CoSchedule

Provide Real-Time Project Updates With Your Clients



In This Lesson

Add A Stakeholder As A Guest Contributor On Their Projects

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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.

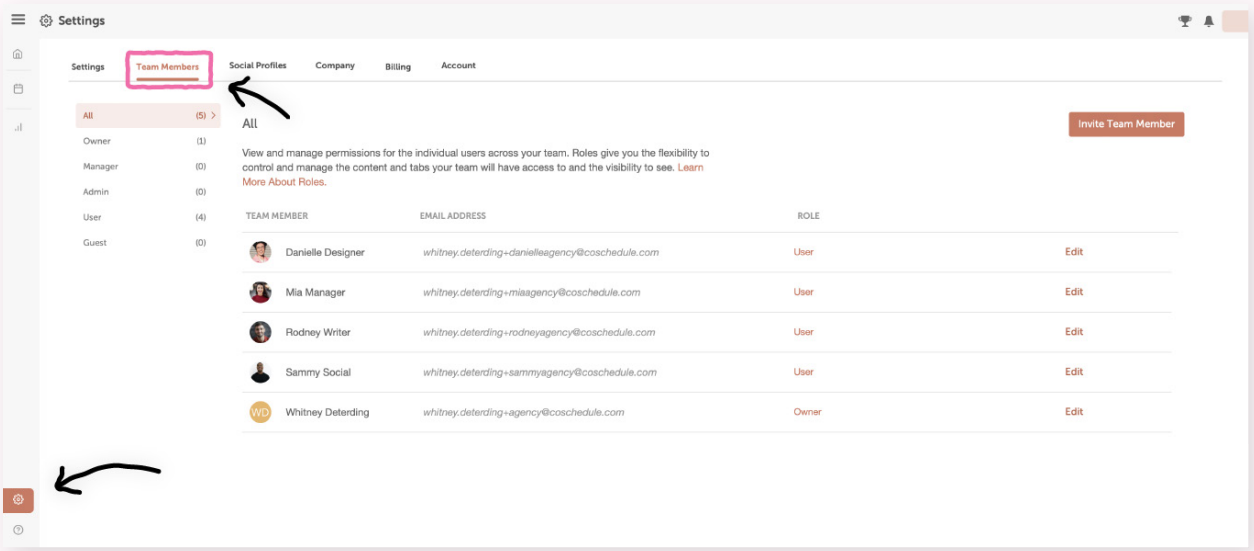
Individuals with guest access can:

- 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?

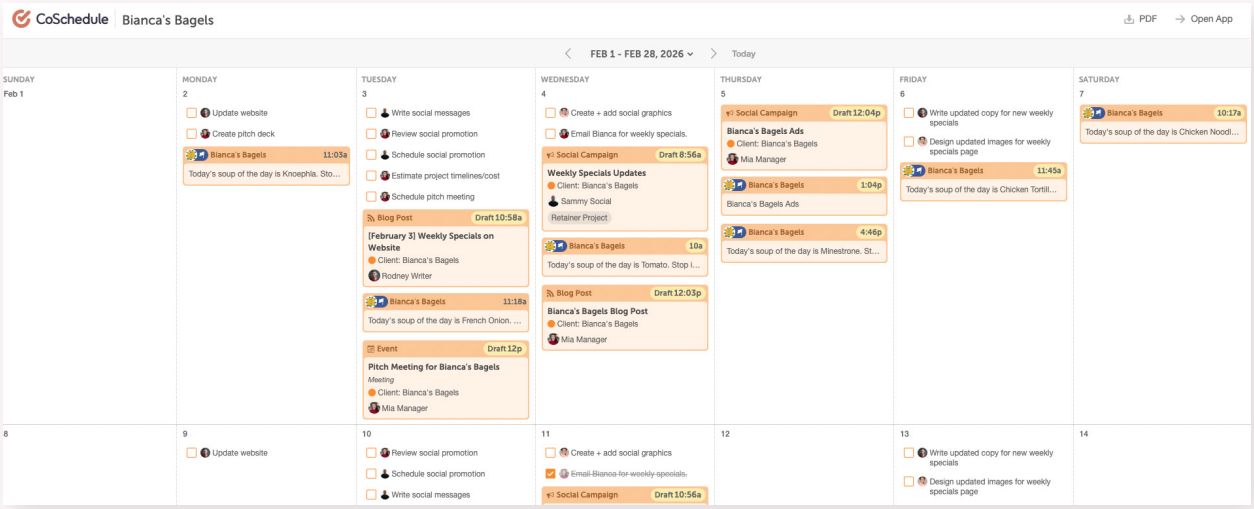
Here are a few guests you can consider adding to your Calendar:

- 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

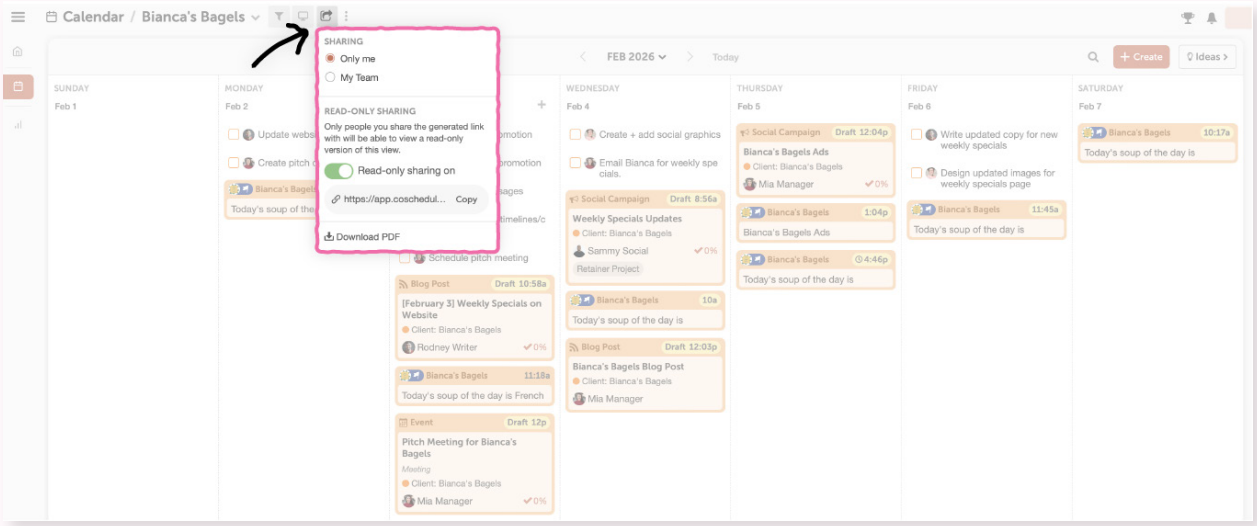
To give your clients visibility of what you're working on, you can create read-only access links of their Calendar.

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! ->

