Chapter 2:

Take Control of Your Process With Your Marketing Calendar

CoSchedule

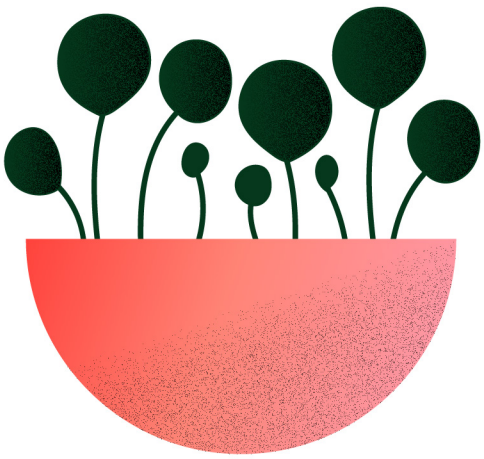


In This Lesson

Getting a Process in Order

Step 1: Use Project Statuses to See Progress

Step 2: Color Code Your Calendar

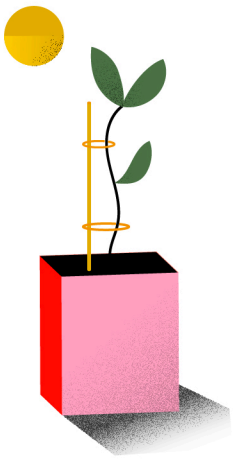


Get Your Process in Order

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?

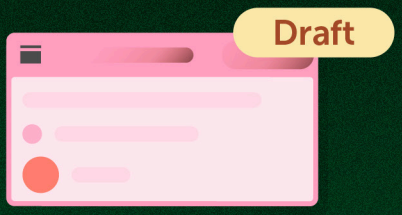
This lesson will walk through how to use the CoSchedule Marketing Calendar as your marketing process.

Who is this guide for?

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

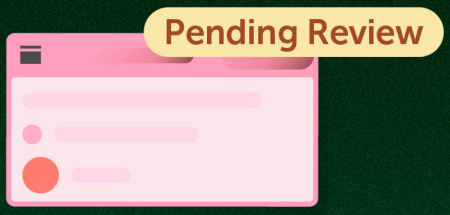
Step 1: Change The Status of a Project

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.



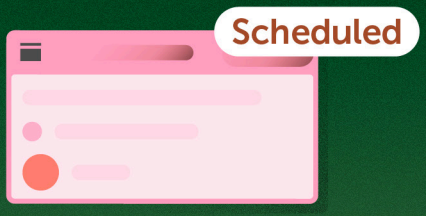
Project WILL NOT publish or go live.

> *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.*



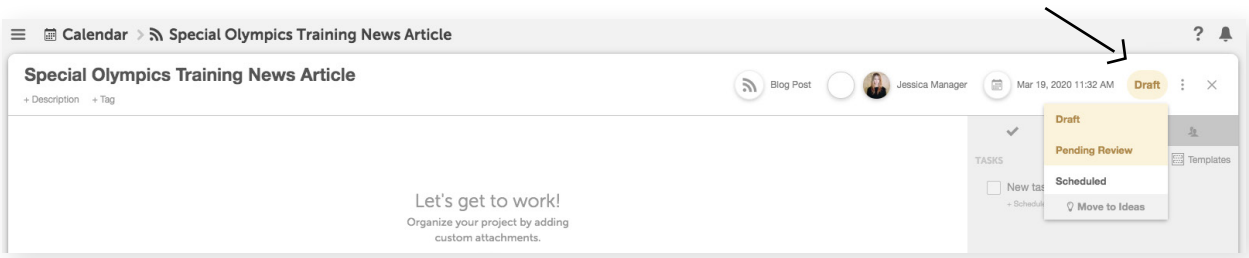
Had been published, sent, or is live on your website/social media channels.

> *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*



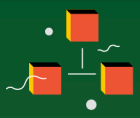
Region: Use this if your team creates marketing materials for different business regions.

- *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*



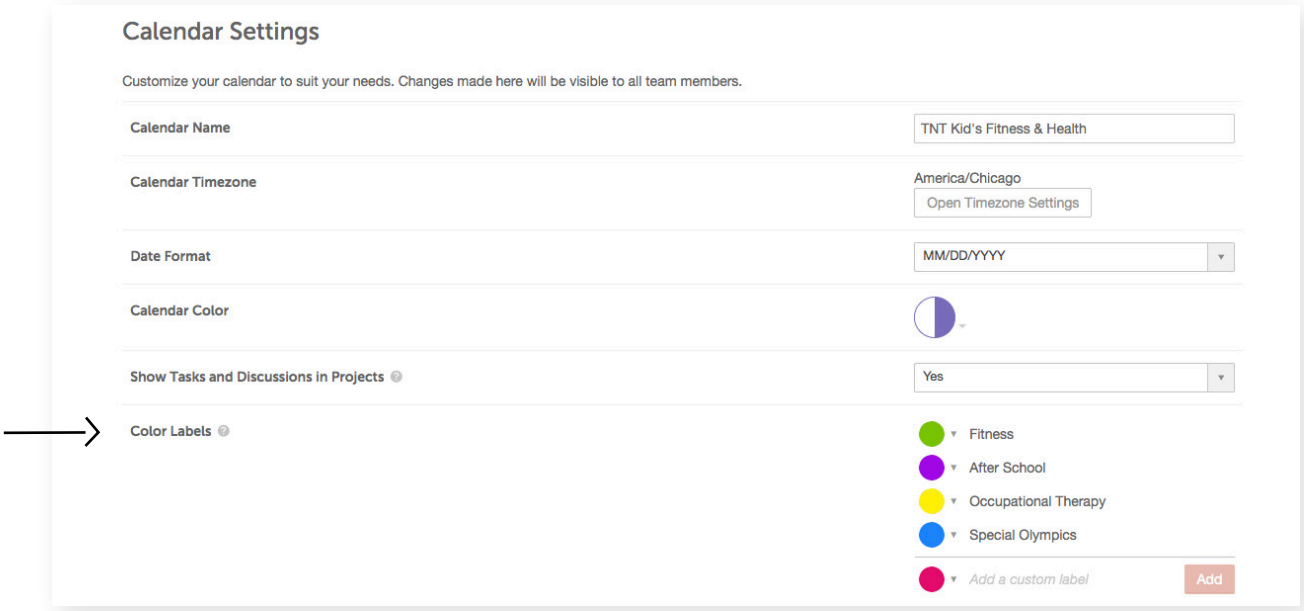
Client: Use this if you're an agency and need to divide your work by client.

- *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.

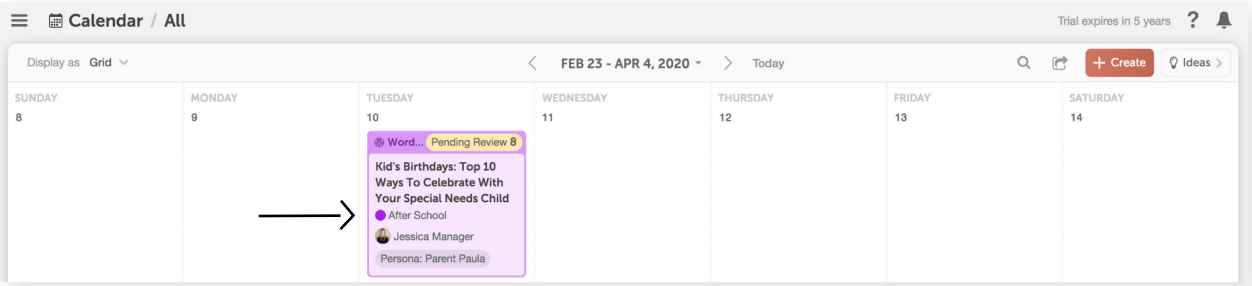




Getting Started Challenge:

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.

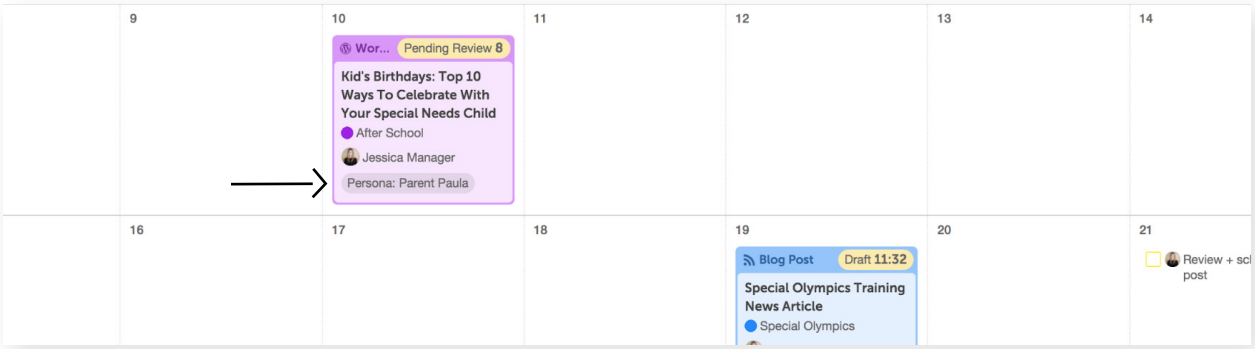


Bonus Step: Apply Additional Metadata to Your Projects

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

Tags

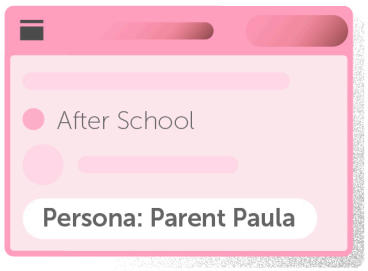
Tags build an added layer of information on top of your color labels. This helps you quickly see from the project card which projects contribute to various goals, target audiences, or initiatives.



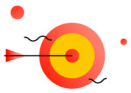
Here are some popular tags to add to your projects.



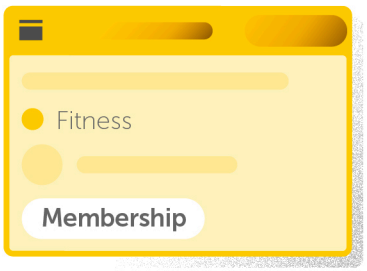
Target Persona



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



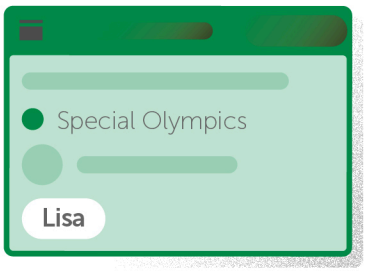
Marketing Goal



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

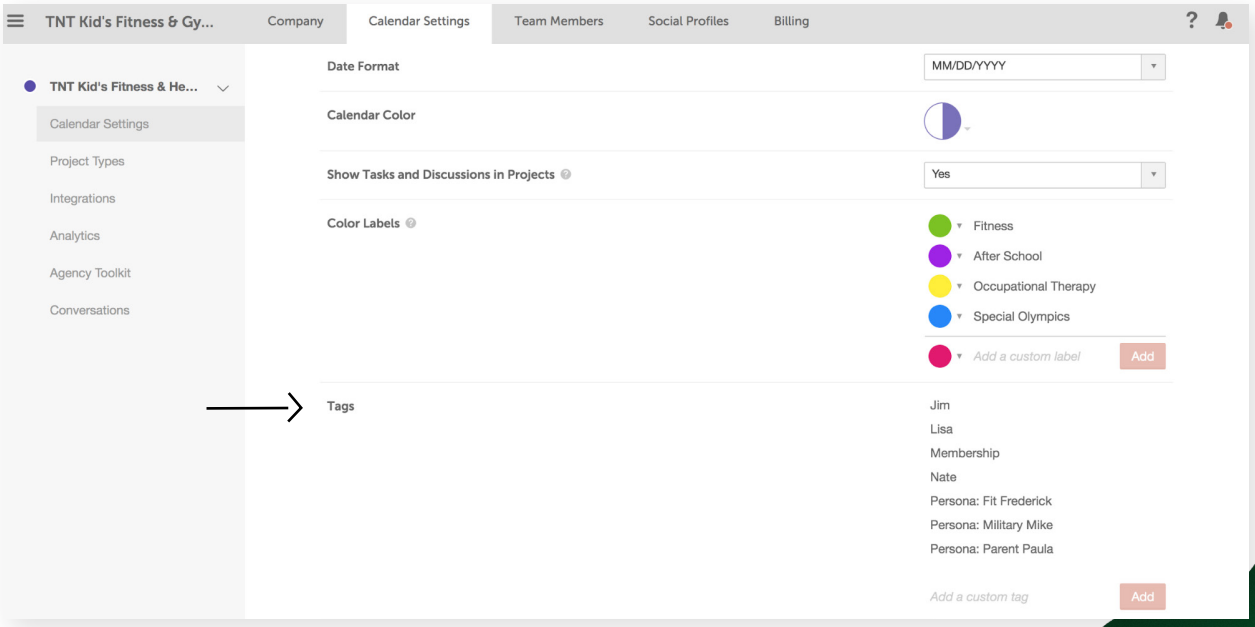


Team Members



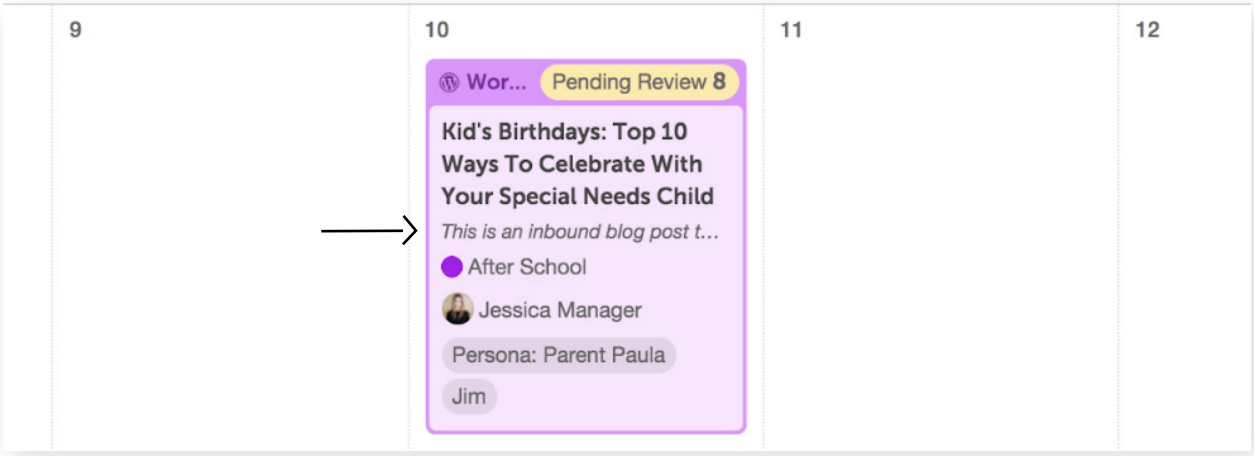
Add team members as a tag to quickly see who is working on each project.

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

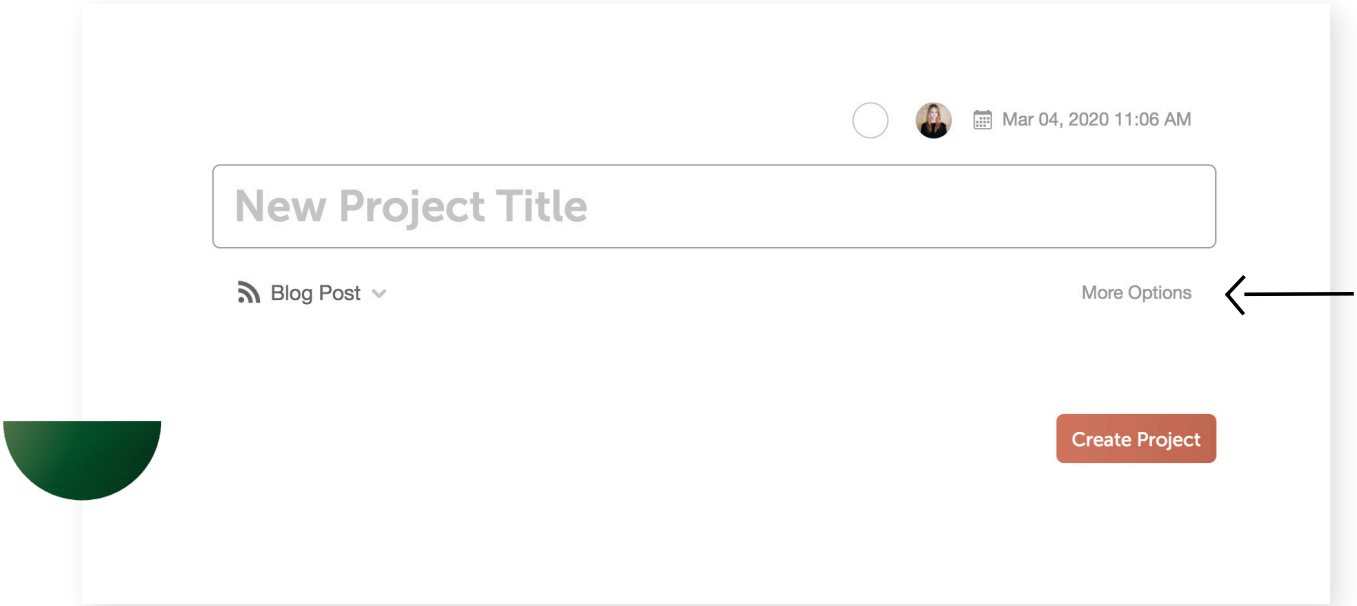


Descriptions

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

