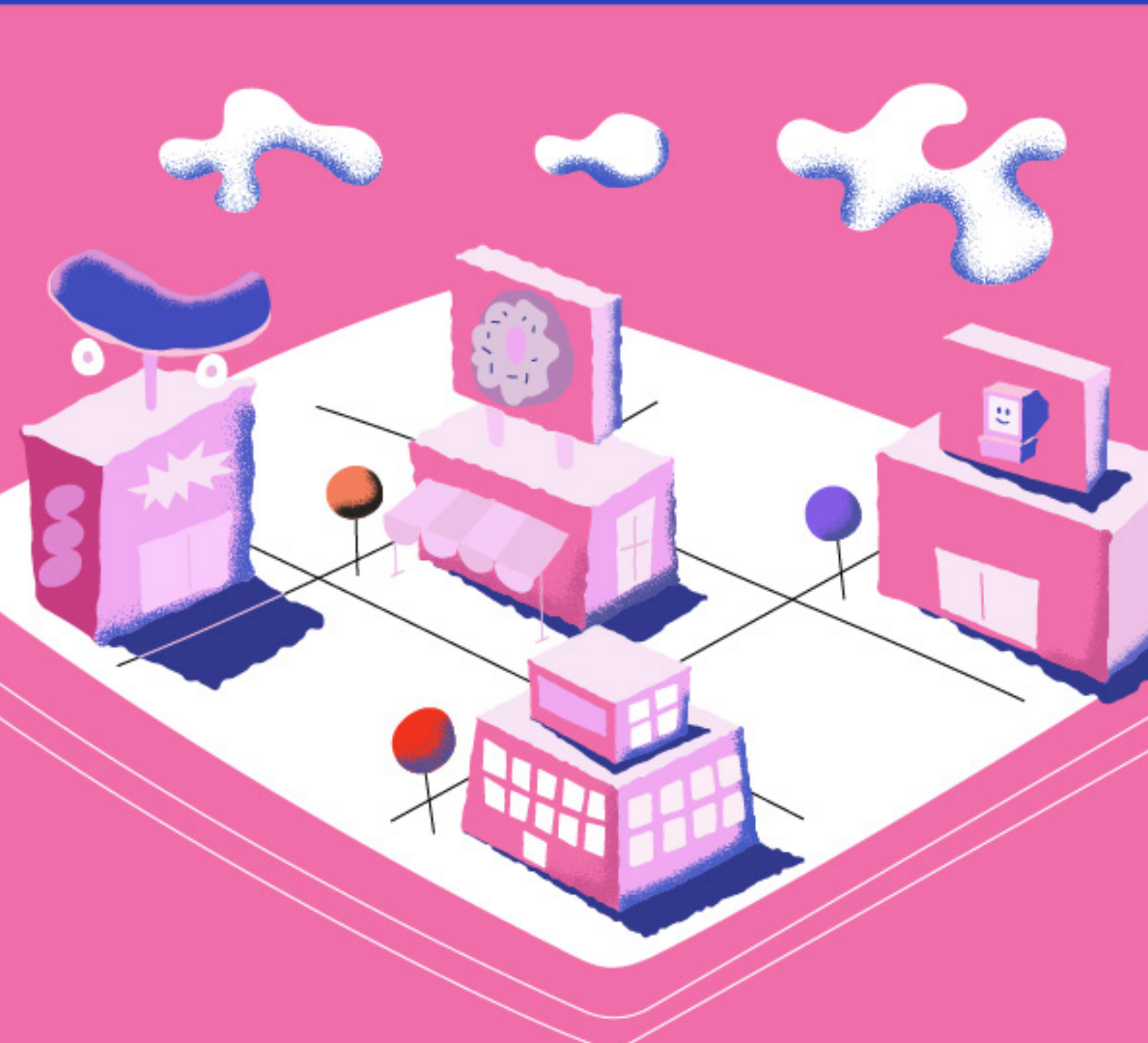
CoSchedule

# 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.

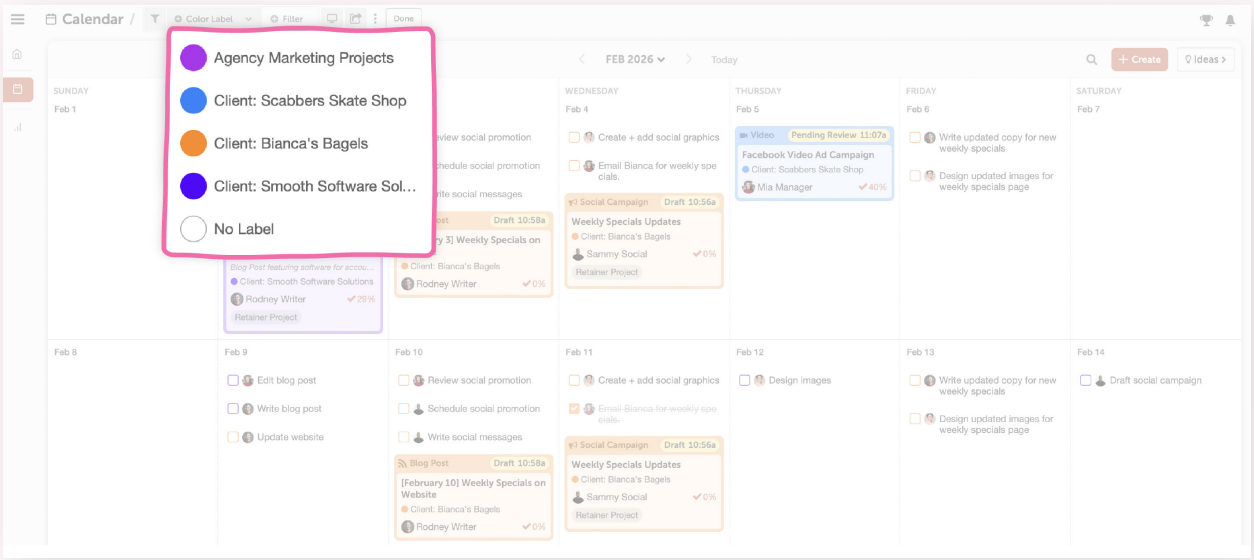
In this Chapter, you'll get step-by-step recommendations on how to set up your Marketing Calendar for managing multiple clients.

**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.



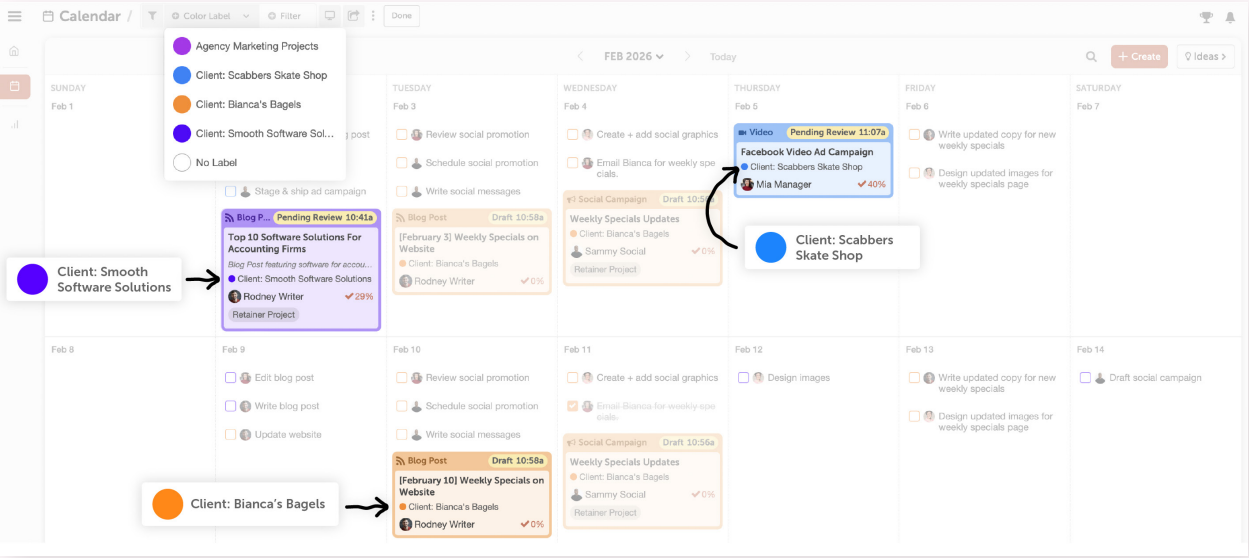
Create a Color Label for every client & another for your internal marketing projects. This gives your entire team visibility into what your team is working on for clients & when in a glance.

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.

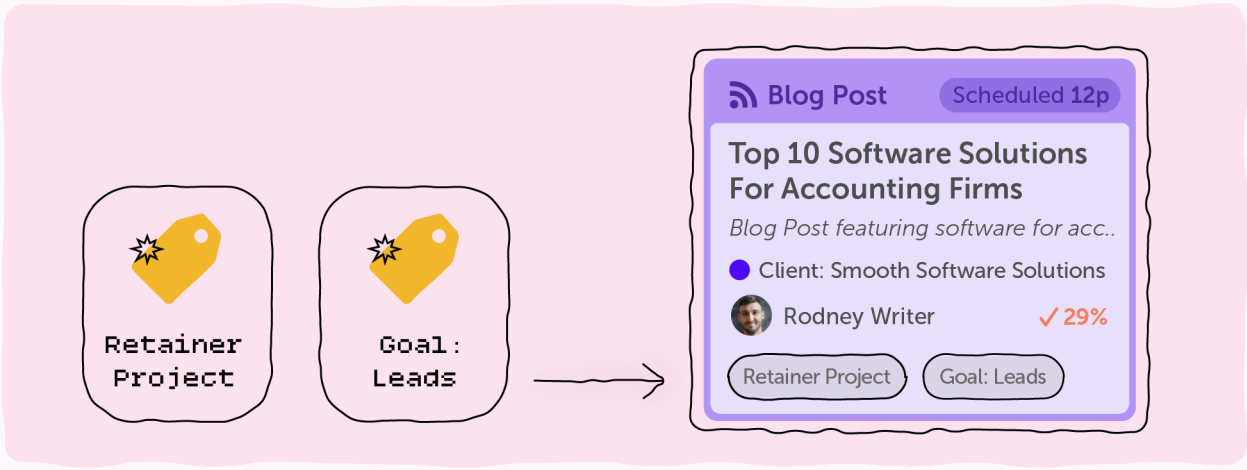
Create & use tags as another way to categorize your client projects.

## 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.



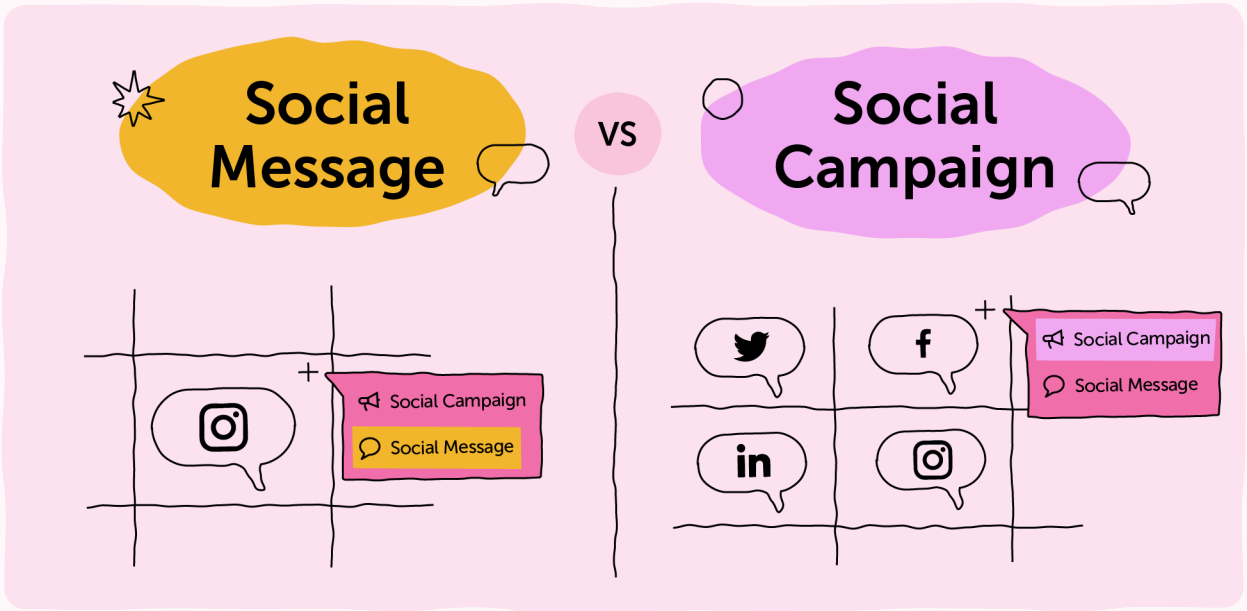

Plus, you can use tags as a filter to create Saved Views, Reports, & more.

*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.

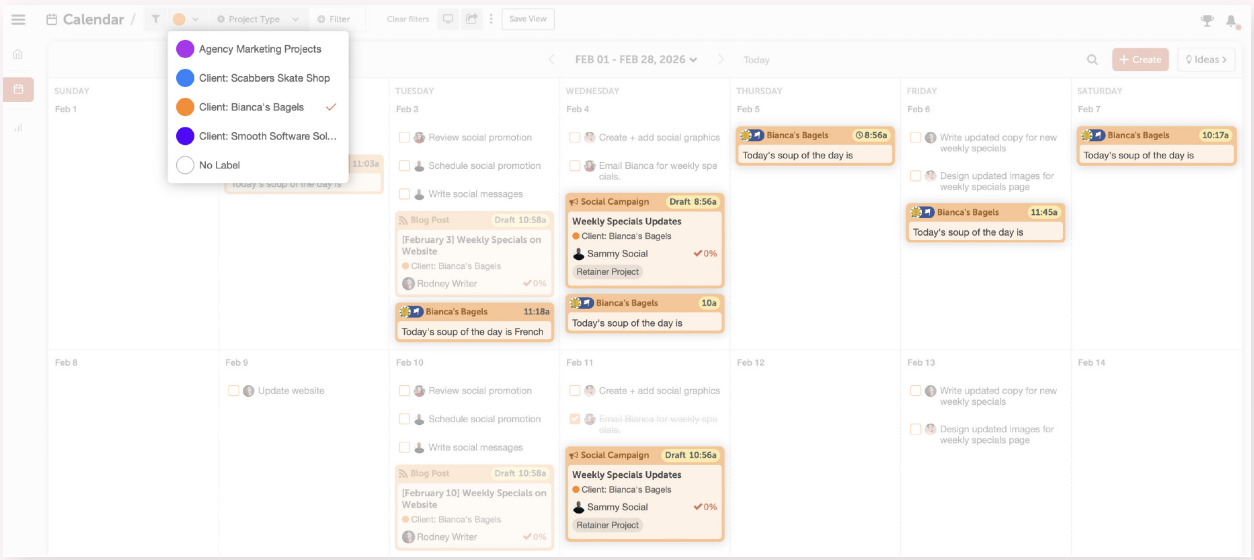
You can create standalone social messages or build out entire social campaigns on your Marketing Calendar. But first, you need to connect your client's social profiles.



## 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).



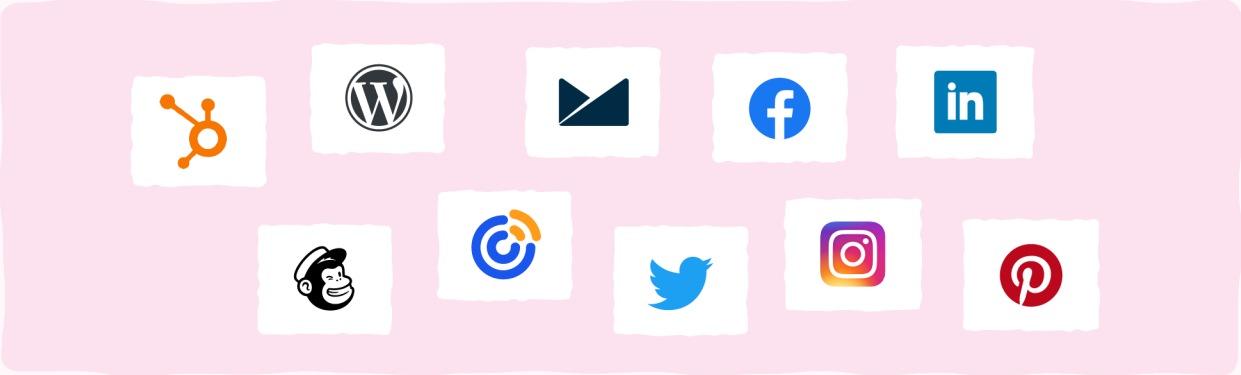

This gives you total visibility of your clients' published social messages for each day, week, & beyond on the Calendar.

## 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:

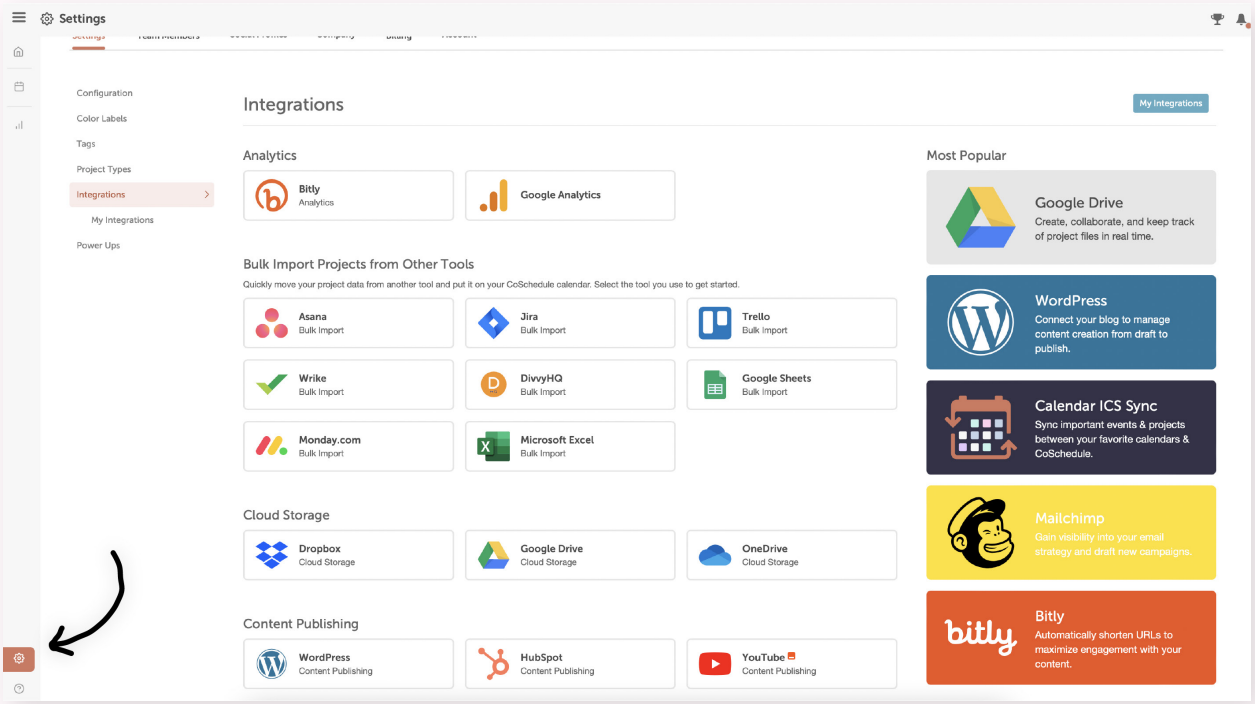
- **WordPress & HubSpot** - Whenever someone creates a new blog post in WordPress or HubSpot, it will automatically appear on your Marketing Calendar.
- **Email Marketing** - Whenever someone creates a new email in Mailchimp, HubSpot, Constant Contact, or Campaign Monitor, a new project card will appear 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:

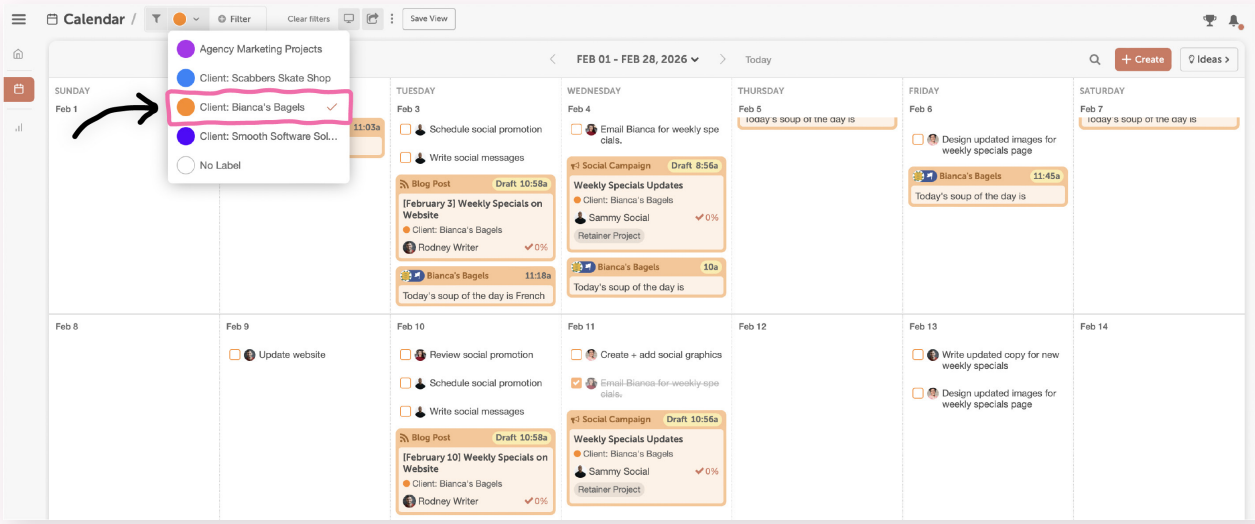
1. Click the Settings button in the left-side panel
2. Select Integrations
3. Start adding platforms.

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. ->**