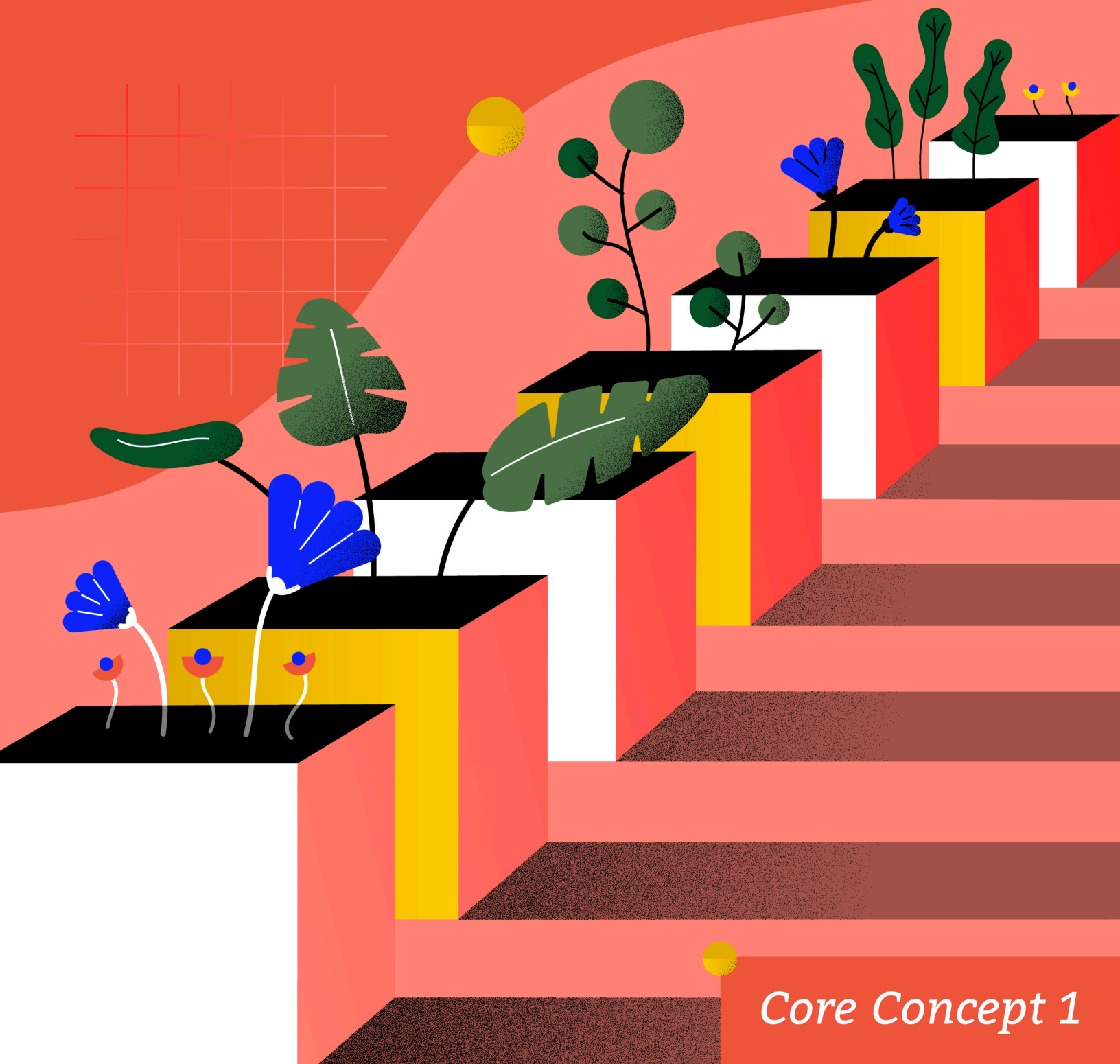
How You Will

Create and Share Your Ideal Marketing Calendar

CoSchedule



Core Concept 1

In This Lesson

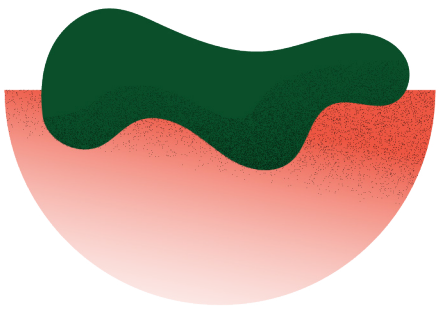
The Marketing Calendar Rundown

Put Everything In CoSchedule

Enhance Your Projects With Integrations

Schedule Projects on the Day They Will Publish

Share Visibility With Your Entire Organization



The Marketing Calendar Rundown

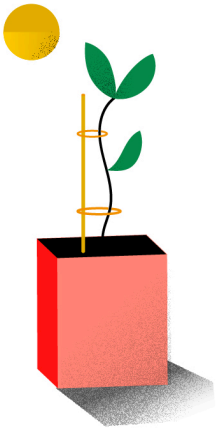
Winging it. Flying by the seat of your pants. Improvising. Ad hoc.

These are all terms marketers use to describe their marketing process before CoSchedule.

The good news is, marketing doesn't have to feel like this.

Thousands of marketing teams have organized their marketing with the CoSchedule Marketing Calendar.

Throughout this process, you'll receive a step-by-step guide to give you the confidence to master your marketing with CoSchedule. This chapter walks you through what you can achieve with CoSchedule.



What is this guide?

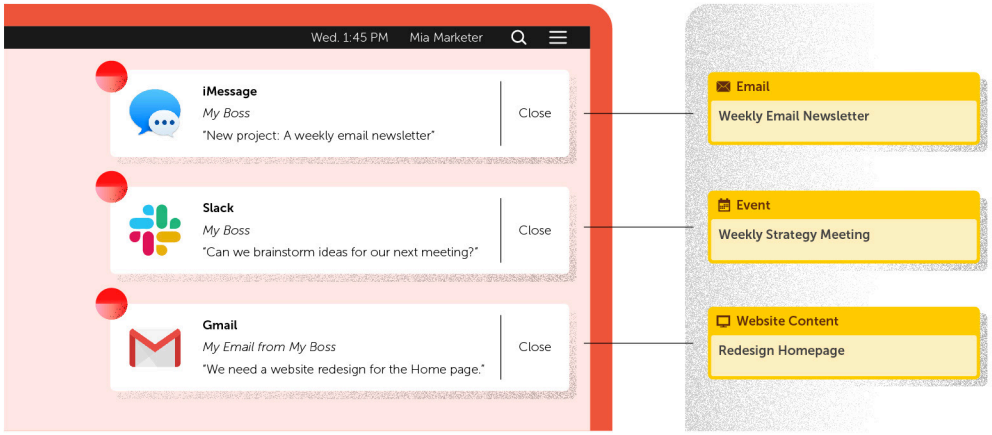
This lesson will walk you through what you can achieve with CoSchedule.

Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Put Everything In CoSchedule

Marketing projects, requests, and ideas get dropped on you from all directions – emails, Slack messages, meetings, and even desk drop bys.



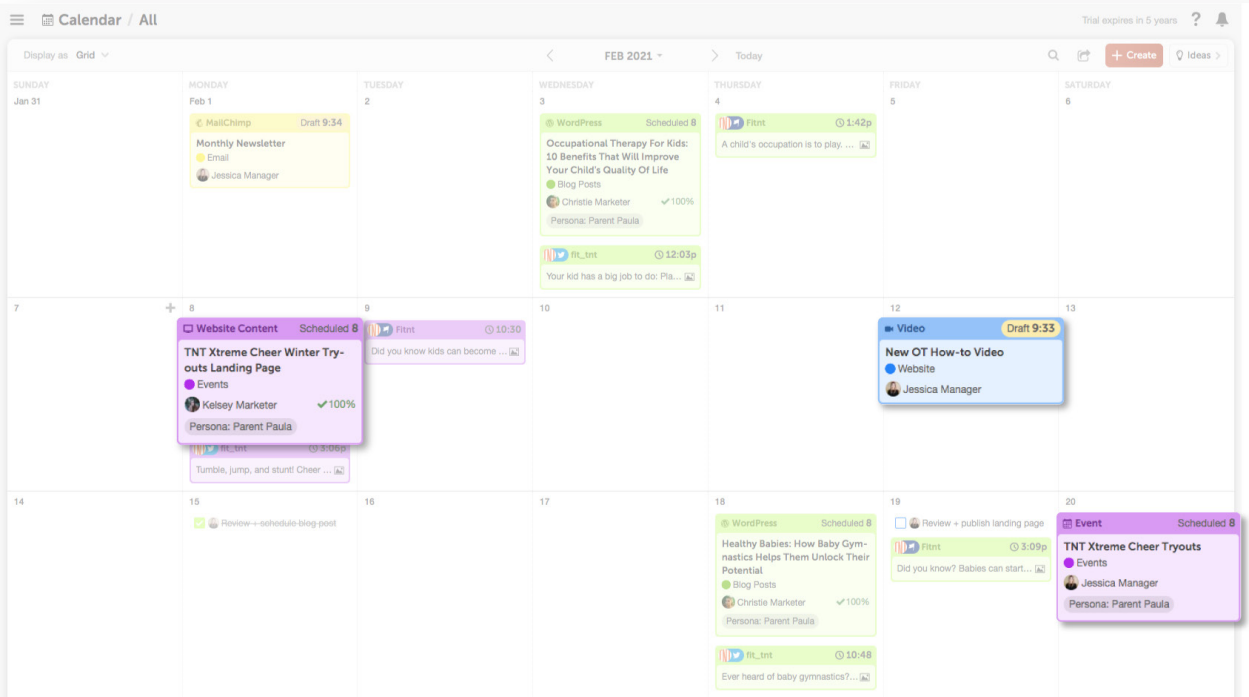
In order to get visibility into everything marketing does, create a new project card on your Marketing Calendar for every project and request that comes your way – even if you don't need to collaborate on it with other team members.

Tip

Everything you do needs to be on your Marketing Calendar—

- Blog posts
- Social campaigns
- Emails
- Website content, Events, and more.

Here's what it looks like when you have multiple projects organized on your Marketing Calendar.



Enhance Your Projects With Integrations

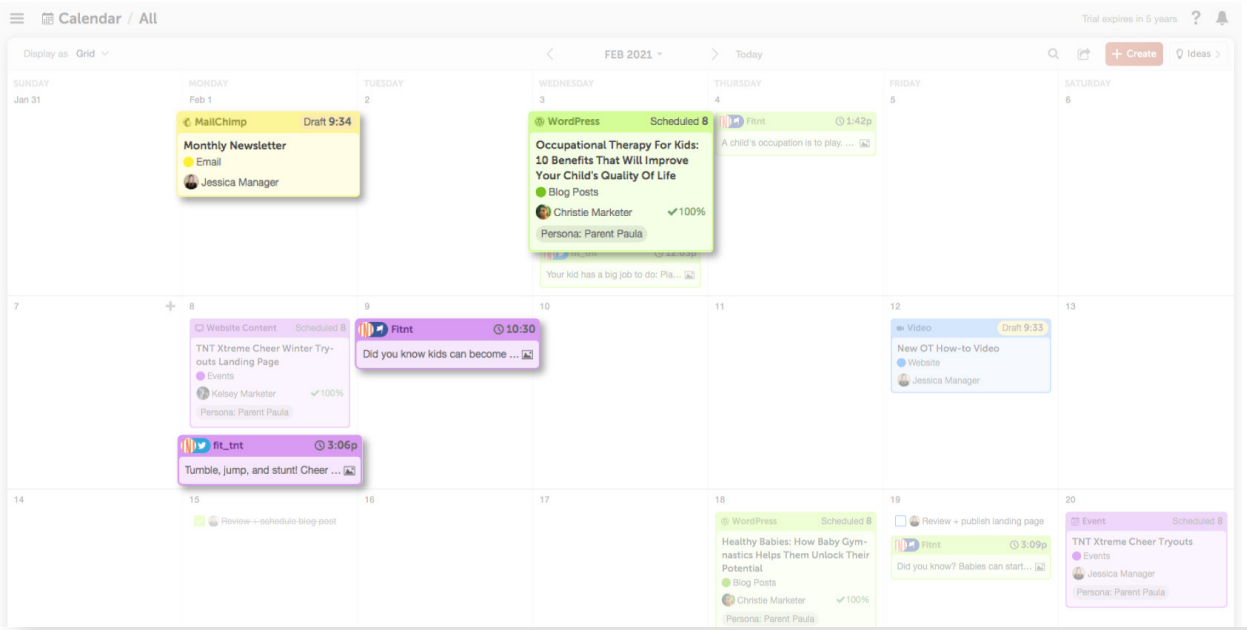
Integrations enhance your projects by syncing activities from outside tools like MailChimp, WordPress and Social Media to your calendar – which means you don't have to waste your time duplicating work.

Here are a few of the best integrations for marketing teams like yours.

1. **WordPress/Hubspot** - Whenever someone creates a new post in WordPress or Hubspot, it will automatically appear on your CoSchedule calendar.

2. **Email Marketing** - Whenever someone creates a new email in MailChimp, Hubspot, Constant Contact, or Campaign Monitor, a new project card will appear on your CoSchedule calendar.

3. **Social Media** - CoSchedule connects to your social media channels so you plan, create, and schedule your social media alongside your other marketing projects.



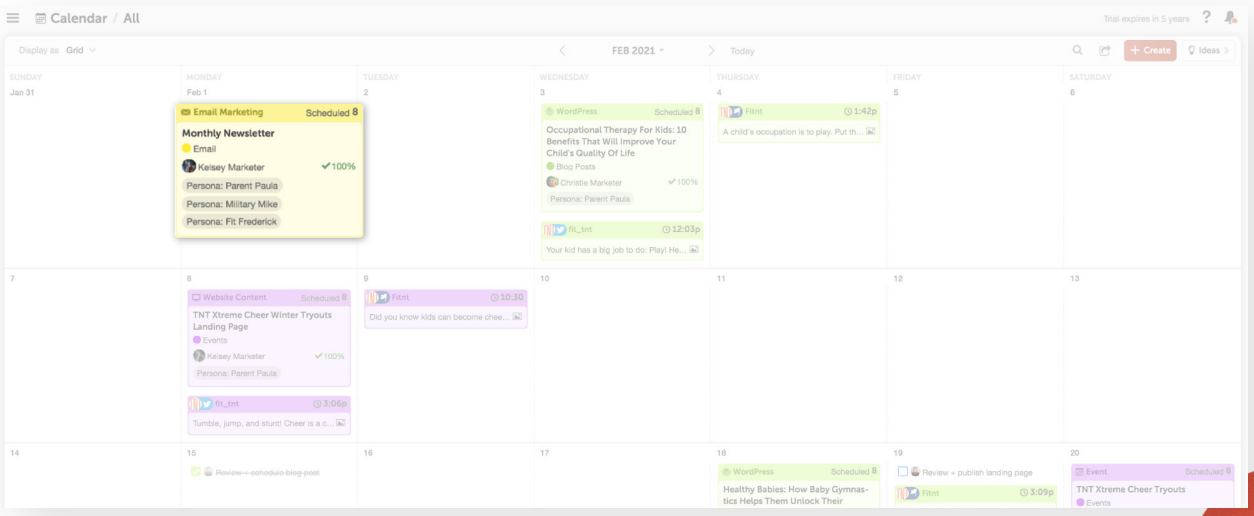
Schedule Projects on the Day They Will Publish

Once you get in the habit of putting everything on your calendar, the calendar becomes your process for getting work done.

CoSchedule is meant to be used like a publishing calendar – meaning you'll add projects to the calendar on the day they will go live or be completed.

Here's why:

- This enables visibility so everyone knows what's going live and when.
- It helps set priorities (i.e. the next upcoming project is the team's priority).
- It creates a deadline – which increases the likelihood of accomplishing a project on time.

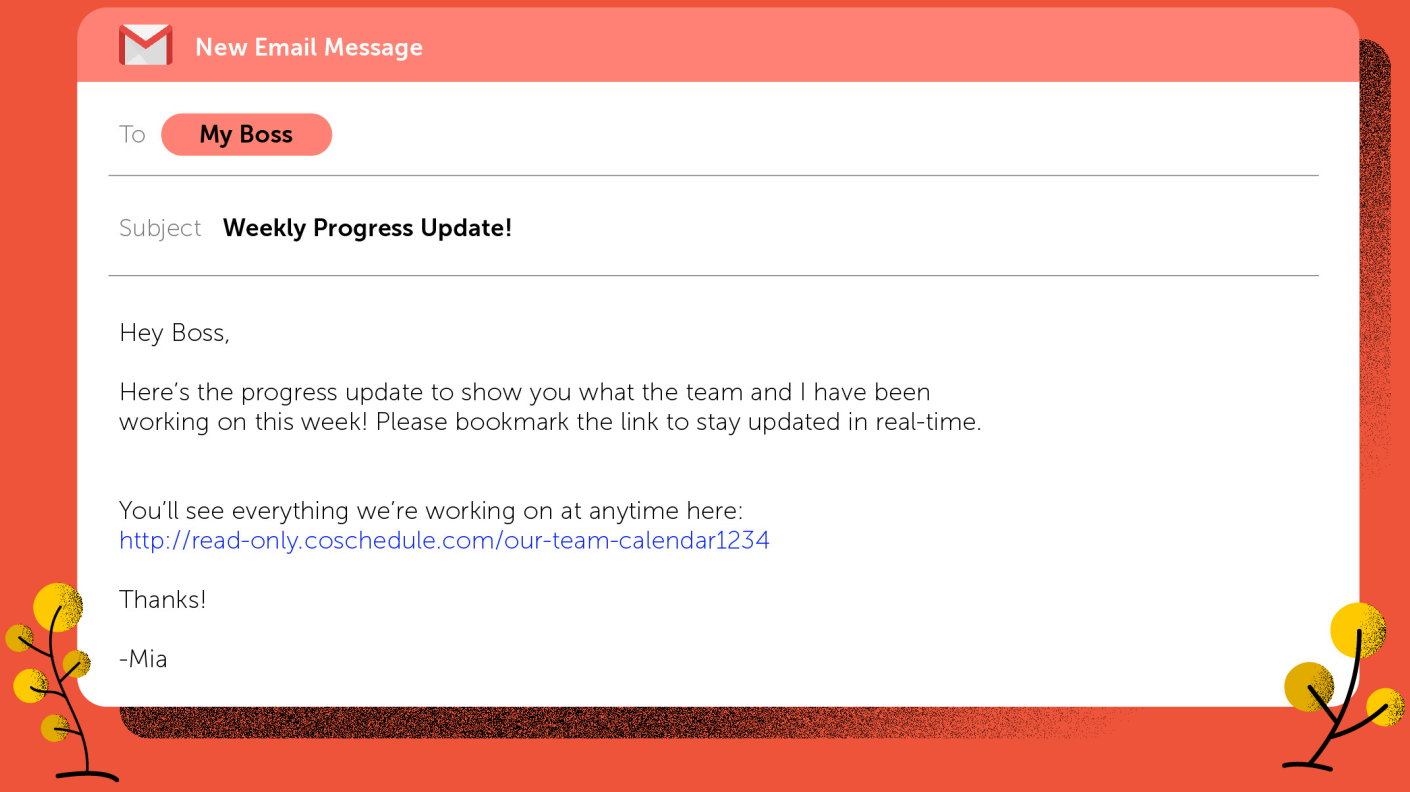


Share Visibility With Your Entire Organization

Keeping your boss updated on what your team is working on usually involves manual workarounds and time-consuming meetings.

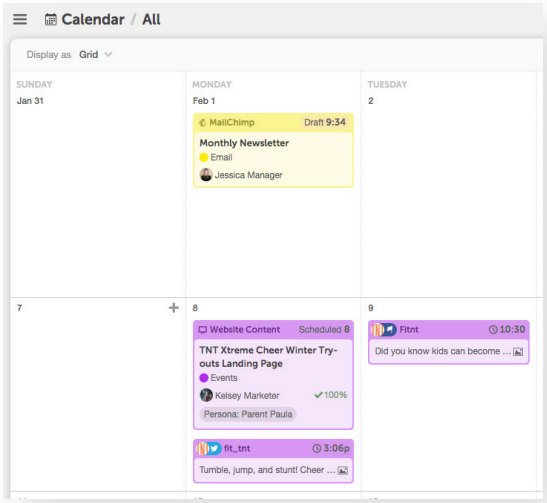
Until CoSchedule.

CoSchedule lets you share visibility and prove your marketing value to stakeholders so everyone can be up-to-date about what your team is working on.

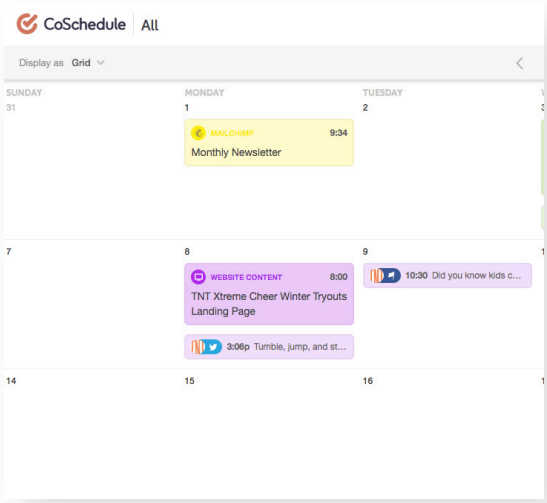


Simply create and share a read-only link of your calendar. The best part? Read-only links aren't dynamic so nothing can be rescheduled or deleted.

What you see in CoSchedule

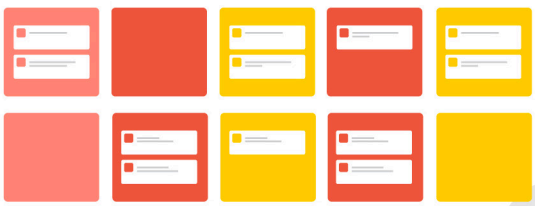


What your boss sees in read-only:



Head Over to Your Marketing Calendar!

GET STARTED



How Your Marketing Calendar Will

Improve Project Visibility and Control

CoSchedule



Core Concept 2

In This Lesson

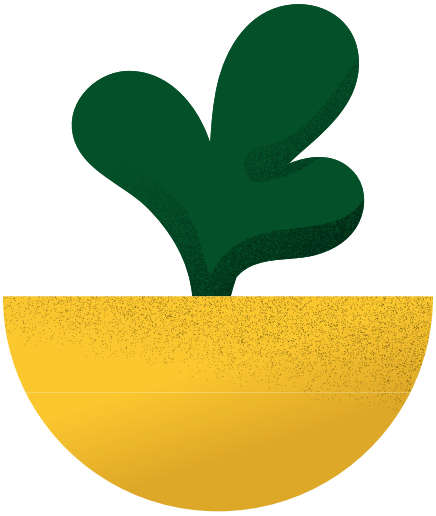
Getting to Know Your Calendar

Use Color Labels To Visually Organize Your Projects

See the Big Picture and What's Coming Next with Project Types

Keep Everyone Accountable by Delegating Project Owners

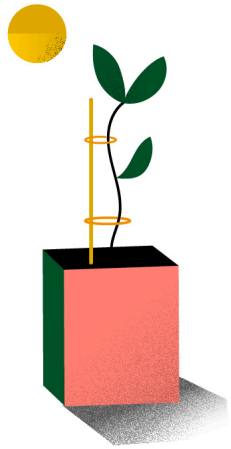
Project Status Shows What You Are Working on and When It Will Be Published



Getting to Know Your Marketing Calendar

As you begin to add projects to CoSchedule, the Marketing Calendar will become the backbone of your marketing process. It will support you and your team as you take control of your marketing.

There's a lot the calendar can do for you in terms of solidifying a marketing process and getting organized. This chapter focuses on how you can increase marketing visibility and team efficiency with your CoSchedule calendar.



What is this guide?

This lesson will walk you through how you can use the CoSchedule Marketing Calendar to increase visibility and team efficiency.

Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Use Color Labels To Visually Organize Your Projects

Color labels are the most powerful way to add visual organization to your calendar. Customize your labels to match what is most important to your company or add visual hierarchy to your calendar.

Here are a few ways people use them: 👇



Color Only: Use this if you want a simple way to add visual hierarchy to your calendar.

- *Purple*
- *Yellow*
- *Blue*
- *Green*



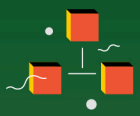
Region: Use this if your team creates marketing materials for different business regions.

- *West*
- *Midwest*
- *Southeast*
- *South*



Product line: Use this if your team creates content to promote different product lines.

- *Gardening*
- *Lawn Care*
- *Snow Removal*
- *Landscaping*



Department/Team: Use this if you need to quickly see which department marketing projects serve.

- *Sales*
- *Demand Generation*
- *PR*
- *Product Marketing*



Client: Use this if you're an agency and need to divide your work by client.

- *Country Table Foods*
- *Lynx Machinery*
- *Johnson Ag Products*
- *Red Tree Electric*







See the Big Picture and What's Coming Next with Project Types

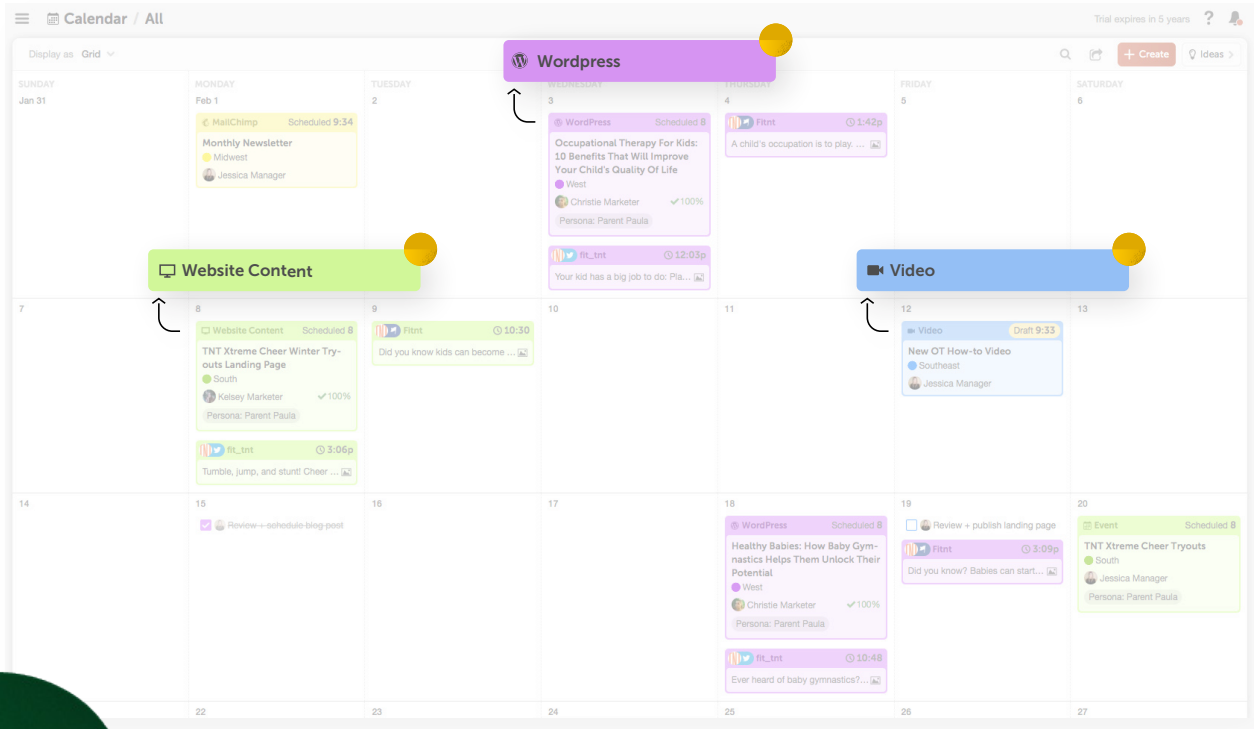
The project card tells you a lot of information. One of the first things you'll notice is the project type located in the top left-hand corner.

Project types tell you what type of work it is that you will be creating.

Glancing at the project type helps you understand the kind of content you'll create, without having to click into the project for more details.

Why are project types important?

1. It shows the tactics that contribute to your marketing strategy.
2. It helps inform others for easier delegation.
3. It highlights project frequency so your strategy can be more balanced.
4. It allows you to create filtered sub-calendar views. (More on this later.)

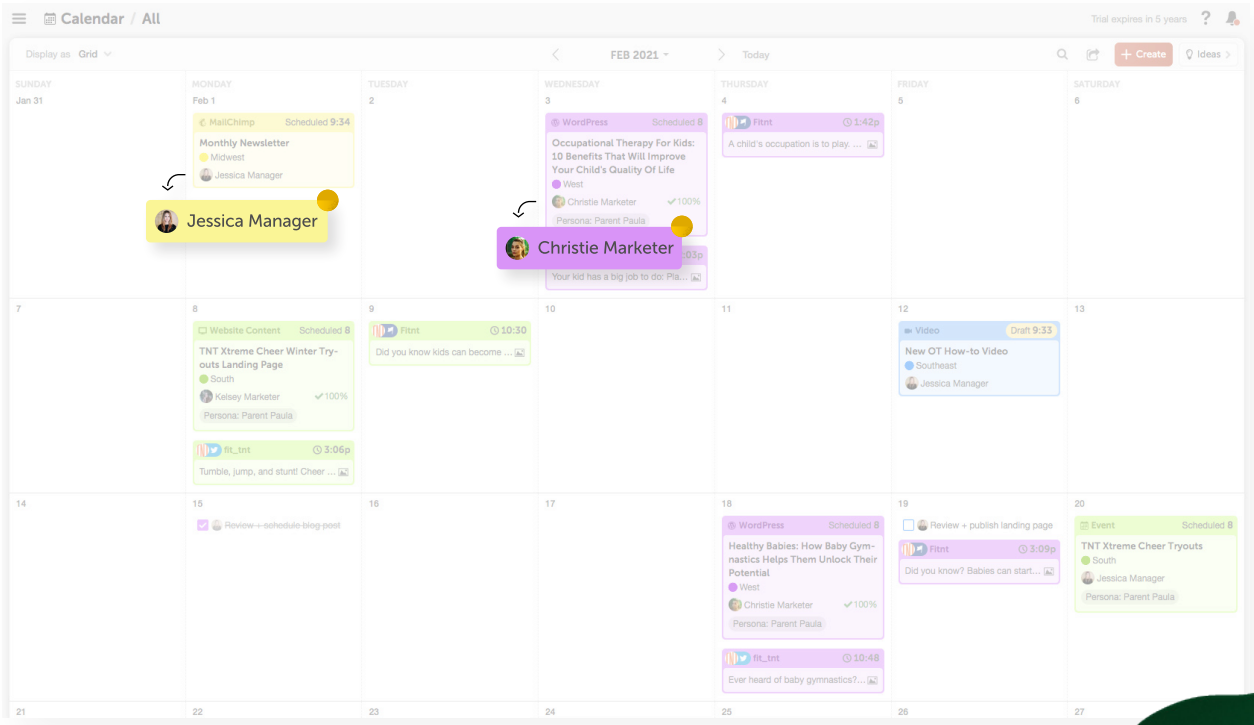


Keep Everyone Accountable by Delegating Project Owners

You can also use the calendar to delegate project ownership so everyone knows who is responsible for the project. This helps you:

1. See **who** is working on what at a glance.
2. **Allocate** work effectively.
3. Keep yourself **accountable** for completing things on time.

Notice the project owner is present on the calendar card. 👇



Project Status Shows What You Are Working on and When It Will Be Published

The project card tells you what status the project is currently in. This helps you prioritize your work, and keep things from going live before you are ready.

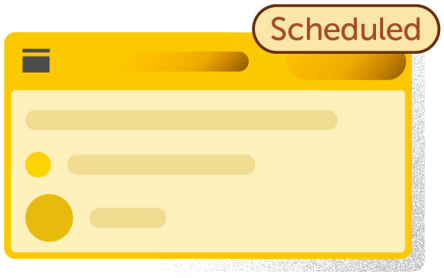
There are four statuses in CoSchedule:



Draft **-** Project WILL NOT publish or go live. Best used when the project is still in progress.



Pending Review - Project WILL NOT publish or go live. Best used when a project needs to be approved by another individual.



Scheduled - Project WILL publish or go live at the time scheduled. Best used when a project is completed, but will go live at a future date/time.



Published - Had been published, sent, or is live on your website/social media channels. Best used to mark which projects have been fully completed by your team.

Start Building Your Marketing Process Now

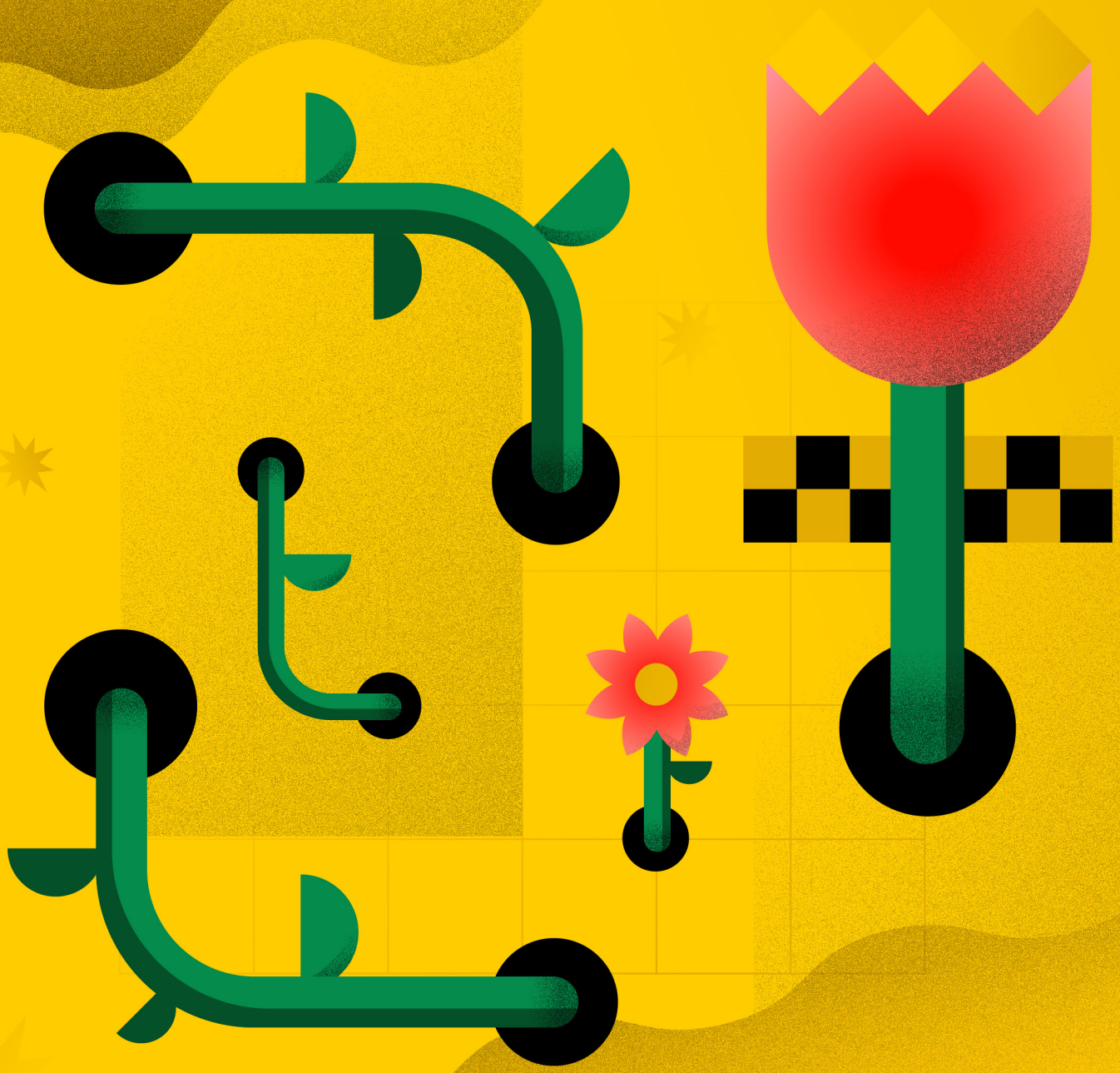
GO TO MY CALENDAR



How Your Marketing Calendar Helps You

Be Flexible When Project Dates Change

CoSchedule



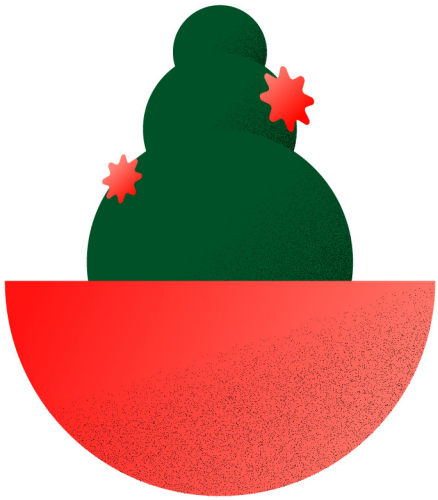
Core Concept 3

In This Lesson

Planning Marketing Projects is Just The Start

Connect Social Messages and Tasks to Projects

Reschedule Everything With Drag & Drop



Planning Marketing Projects is Just The Start

Planning projects on your marketing calendar is an important part of being proactive and getting organized, but that's just one piece of the marketing puzzle.

CoSchedule brings additional things like project checklists and social media scheduling under one roof so you can save time and see everything that's going on.

This lesson focuses on the benefits of attaching project checklists and social messages to a project in CoSchedule.



What is this guide?

This lesson will show you the benefits of attaching project checklists and social media messages to a project in CoSchedule.

Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

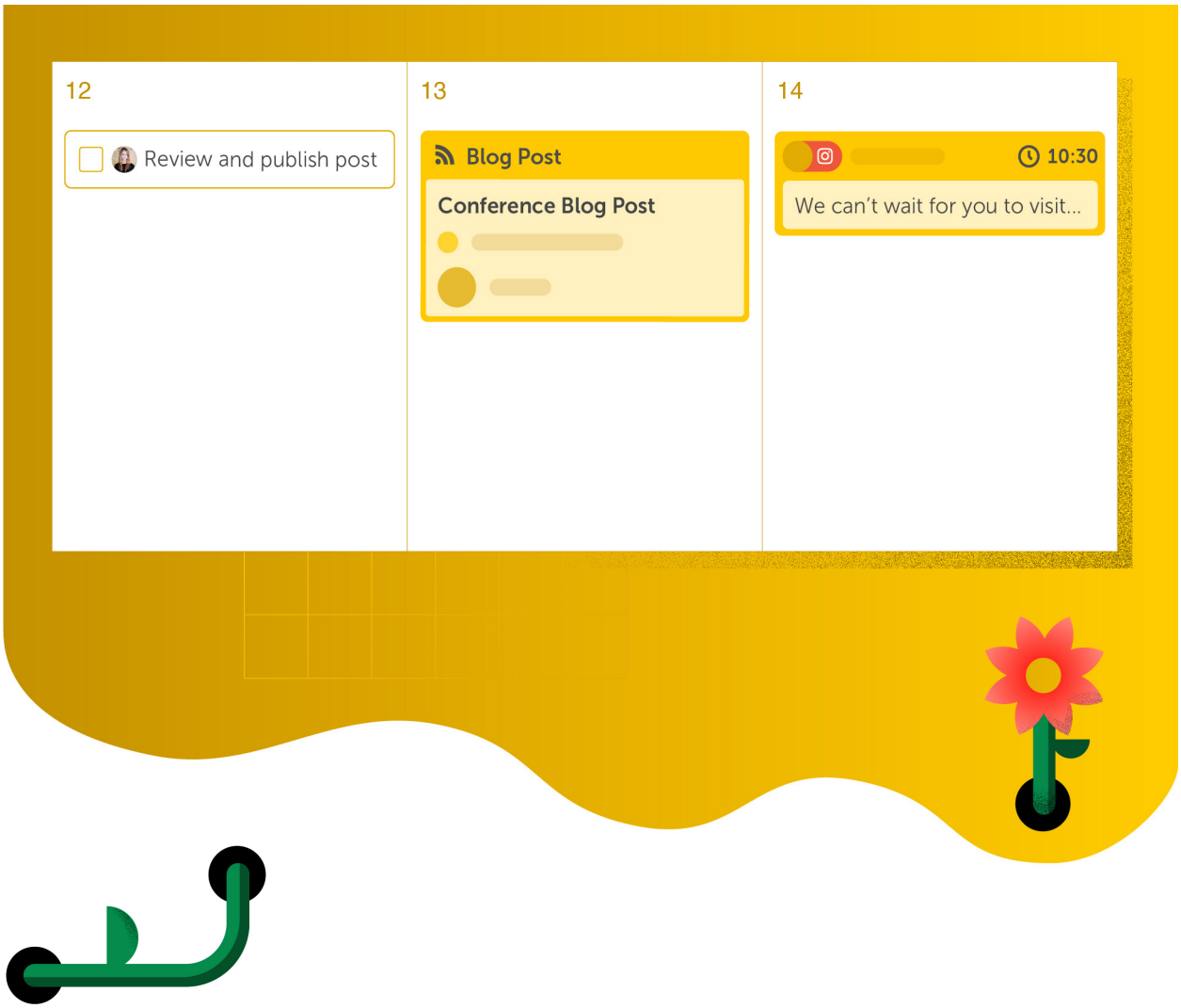
Connect Social Messages and Tasks to Projects

Everything that has a date should be on your CoSchedule Marketing Calendar – including tasks, social messages, events, and even notes.

Make your life easier by connecting tasks and social messages directly to your marketing projects.

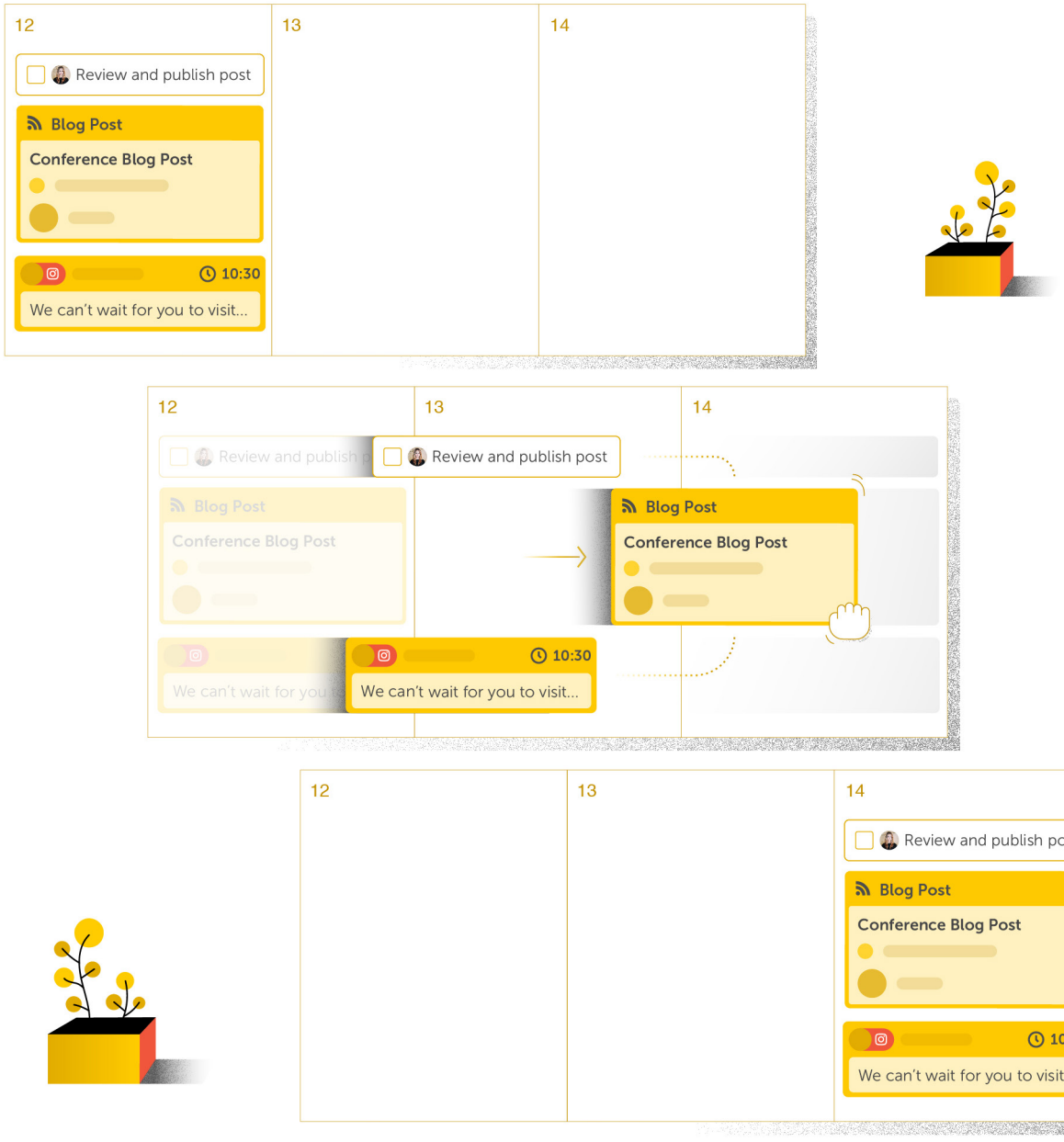
Tasks are added before the project's due date, so that all the work is done prior to the project publishing. Social messages come after the project publishes, so you are promoting something that is live.

You'll notice tasks and social messages live on your Calendar next to your Project Cards.



Reschedule Everything With Drag & Drop

If a project's due date changes, simply drag and drop the project to a new date on the calendar. All the connected tasks and social messages will automatically reschedule along with it.



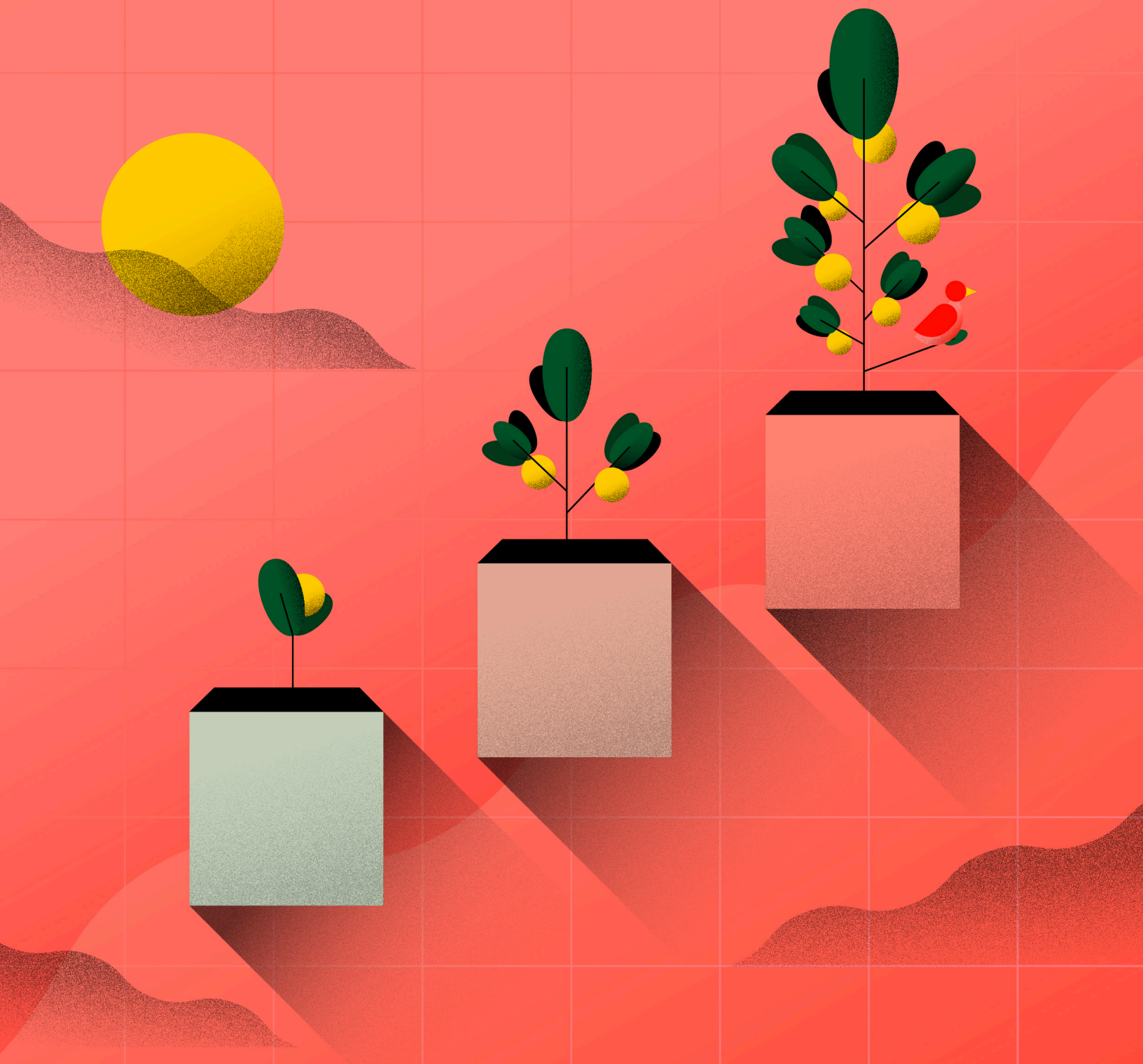
Add Some Tasks and Social Messages to Your Calendar

GO TO MY CALENDAR

Chapter 1:

Build Your Own Ideal Marketing Calendar

CoSchedule



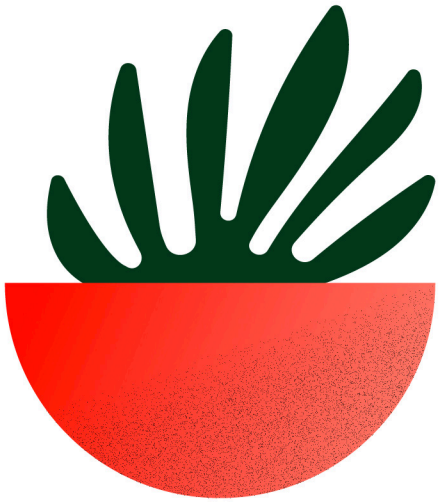
In This Lesson

Putting The Concepts Into Practice

Step 1: Add a Project to Your Calendar on the Publish Date

Step 2: Give Your Project A Name

Step 3: Add Your Integrations

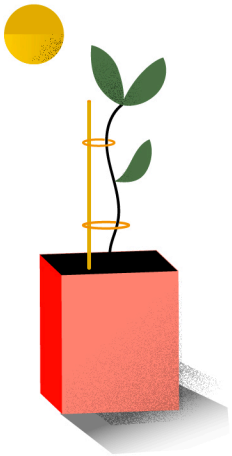


Putting The Concepts Into Practice

By now you should have a good understanding of how CoSchedule is going to help you get your marketing under control.

Now the fun begins.

You're going to learn step-by-step, how to build your own marketing calendar and put an end to the overwhelming feeling that is your current marketing situation.



What is this guide?

This lesson will walk you through how to build your Marketing Calendar.

Who is this guide for?

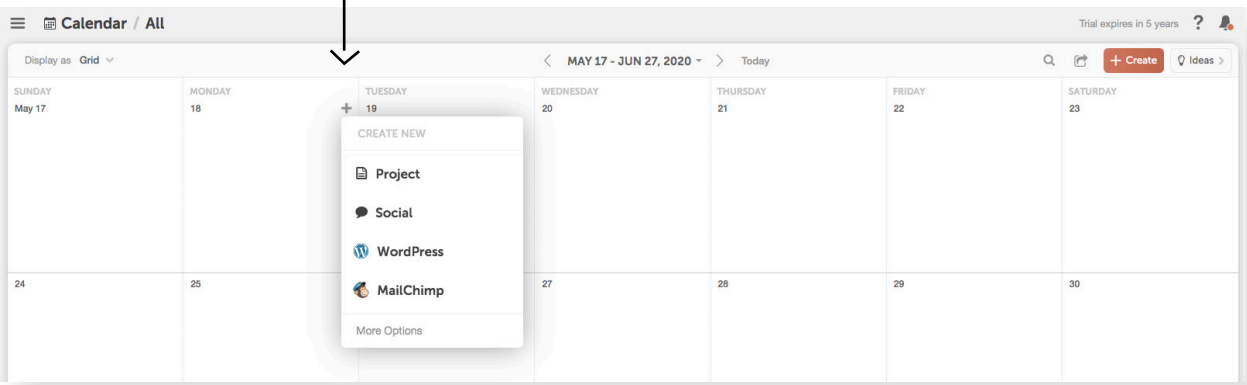
Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Step 1: Add a Project to Your Calendar on the Publish Date

The first thing you need to do is add every project to your marketing calendar from now on.

Think of an upcoming blog post, newsletter, event, etc. that you are currently working on. Add it to your calendar on the day you want it to go live or publish.

TO DO: Click the plus sign on the project's go live or publish date. Then choose the project type from the drop down.



Here's a quick cheat sheet for when to choose each project type.

Project: Use if you want to create...

- Blog posts.
- Videos.
- Events.
- Website Content.
- Newsletters.
- etc.

Social: Use if you want to create...

- Single social media messages.
- Multiple social media messages in a campaign.

Wordpress: Use if you want to create...

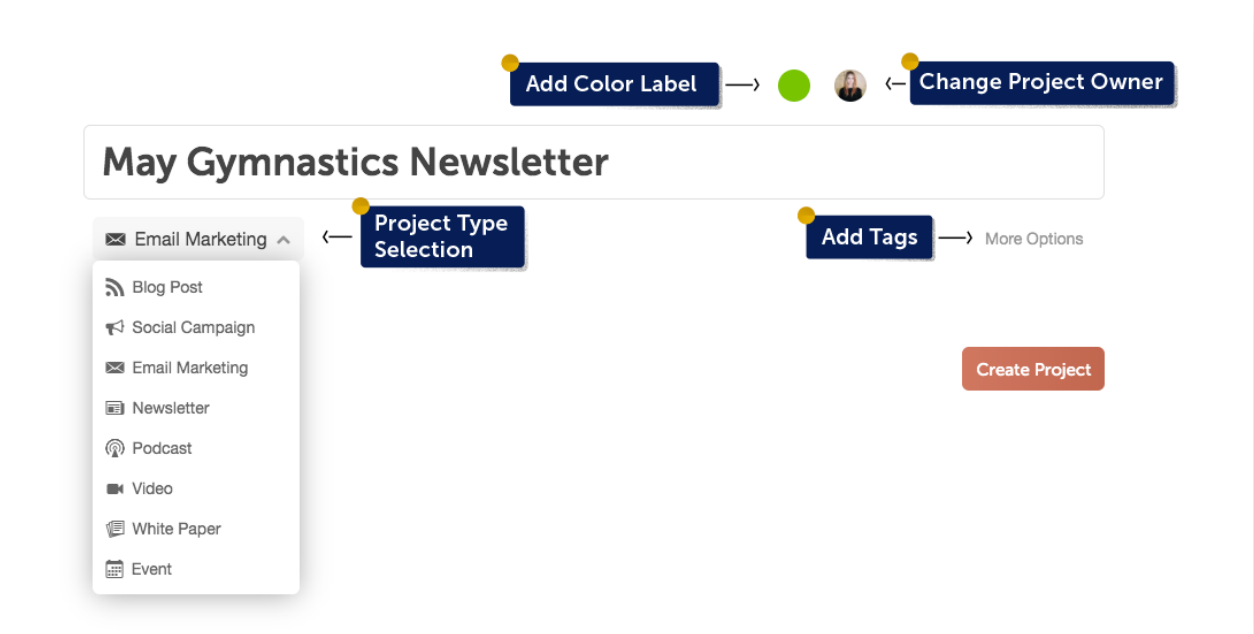
- A blog post that also appears in WordPress.

MailChimp: Use if you want to create...

- An email that also appears in MailChimp.

Step 2: Give Your Project A Name

After you've clicked the plus sign on the publish date, give your project a name and choose from the dropdown list to add the project type.

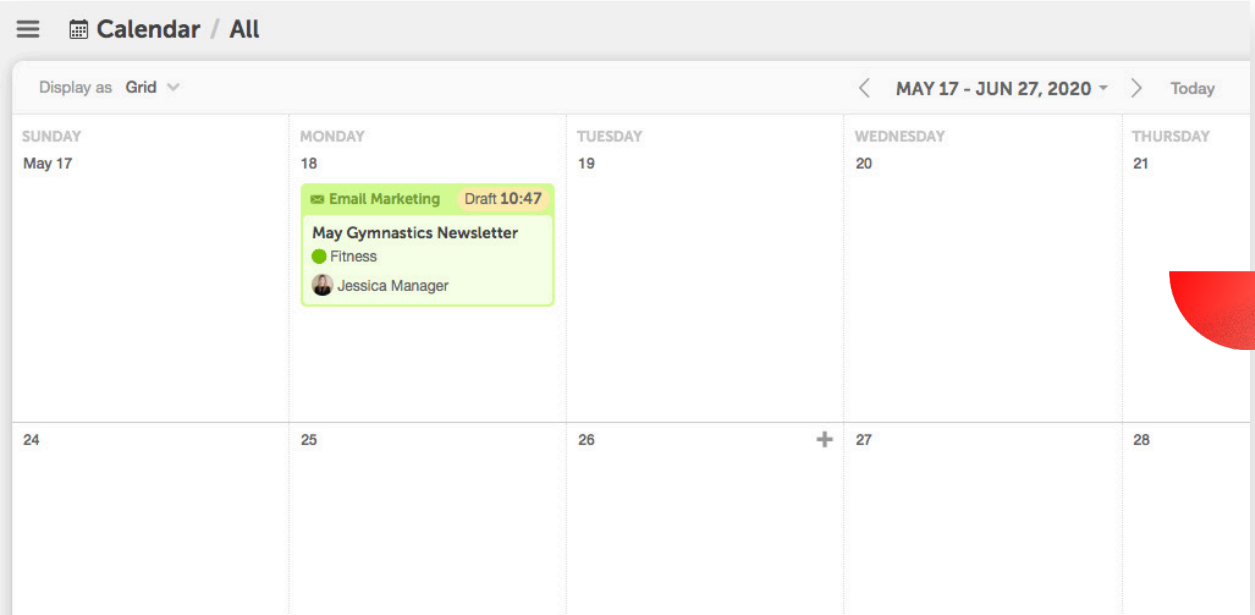


Tip

You can also...

- Change the project owner by clicking your image.
- Add a color label by clicking the circle next to your image.
- Add other metadata like tags under "more options".

You'll see the project you just created on your calendar. The project card tells you all the details you just filled out like the project name, owner, and project type.



Continue adding planned marketing projects to your calendar to build visibility into everything going on with your marketing team.



Getting Started Challenge: Try to add a month's worth of planned projects to your calendar.

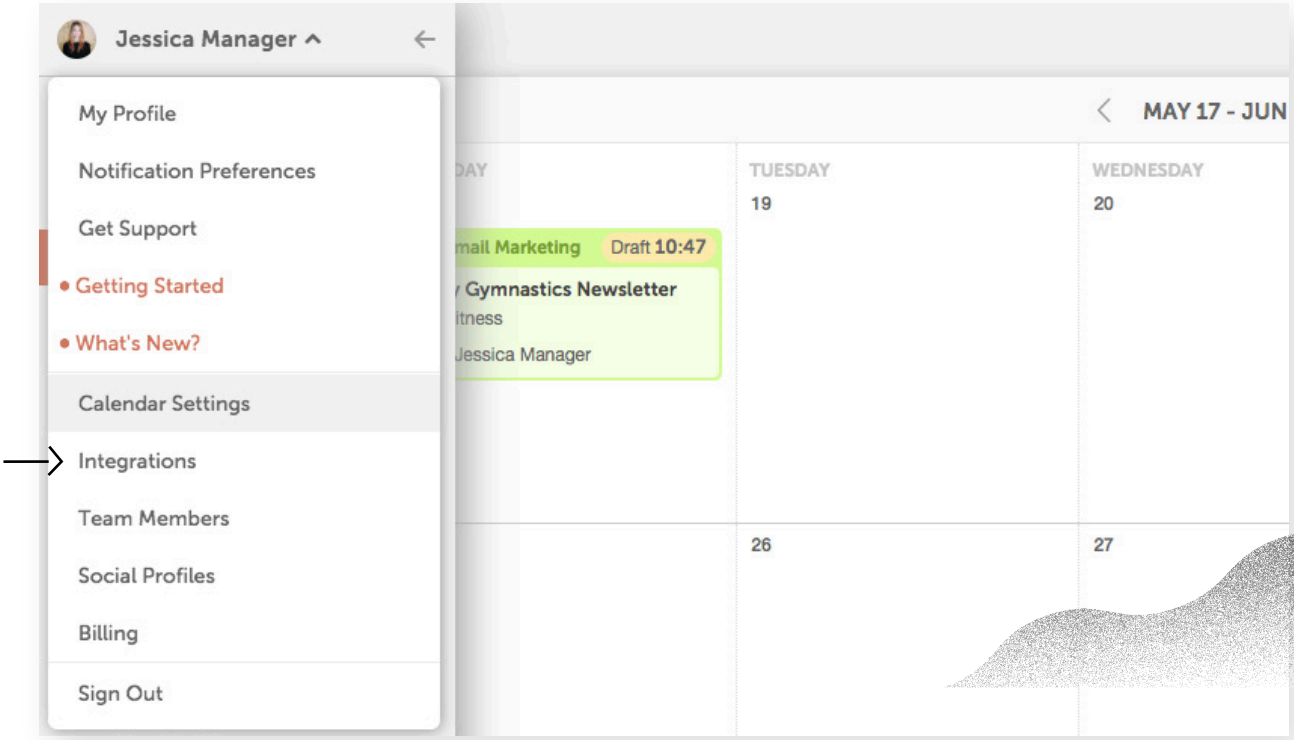
Step 3: Add Your Integrations

The three most used integrations include WordPress, Email Marketing platforms (like MailChimp), and Social Media channels.

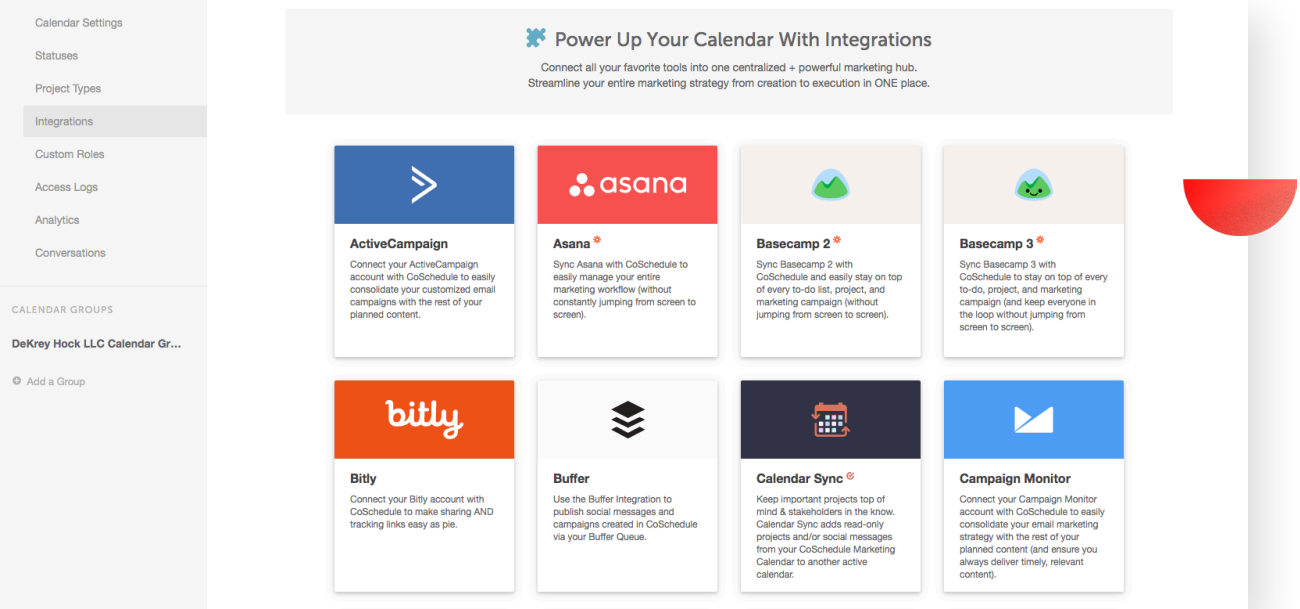
It's recommended that you set up all three, if applicable.

To add an integration:

1. Click the hamburger menu in the top left-hand corner.
2. Toggle down your name.
3. Choose integrations.



Then choose the integrations option from the left-hand menu.



Once your integrations are set up, everything you do outside of CoSchedule will be synced to your calendar – which means you don't have to waste your time duplicating work.

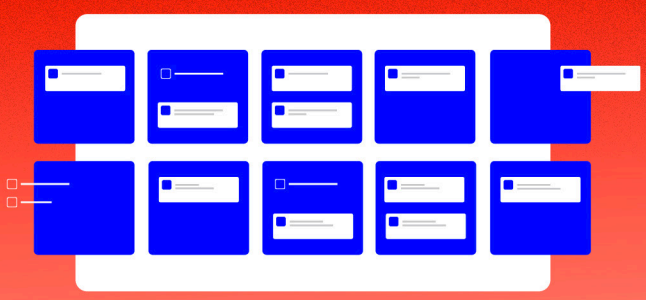


Getting Started Challenge:

Try to connect three integrations to CoSchedule.

Add a Project To Your Marketing Calendar

GO TO MY CALENDAR



Chapter 2:

Take Control of Your Process With Your Marketing Calendar

CoSchedule

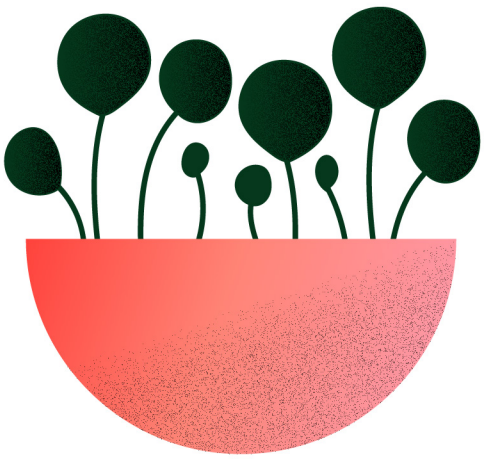


In This Lesson

Getting a Process in Order

Step 1: Use Project Statuses to See Progress

Step 2: Color Code Your Calendar

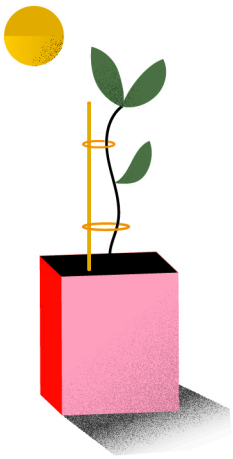


Get Your Process in Order

When your marketing team suffers from a lack of process, it can feel like things are out-of-control.

You have no idea what's going on, who's doing what, and when things are going live.

In this chapter, you're going to learn how to use your CoSchedule Marketing Calendar to get a solid marketing process in place.



What is this guide?

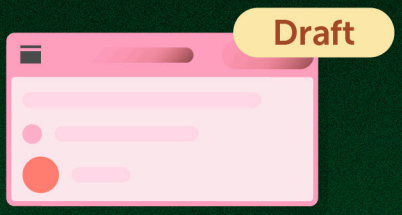
This lesson will walk through how to use the CoSchedule Marketing Calendar as your marketing process.

Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

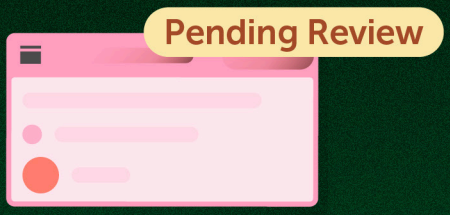
Step 1: Change The Status of a Project

Project cards can help you track what phase each project is currently in. This helps you better prioritize your work and lets you see what's currently being worked on.



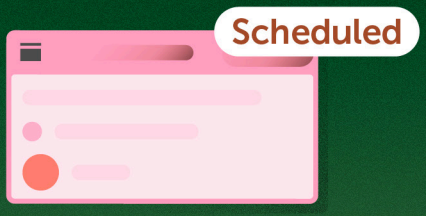
Project WILL NOT publish or go live.

> *Use this when your team is currently working on the project.*



Project WILL NOT publish or go live.

> *Use this if your boss or CEO needs to approve something before it goes live.*



Project WILL publish or go live at the time scheduled.

> *Use this when a project is completed and will go live at a later date.*



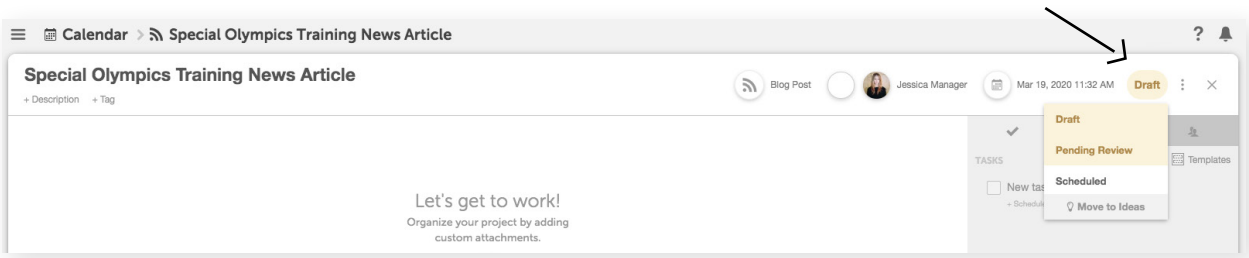
Had been published, sent, or is live on your website/social media channels.

> *Best used to mark which projects have been fully completed by your team.*

To change the status of a project:

1. Click a project card on your calendar.

2. Click the status button in the top right-hand corner to move a project forward.



Step 2: Choose Your Color Labels

Color labels are the most powerful way to add visual organization to your calendar. Here are some of the most popular ways to organize your color labels.



Color Only: Use this if you want a simple way to add visual hierarchy to your calendar.

- *Purple*
- *Yellow*
- *Blue*
- *Green*



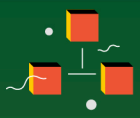
Region: Use this if your team creates marketing materials for different business regions.

- *West*
- *Midwest*
- *Southeast*
- *South*



Product line: Use this if your team creates content to promote different product lines.

- *Gardening*
- *Lawn Care*
- *Snow Removal*
- *Landscaping*



Department/Team: Use this if you need to quickly see which department marketing projects serve.

- *Sales*
- *Demand Generation*
- *PR*
- *Product Marketing*



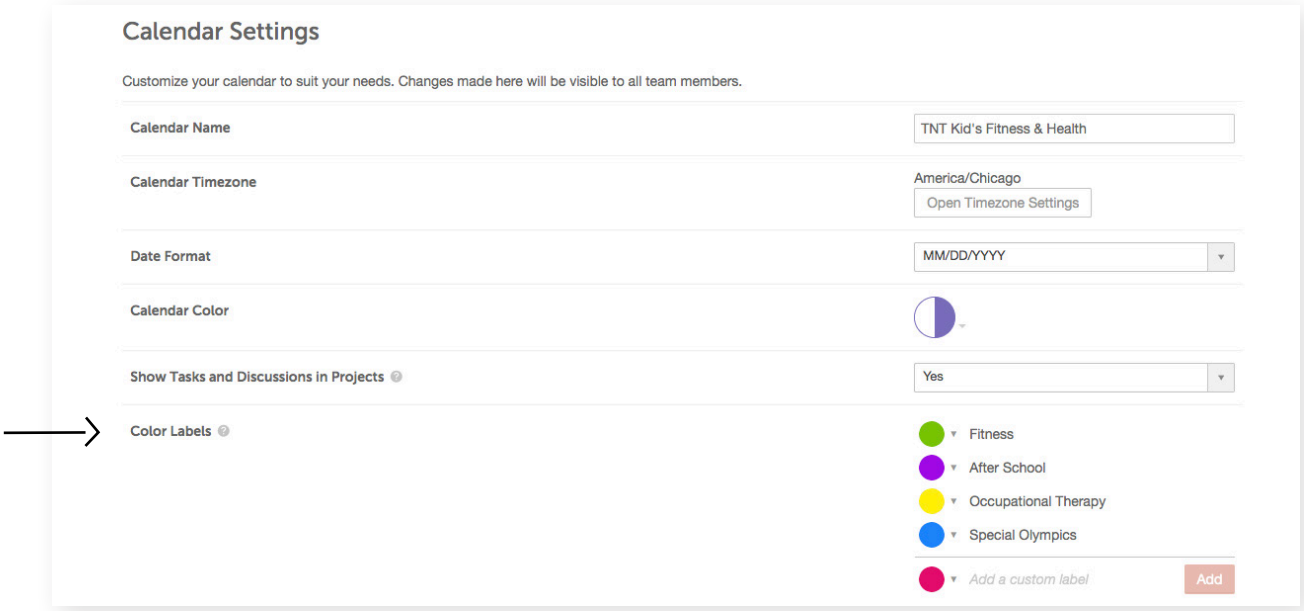
Client: Use this if you're an agency and need to divide your work by client.

- *Country Table Foods*
- *Lynx Machinery*
- *Johnson Ag Products*
- *Red Tree Electric*

Step 3: Apply Color Labels to Your Marketing Calendar

To set up color labels:

1. Click the hamburger menu in the top left-hand corner
2. Toggle down your name.
3. Choose calendar settings.

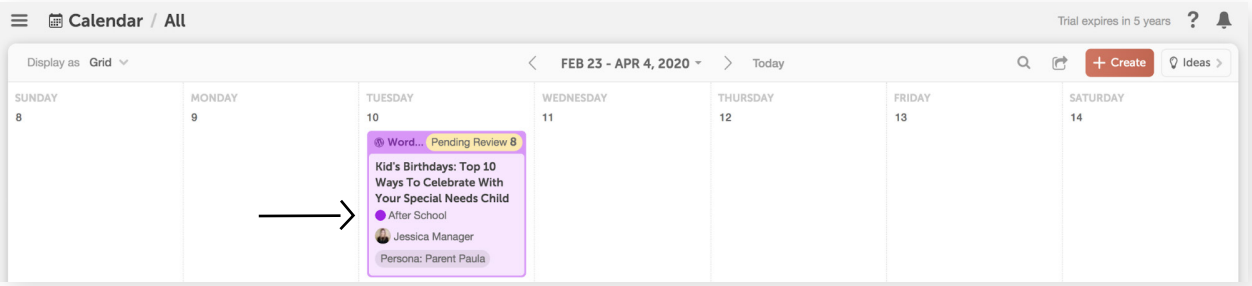




Getting Started Challenge:

Add at least two color labels to your calendar.

After you've set up color labels, you can apply them to your projects to visually distinguish between different projects on your calendar.

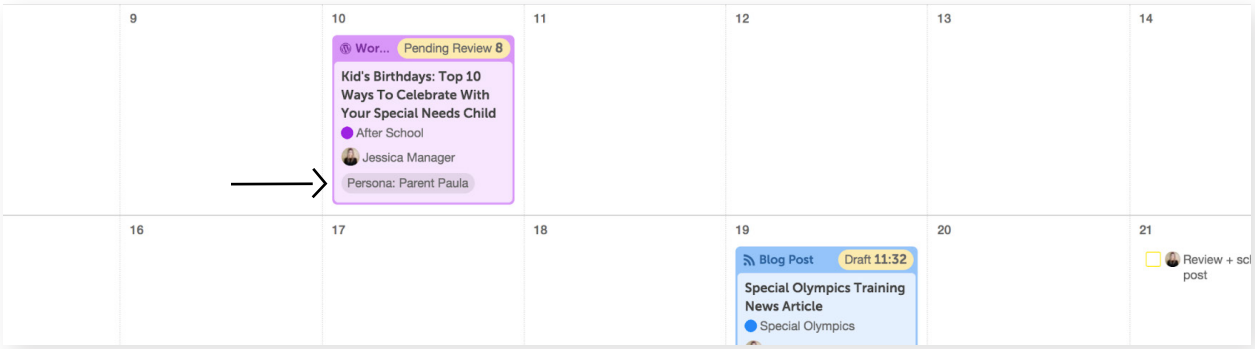


Bonus Step: Apply Additional Metadata to Your Projects

Aside from color labels, there are additional descriptors you can add to your projects for even better visibility.

Tags

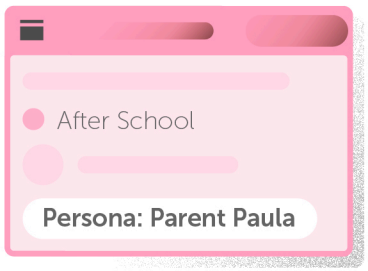
Tags build an added layer of information on top of your color labels. This helps you quickly see from the project card which projects contribute to various goals, target audiences, or initiatives.



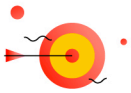
Here are some popular tags to add to your projects.



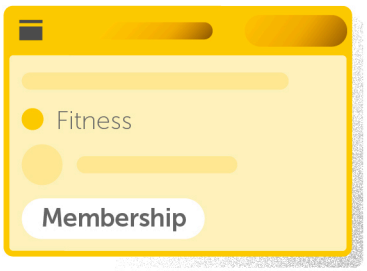
Target Persona



Add personas as a tag to quickly see what content you're publishing for each audience.



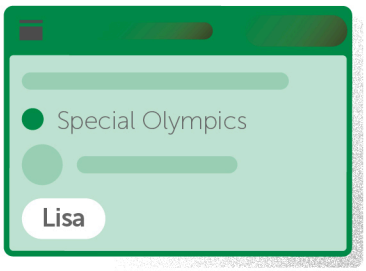
Marketing Goal



Add marketing goals to quickly see which projects contribute to strategic growth.

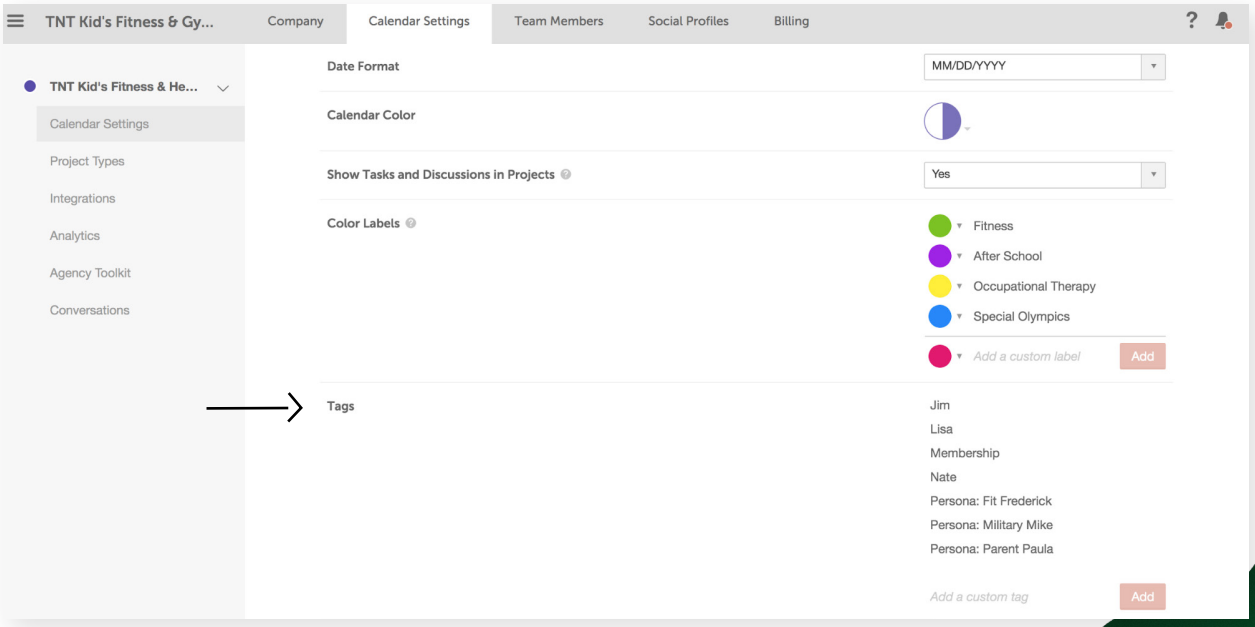


Team Members



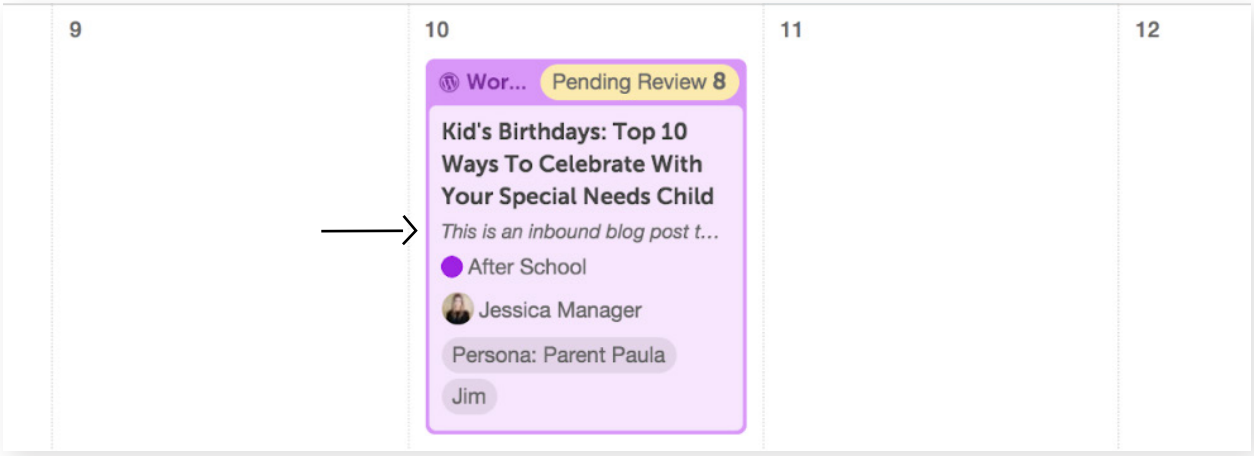
Add team members as a tag to quickly see who is working on each project.

To add tags to your projects, navigate to your calendar settings. Tags are located under your color labels.

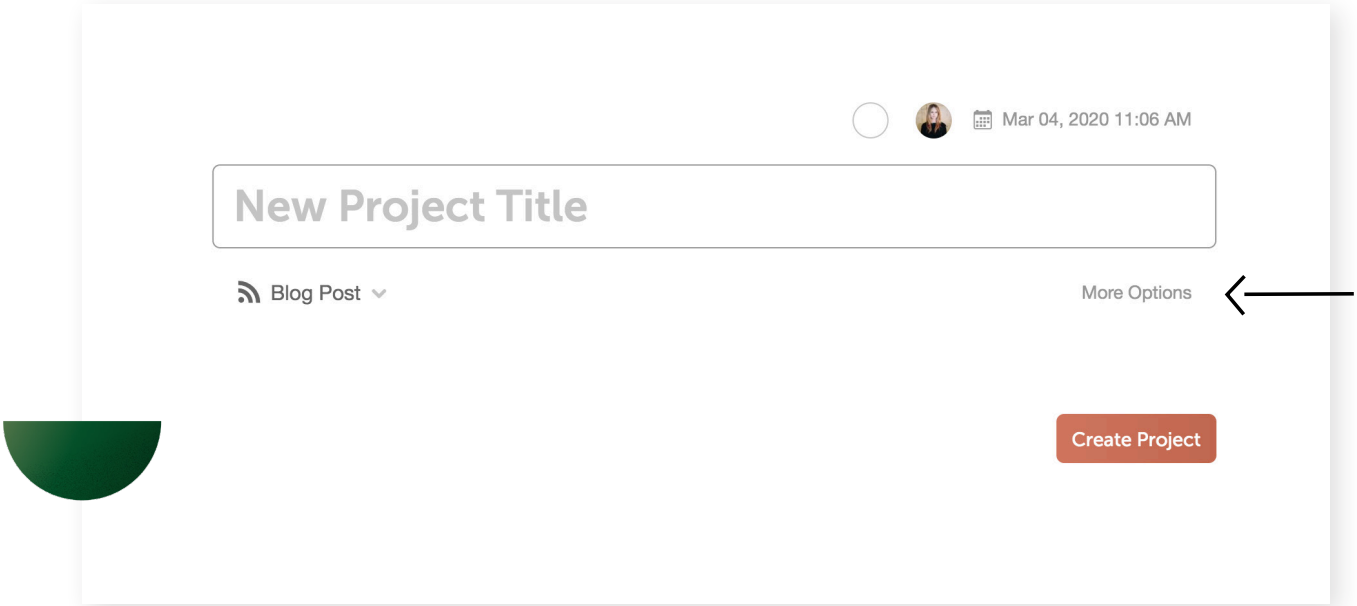


Descriptions

Project descriptions clarify more details about a project. This helps team members quickly understand how to create successful content that meets expectations.

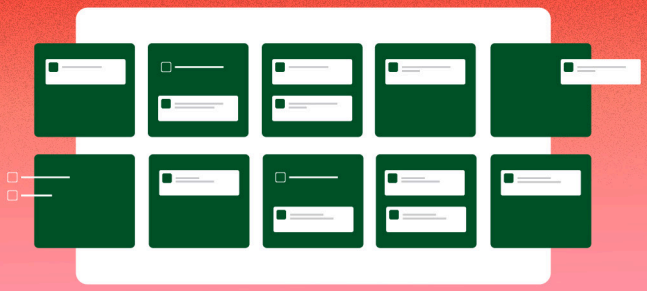


Descriptions can be added by clicking “More Options” when creating a new project.



Start Implementing Your New Marketing Process

GO TO MY CALENDAR



Chapter 3:

Share Your Marketing Calendar With Stakeholders

CoSchedule



In This Lesson

Keep Other Stakeholders Updated

Step 1: Create a Read-Only Link

Step 2: Create a Specialized View to Share



Keep Everyone Updated

There are two different types of people who will use CoSchedule – a user and a stakeholder.

Users are people who you need to invite to CoSchedule. These are people, usually on your marketing team, that need to execute their work by accessing their projects, tasks and social messages directly in CoSchedule.

Stakeholders are people that don't need to use CoSchedule to execute their daily work but could benefit from being in-the-know about what the marketing team is working on.

These are usually managers, CEOs, or members of other departments within your organization like the sales team.

Rather than inviting these individuals to be a "user" in CoSchedule, you can have them access the tool through something called a read-only view. Read-only views allow stakeholders to have marketing visibility without paying for an extra user.

Stakeholders

READ-ONLY ACCESS



- Don't execute their work in CoSchedule.
- Usually a member of a non-marketing team or in a leadership role.

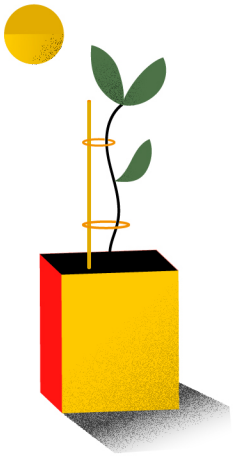
vs.

Users



- Need CoSchedule to see their daily projects, tasks and social messages.
- Usually a member of the marketing team.

In this chapter, you're going to learn how you can use your Marketing Calendar to create and share read-only links.



What is this guide?

This less will walk you through how you can easily share your Marketing Calendar with a read-only link.

Who is this guide for?

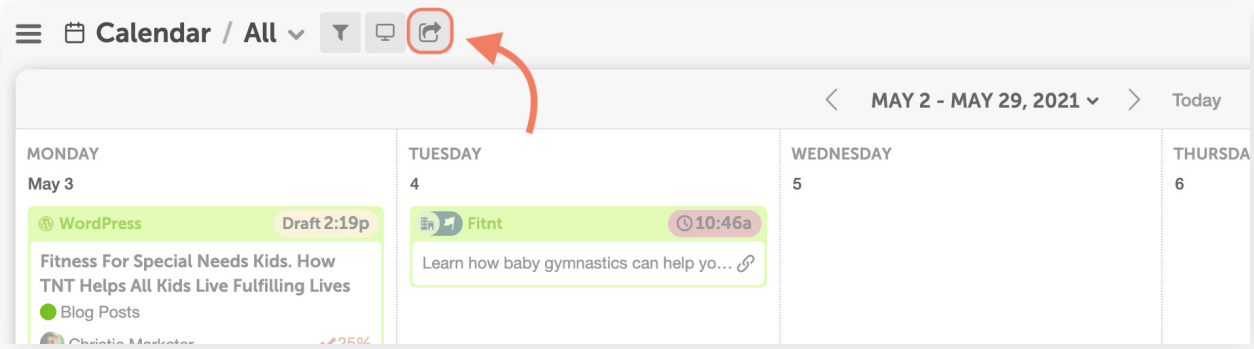
Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Step 1: Create a Read-Only Link

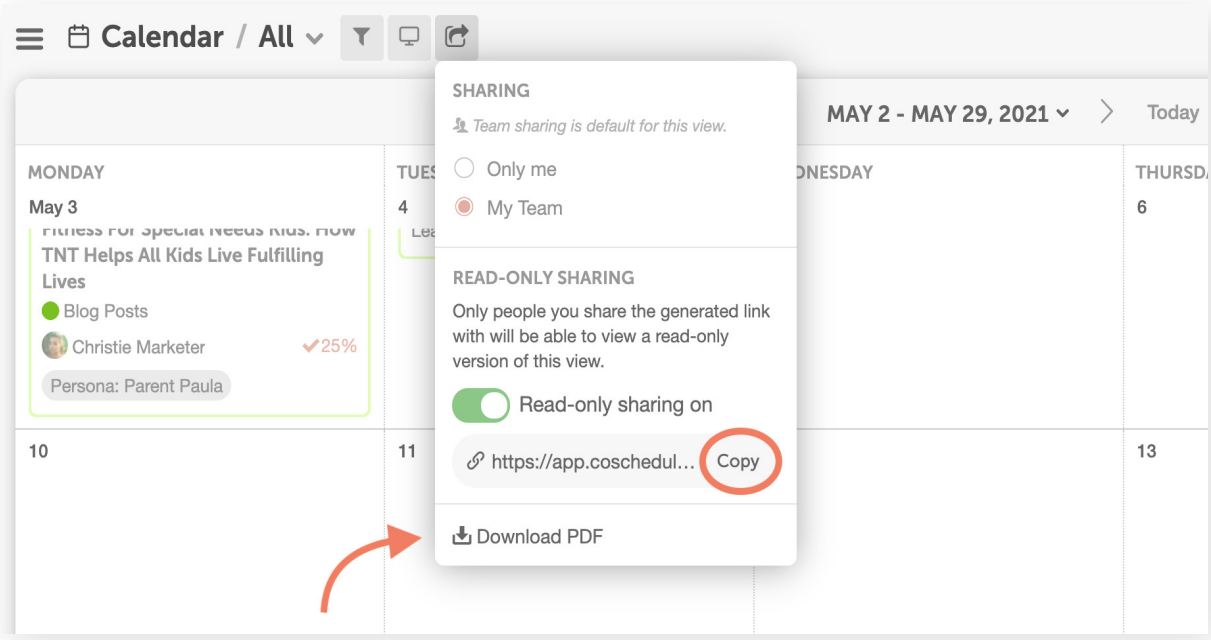
Read-only links let you share unmodifiable versions of CoSchedule with whomever you want.

To share a read-only version of your entire calendar or a saved view:

1. Click into the specific calendar you want to share by selecting it from the views list. Then click the share button in the top left-hand corner of the calendar.



2. Click the link button or **Copy** next to the link to copy the URL. To download a PDF, click **Download PDF**.



3. Send the link or downloaded PDF attachment to anyone who needs to see the calendar.

Step 2: Create a Specialized View to Share

Sometimes stakeholders don't need to know everything your team is doing.

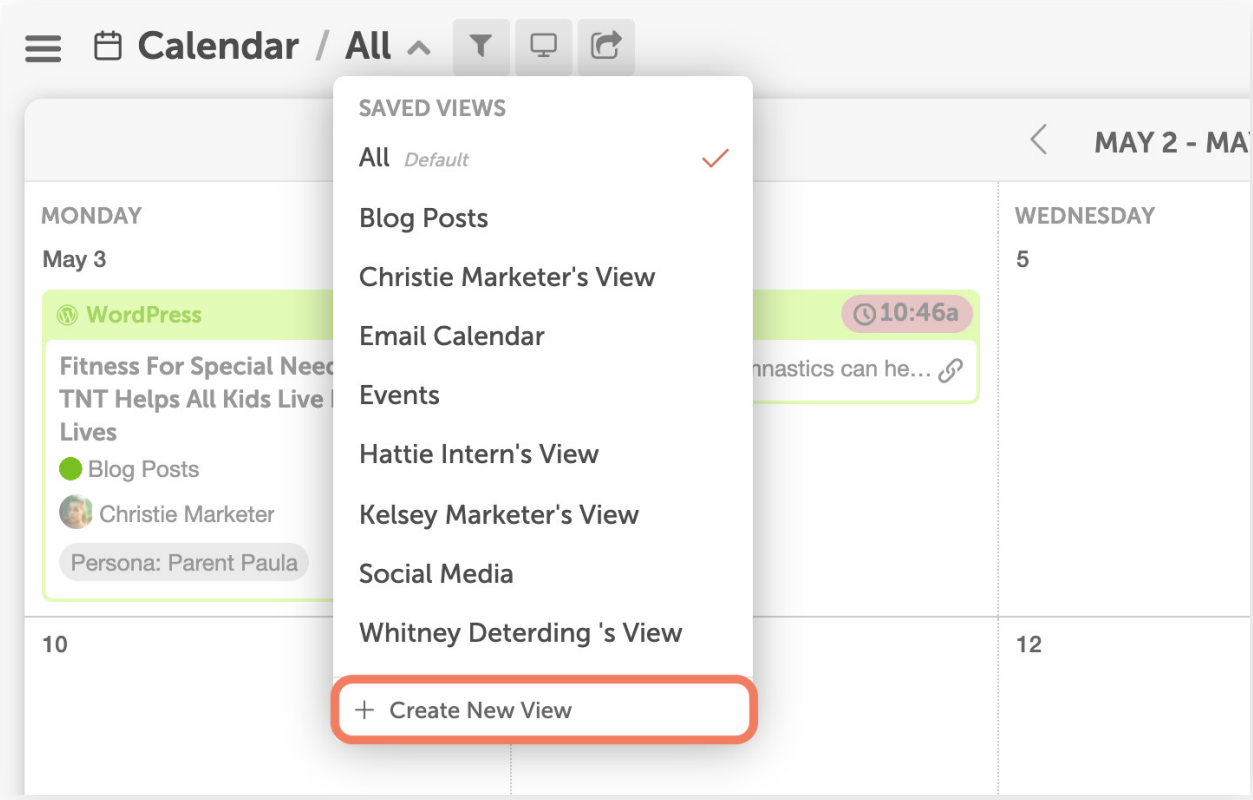
If you need a specialized view for someone in the company, you can create and share a filtered view of the calendar that contains only relevant projects – like only social media messages or blog posts.

Here's how to create a saved filter of your calendar that only contains certain things.

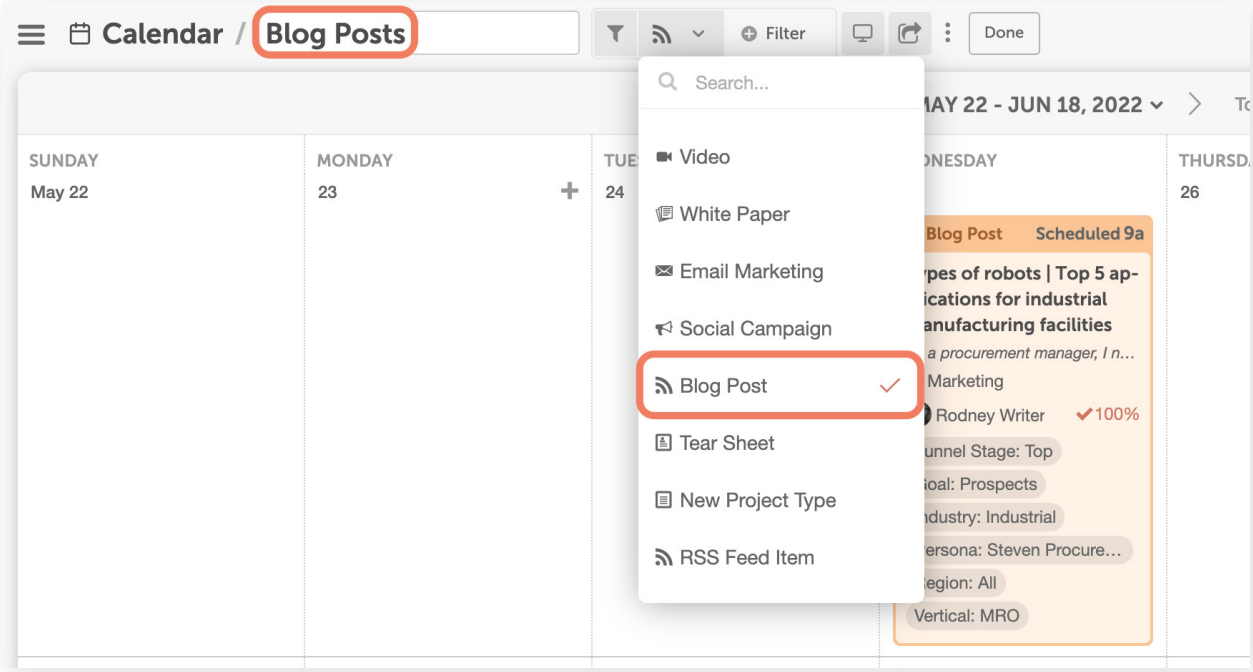
How to Create a Blog Post Saved Filter

This is how to set up a saved view that contains only your blog posts.

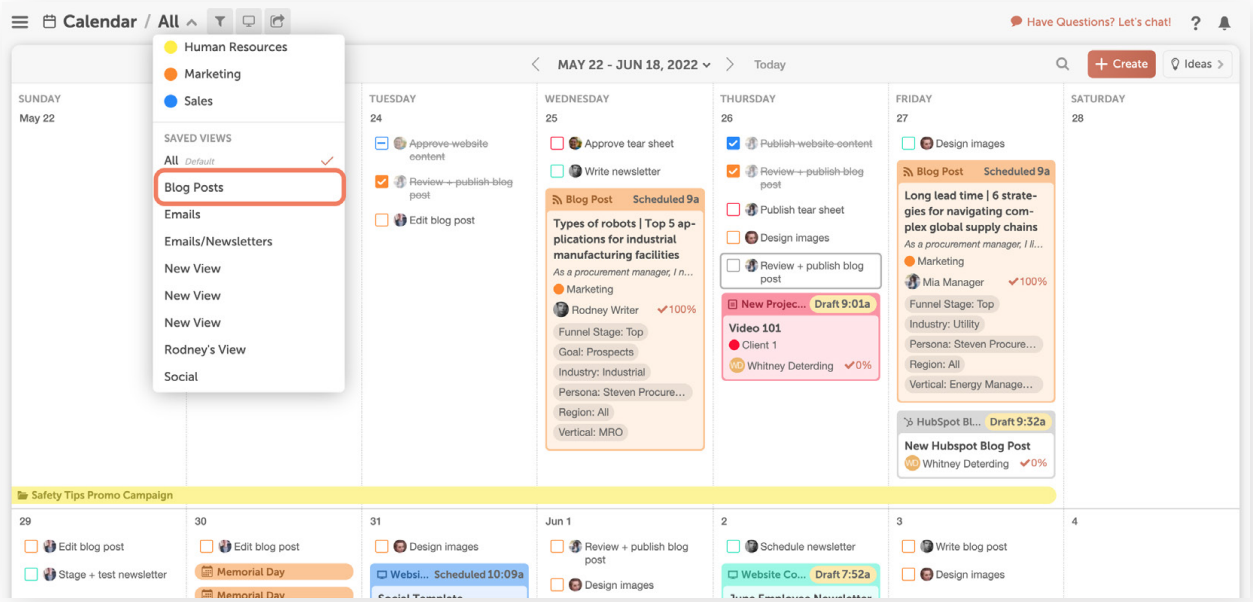
- Click "All" located in the breadcrumb menu. Then choose "Create New Saved View".



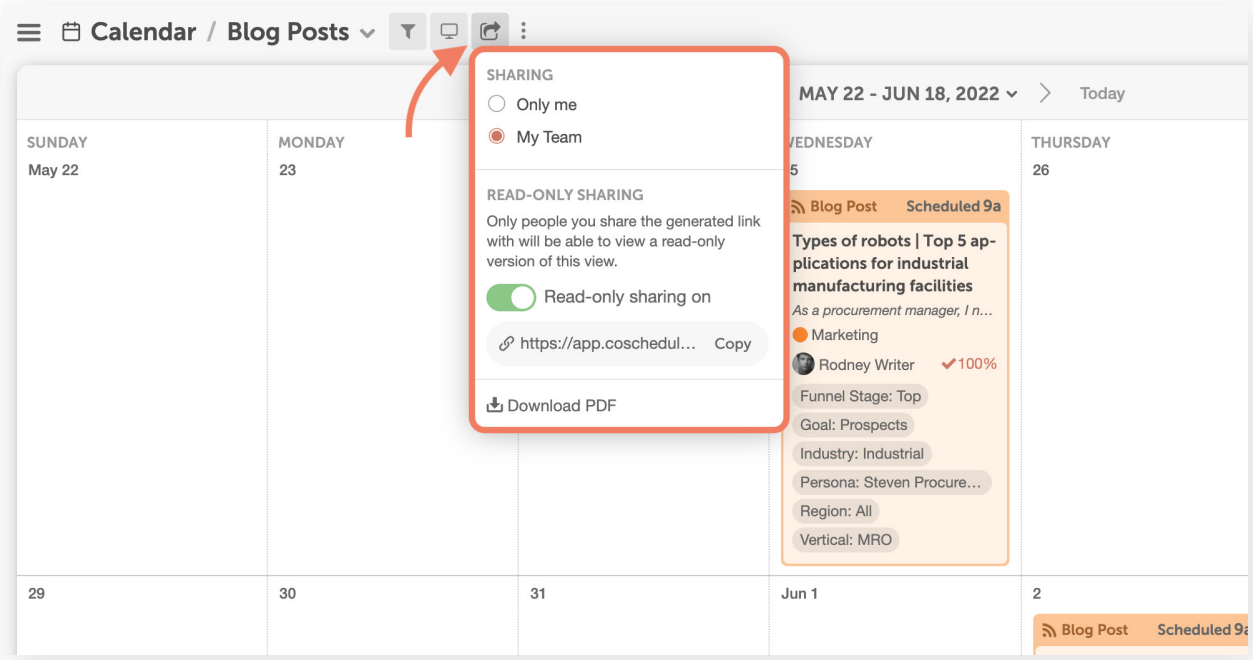
- Name your new calendar filter "Blog Posts" and click **Filter** to select **Blog Post** from the list. Click **Done** to save this new view.



- To access this view, click All in the breadcrumb menu and then choose Blog Post from the drop-down.



To share this view with a stakeholder, click the share icon to copy the link or download the PDF.



How to Create a Saved Filter for Each of Your Clients

Read-only views are a great way to allow clients to quickly see everything your team is working on for them and when each of their projects will be delivered.

To create a saved filter for each client, follow the steps above, but choose:

- Color Label as the Filter Category.
- Then choose the client color label you're creating the filtered view on behalf of.

Start Sharing Your Calendar With Read-Only

GO TO MY CALENDAR



Chapter 4:

Invite Team Members to Join Your Marketing Calendar

CoSchedule



In This Lesson

Getting CoSchedule Ready for Your Team

Step 1: User Roles in CoSchedule

- Owner
- Manager
- Admin
- User
- Guest
- Where to Invite Users and Set Roles

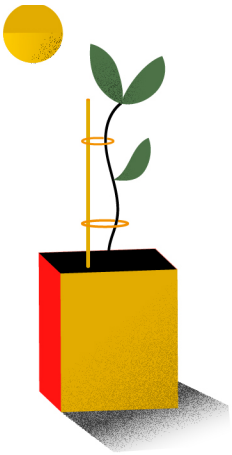
Step 2: Onboard Your Team to CoSchedule



Getting CoSchedule Ready for Your Team

CoSchedule users are the individuals on your marketing team that need to regularly execute their work in CoSchedule. These people need more than just a read-only view.

CoSchedule has several different user roles that can be applied to limit or expand areas of the app, depending on the person's responsibilities.



What is this guide?

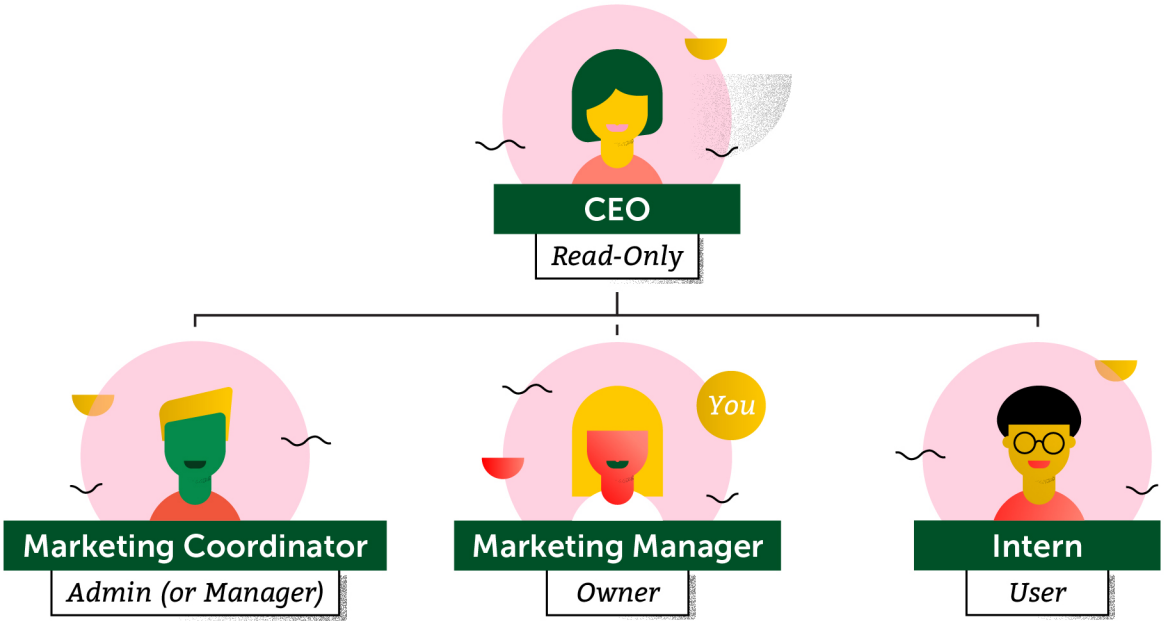
This lesson will walk you through a to-do list that needs to be completed before you invite your team to start using CoSchedule.

Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Step 1: User Roles in CoSchedule

It's a good idea to sketch out who, on your team, will have which roles before you start. Here's an example to illustrate how each role could be implemented in a marketing team.



Owner

An owner in CoSchedule is the individual with the highest access rights.

This individual can:

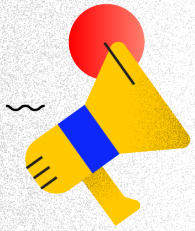
- Change the subscription plan, update billing information, and delete calendars
- View, edit, publish, and delete projects
- View, edit, publish, and delete social messages
- Create and assign tasks to all team members
- Change calendar settings
- Administer social profiles, including the ability to delete profiles from your company
- Administer team members, including the ability to delete team members from your company

Manager

Managers have the same access rights as an owner. However, the owner can rescind rights from the manager as necessary. Managers cannot add additional managers to the account, this can only be done by owners.

These individuals can:

- Change the subscription plan and update billing information
- View, edit, publish, and delete projects
- View, edit, publish, and delete social messages
- Create and assign tasks to all team members
- Change calendar settings
- Administer social profiles, including the ability to delete profiles from your company
- Administer team members, including the ability to delete team members from your company



Who Should Have Manager Access Rights?

- One individual on your team that you trust with billing aspects of CoSchedule.

Admin

Individuals with admin access can:

- View, edit, publish, and delete projects
- View, edit, publish, and delete social messages
- Create and assign tasks to all team members
- Change calendar settings
- Administer social profiles, excluding the ability to delete profiles from your company (Only owners and managers can permanently delete a social profile from the entire company)

- Administer team members, excluding the ability to delete team members from your company (Only owners and managers can permanently delete a team member from the entire company)



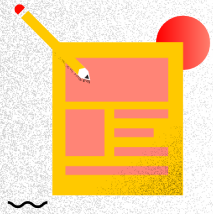
Who Should Have Admin Access Rights?

- Your marketing coordinator or similar position that helps you with planning and execution.

User

Individuals with user access can:

- View, edit, publish, and delete projects
- View, edit, publish, and delete social messages
- Create and assign tasks to all team members



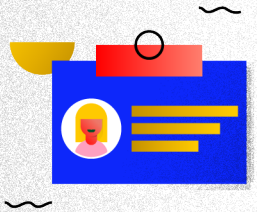
Who Should Have User Access Rights?

- Interns, graphic designers, etc.

Guest

Individuals with guest access can:

- Can view and edit projects only if assigned to them.
- Can complete tasks assigned to them.

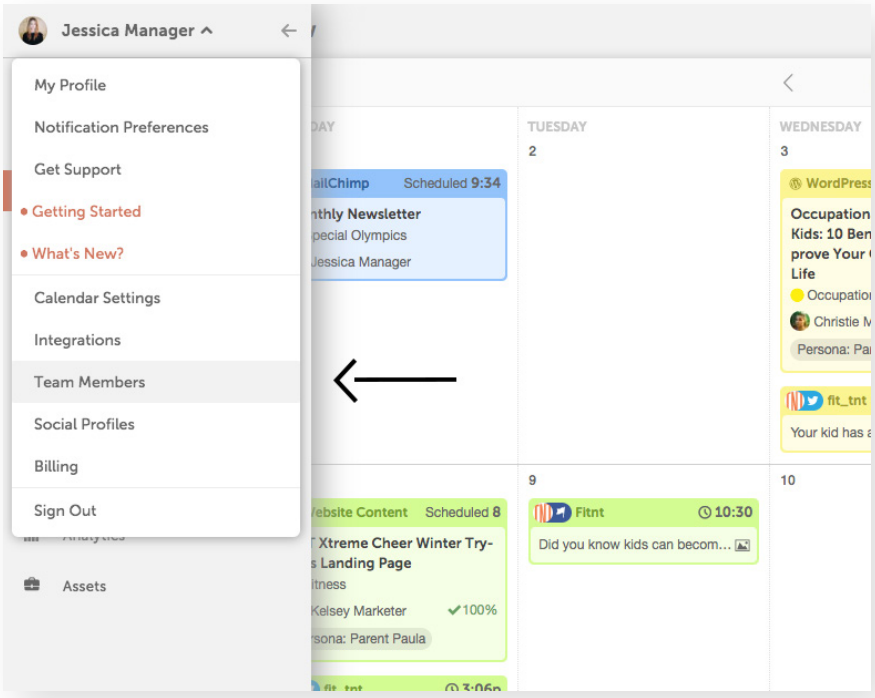


Who Should Have Guest Access Rights?

- External writers.
- Freelancers.
- Event Agencies.
- Vendor partners.

Where to Invite Users and Set Roles

When you're ready to start inviting team members to CoSchedule, user roles can be set by toggling down your name in the left-hand corner and clicking the "Team Members" option.



When introducing your team to CoSchedule, schedule a meeting to get everyone in the same room. We've created a slide deck to help you teach your team:

- What CoSchedule is.
- What problems CoSchedule will solve for your team.
- How CoSchedule will impact their daily work.

CHECK OUT THE SLIDE DECK



Step 2: Onboard Your Team to CoSchedule

Once you've invited your team to use CoSchedule, it's important that they get onboarded to the Marketing Calendar, as well.

Have all of your team complete the CoSchedule Team Member Onboarding Certification course within the first seven days.

It's also available as a digital version or PDF for those who prefer to learn by reading.

Get all your team members CoSchedule certified for free with the CoSchedule Academy.

GO TO COSCHEDULE ACADEMY



Bonus: Action Items for Each Team Member



Owner (You)

- [x] Set up your environment
- [x] Add a few projects to your calendar
- [x] Connect your social media channels and other integrations
- [x] Write out a list of your team members and who should be a user vs. read-only
- [x] Schedule and send invites to onboarding meeting



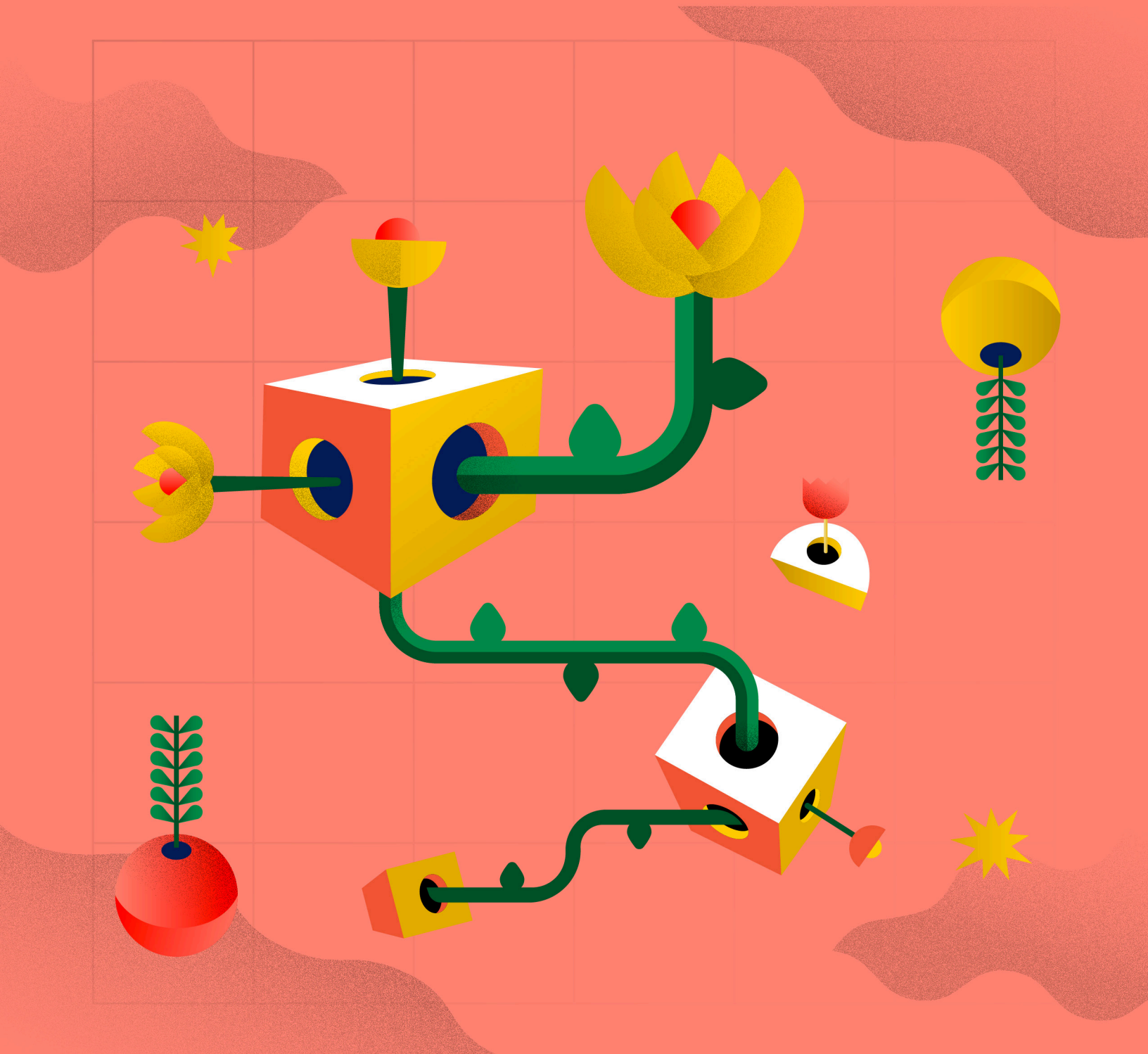
Team Members

- [x] Attend team onboarding meeting
- [x] Take CoSchedule academy course
- [x] Download mobile app

Chapter 5:

Tips For Team Collaboration in CoSchedule

CoSchedule



In This Lesson

CoSchedule Collaboration 101

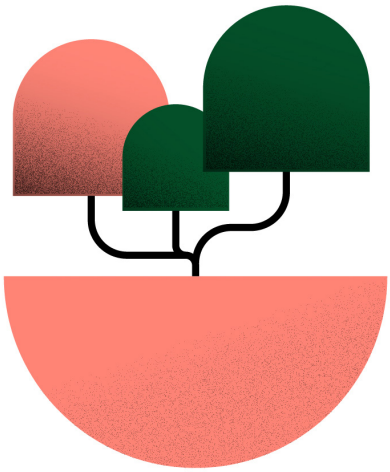
Step 1: Assign a Task

Step 2: Add a Discussion

Step 3: Explore Your Home Dashboard

Step 4: Create a Personal Saved View

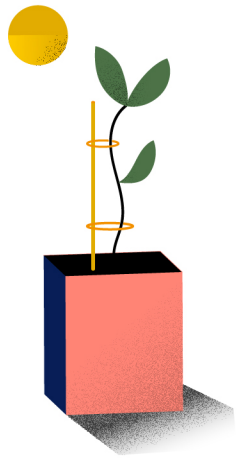
Step 5: Download the Mobile App



CoSchedule Collaboration 101

Collaborating is important whether you have a few people on your team or it's just you and your boss. CoSchedule makes it easy to be accountable for your work and keep others in-the-know.

In this lesson, you're going to learn a few tips to make collaborating seamless.



What is this guide?

This lesson will walk you through tips to help you collaborate better in CoSchedule.

Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Step 1: Assign a Task

Tasks in CoSchedule are attached to Projects. If you have a small team, applying tasks is a good way to make sure that projects are completed on time and everyone knows who's doing what.

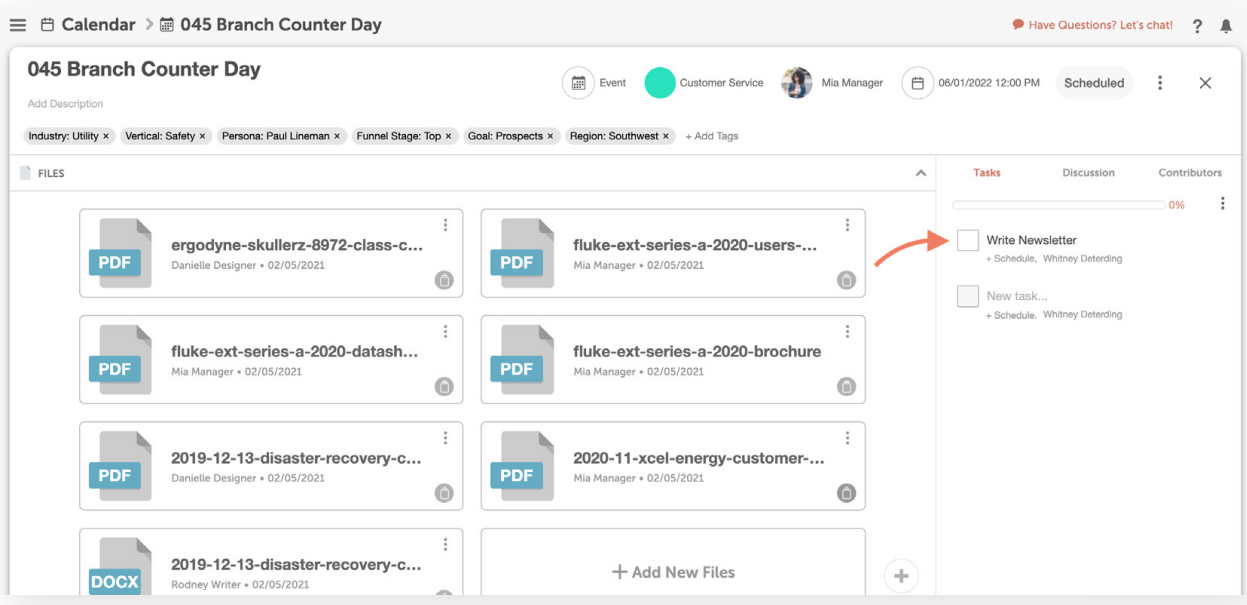
If you are a team of one, applying tasks helps you manage your daily workload with a simple checklist.



Team members get notified when a task is assigned to them. They also get a notification when the task is past due.

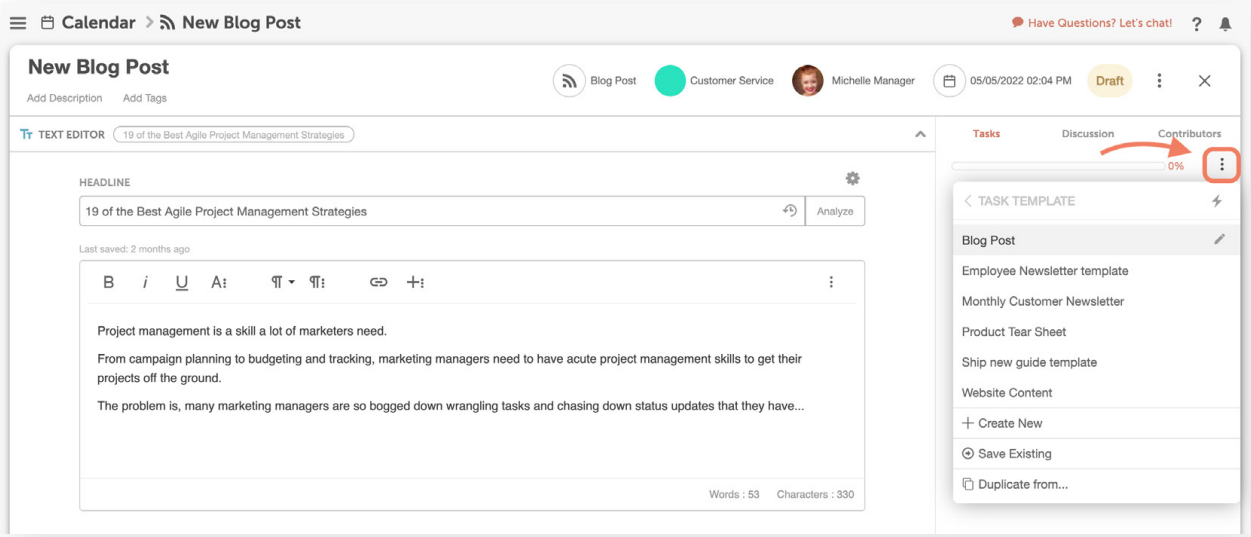
To add a task to a project,

- Open a project on your calendar.
- Add tasks, due dates and task owners on the right-hand side.



You can also take advantage of CoSchedule's built-in task templates. Your CoSchedule Calendar includes a pre-set list of task templates that contain tasks commonly needed for various project types.

Simply click the "Templates" icon and choose from a standardized checklist. Once applied, see the checklist magically apply to the project.

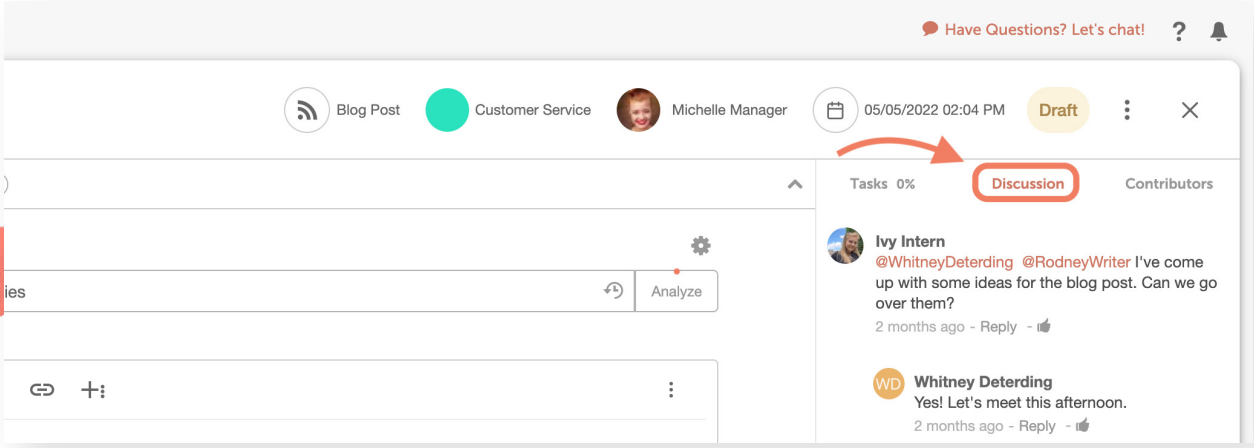


Step 2: Add a Discussion

Discussions are a great way to collaborate with your team and keep everyone informed without lengthy email threads.

If you @ mention someone, the person will receive a notification that a project needs their attention.

You can also attach things directly in the comments section like images, new text changes, or any type of document that pertains to the project.

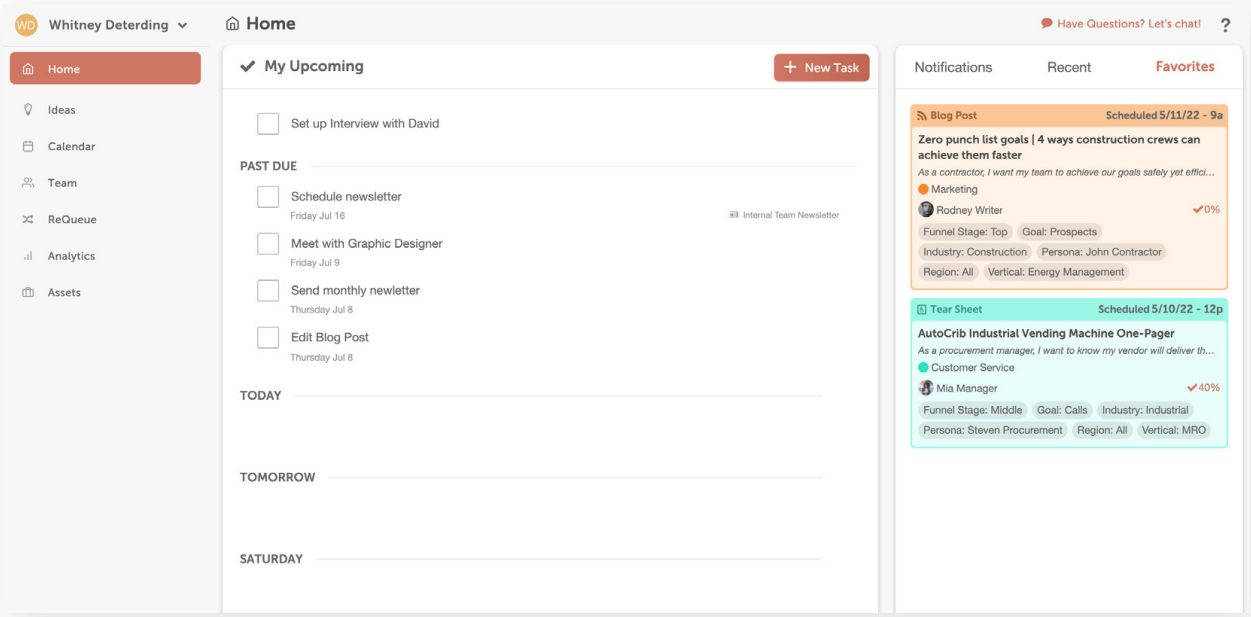


Step 3: Explore Your Home Dashboard

The Home Dashboard in CoSchedule contains a list of all your upcoming tasks. It's a good place to check out first thing in the morning and understand what you need to get accomplished that day.

You'll also see...

- **Your notifications** - things like comments that need your attention, when tasks have been completed by team members, etc.
- **Your recent projects** - this is a list of all the marketing projects you've recently been working in. This makes it easy to jump back into where you left off.
- **Your favorites** - if you need quick access to any project, add it to your favorites list to quickly find it from your Home Dashboard.



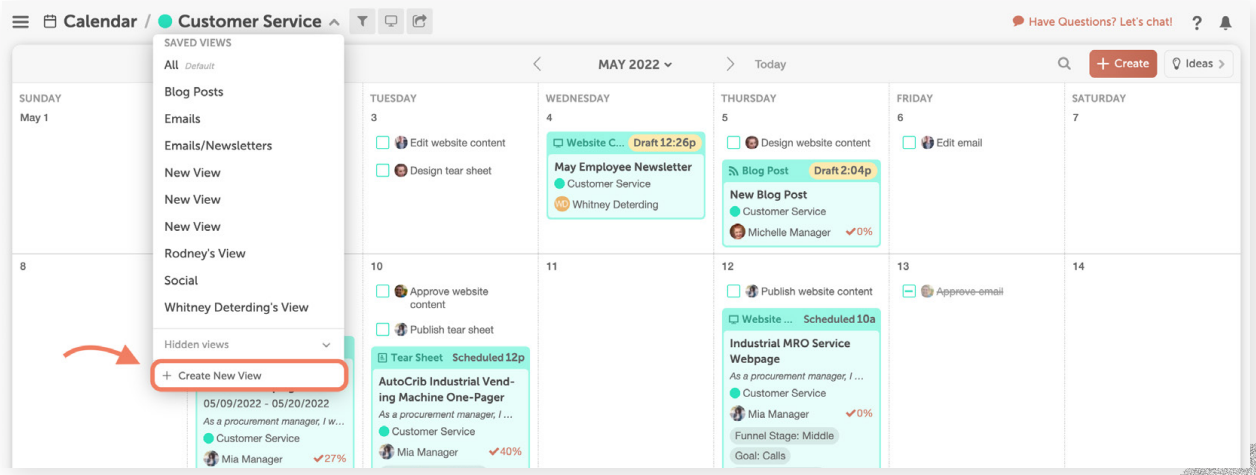
Step 4: Create a Personal Saved View

A personal saved view is a filtered view of your Marketing Calendar that only contains your projects and tasks. It clears out the clutter of the calendar so you can focus on the things that pertain to you.

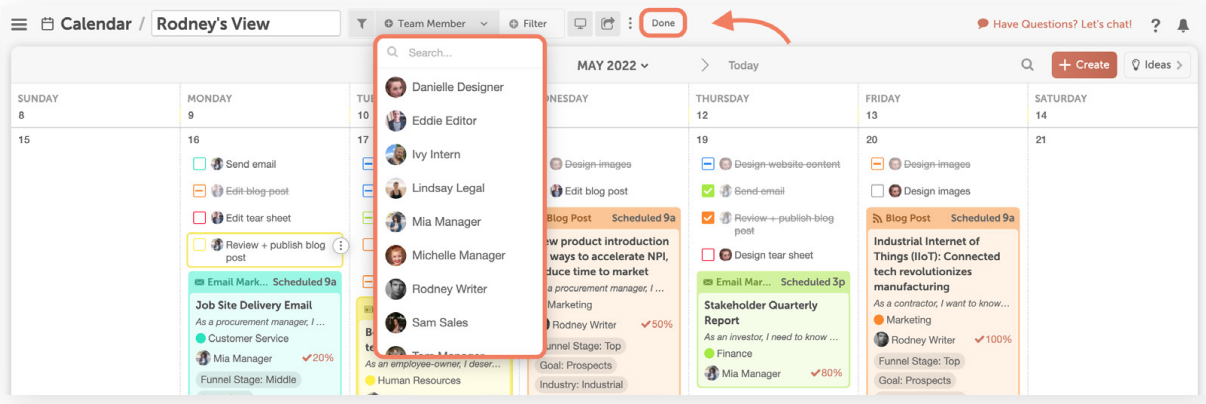
It's a good idea to have all Coschedule users on your team to create a personal saved view for themselves.

Here's how to do it.

1. Click "All".
2. Choose "Create new saved view".



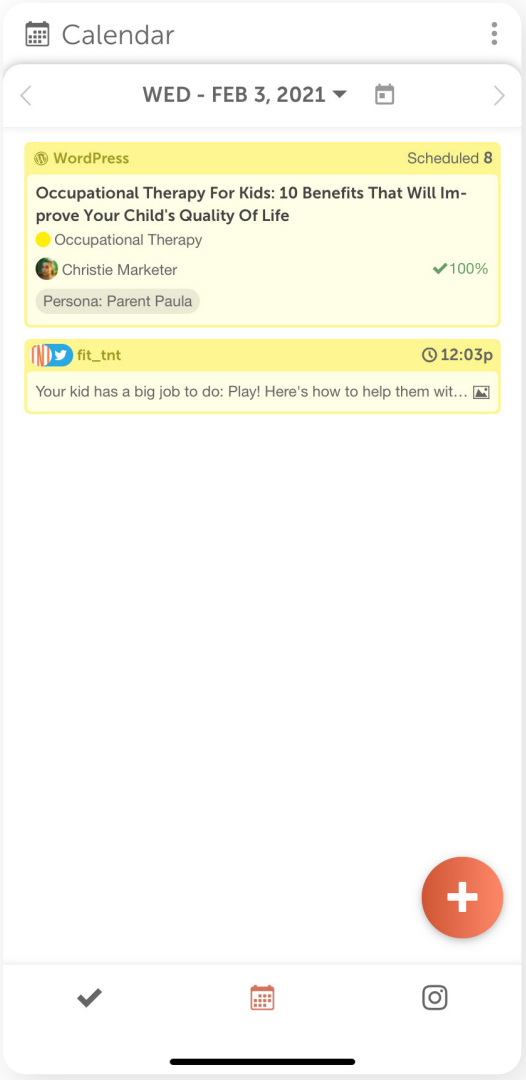
3. Name the saved view "(Your Name)'s View".
4. Click "Filter" to customize the filters for this view.
5. Click "Team member" and find your name.
6. Then click "Done".



To find your personalized saved view, Click "All" from the breadcrumb menu and choose the view from the drop-down menu.

Step 5: Download the Mobile App

CoSchedule's mobile app allows you to stay updated on all your projects even if you're not at your computer.



You can do things like:

- Publish projects directly from your phone.
- See your tasks for the day.
- Assign tasks to team members when you're on the go.

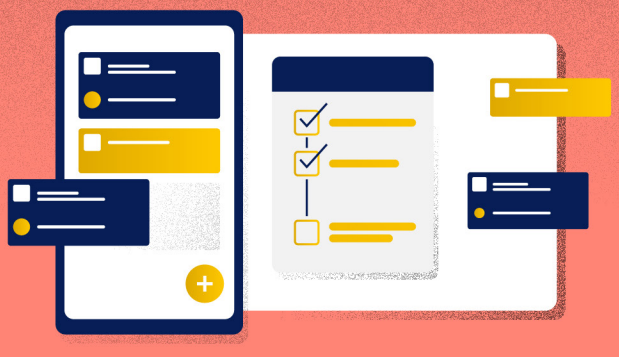
To use the mobile app, download on the App Store. Or get it on Google Play.

Download on the App Store

GET IT ON Google Play

Head Over to Your Calendar to Implement the Items in This Chapter

GO TO MY CALENDAR



Chapter 6:

Keep Everything in One Place with Projects

CoSchedule



In This Lesson

Get Started with Attachments

Create Your Content With The Text Editor

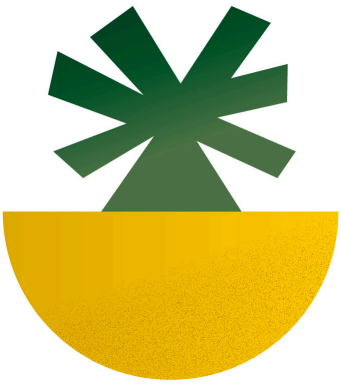
Include All Related Assets and Files

Compose and Collaborate on Content with Google Docs

Attach Office 365 Documents

Group Related Projects Together as a Campaign

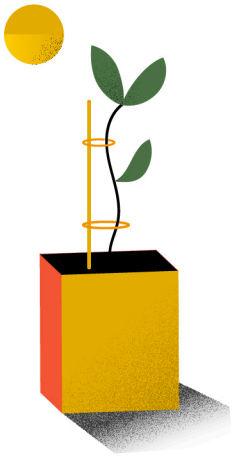
Make Social Messages Part of The Content Creation Process



Keep Everything in One Place

Projects in CoSchedule help you bring everything into one place, so you can easily see your progress and get organized.

In this lesson, you're going to learn a few ways to make the most of out planning a marketing project in CoSchedule.



What is this guide?

This lesson will walk you through tips and tricks to get the most out of a marketing project in CoSchedule.

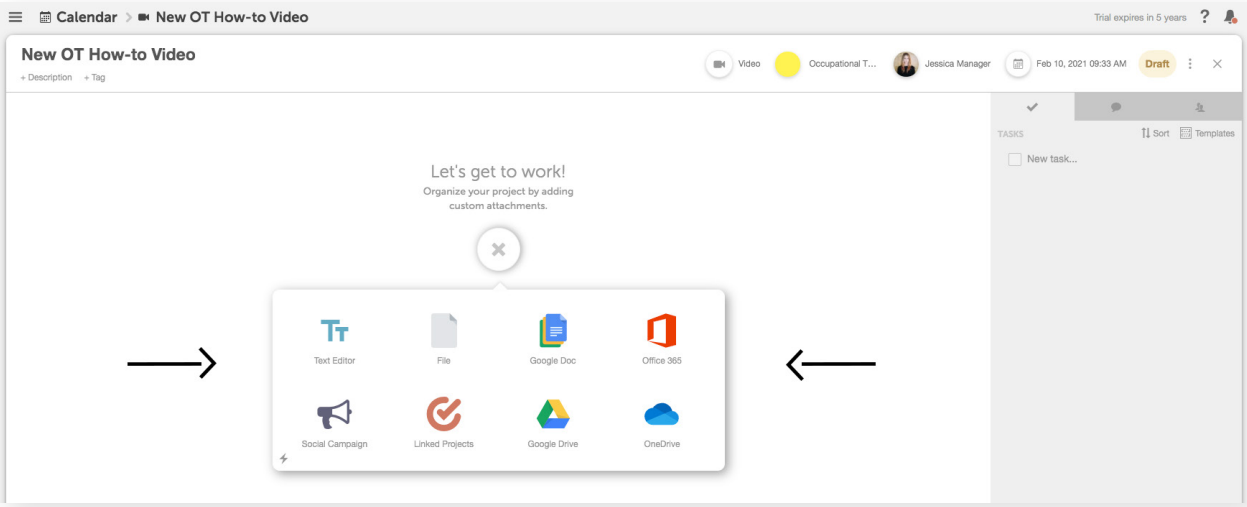
Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Get Started with Attachments

When you open a project on your calendar, you'll see a list of attachments pop up. Attachments make it easier to execute your projects by keeping everything in one place.

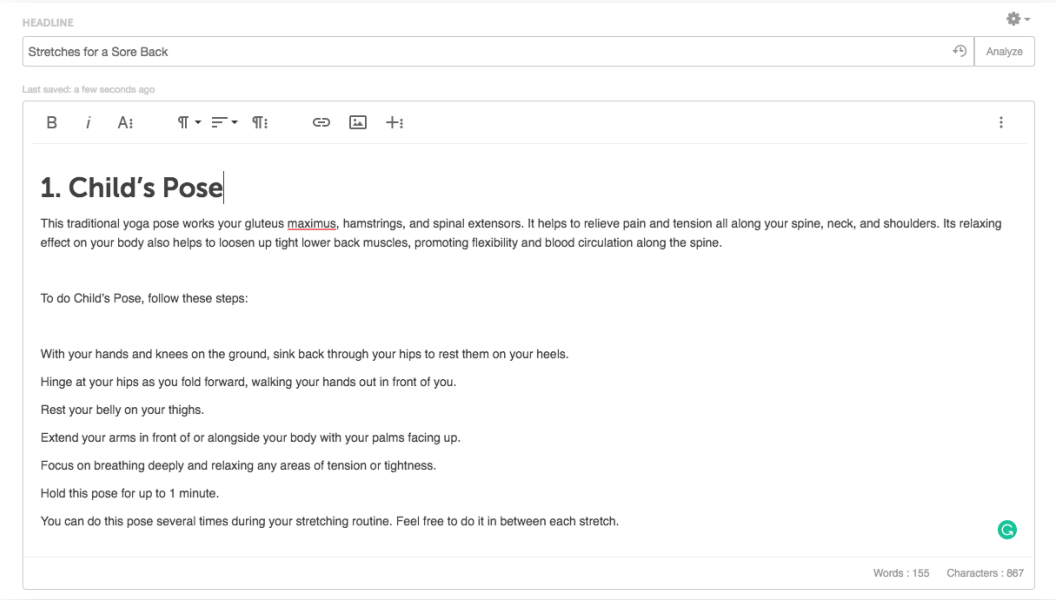
Here's a list of each attachment type and how you should use it.



Create Your Content With the Text Editor

The text editor allows you to write content directly in CoSchedule. You can compose your blog post, video script, or any type of written document for your project.

You could also use the text editor to leave written feedback or propose changes to a project.



Pro Tip:

We're helping you create better content. Use CoSchedule's Famous Headline Analyzer or Email Subject Line Tester directly from the text editor. Simply click the "Analyze" button to create a more powerful headline or subject line.



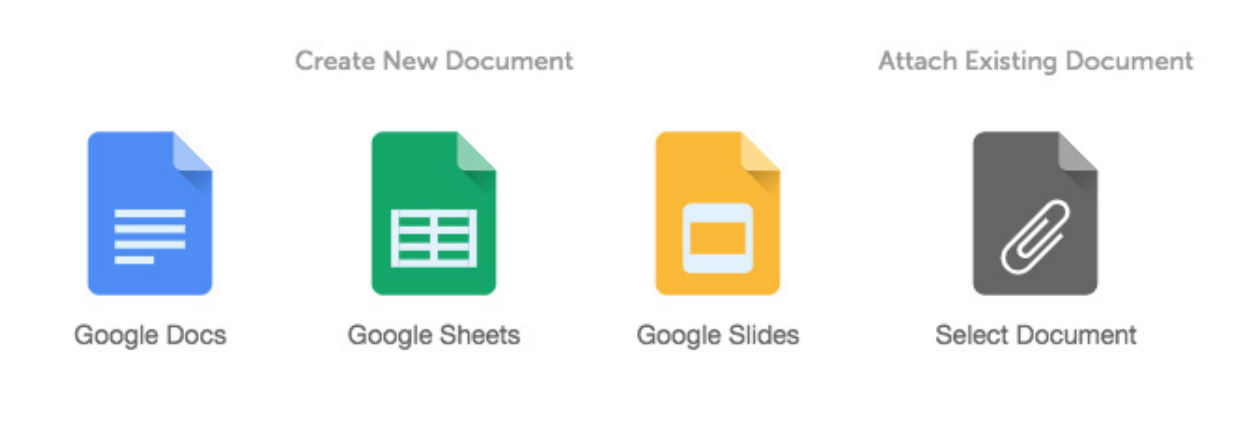
Include All Related Assets and Files

Attaching files allows you to keep all of a project's supporting documents in one place. There are a few different ways you can attach files to your marketing projects in CoSchedule.

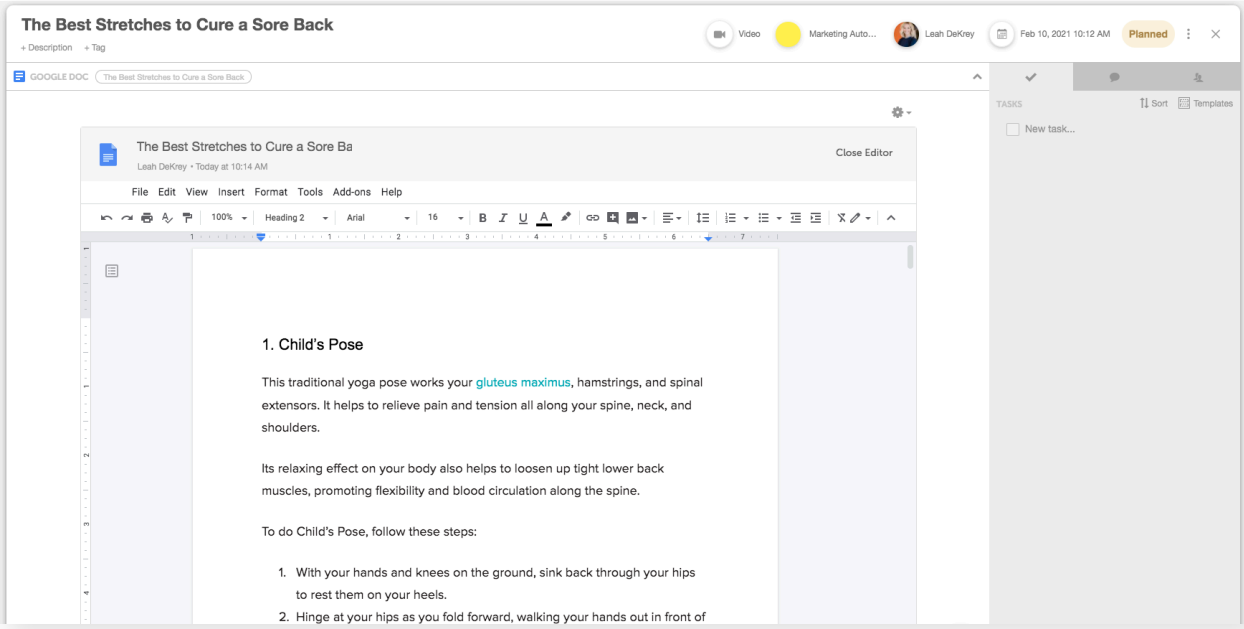
1. **File** - This allows you to attach a file directly from your computer's hard drive.
2. **Google Drive** - This allows you to attach a file from your Google Drive account.
3. **One Drive** - This allows you to attach a file from your Microsoft OneDrive account.

Compose and Collaborate on Content with Google Docs

By selecting Google Docs, you can create a new document in your Google Drive without having to leave CoSchedule. You can also attach an existing Google Drive document. This is best used for creating the project's main deliverable.

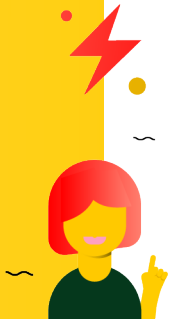


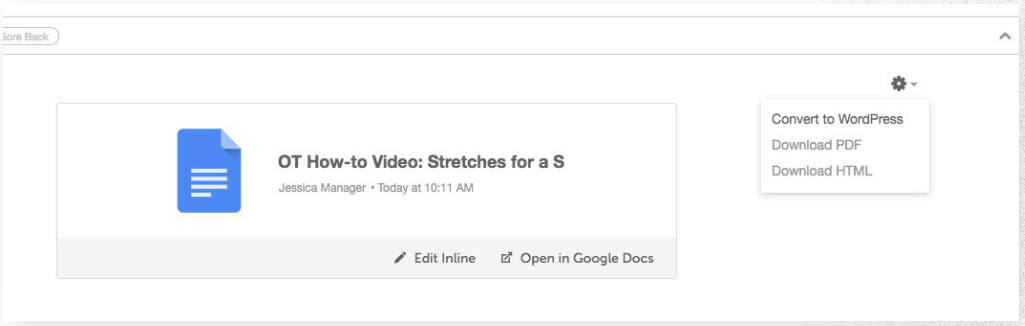
Select the "Edit Inline" option to make changes or add comments to a Google Doc directly from your CoSchedule marketing project. This unlocks all the features of the Google Doc editor without having to open another tab.



Pro Tip:

Click the gear after you've added a Google Doc or text editor attachment to convert the content to a WordPress blog post. CoSchedule will grab all the images, text, and links and automatically create a post over in your WordPress account.



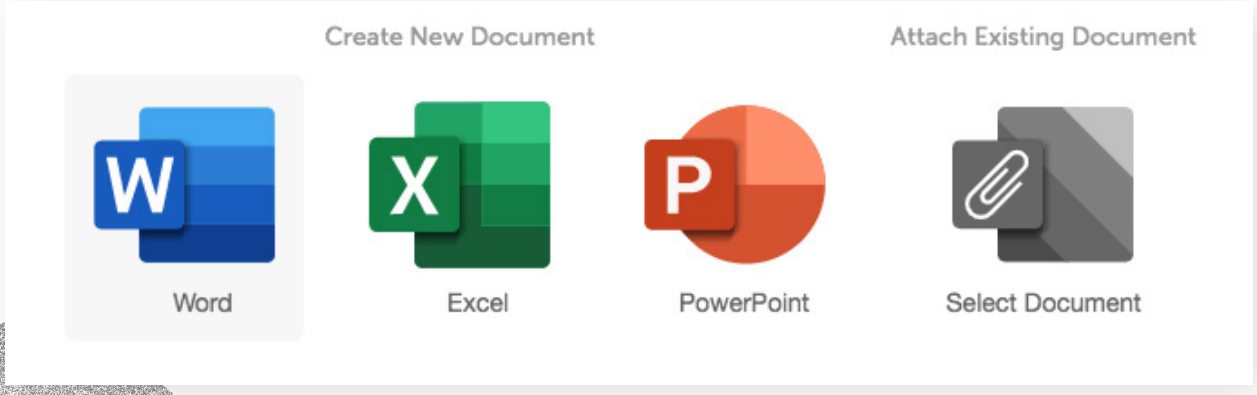


Attach Office 365 Documents

Selecting to add an Office 365 attachment functions similarly to the Google Doc option outlined in the previous section.

You can create a new Word Doc, Excel Spreadsheet, or PowerPoint presentation from a marketing project. One thing to note, however, is that Office 365 does not have the same inline editing capabilities as Google Docs.

If you want to make edits to an Office 365 document, you'll have to do it directly from Word, Excel, or PowerPoint.

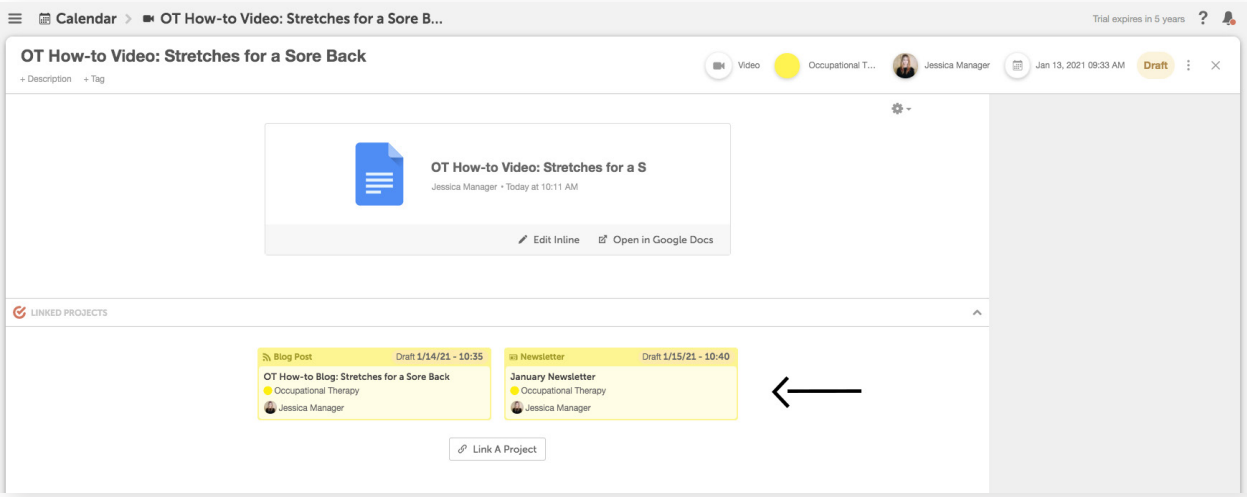


Group Related Marketing Projects Together as a Campaign

Adding a Linked Project is a good way of connecting two or more projects that either support one another or, perhaps, function together as a marketing campaign.

In this example, there are three projects that are connected to one another.

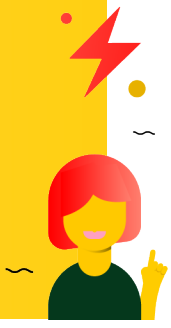
1. A how-to video
2. A written blog post that outlines the content of the video
3. A newsletter that distributes the video



Linking projects together makes it easier to find and reference items that work toward the same goal.

Make Social Messages Part of the Content Creation Process

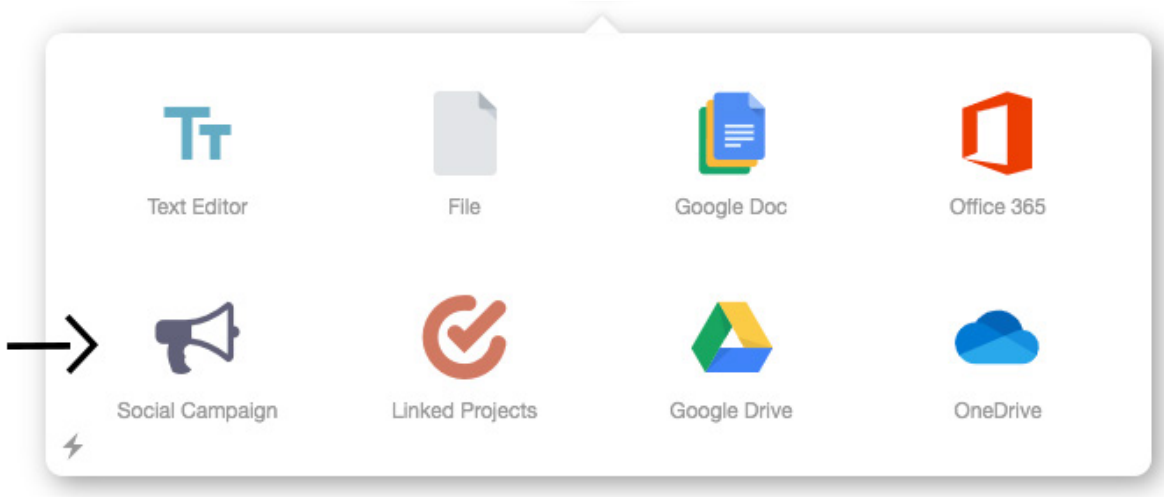
Perhaps one of the most powerful attachments, CoSchedule allows you to schedule your social messages directly in a marketing project. This makes writing your social messages a part of the content creation process, not an afterthought.



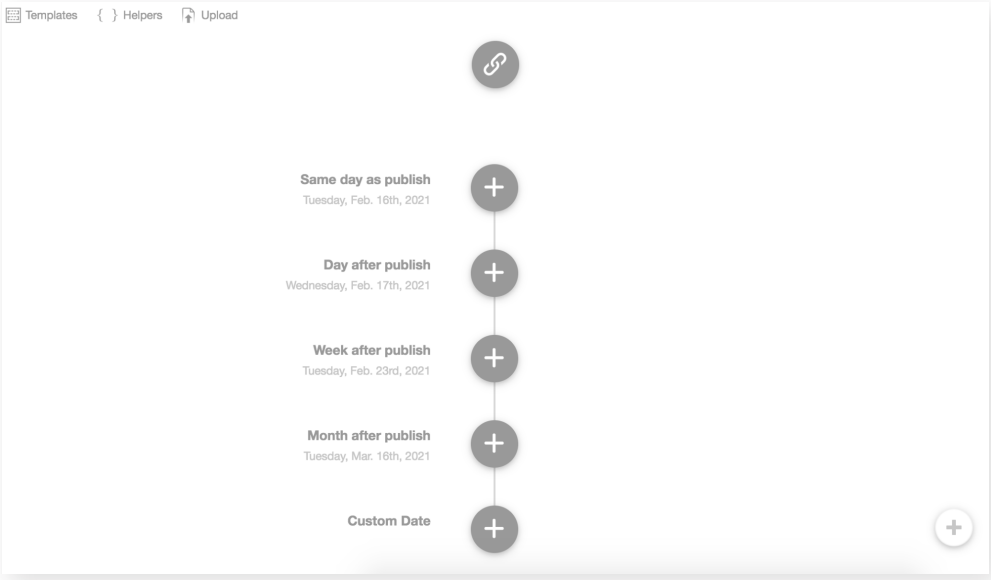
Pro Tip:

A social campaign is a string of social messages that extend over a period of time. Creating a campaign of social messages—rather than a stand- alone social message—drives more traffic to your content.

To add a social campaign to your marketing project, choose the attachment option that says “Social Campaign”.

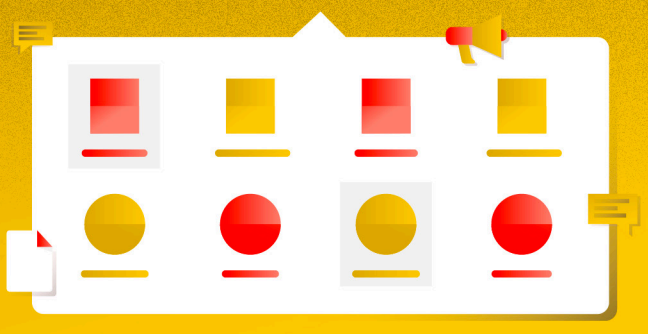


From there, click the plus sign on a day you’d like to schedule a social message. Then, use the social composer to create your social message.



Head Over to Your Calendar to Add Some Attachments

GO TO MY CALENDAR



Chapter 7:

Maximizing Your Social Media Strategy with CoSchedule

CoSchedule



In This Lesson

Step 1: Creating Social Messages in CoSchedule

Step 2: Schedule a Stand-alone Message

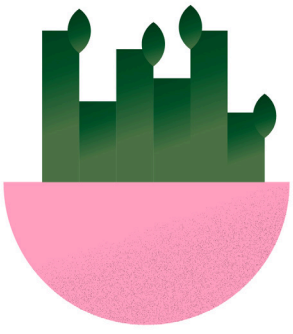
Step 3: Schedule a Social Media Campaign

- Attach a Social Campaign to a Marketing Project
- Schedule a Stand-alone Social Campaign

Step 4: Advanced Social Media Strategy

- Use the Social Media Optimizer to Write Better Social Messages
- Use Best Time Scheduling to Post at the Right Times
- Use ReQueue to Get More Traffic to Your Content
- Use the Conversations Inbox to Stay Updated on Your Social Media Mentions

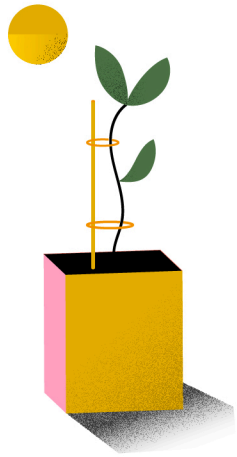
Step 5: Use Social Analytics to Fine-tune Your Strategy



Social Media with CoSchedule

CoSchedule is the only marketing calendar that lets you plan all your marketing projects AND write, schedule, and fine-tune your social media strategy in the same place.

This chapter will highlight all the best ways CoSchedule will help you get proactive and quit wasting time with the painful and time-consuming parts of social media.



What is this guide?

This lesson will walk you through the best way to maximize your social media strategy with CoSchedule.

Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

What is this guide? This lesson will walk you through the best way to maximize your social media strategy with CoSchedule.

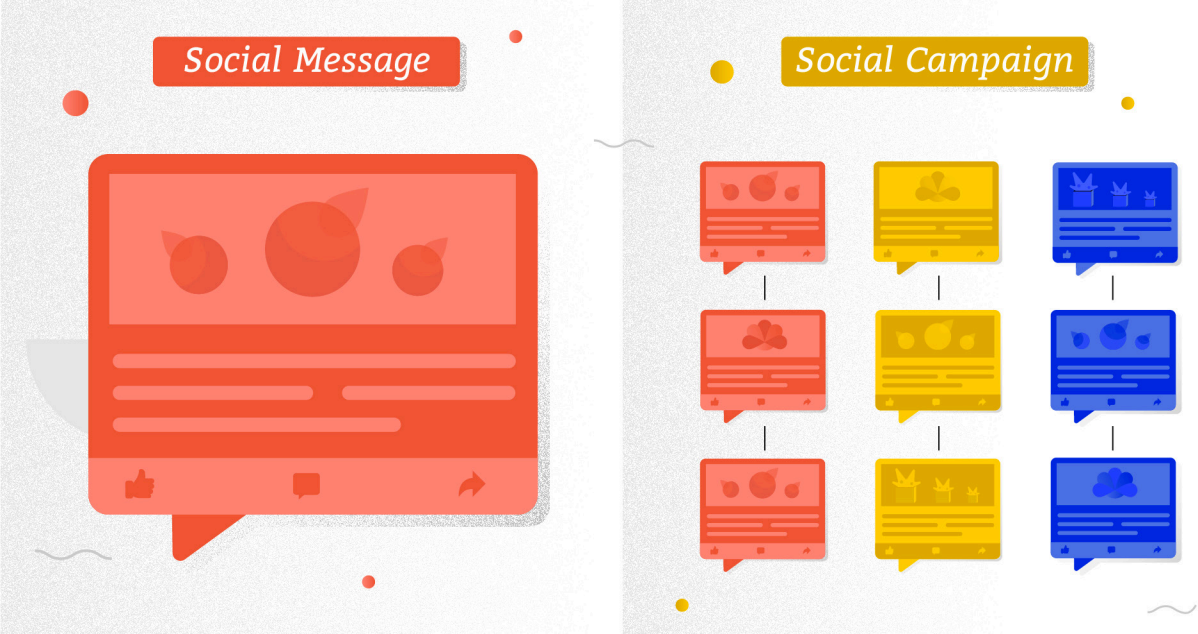
Who is this guide for? Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Step 1: Creating Social Messages in CoSchedule

There are two different ways to create social messages in CoSchedule – a stand-alone social message and a social campaign.

Stand-alone social messages are great for one-off things that you want to post on social media.

Social campaigns are several social media messages that get posted to your social channels over an extended period of time. Social campaigns are usually used to promote things like blog posts, videos, events, or webpages.



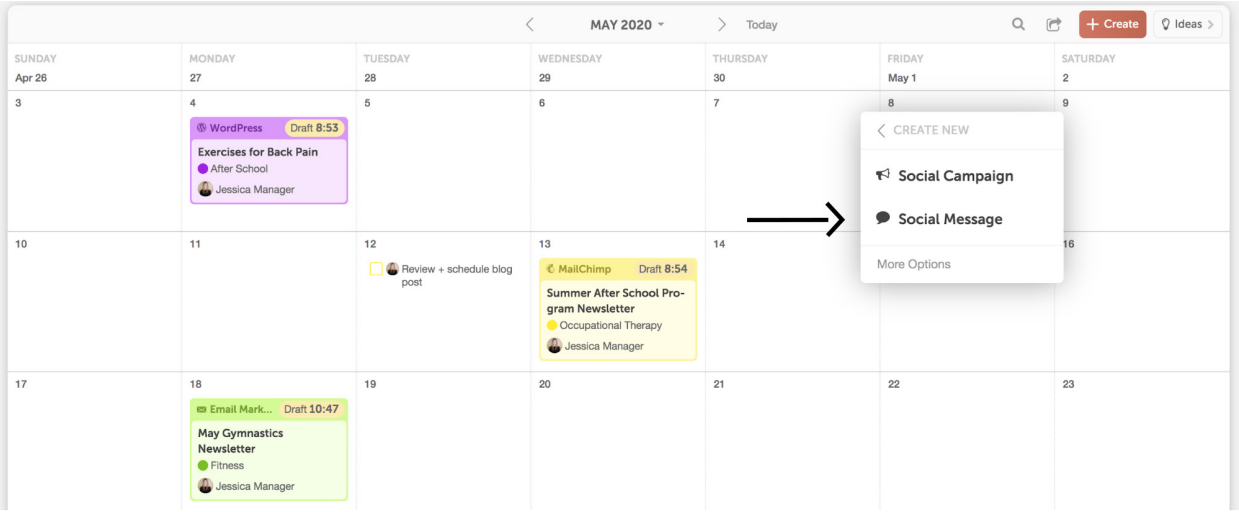


Pro Tip:

To drive the most traffic to your content, try promoting your content on social media several times over the course of a few weeks.

Step 2: Schedule a Stand-alone Message

To schedule a stand-alone social message, click to create a new project on your Marketing Calendar. Choose “Social” and then “Social Message”.



This will open the social composer where you can create a stand-alone social media message.

Step 3: Schedule a Social Media Campaign

Social media campaigns ensure that your audience is more likely to see your content, which drives more traffic and helps improve the return on investment for all your hard work.

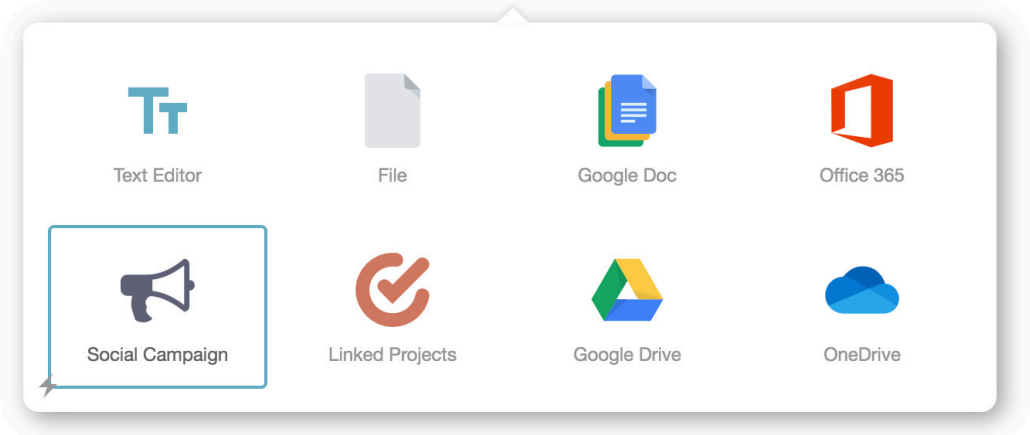
There are two ways to schedule a social media campaign in CoSchedule.

1. Attach a Social Campaign to a Marketing Project

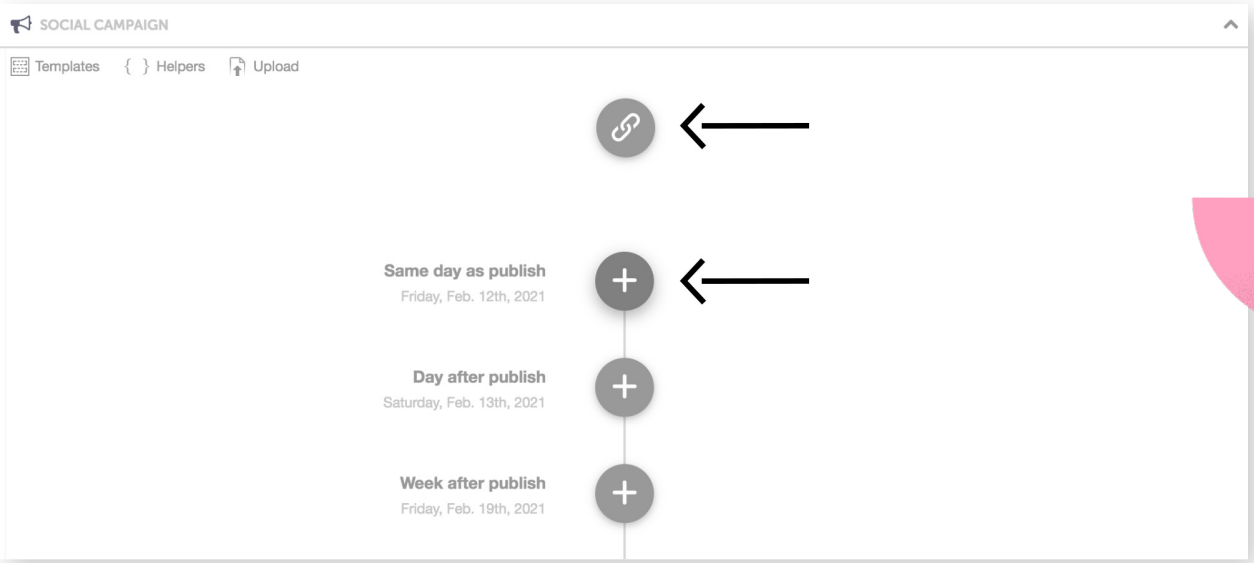
If you’re creating a social media campaign to promote another marketing project you have planned in CoSchedule, it’s best to attach that campaign directly in your project.

In this example, you’ll learn how to create a social media campaign that will promote a blog post with CoSchedule.

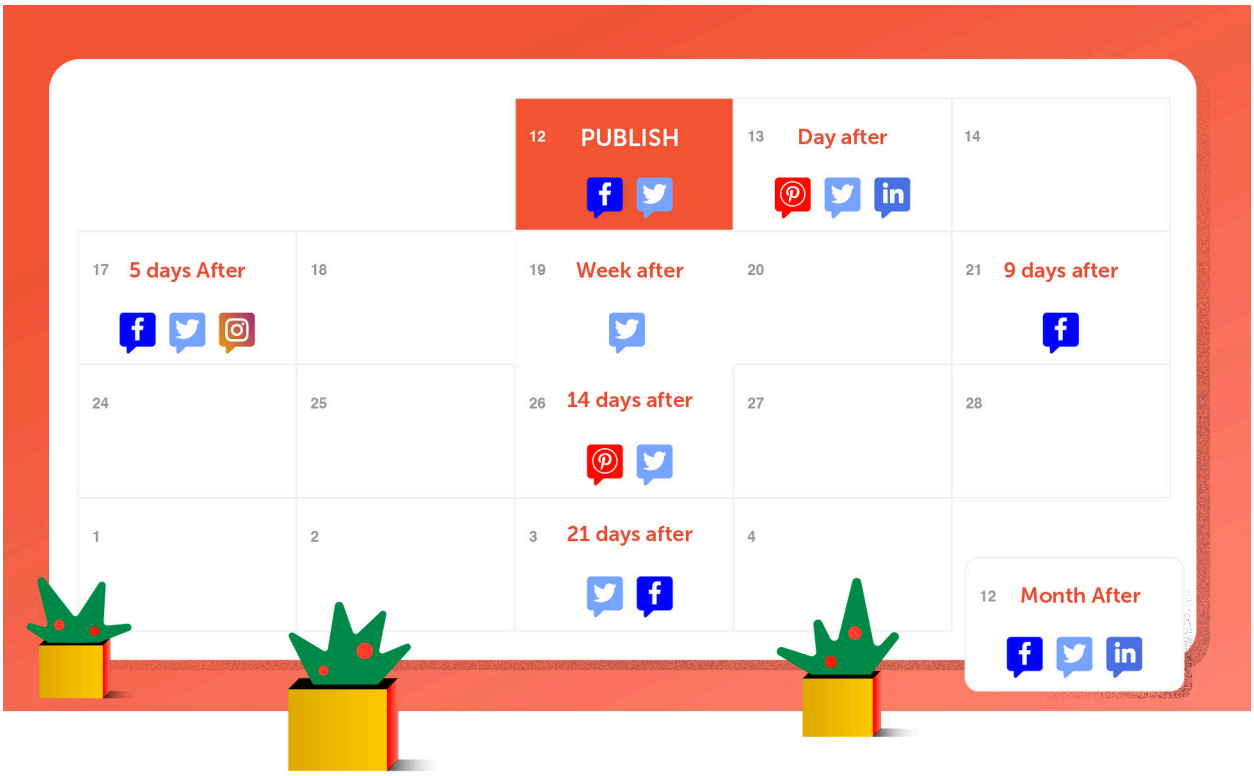
1. Open the project on your calendar.
2. Add a "**Social Campaign**" attachment.



3. Next, click the **plus sign** to add a social message on a specific day.
4. Add the link to your blog post by clicking the **link button** on the top.



If you're not sure how you should build out your first social campaign, here's our best practice recommendation. Keep in mind that this can be tailored based on the social channels you use.



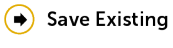


Pro Tip:

Save your recently created social media campaign as a template to use again.

1. Click the "Templates" option in the top left corner. 

2. Toggle down "New template". 

3. Choose "Save Existing". 

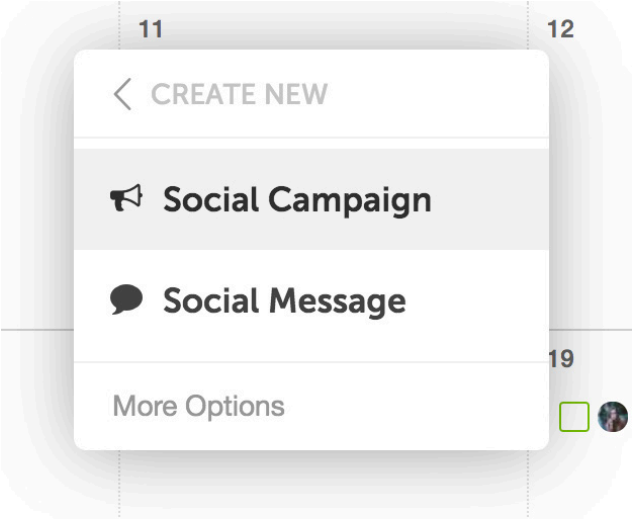
4. Name your template "Blog Social Template".

2. Schedule a Stand-alone Social Campaign

Maybe you need to create a social campaign that doesn't promote a Marketing Project in CoSchedule. This could be a campaign that promotes partner content, a recent news story that pertains to your business, or something like a positive customer review you want to promote.

To create a stand-alone social campaign:

1. Click to **add a new project** to your calendar.
2. Choose "**Social**", then "**Social Campaign**"



3. Name your social campaign and apply any details — like color labels.
4. Click the plus signs to add messages just like you did in the previous section.

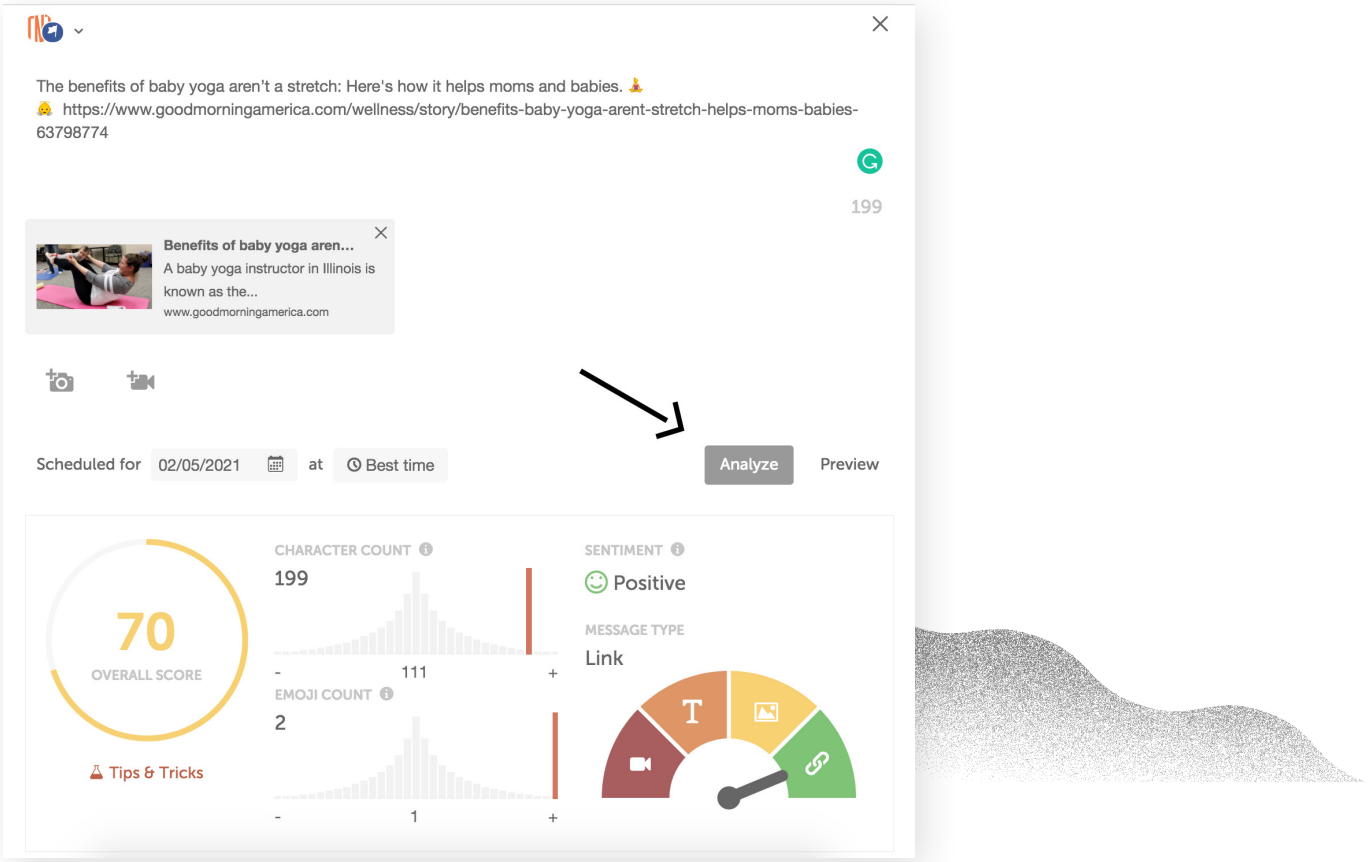
Step 4: Advanced Social Media Strategy

There are some advanced ways you can better manage your social media strategy.

1. Use the Social Media Optimizer to Write Better Social Messages

The CoSchedule Social Composer has a built-in optimizer that helps you be more strategic and get more engagement from your social media messages.

Once you've written your social media message, click the "**Analyze**" button.



From here, you can fine-tune your message so it will perform even better on social media.

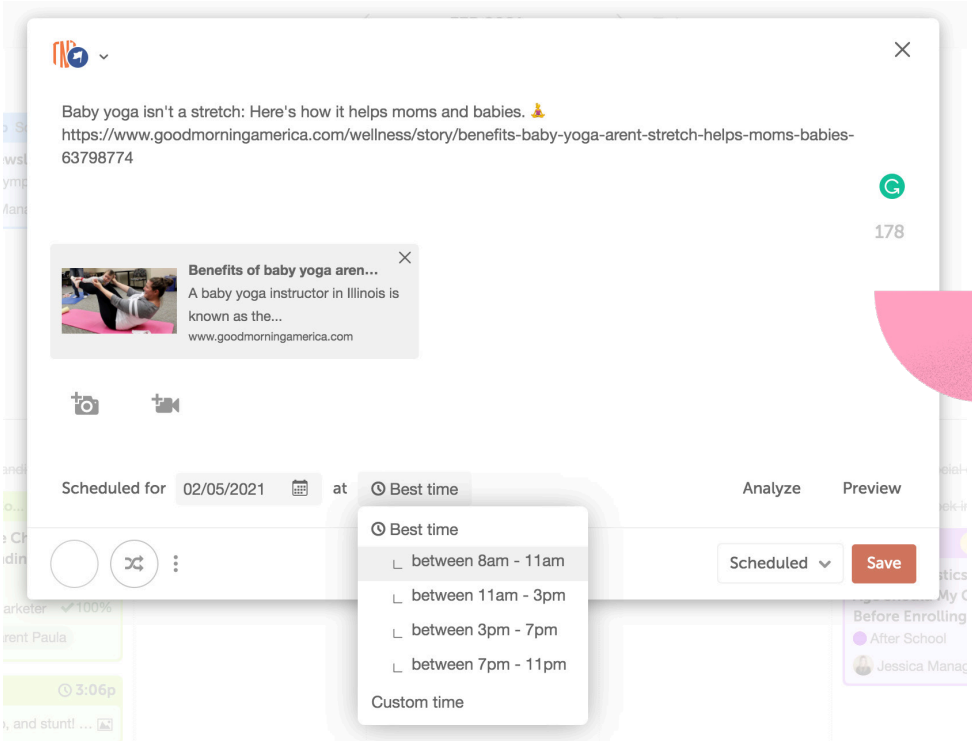
2. Use Best Time Scheduling to Post at the Right Times

CoSchedule has built-in automation that allows you to post to your social media channels at the best times.

With Best Time Scheduling, you can schedule with confidence, knowing your messages are being sent at the best time possible — according to research and best practices — for increased traffic, engagement, and followers.

This takes the guesswork out of posting your social media messages.

To use Best Time Scheduling, use the dropdown to select a "best time" timeframe. CoSchedule will automatically post your message on your behalf at the best time within the selected timeframe.



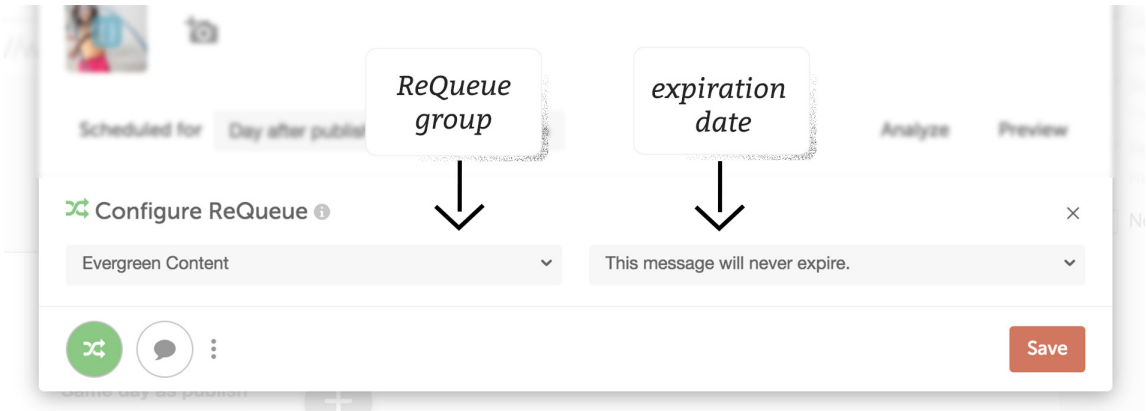
3. Use ReQueue to Get More Traffic to Your Content

ReQueue is the only social automation tool with built-in intelligence. It takes into account your entire social schedule, uses Best Time Scheduling intelligence to promote your messages *at the most optimal times*, AND intelligently finds the gaps in your schedule (so you don't have to).

When you've composed a social message that would be great to share more than once, simply click the ReQueue button in the bottom left corner from the social composer.

From there, you can add this message to a ReQueue group or create a new group.

You can also choose when you want ReQueue to expire the message.



Keep in mind that ReQueue must be enabled by visiting your calendar settings and turning it on under "Power Ups".



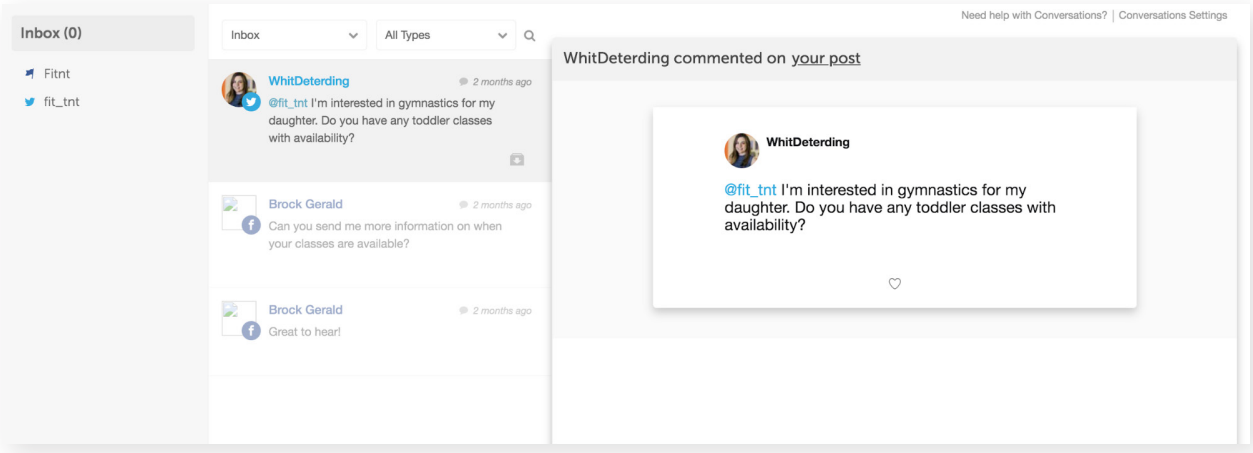
Pro Tip:

For more information and best practice about ReQueue settings, check out this ReQueue Guide.

4. Use the Conversations Inbox to Stay Updated on Your Social Media Mentions

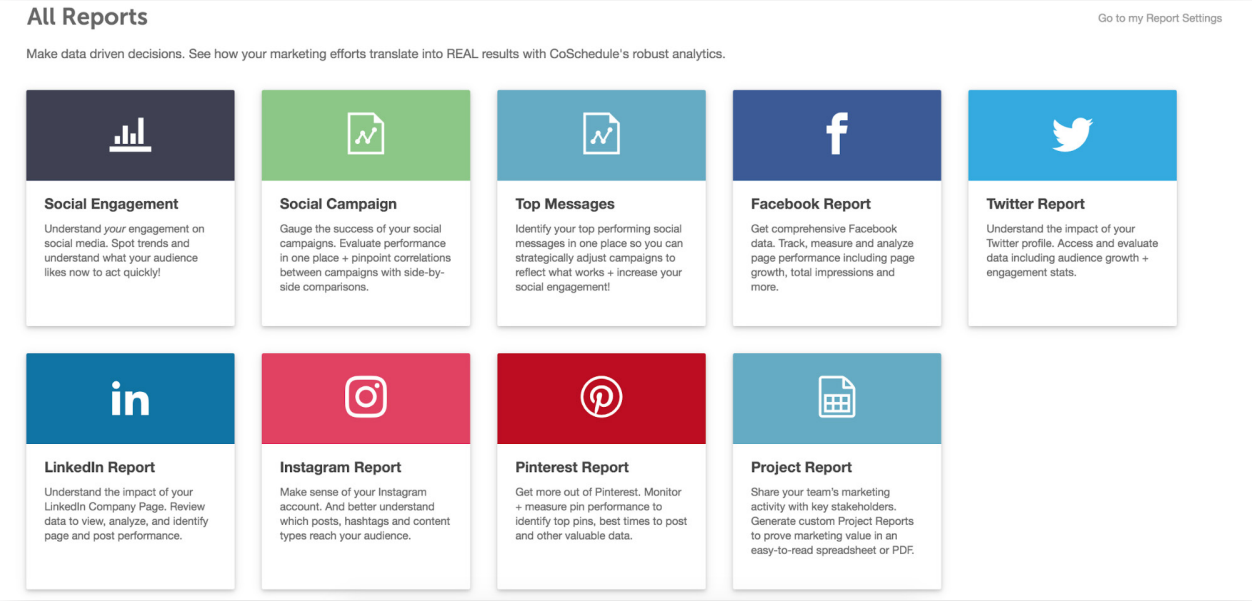
CoSchedule also has social media monitoring capabilities. Anytime someone @ mentions you or sends you a direct message, you can respond directly from CoSchedule.

This means you don't need to waste time manually checking each social media network and potentially missing something important.



Step 5: Use Social Analytics to Fine-tune Your Strategy

CoSchedule has a ton of built-in social media reports to help you understand what's working and what isn't.



Here's a list of each report and what it can tell you.

1. **Social Engagement Report:** This helps you understand which of your social media messages are receiving the most engagement. From there, you can fine-tune your strategy to get better engagement.

2. **Social Campaign Report:** With this report, you can create a side-by-side comparison of two different social media campaigns to understand which performed better.

3. **Top Messages Report:** This report tells you which of your social media messages performed the best across all of your social media platforms.

4. **Individual Social Network Reports:** These reports provide in-depth details about your social posting performance on each specific social channel.

5. **Project Report:** This report tells you how many marketing projects your team is accomplishing within a given period of time. This is helpful to keep stakeholders aware of all the work your team has done.

Head Over to Your Calendar to Start Scheduling your Social Media

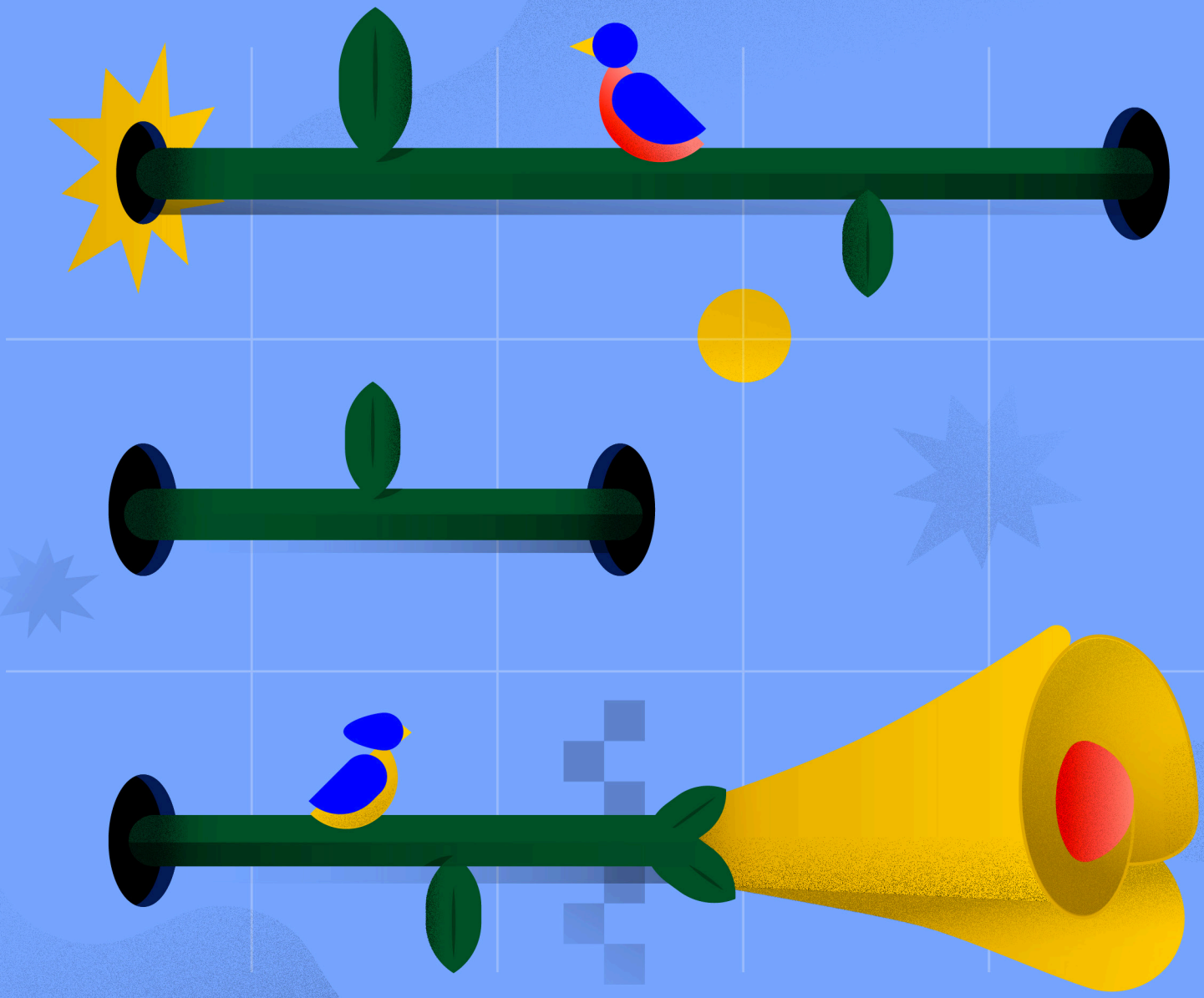
GO TO MY CALENDAR



Chapter 8:

The Best Way to Manage a Project From Start to Finish

CoSchedule



In This Lesson

Step 1: Add Projects to Your Marketing Calendar

Step 2: Apply A To-Do List to Your Project

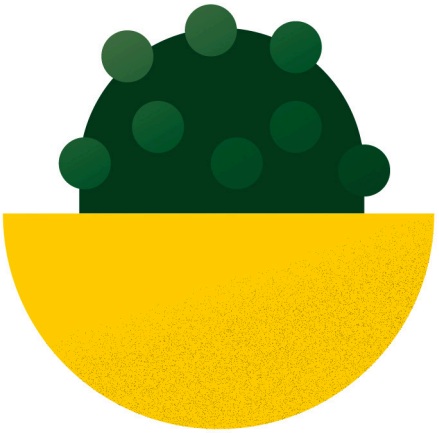
Apply an existing task checklist

Step 3: Create a New Google Doc Attachment

Step 4: Add a Social Media Campaign Attachment

Step 5: Schedule Your Project and Let CoSchedule Do the Rest

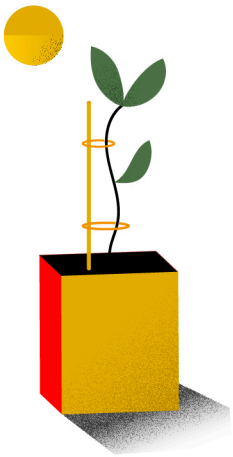
Step 6: Measure the Performance



Planning a Project from Start to Finish

Now that you've learned all the parts of CoSchedule, it's time to tie it all together. This chapter focuses on showing you how to manage a blog post project from start to finish using your CoSchedule Marketing Calendar.

You'll take the elements you learned in each of the previous lessons to create a streamlined marketing process where things finally run smoothly.



What is this guide?

This lesson will walk you through how to manage a project from start to finish with your CoSchedule Marketing Calendar.

Who is this guide for?

Marketers who are wearing many hats and are struggling to formalize a marketing process as their responsibilities grow.

Step 1: Add Projects to Your Marketing Calendar

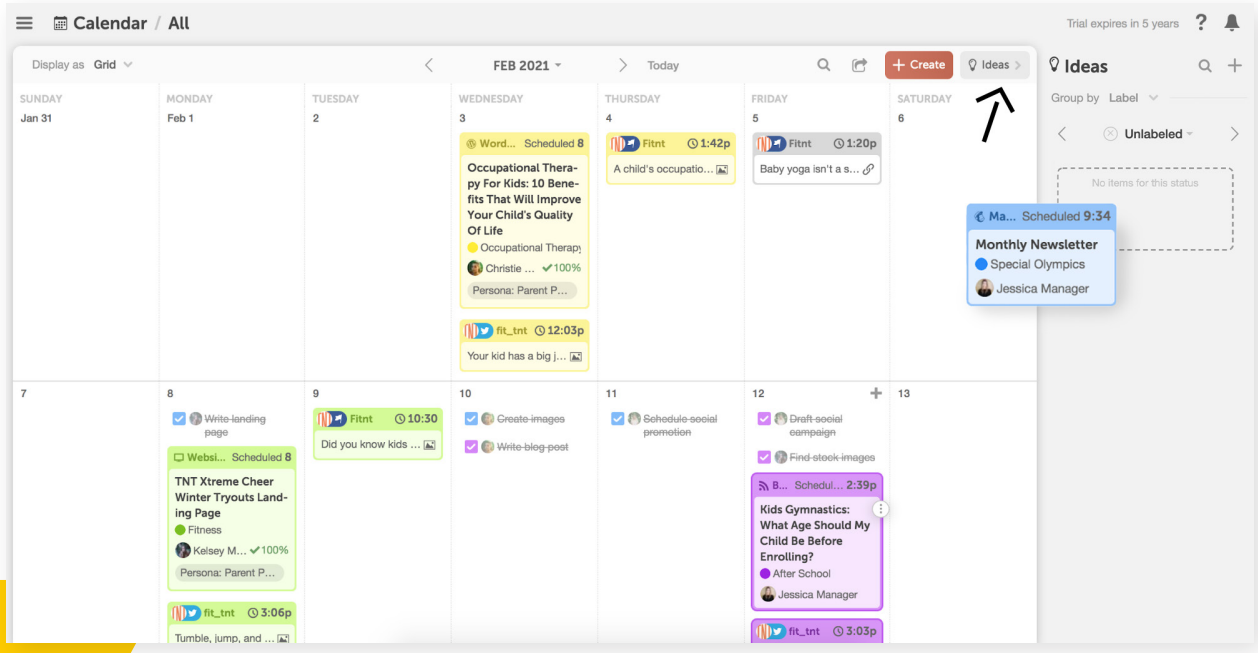
Knowing what type of projects to start putting on your calendar is tricky. It's a common hurdle for people just getting started with CoSchedule.

That said, here are some common recurring marketing projects that you may want to add to your calendar if applicable.

- Weekly or monthly newsletters
- Upcoming events
- Blog post topics you want to write about

Once projects are on your calendar, it isn't set in stone. You can easily move projects that are on hold over to your Idea Board. Here's how:

1. Click the "Ideas Button".
2. Drag and drop the project over to the Ideas area to keep it on your radar, but off your calendar.

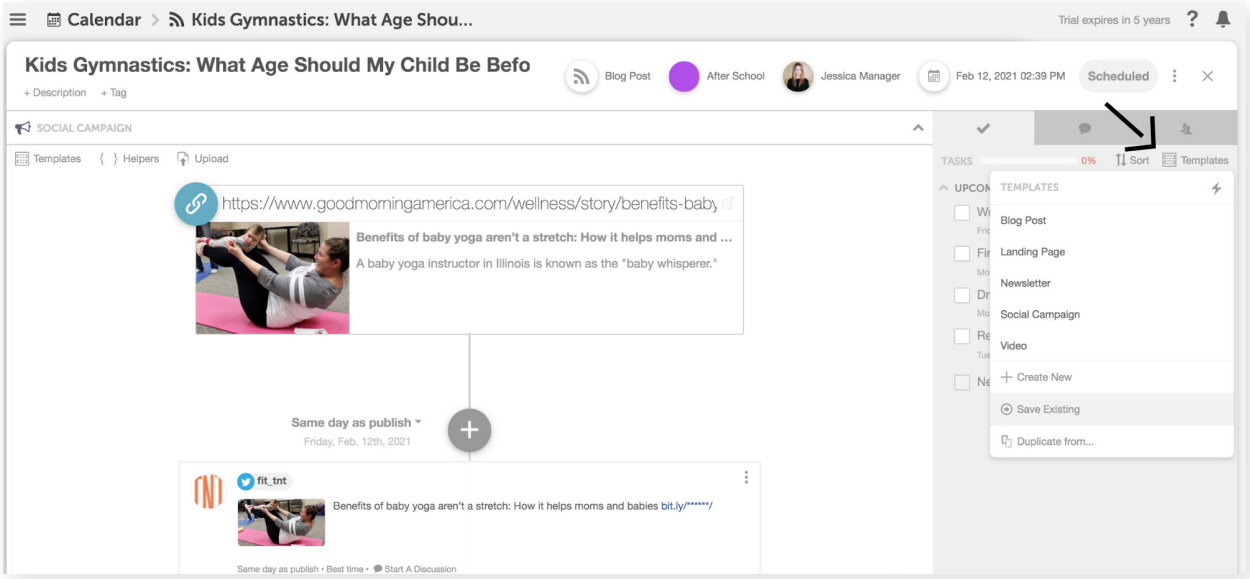


Step 2: Apply A To-Do List to Your Project

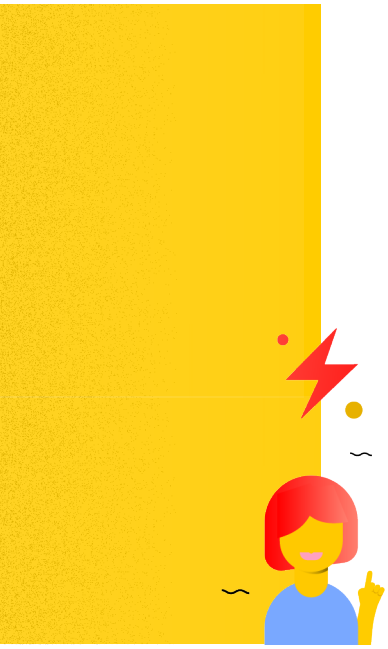
After you've got a blog project on your calendar, the next thing you'll need to do is apply a task checklist to make sure everything gets done on time.

Apply an existing task checklist

CoSchedule has a pre-set list of task templates that contain commonly needed tasks for various types of marketing projects.



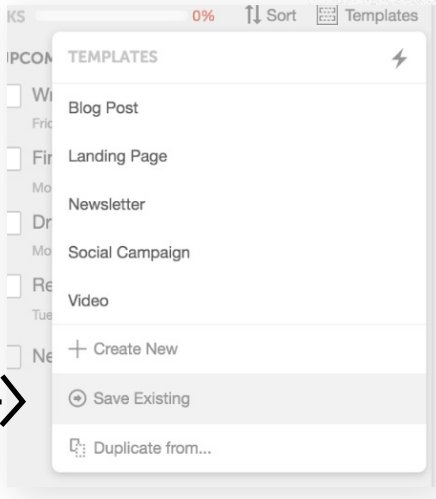
Once you've applied the task template, you can easily delete unnecessary tasks, assign them to yourself or someone on your team, and apply a due date.



Pro Tip:

Once you've edited the tasks and delegated to team members, you can re-save your customized checklist to use again on relevant marketing projects.

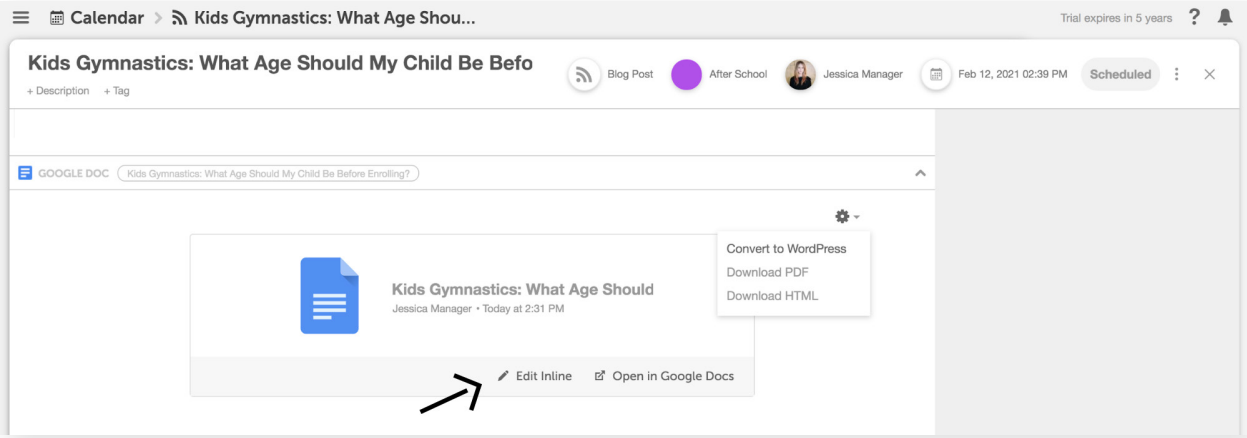
Save Existing

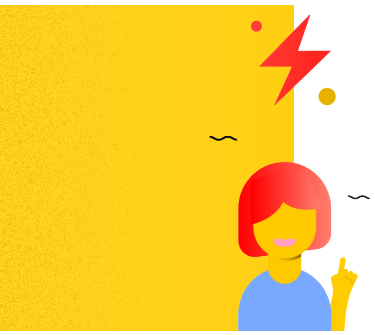


Step 3: Create a New Google Doc Attachment

The next thing you'll need to do is attach a new Google Doc to your project. This allows you to write your content and collaborate all from one place.

Once you've added the new Google Doc attachment, click the "Edit Inline" option to start writing your blog post directly in CoSchedule.

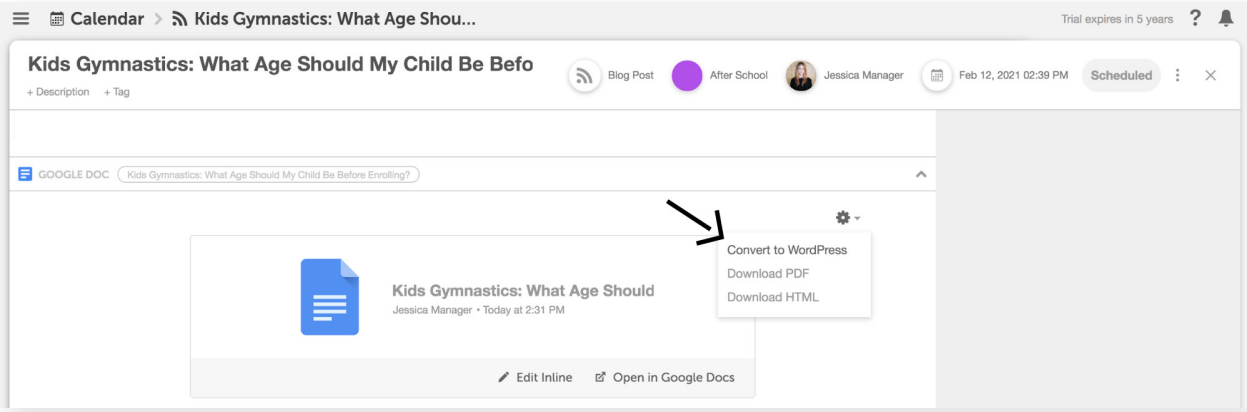




Pro Tip:

You can also use the Text Editor or Word Doc attachments to write your content, if you prefer.

Once all your content is completed in your Google Doc, use the "Convert to Wordpress" button to automatically move everything over to a new WordPress post with one click.

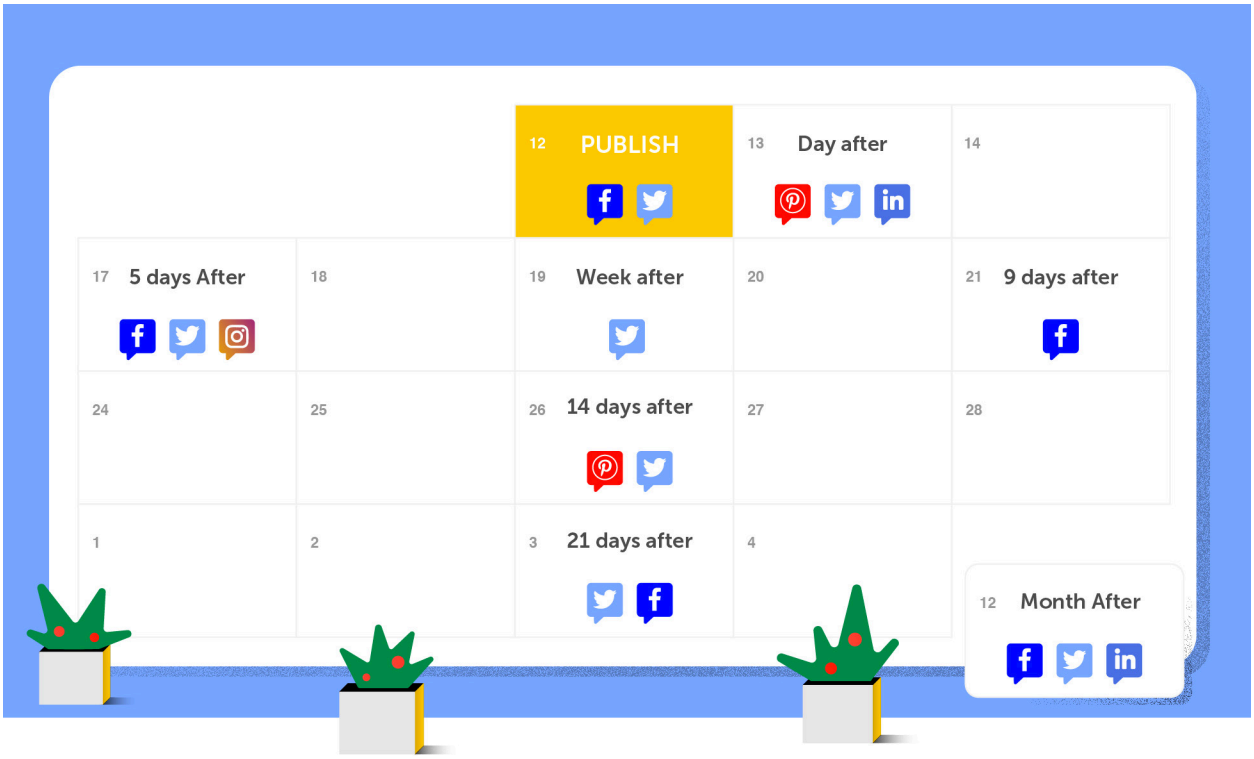


Step 4: Add a Social Media Campaign Attachment

The next step is to add a social media campaign to your project. This allows you to write, collaborate, AND promote your blog post all from CoSchedule.

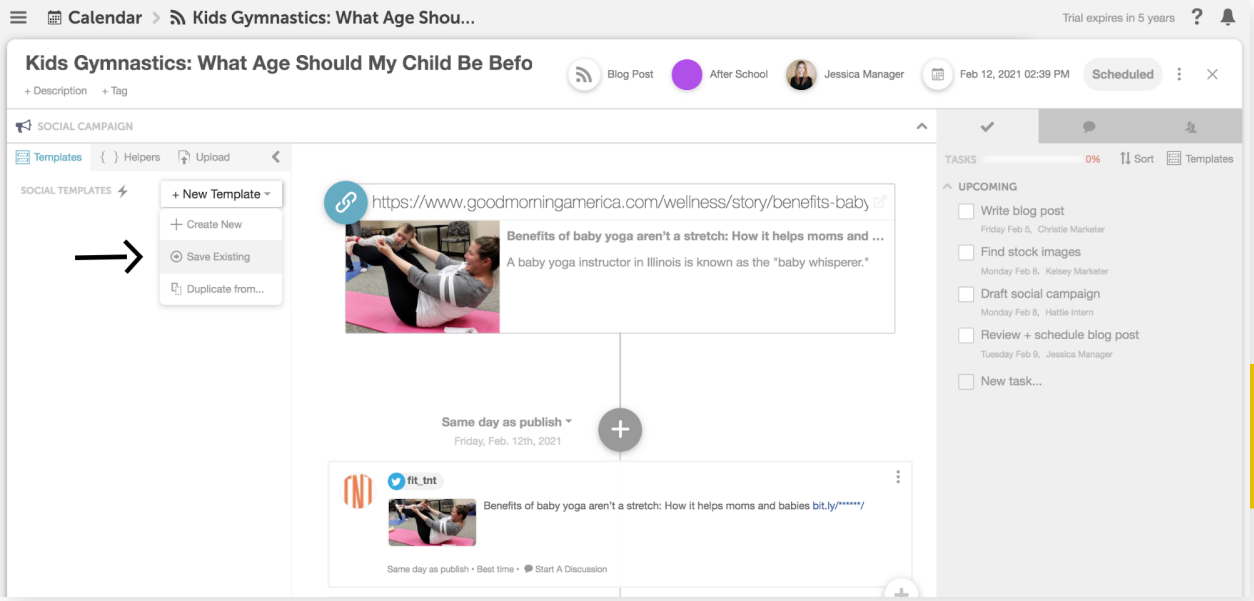
Using the exact social message cadence we discussed in the previous chapter, add your social messages one by one to create a social media drip campaign that will drive more traffic to your blog post over time.

In case you don't remember the social campaign recommendation, here's a graphic to help.



Next, you can save that campaign as a template to use again. This way you don't have to remember again and again what channels you posted to and on which day.

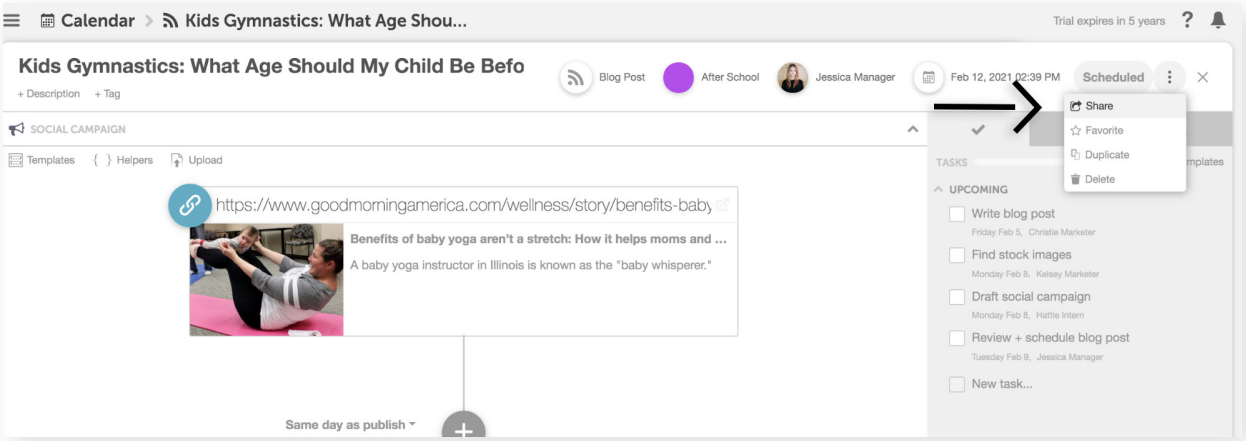
To save your social campaign as a template to use again, simply click the **"Templates"** icon and then choose **"Save Existing"**.



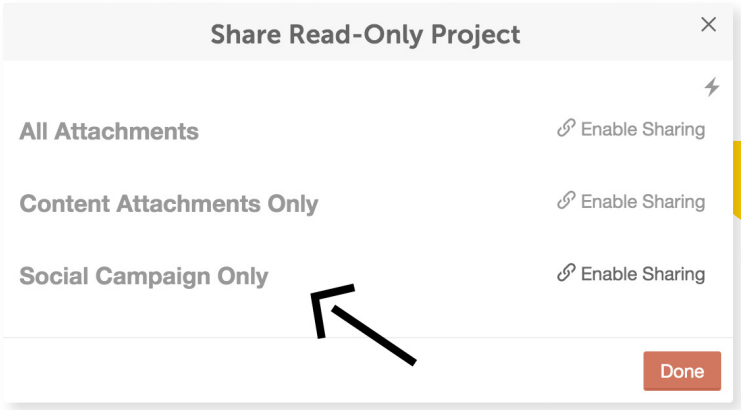
Did you know that you can create a read-only link of your social campaign to share with anyone? This means you don't have to copy and paste or screenshot individual social messages to get approval.

To create a read-only link of a social campaign attached to a project,

- Click the ellipsis.
- Choose "Share".



- Enable sharing on the “Social Campaign Only” option.
- Send the link to anyone for input, comments, or approval.

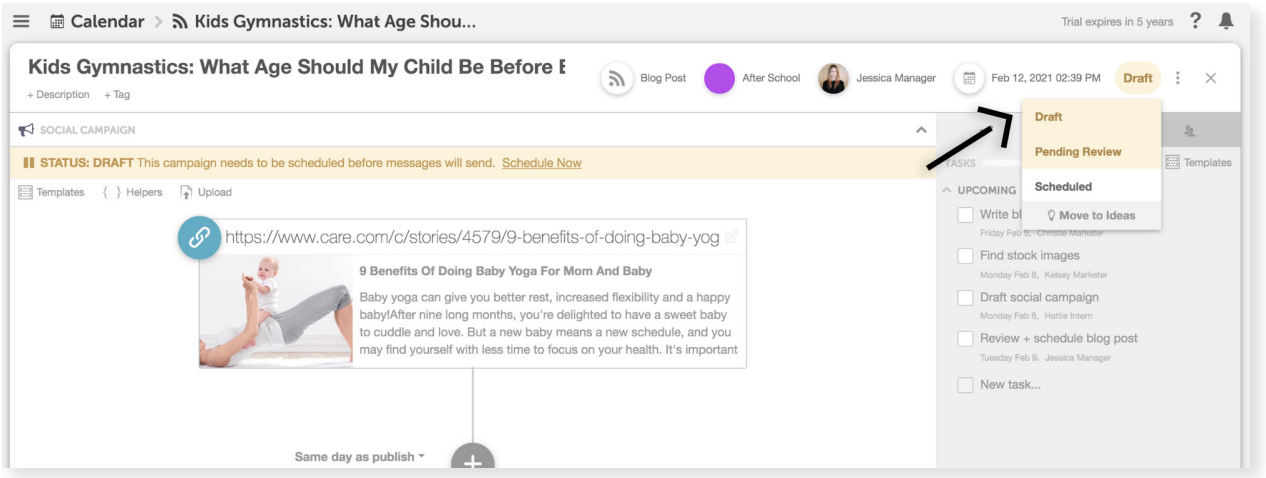


Step 5: Schedule Your Project and Let CoSchedule Do the Rest

Once you’ve completed all the previous steps in this lesson, it’s time to schedule your blog post to go live. This will not only schedule your blog post to publish, but it will also put in motion the social media campaign you scheduled.

You’ll find the project status in the top right corner of your project. When you’re ready to schedule your project,

- click the status
- choose the “Scheduled” option

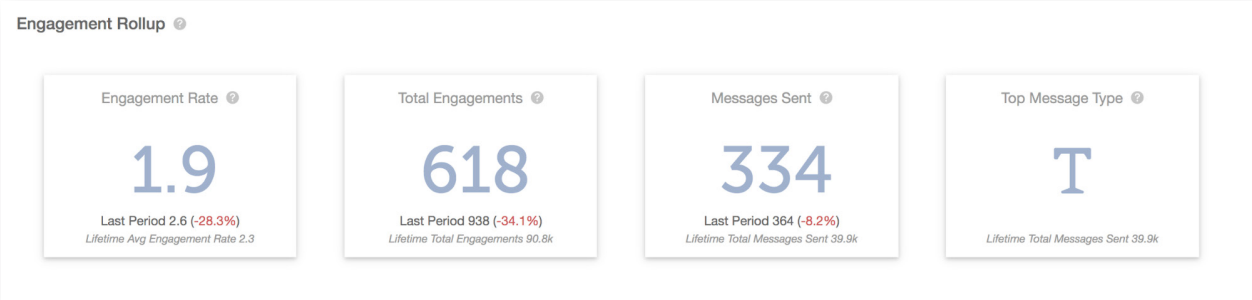


This lets you schedule your projects so CoSchedule can push everything live when it’s time.

Step 6: Measure the Performance

Once your blog project and social media campaign has been published, you can track the performance using CoSchedule's built-in analytics.

You'll find all sorts of useful social media campaign data like social media engagement reports, best performing messages, and campaign comparison reports.



Get Started Planning a Blog Project in CoSchedule

PLAN A PROJECT ON YOUR CALENDAR

