpot, Constant Contact, or Campaign Monitor, a new project card will appear on your Marketing Calendar.
- **Social Media** - Marketing Calendar connects to your social channels, so you can plan, create, & schedule your social messages alongside your other projects. It also pulls social messages published outside CoSchedule to your Calendar, too.



To connect an integration such as WordPress:

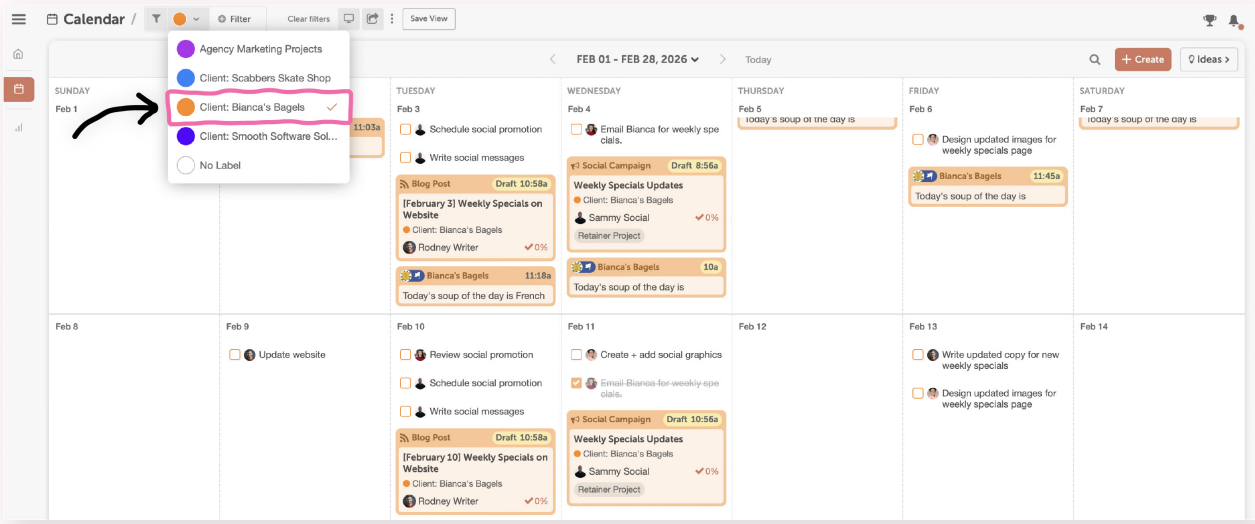
1. Click the Settings button in the left-side panel
2. Select Integrations
3. Start adding platforms.

This allows your Marketing Calendar to sync to outside sources, so duplicating work is never necessary.



Create A Custom Calendar For Every Client

After you create your color labels & tags, you can create a custom Calendar for every client using Saved Views.



This filtered view of your Calendar allows you to declutter your Calendar and focus on work specific to each client.

You can create as many of these as you have clients.

How To Create A Saved View

Here's how:

1. On your main Calendar view, click "All."
2. Scroll to the bottom, and click + New Calendar View.
3. Name the Calendar "[Client Name]."
4. Click Filter to customize the filters for this view.
5. Click Color Label & select the client's designated color label from the list. This will pull in projects to this Calendar View using that specific Color Label. It will filter out the rest of the projects.
6. Then click "Done" to save the Calendar.

**If you are in a Marketing Suite plan, these will be automatically created for you using Sub-Calendar Views.*

You'll learn how to share these custom calendars with your clients in Chapter 7: Provide Real-Time Project Updates With Your Clients

Want to continue adding onto your Marketing Calendar?

Continue on to Chapter 3 to learn how to add client projects. ->

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CH 3

Add Client Projects To Your Calendar



In This Lesson

Create Projects For Client Projects & Requests

Schedule Projects To Meet Client Deadlines

Organize Projects For Pitches & Delivery Meetings With Clients



Build Out Your Clients' Calendars

As an agency, adding client projects to your calendar sets the right precedence for you and your team. Meeting deadlines and scheduling delivery dates for projects shows your team where your priorities are.

In this chapter, you will learn how to add client projects along with scheduling projects within your Marketing Calendar.

What is this guide? This guide shows agencies how to properly utilize Marketing Calendar in order to maximize profitability and track your projects amongst clients.

Who is this guide for? Marketing Agencies & Freelancers who want to use Marketing Calendar to track client projects and set proper expectations for their organization.

Create Projects For Client Projects & Requests

Projects are designed specifically for you to visualize all your marketing projects in one place.

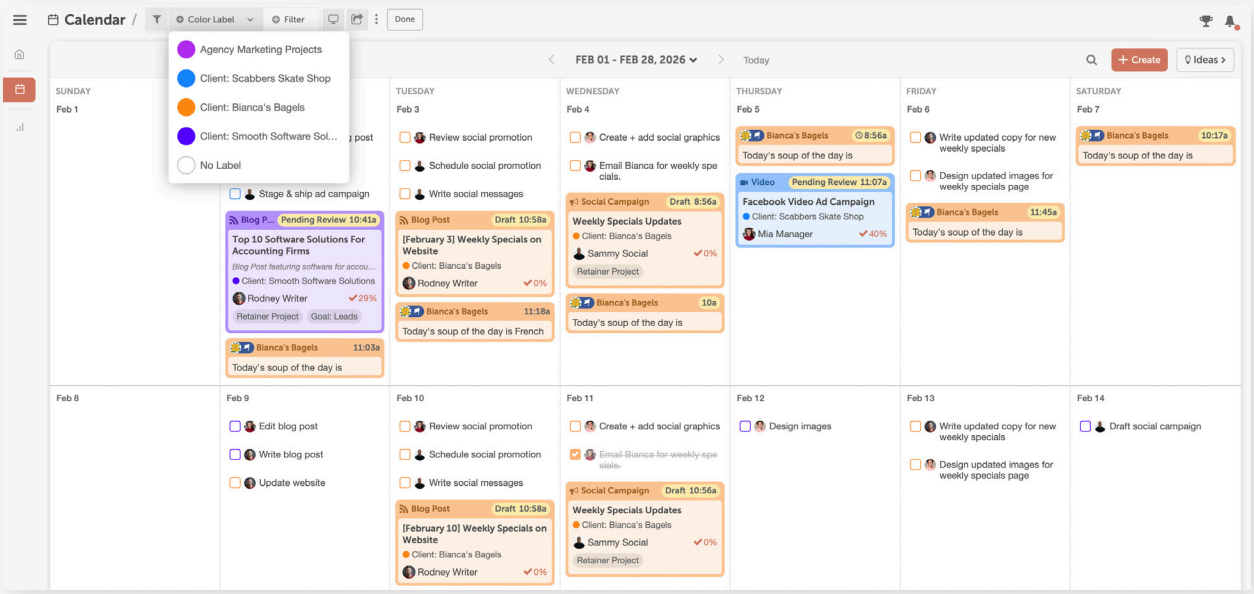
Not sure what types of projects you should add to your calendar? Anything you work on for your clients or your own internal marketing, including:

- Social campaigns
- Email campaigns
- SEO projects
- Website projects
- & more!

When you add Projects on your Marketing Calendar, it gives everyone on your visibility of what projects are in motion at the same time.

This improves communication between employees, so team members can easily track when work is in process, completed, & ready to launch.

Here's what it looks like when you have all your clients' projects on your Marketing Calendar



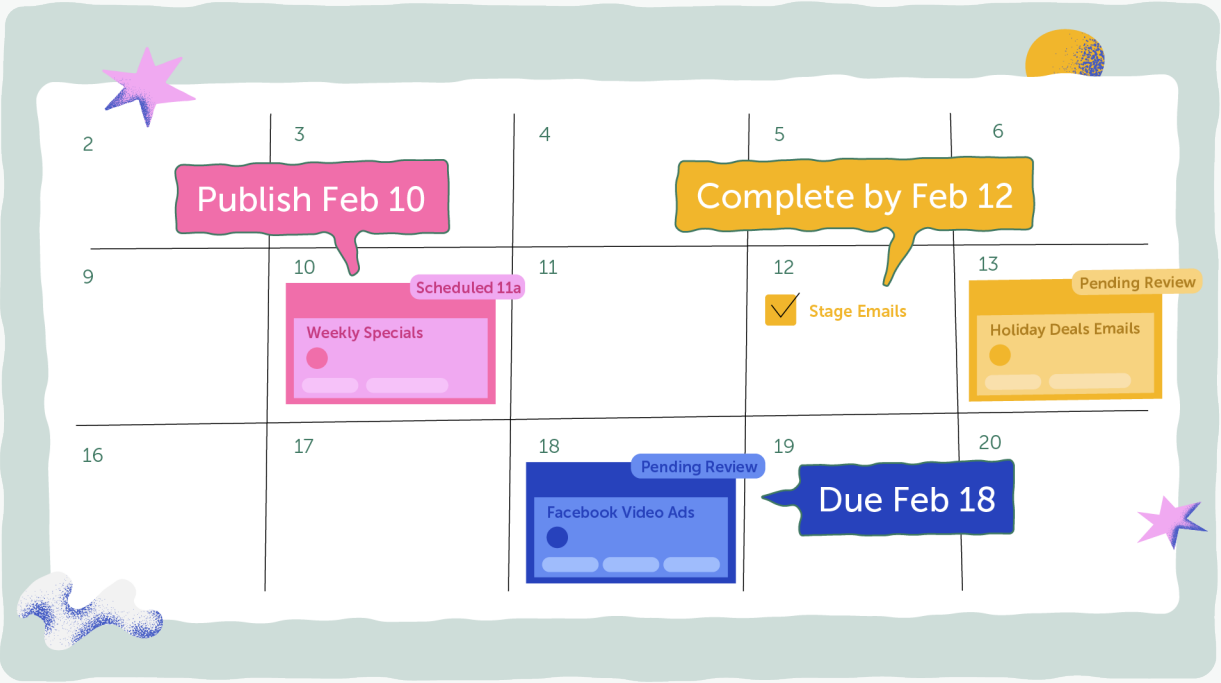
Bonus: don't forget to apply your color label & tags (as needed) to organize work for specific clients & campaigns.

Schedule Projects To Meet Client Deadlines

CoSchedule Marketing Calendar is meant for publishing projects on the day they publish or need to be completed.

When you add client projects to the calendar, it:

- Provides visibility of all client projects for your entire team
- Sets clear priorities for your team
- Defines deadlines in order to finish projects on time



Help your team get in the habit of putting new client projects & internal projects on your calendar to improve visibility & understand priorities based on deadlines.

Your Calendar empowers your team to prioritize their work, so they can consistently complete work by or before client deadlines.

Organize Projects For Pitches & Delivery Meetings With Clients

If you have multiple projects to deliver to a client at one time, connect them using linked projects to keep everything organized & on track.

Step 1: Add A "Meeting" Project On The Day Of Your Client Meeting or Pitch Meeting

- Create an Event project.
- Give it a name like, "Spotify Monthly Client Meeting April 2024" or "Pitch Meeting for Spotify" for example.

Step 2: Add each of the client deliverables on your Calendar as a Project

- Create a project card for each deliverable & put them on your calendar.
- This could include blog posts, pitch presentations, statements of work or estimates, reports, social campaigns, ads, website landing pages, etc.

Step 3: Link your client projects to the new Event Project

- Open your Meeting project & add each of your deliverables as a "linked project" to get quick access to all the work required for that meeting.

Once this is set up, you'll have quick access to every project you'll deliver or discuss at the next client meeting.

This is especially helpful for Project Managers or Account Managers that are responsible for client relations. You'll no longer have to spend tons of time scrambling to get updates from your team.

Ready to increase your team's productivity & reduce admin time on client projects?

Read Chapter 4 to learn how to create reusable workflows for recurring retainer projects.->

CoSchedule

CH 4

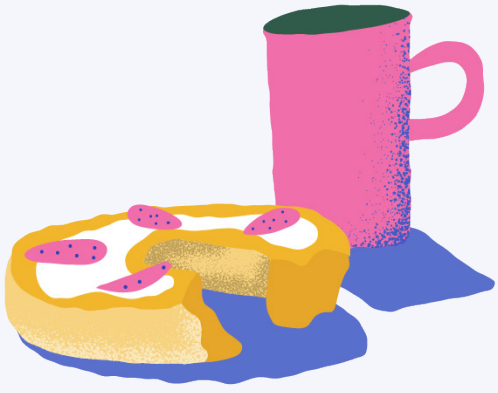
Create Reusable Workflows For Recurring Retainer Projects



In This Lesson

Create Reusable Workflows To Develop Consistent Processes

Build Task Templates



Create Workflows For Specific Projects

Managing work and projects as an agency or freelancer can be time consuming. In this chapter, you will learn how to create reusable workflows and recurring projects to create a more seamless workflow that saves you time (and money!) on project management & admin tasks.

What is this guide? This guide is to help agencies take advantage of their Marketing Calendar by applying reusable workflows & creating task templates.

Who is this guide for? Marketing Agencies & Freelancers that want to save time with reusable workflows.

For agencies, time spent on coordinating projects is directly related to the bottom line. Maximize your creative time by streamlining task & project management with Task Templates.

Create Reusable Workflows To Develop Consistent Processes

When you estimate new projects, you've already determined the process & level of effort it takes to create a new social campaign or develop a new website.

Instead of manually recreating the same tasks over & over again, create a task template.

You can customize your own templates, so you can get projects completed faster & with less administrative time.

This not only saves you precious time but is also an efficient way to meet deadlines every time.

First, you'll want to define which processes & projects are a good fit for a task template. This could include any project you regularly estimate & create for your clients.

Potential ideas include:

- Landing Pages
- Social Campaigns
- Blog Post
- Monthly 2 Blogs Per Month Plan

How To Build A Task Template.

Now that you have your list, it's time to build your reusable task templates.

***Task Templates are available in Marketing Calendar Pro & Marketing Suite plans.*

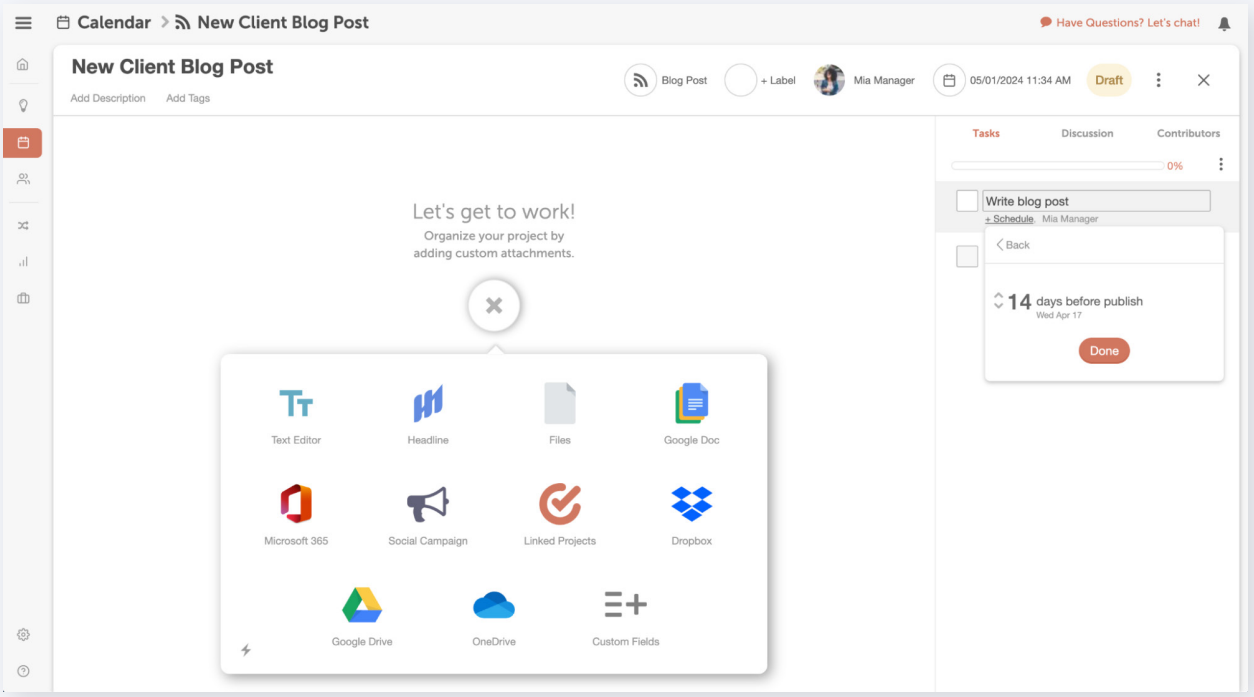
Tasks are attached to your Projects and allow you to designate duties to specific team members to keep the work on track for your client's delivery date or publishing deadlines.

Step 1: Add Tasks To A Marketing Project

To start, open a project on your calendar.

If you don't have any projects on your calendar yet, create one using the orange create button.

Once you have a project open from your calendar, you'll see a gray taskbar on the right-hand side.

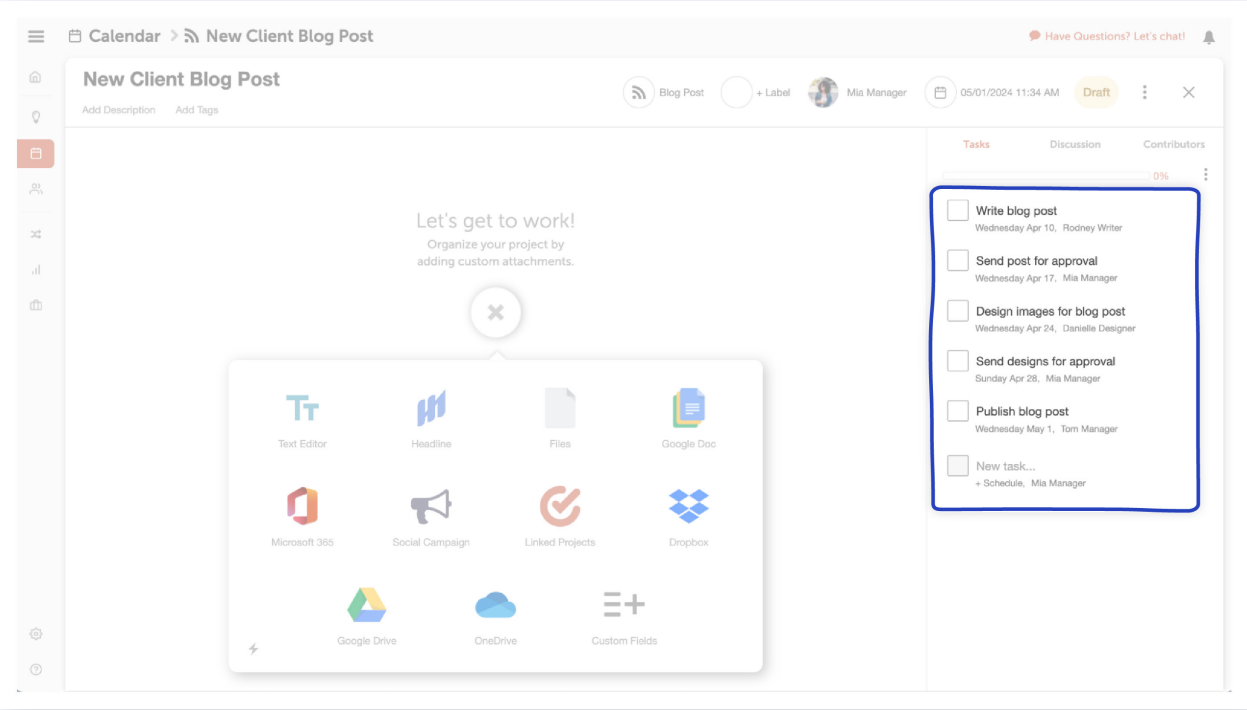


Start by adding the first task or required step you need to complete in order to finish the project.

Next add a due date & assign the team member who is responsible for executing the task.

After you've created one task, continue adding the list of tasks to build out the entire workflow for the project.

Here's what that could look like when you're done:

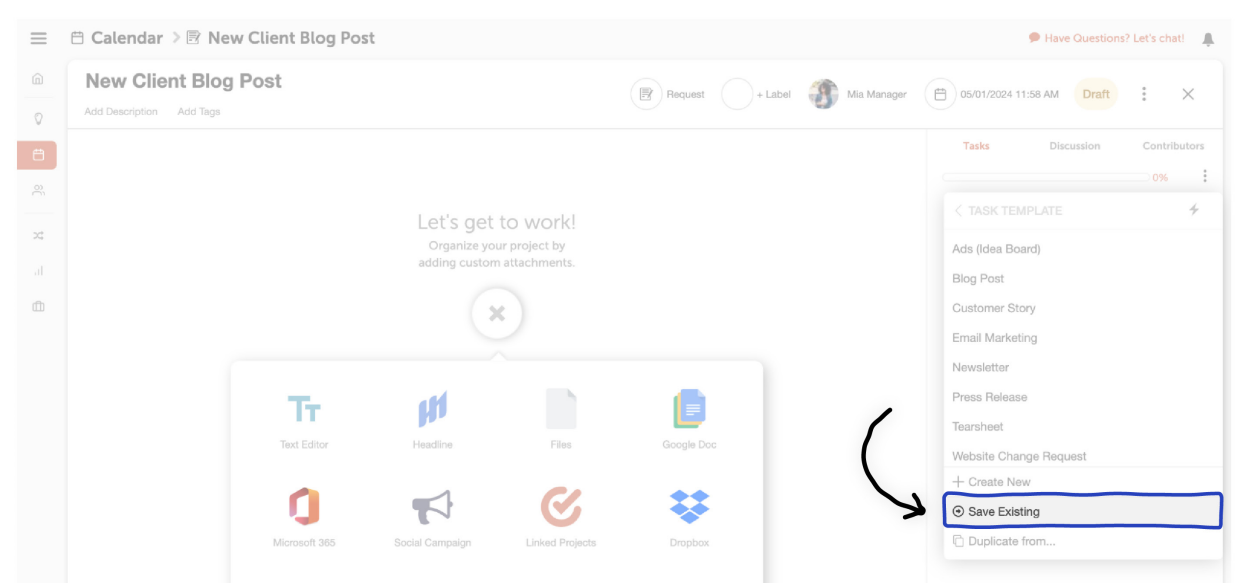


Step 2: Save Task List As a Reusable Template

Once you've outlined your process once, you can save it as a reusable template to apply to future projects.

To save the workflow you just created as a template:

- Click on the 3 dots
- Select Task Template
- And choose the option that says "Save Existing."



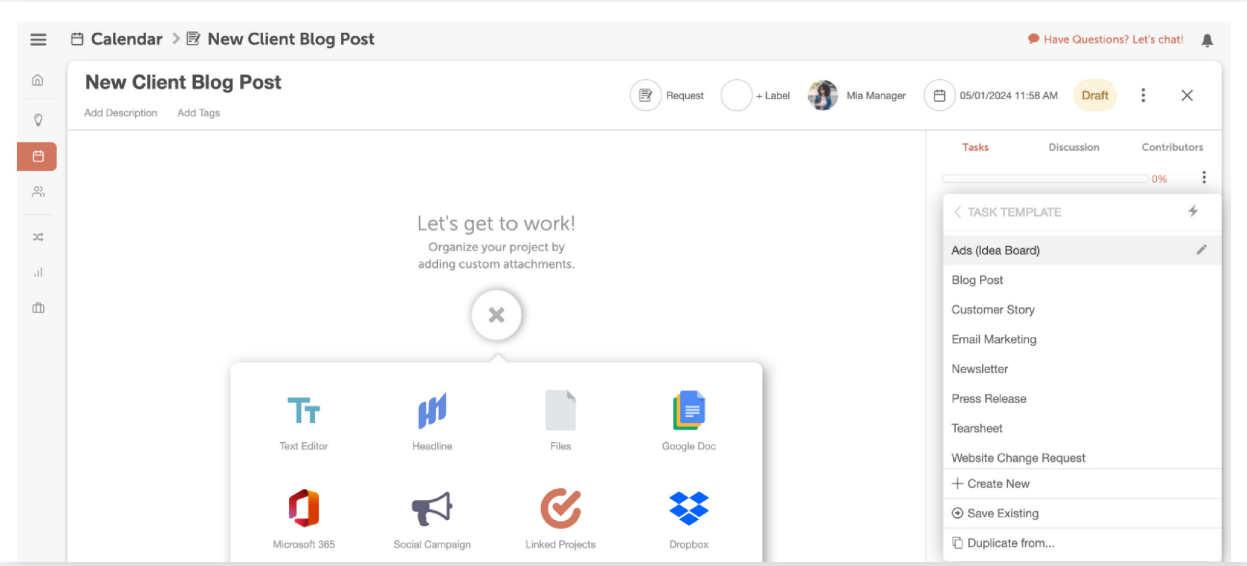
Give the task template a recognizable name like "Blog Post" or "FB Ads (Set of 5)" for example.

Bonus Tip: Check the box "Ignore Weekends" to avoid assigning out any deadlines for tasks to your team on Saturdays & Sundays.

Repeat this process for any & all of your recurring processes for client projects.

Step 3: Apply Task Templates To Any Project

Once you've built & saved all your task templates, they can now be applied to any similar client projects in the future.



Choose your template from the list, and the tasks automatically populate. Tasks are assigned to your team & due dates populate based on the project's due date.

Once you've applied the template, you can easily delete unnecessary tasks, assign them to a different member of your team, or change due dates as needed.

Now getting new projects into production is quicker & easier than before.

Want to incorporate your social media within your Marketing Calendar?

Read more about creating & publishing social campaigns in Chapter 5.->

CoSchedule

CH 5

Create & Publish Social Campaigns For All Of Your Clients



In This Lesson

Create & Publish Social Campaigns

Share Social Campaigns With Clients For Final Review



Create Customized Social Campaigns

Do you create & publish social campaigns for clients? Do you promote your own agency on social media?

You can create, schedule, & publish social campaigns in Marketing Calendar to save you time & effort on social strategy for your own company or clients.

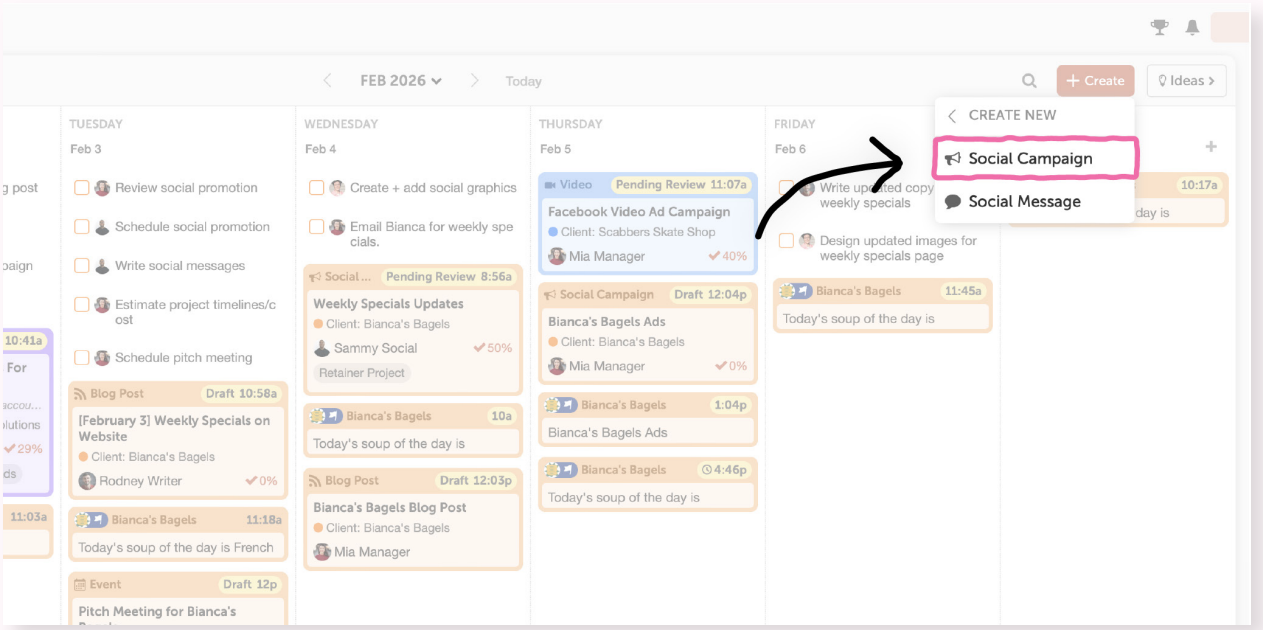
What is this guide? This guide teaches you how to use Social Campaigns in Marketing Calendar to create, organize, and schedule messages to your social media accounts.

Who is this guide for? Marketing Agencies & Freelancers who want to manage their social campaigns in Marketing Calendar.

Create A Social Campaign

You can schedule social media campaigns for all of your clients using CoSchedule Marketing Calendar. This is a must-try feature if social media management is included in your lineup of services.

In Marketing Calendar, Social Campaigns include a series of social messages that are published to your social channels over an extended period of time.



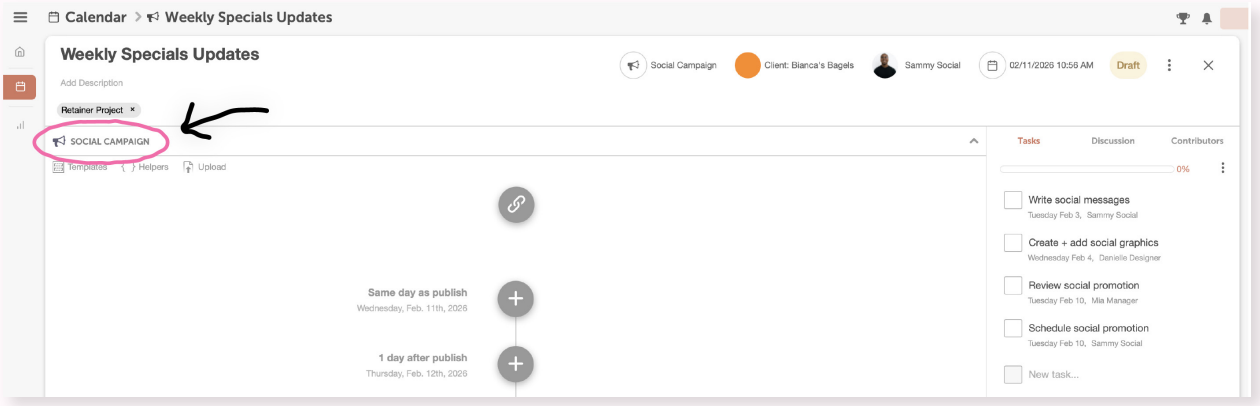
Use Social Campaigns to promote specific content or initiatives, like:

- Videos
- Events
- Blog posts
- Webpages
- Product Launches
- Company Announcements
- Promotions
- And more!

There are two ways you can schedule a social media campaign:

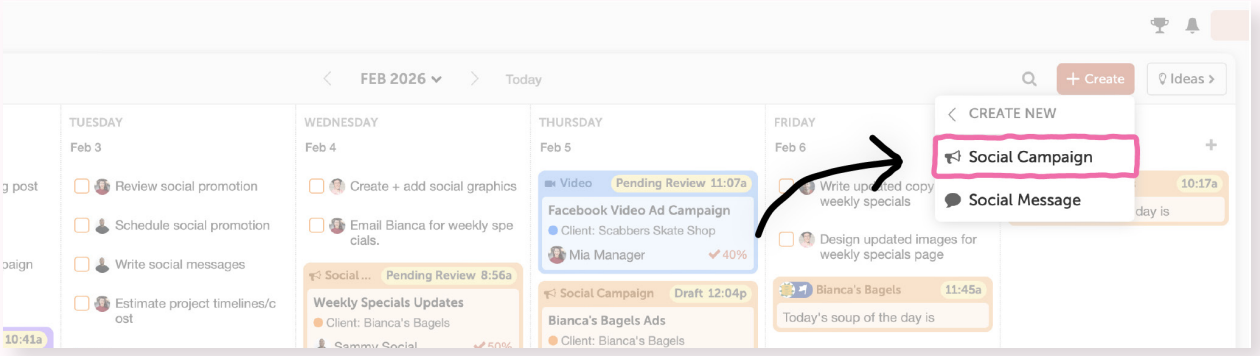
1. Attach a Social Campaign

- Open the project on your calendar.
- Add a “Social Campaign” attachment.
- Click the plus sign to add a social message on a specific day.
- Add the link to your blog post by clicking the link button on the top.



2. Schedule a Stand-alone Social Campaign

- Click to add a new project to your calendar.
- Choose "Social", then "Social Campaign."
- Name your social campaign and apply any details - such as Color Labels.
- Click the plus signs to add messages just like you did in the previous section.



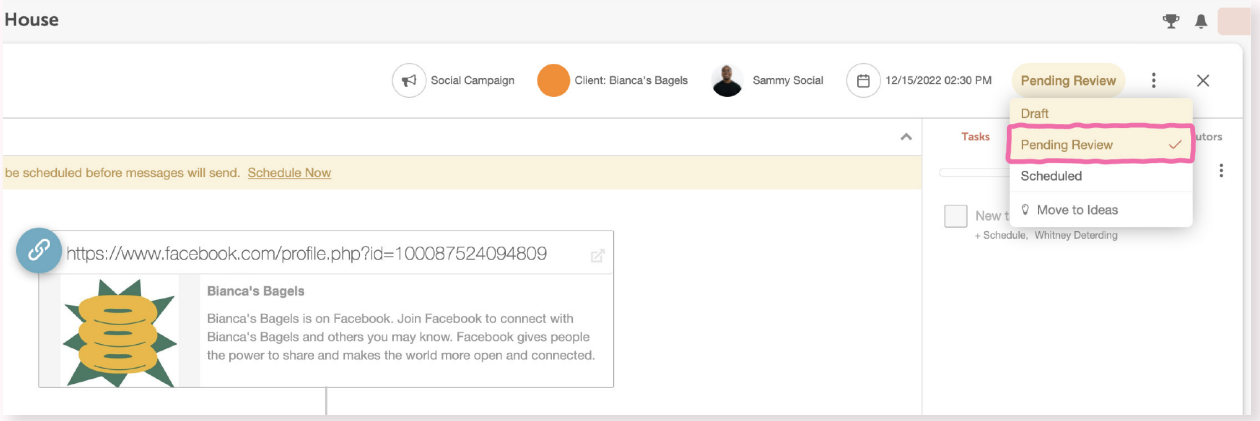
You can also apply Color Labels to the Social Campaigns as another way to keep things nice and organized. This also comes in handy when creating Social Media Reports.

Share Social Campaigns With Clients For Final Review

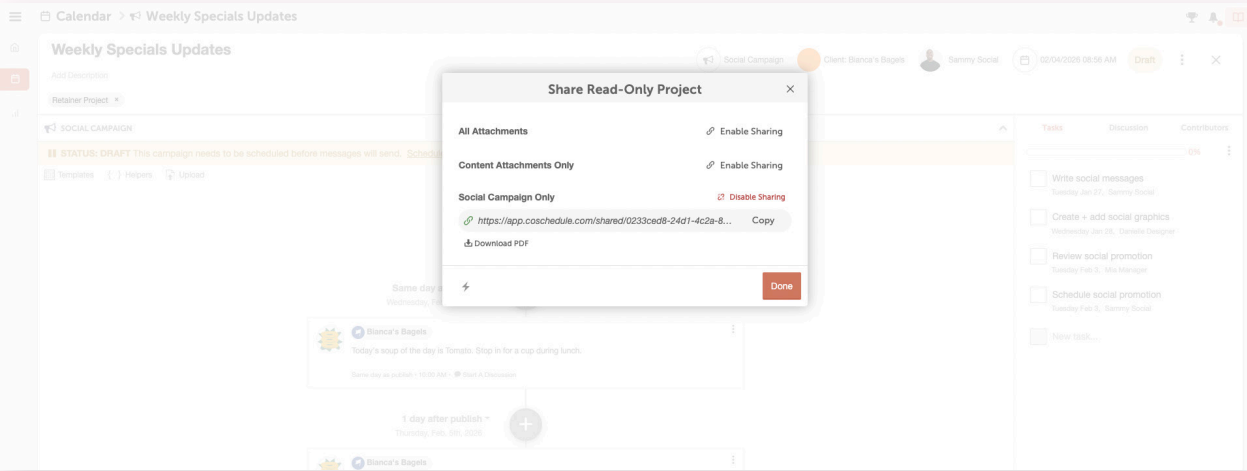
If your clients review social messages before they publish, you can send them a Read-Only link to see your drafted Social Campaigns.

Here's how::

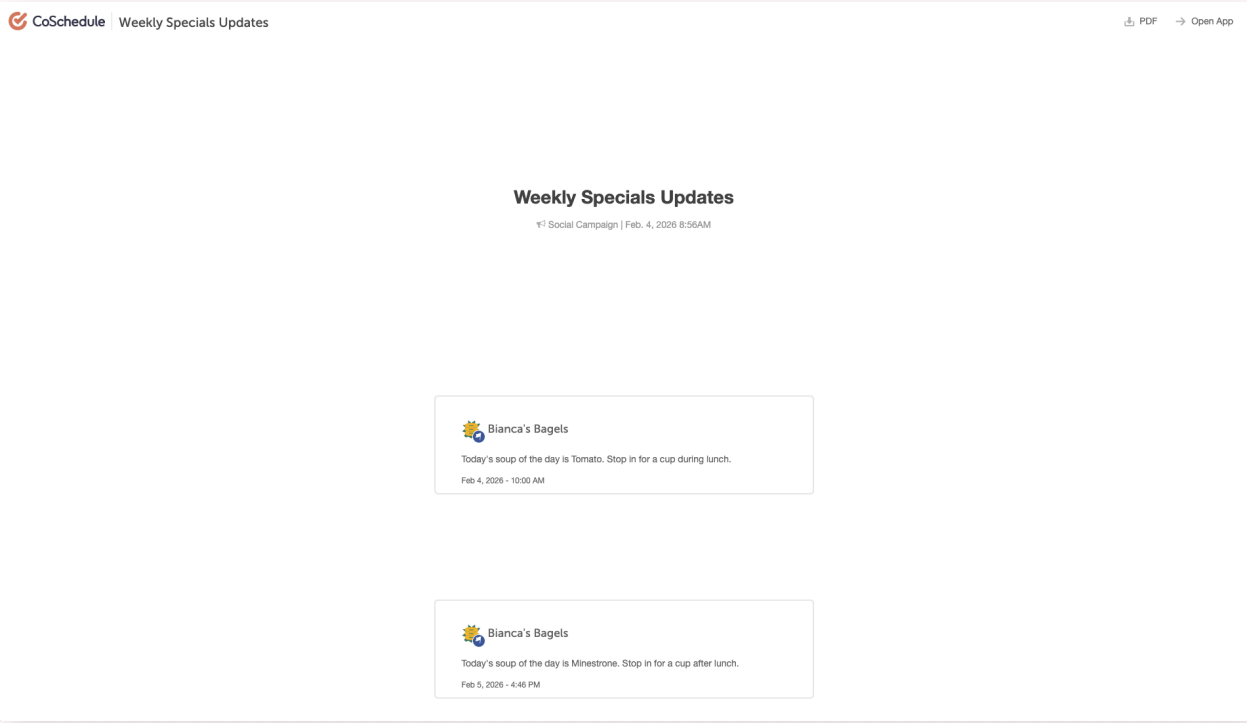
1. Draft your social messages in a Social Campaign.
2. Set the Social Campaign to "pending review," so it won't publish if it's awaiting approval from the client.



3. Create a Read-Only link of the social campaign.



4. Share the Read-Only link with your client. With this link, they can review the message copy & designs for the Social Campaign.



From there, your clients can then reply with feedback regarding potential changes or give you the go-ahead to publish the campaign.

Learn more about incorporating your social media within your Marketing Calendar in Chapter 6. ->

CoSchedule

CH 6

Build Professional, Easy-To-Understand Social Media Reports For Clients



In This Lesson

Create Social Media Reports Using Social Analytics Reports

Bonus Tip: Export PDF Of Reports For Your Clients

Save Custom Social Reports For Each Client



Create Social Analytics Reports

Without a reporting tool, creating social media reports for clients can be very manual & time-consuming. With the Social Analytics Reports in CoSchedule Marketing Calendar & Marketing Suite, you can create reports for social campaigns & specific social profiles that are easy for your client to understand.

What is this guide? This guide shows you how to take advantage of Social Analytics Reports to save you time creating social media reports for your clients.

Who is this guide for? Marketing Agencies & Freelancers who want to create & share custom social media reports for their clients.

Create Social Media Reports Using Social Analytics

CoSchedule Marketing Calendar & Marketing Suite feature a series of social media reports you can create & share with your clients.

First, you'll want to choose the report that is the right fit for your social media clients.

There are various reports available:

- Social Engagement Report
- Social Campaign Report
- Social Profile Report

Social Engagement Report

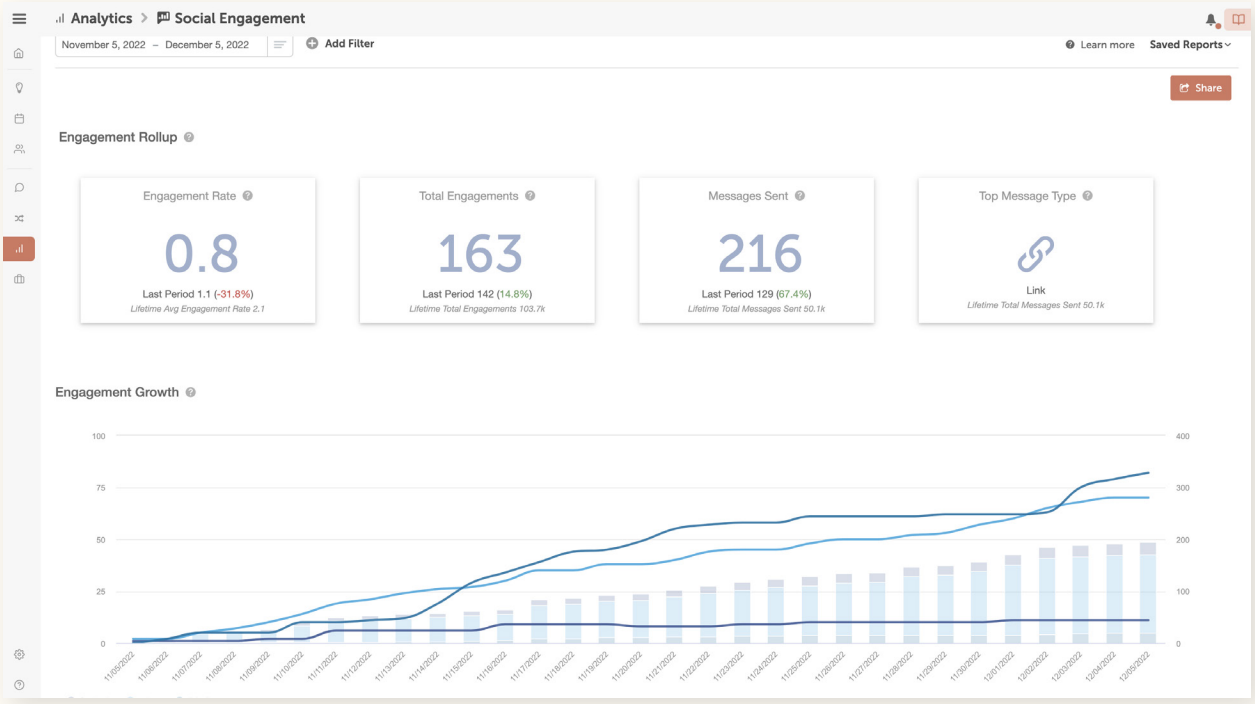
This report is specifically designed to allow users to get a high-level overview of your entire social strategy.

You can use Social Engagement Reports to:

- Identify top-performing messages
- Download and share reports with stakeholders
- Visualize trends across your social channels
- Compare how different channels are performing

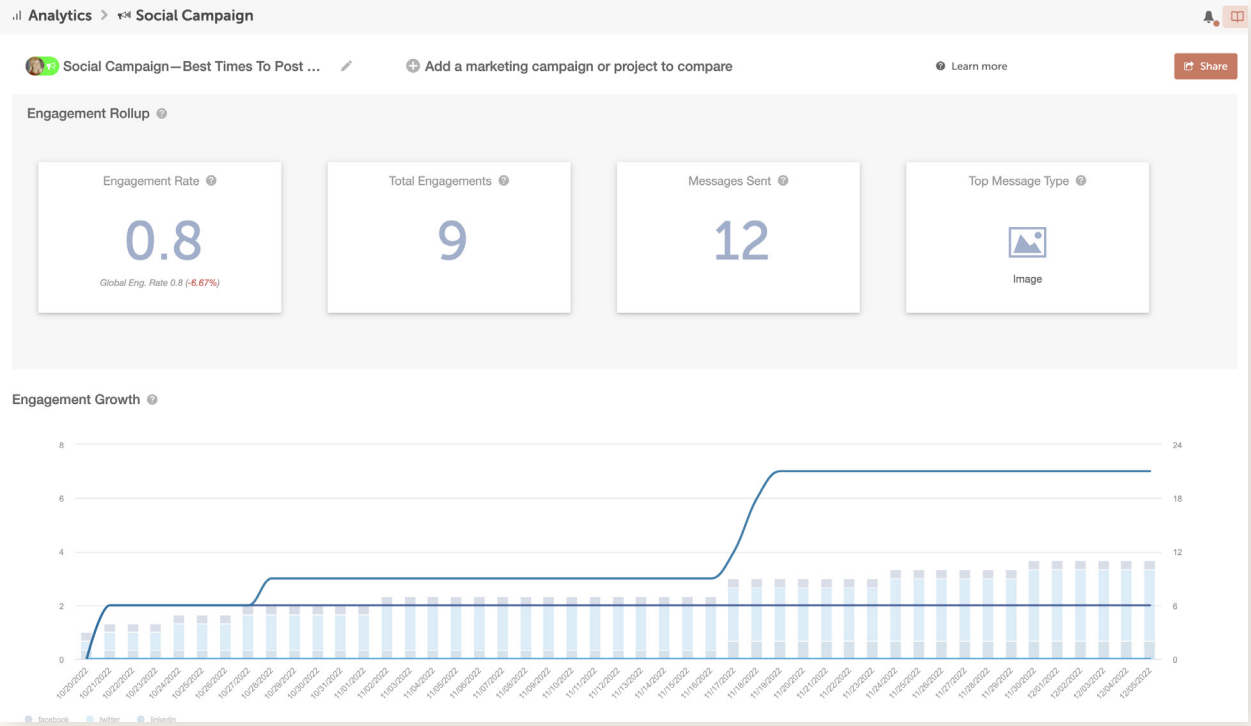
This report works well for retainer clients where you (or your team) manage their entire social media strategy.

You customize this report by using different filters for specific social profiles, Project Types, and Color Labels to help you narrow down social media engagement & performance metrics for specific initiatives, stakeholders, or clients.



Social Campaign Report

This report can be used for measuring the success of specific campaigns and initiatives. You can filter by project or social campaign so you can report for your client's specific social campaign.



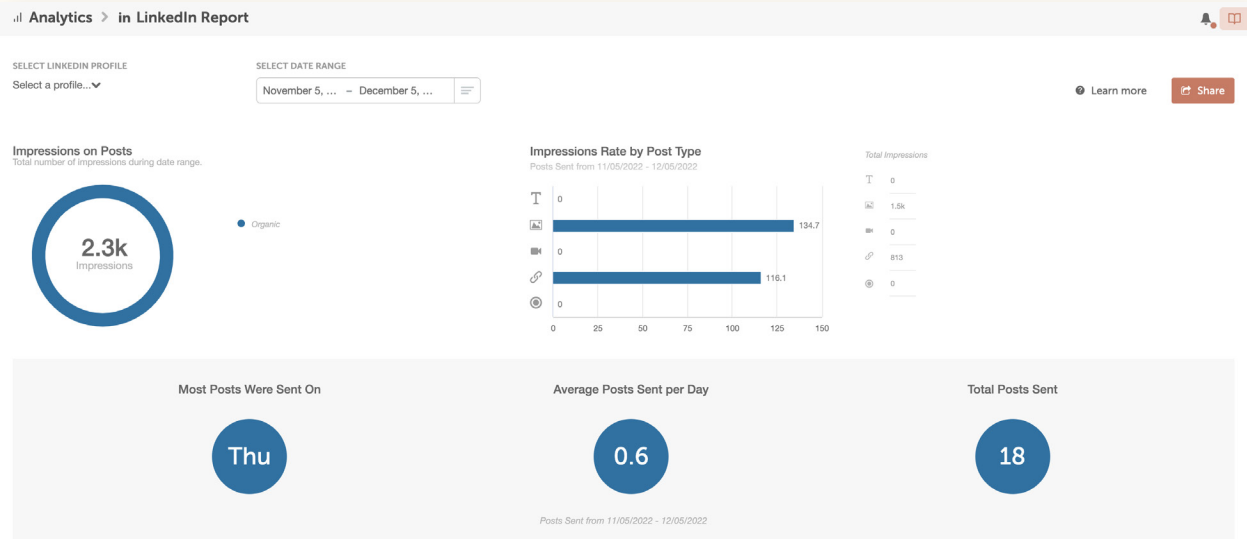
This report works well for running reports for a client's specific social media campaign. This could include a campaign for a product launch, webinar, event, PR announcements, and more.

Social Profile Report

Social Profile Reports help you analyze each of your client's social profiles for key information to improve their strategy.

This includes the best times & days to post, as well as which message types (link, video, text, etc.) perform best on those specific profiles.

You can create a report per profile by choosing your client's social profile when you generate the reports. This will also help you maximize views and traffic when you post!



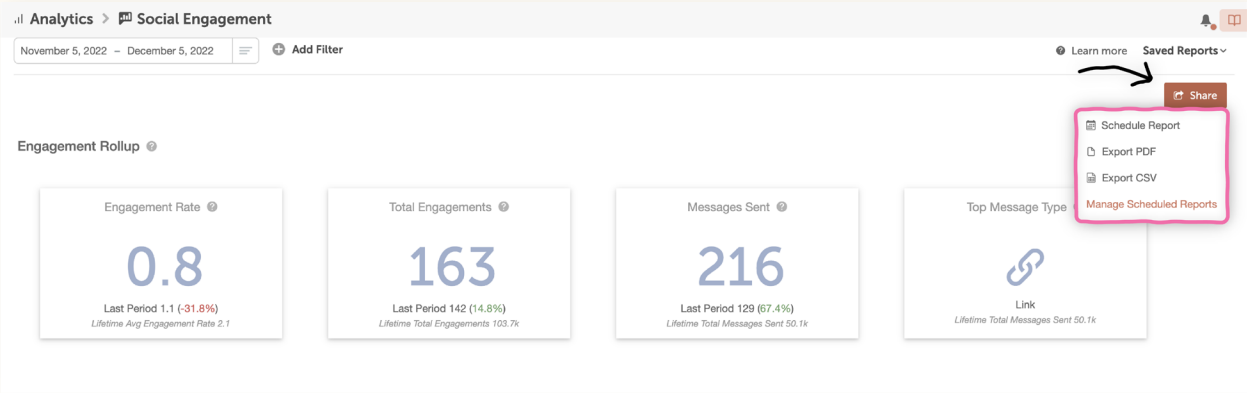
This report is great for sharing high-level findings for each platform including when your client's current audience is most active & what types of content they engage with most.

Bonus Tip: Export PDF of Reports For Your Clients

Creating & sharing these reports with your clients is simple.

You can export any of these reports as a PDF for easy sharing.

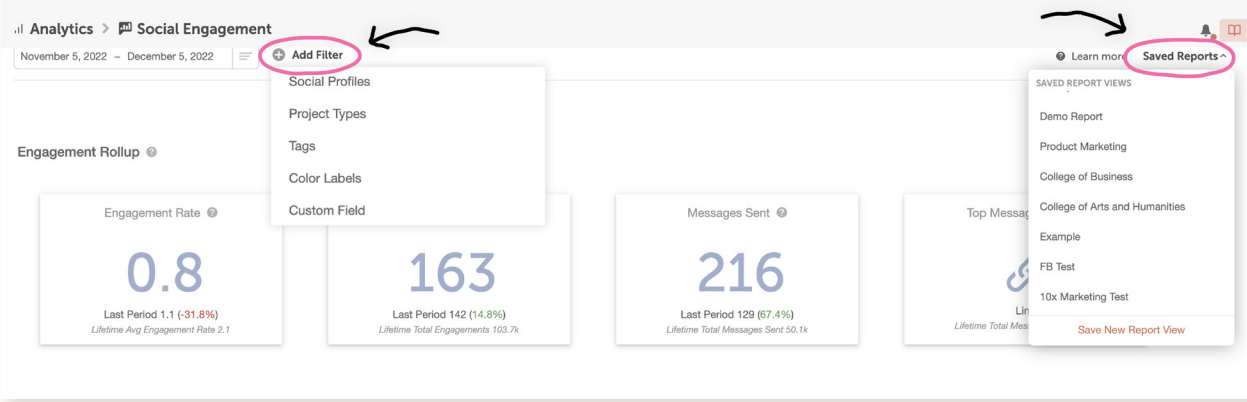
To export a report, open the report you want to export and click "Share" in the top right-hand corner. You can then choose to export it as a PDF, CSV, or schedule a report.



Scheduling a report allows you to send a PDF of the report via email to your client. This can be sent weekly, monthly, or quarterly.

Save Custom Social Reports For Each Client

When you create a custom report, add it to a list of Saved Reports to re-run it each month, quarter, or any time you need it.



You can access your Saved Reports by navigating to Analytics and opening the type of report you want to view, then click “Saved Reports” and choose the saved report you’d like to view.

Now these reports are readily available whenever you (or your client) want to check-in on progress & performance.

Read on to Chapter 7 to learn more about how you can give real-time project updates to your clients to your clients. ->

CoSchedule

CH 7

Provide Real-Time Project Updates With Your Clients



In This Lesson

Add A Stakeholder As A Guest Contributor On Their Projects

Share Custom Read-Only Calendars With Your Clients



Provide Project Updates To Clients

Having an open line of communication with your clients is crucial when working through projects.

You can add stakeholders as a guest on your calendar & invite them to view your calendar even if they don't use CoSchedule Marketing Calendar. Allowing them to have access helps build trust with your clients & keeps them updated in real-time.

What is this guide? This guide teaches you how to share project progress with stakeholders using guest collaboration and read-only views.

Who is this guide for? Marketing Agencies & Freelancers who want their stakeholders to stay updated on project progress.

Add A Stakeholder As A Guest On Your Calendar

If you want to collaborate with your guests in Marketing Calendar, you can add them to your calendar as a guest.

Adding a guest allows you to tag them in discussions, assign them tasks, and give them authorization to review work.

Once a stakeholder is added as a guest, you are able to tag them in discussions or assign them tasks to review work.

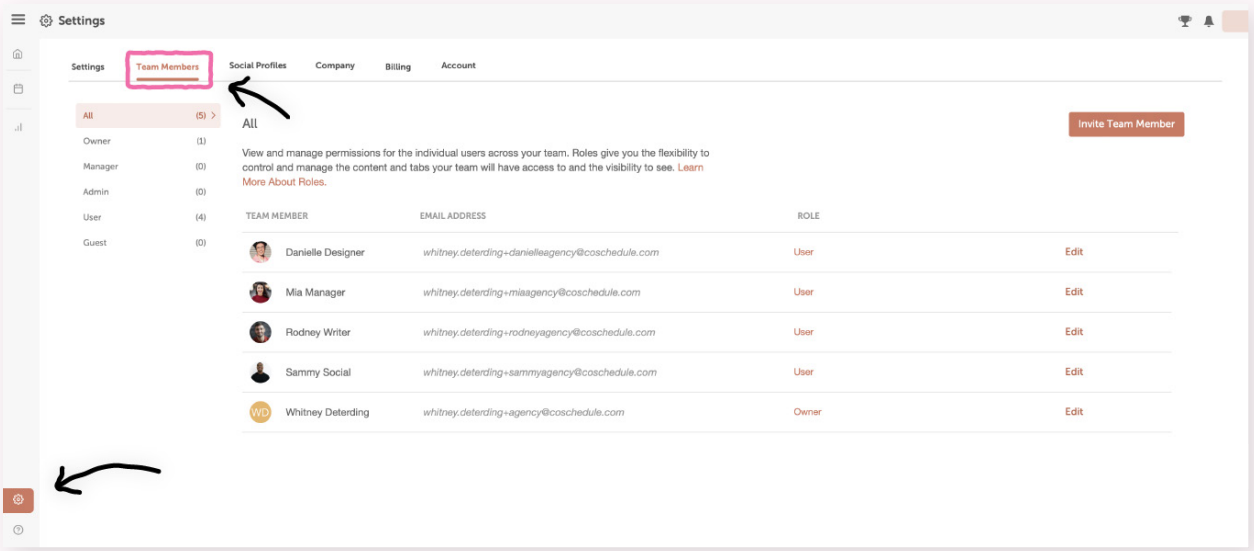
Individuals with guest access can:

- Favorite their projects
- Modify projects where they are a contributor - leave comments, add content to text editor, etc.
- Complete their assigned tasks
- View other tasks within projects where they are a contributor

Guests do not have permission to:

- Delete, templatize a project, move a project to a campaign, or duplicate a project
- View or interact with any social profile accounts or social content within the app

You can invite guests to view your calendar by going to your Settings and selecting "Team Members" from the top menu.



Not sure who should have guest access rights to client work?

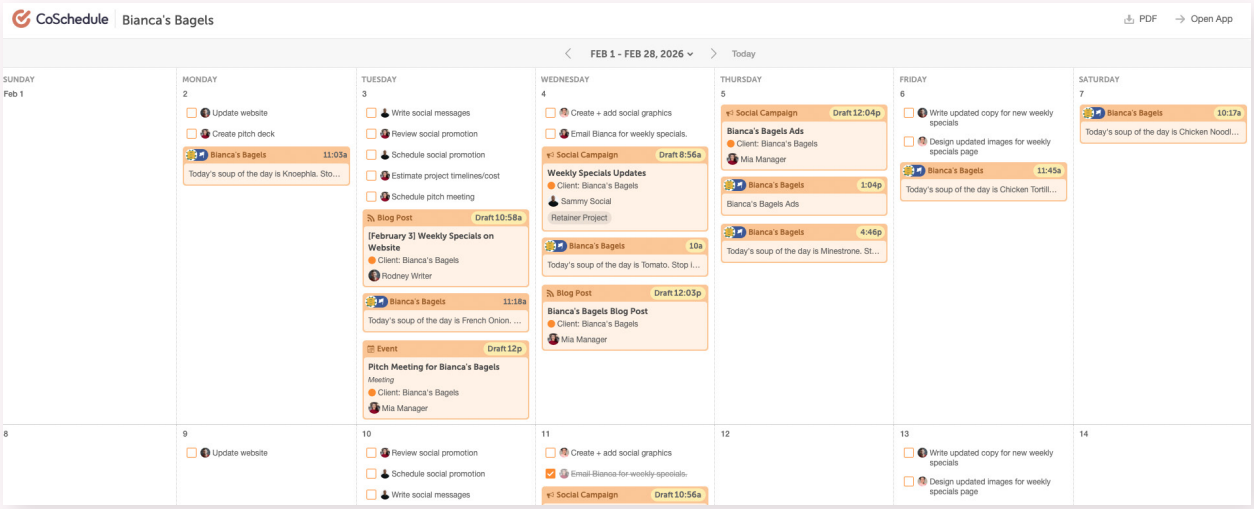
Here are a few guests you can consider adding to your Calendar:

- Primary client contacts - these are the individuals reviewing & approving agency work
- Any other vendor partners collaborating with your client on projects

Share Custom Read-Only Calendars With Your Clients

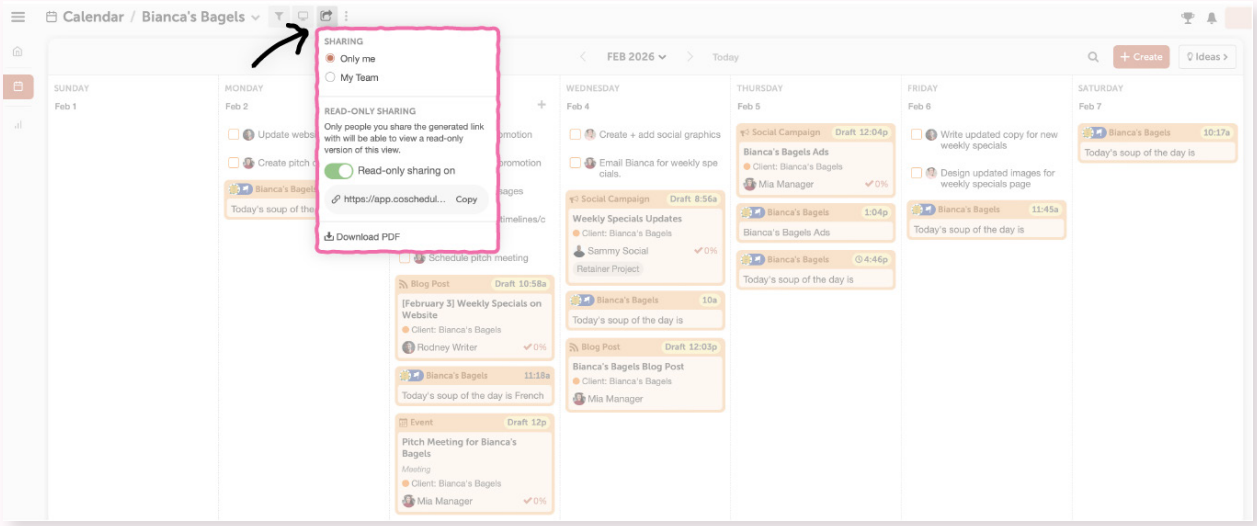
To give your clients visibility of what you're working on, you can create read-only access links of their Calendar.

Read-Only links make it easy to give them a live "status report" of their projects. This works best if you don't want them to be able to change, access, or move anything on your calendar.



To share your Calendar, select the client's custom Calendar. You learned how to create this in Chapter 2 of this Agency Guide.

To share this calendar with your clients, click the share icon to copy the read-only sharing link or download the Calendar as a PDF.



You can create a read-only link of their client calendar to give your client a real-time update on their high level projects & campaigns with your agency.

But you can also create Read-Only links for:

- Projects
- Marketing Campaigns
- Social Campaigns

These work great if you are wanting quick feedback on a specific project, social messages, or campaign.

That concludes all chapters in the Agency Use Case Guides.

Head on over to your Marketing Calendar to apply what you've learned! ->

