CoSchedule

CoSchedule 101:

Build Your Foundation

1



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Introduction

The Home Dashboard

The Marketing Calendar



CoSchedule's Organization Tools

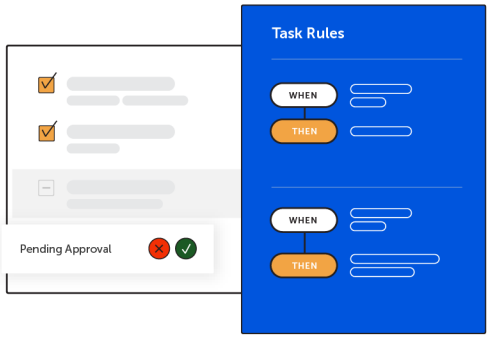
Marketing Calendar

Cross-functional calendar for global visibility of every project.



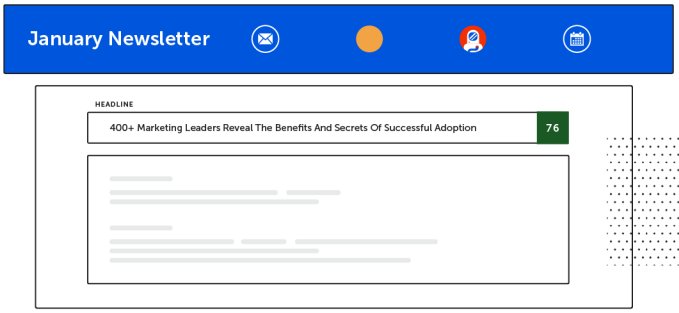
Work Organizer

Team collaboration and work management software to automate workflows.



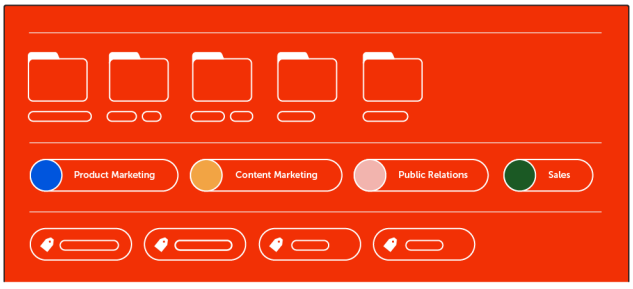
Content Organizer

Content marketing software to drive strategy and growth.



Asset Organizer

Digital asset management software for marketing teams.



Introduction

You've come to CoSchedule with the promise of:

- Completing more work.
- Delivering projects on time.
- Proving the value of your marketing team.

This getting started guide will walk you through how to get off on the right foot and lay the foundation to achieve these outcomes.

You won't learn everything you can do in CoSchedule, but rather the most important things to set yourself up for success. Think of this like a 101 class from your undergrad days.

In this chapter, you'll learn a few basics of the CoSchedule calendar.

What is this guide? This guide will walk you through the initial steps to set up your CoSchedule calendar.

Who's this guide for? New CoSchedule power users that will be implementing the tool for their marketing team.

What you'll learn:

- What the home dashboard is and how it will be used by you and your team.
- When to plan a marketing project vs. a marketing campaign.
- How to get started with the marketing calendar.

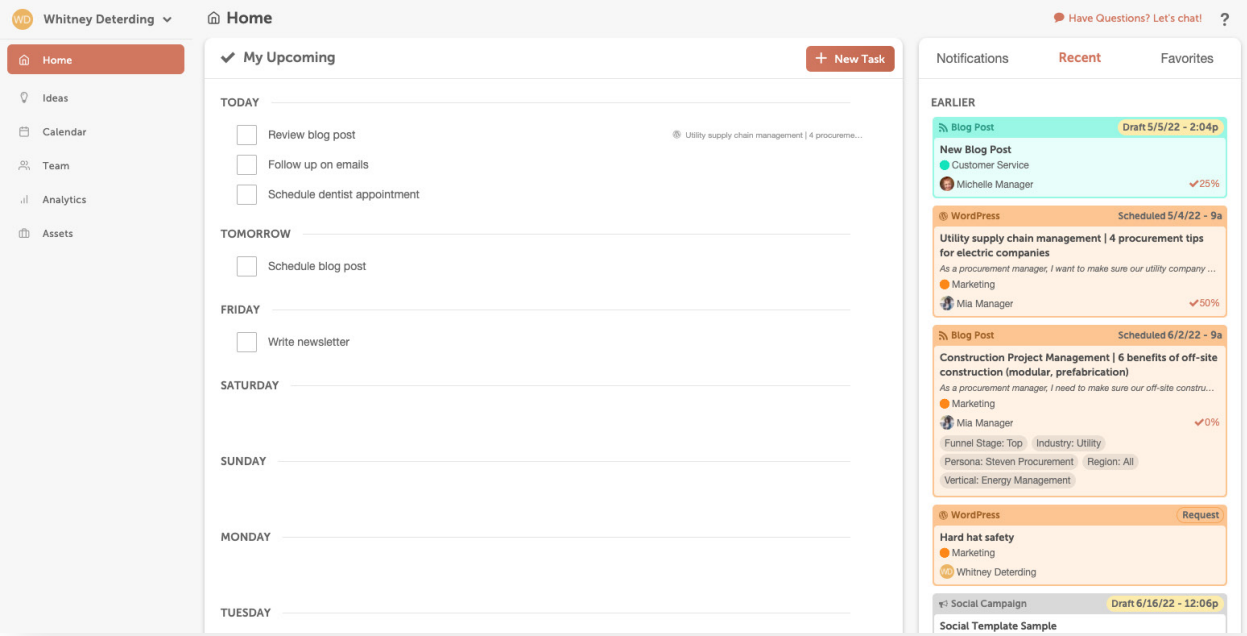
The Home Dashboard

The home dashboard is one of the most important areas for ensuring the on-time delivery of projects.

It's the first place your team members will turn to when setting their daily priorities.

Everyone will see a list of their tasks for the day, a list of notifications to stay in-the-know on all their projects, and a list of their recent/favorite projects to make it easier to jump back in where they left off.

You can also use this to set tasks for yourself or strategically favorite projects to keep an eye on your team's progress.



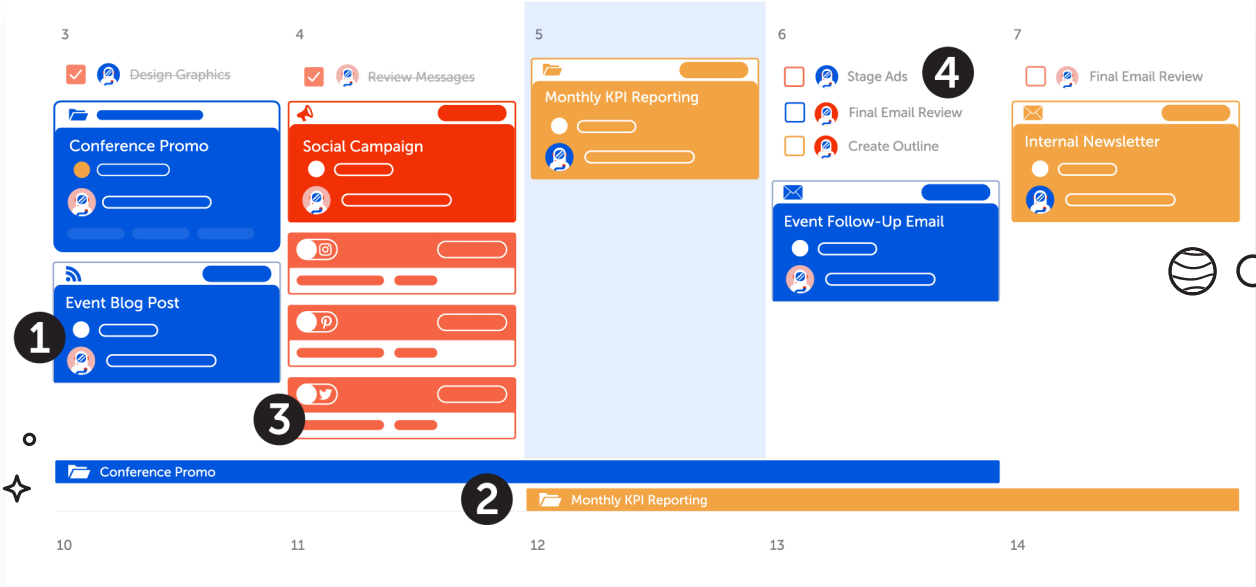
To add a new, private task (like a reminder to respond to an email), click on the orange "New Task" button on your home dashboard.

The Marketing Calendar

CoSchedule's marketing calendar is the single most important thing that will increase visibility into what your team is working on.

It serves as the blueprint for all of your events, content, social media, and more.

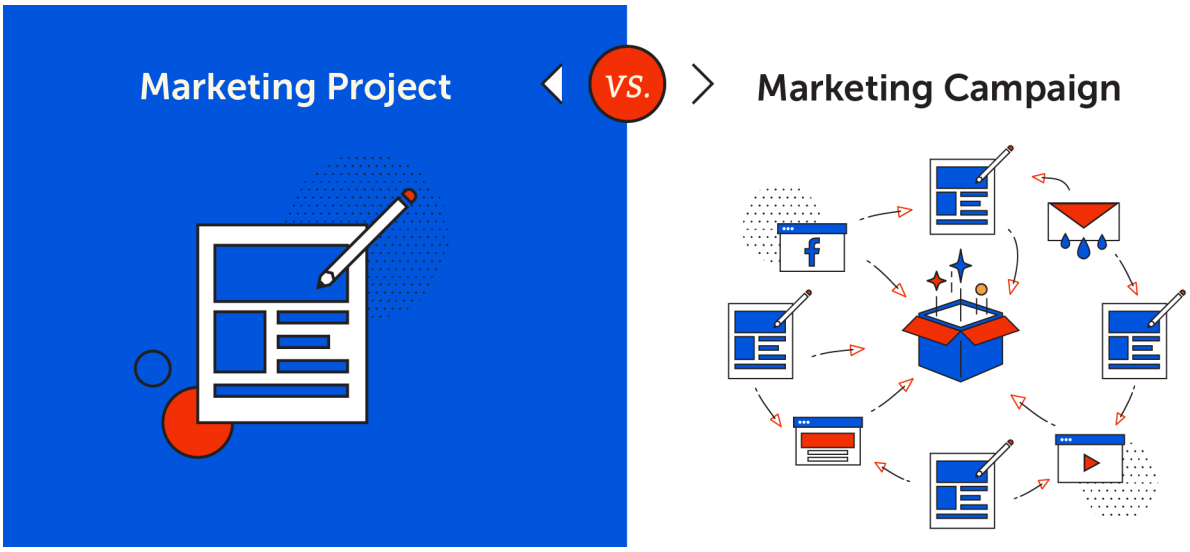
Finally, you'll have visibility into how every project interacts, overlaps, and supports your goals at a glance—confirming your team is working on the right priorities at the right time.



Here are some things you should know about the marketing calendar.

Your calendar will be made up of four items:

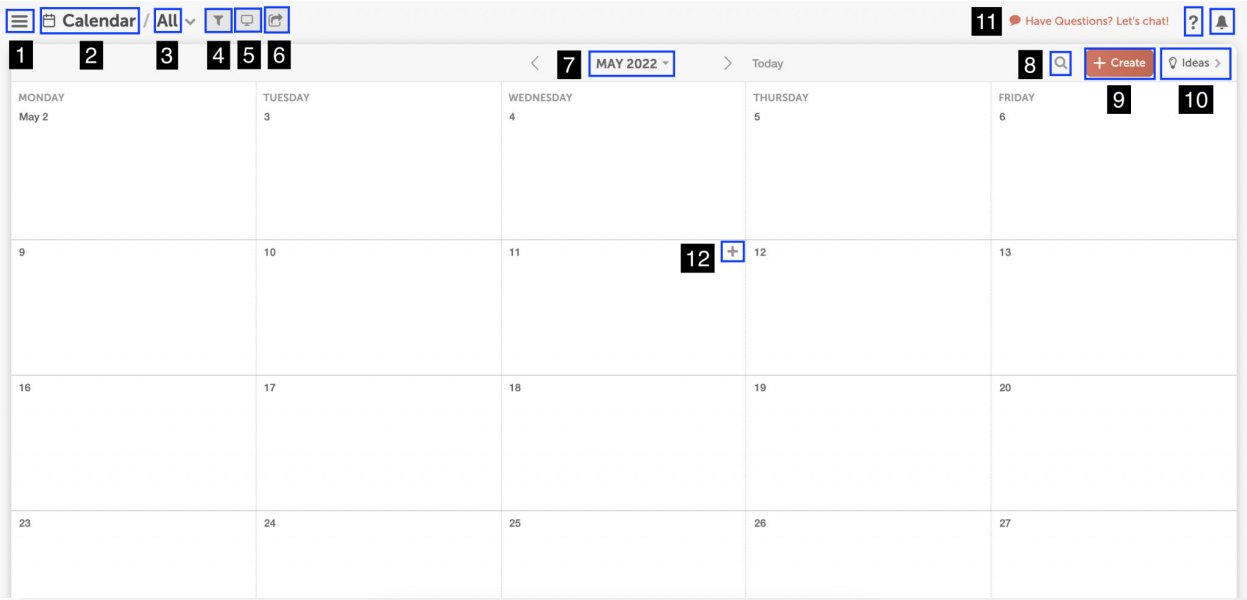
1. **Marketing Projects** - These are one off projects like sales slide decks or new tear sheets.
2. **Marketing Campaigns** - These are comprised of multiple projects like social campaigns, blog posts, emails, ads, etc. that all work towards one goal – like the launch of a new product.
3. **Social Media Messages** - CoSchedule has powerful social media scheduling capabilities so your social team doesn't have to plan their work in an entirely different tool.
4. **Tasks** - Team members will see a list of all the tasks they need to accomplish every day.



The Calendar View

CoSchedule is the only marketing software that allows you to see everything you have scheduled in a calendar view.

Let's explore its features to help you navigate your calendar.

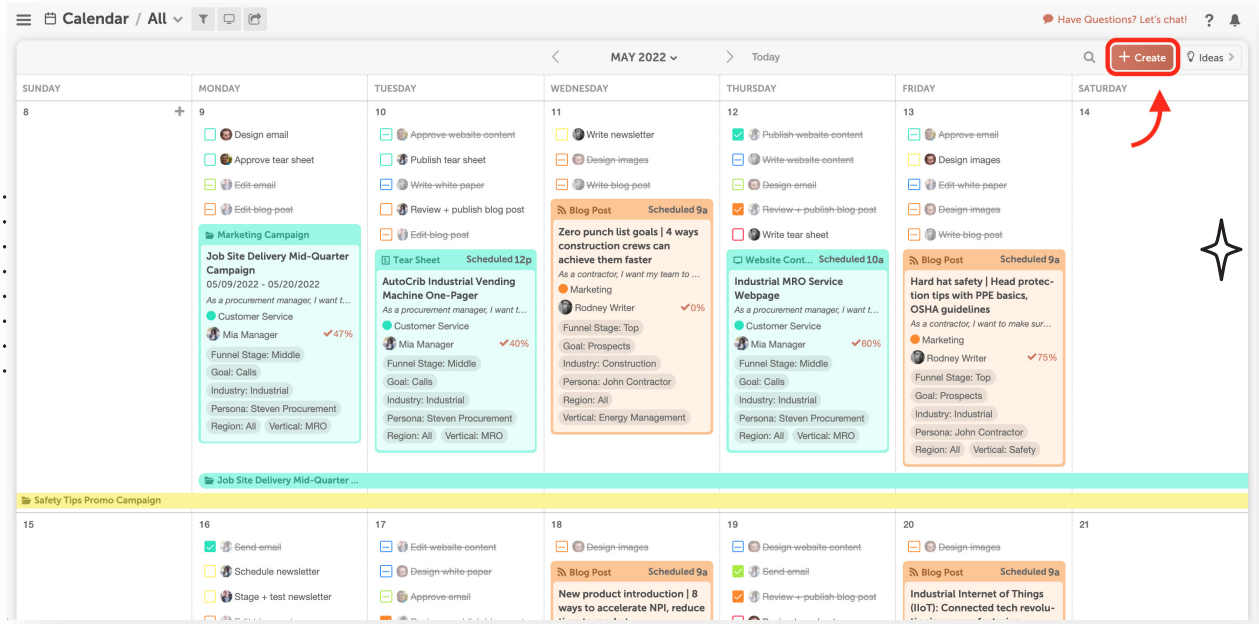


1. **Hamburger menu:** This is where you will find your calendar settings, email preferences, and profile information.
2. **Breadcrumb navigation – tools:** Quickly navigate to different features of CoSchedule. Here you will find things like your analytics & reports, ReQueue, and the Kanban board.
3. **Breadcrumb navigation – saved views:** Choose specific saved views of your calendar to filter out the info you don't need.
4. **Filtering:** Organize your Saved Views your way using filters by adding & customizing your filter settings.
5. **Display settings:** Easily choose how far out you want to view your projects and declutter your calendar by hiding items you don't need to see.
6. **Read-only sharing:** Once you save your new view, you can create a read-only link and share your work with your team.
7. **Date navigation:** Choose specific months/years or navigate forward/backward through your calendar. For example, use this to easily see what you delivered last month.
8. **Search:**Find past or future marketing projects on your calendar using keywords. For example, if a recently published blog post needs an edit, search the title to find it.

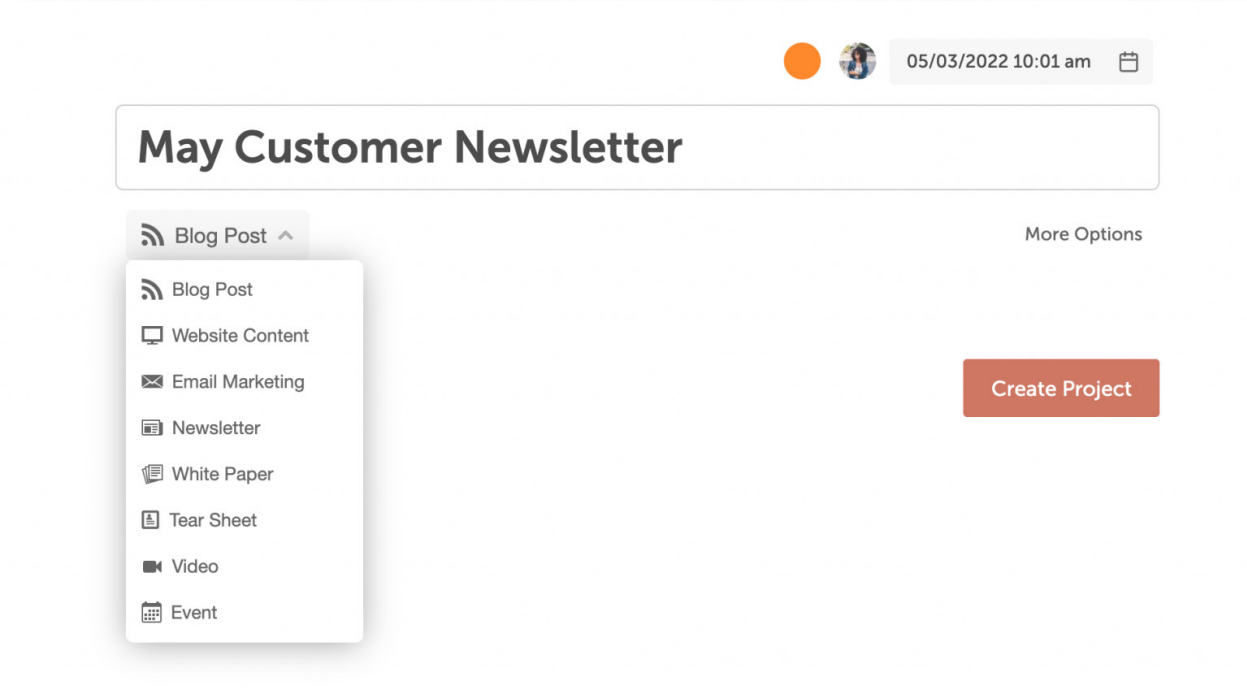
9. **Create:** Add projects to your calendar like new blog posts, social media messages, and newsletters.
10. **Ideas:** The ideas bin is where all project ideas live. When the project is ready to be scheduled, it can be dragged to the calendar. Tip: Use this to see projects that will be coming down the pipeline.
11. **Support center & notifications:** Use the question mark icon to get best practice advice or message the CoSchedule support desk. Use the bell icon to see notifications, recent projects, and favorites.
12. **Create a project on a specific date:** Know the date you want to schedule a project? Add items to specific days using the plus sign on a date.

Planning a Marketing Project

To add a new marketing project to your calendar, click the orange "+Create" button in the top corner or click the plus sign on a date on your calendar.



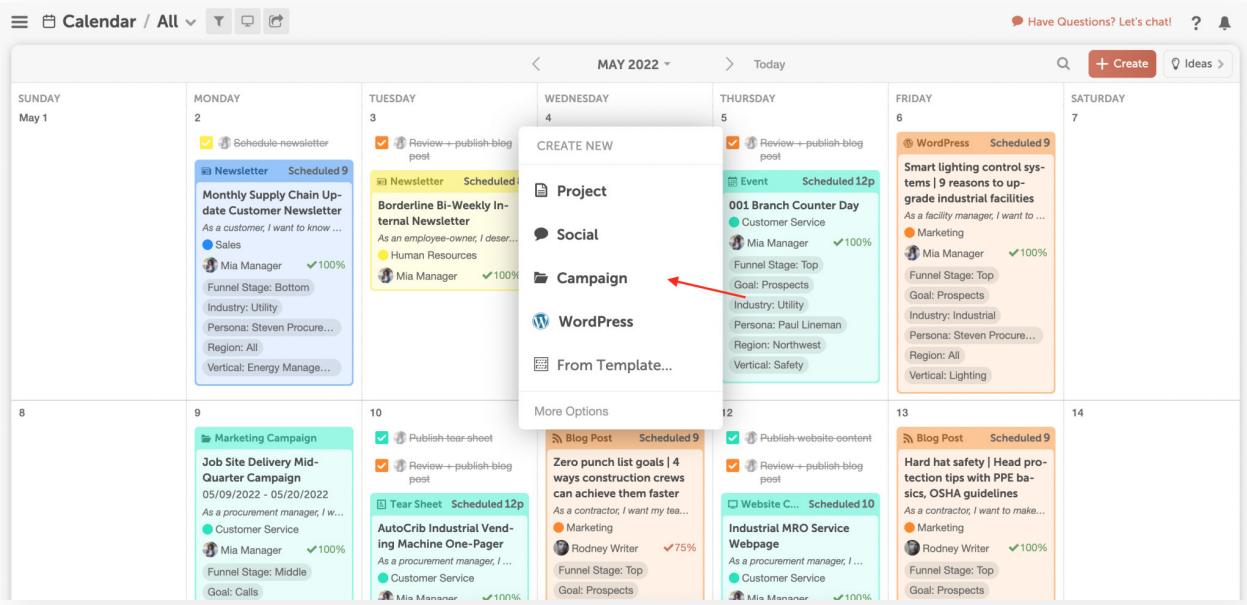
Choose the option that says “Project”. Then, use the dropdown menu to pick which type of project you’re planning. Choose a color label and name your project.



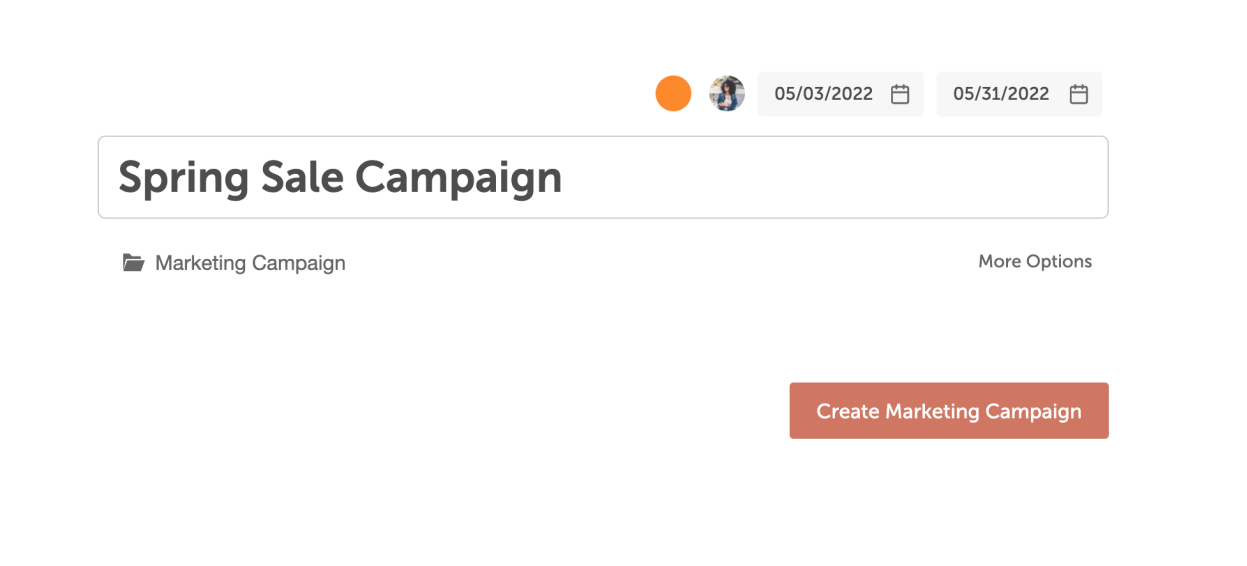
Planning a Marketing Campaign

Marketing campaigns have a lot of moving parts. Here’s how to plan one in CoSchedule to make sure everything moves like a well-oiled machine.

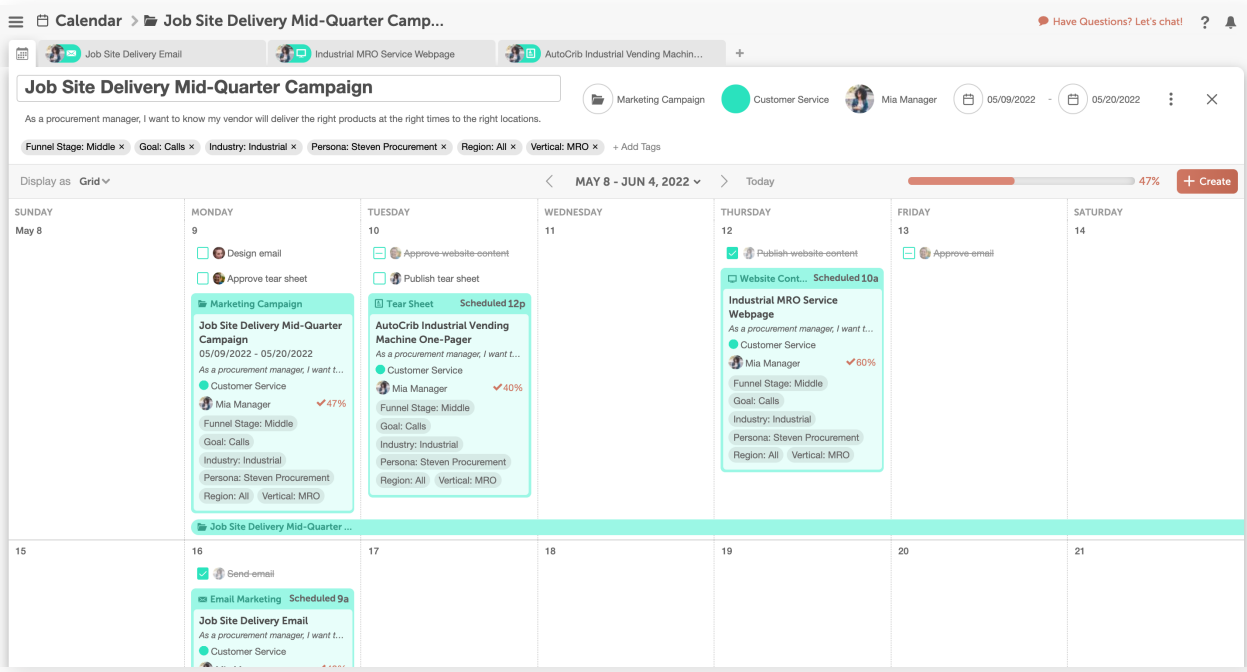
Add a new marketing campaign to your calendar just like you did with a marketing project. From the dropdown list, choose the “Campaign” option.



Give the campaign start and end dates, add a color label, and name it.

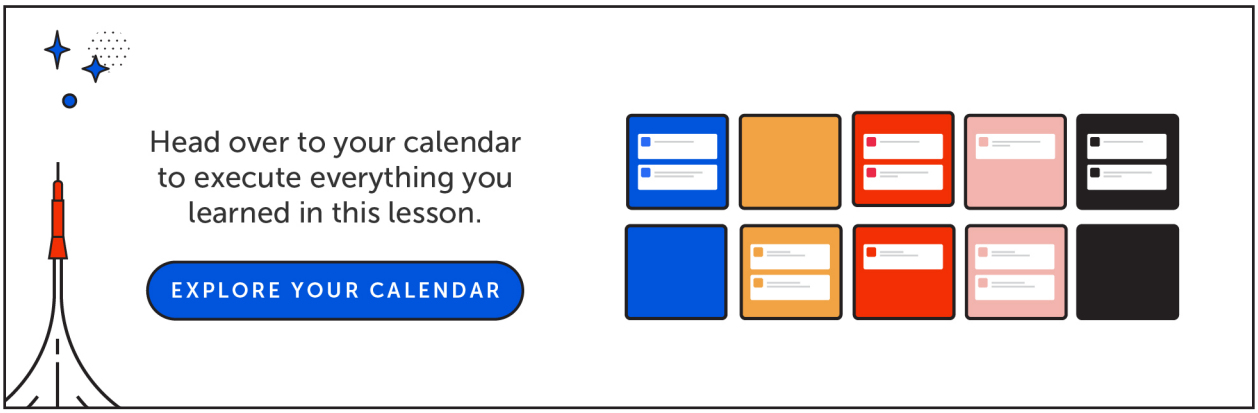


This will create a campaign calendar containing all of the projects associated with the campaign.



From here, start adding marketing projects to the campaign. Once you've got some projects in your marketing campaign, you'll see the strategy to come to life.

Now that you know a little bit about how to start setting up your CoSchedule calendar, why not get started in real life?



OR

