Chapter 4:

Invite Team Members to Join Your Marketing Calendar

CoSchedule



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Getting CoSchedule Ready for Your Team

Step 1: User Roles in CoSchedule

- Owner
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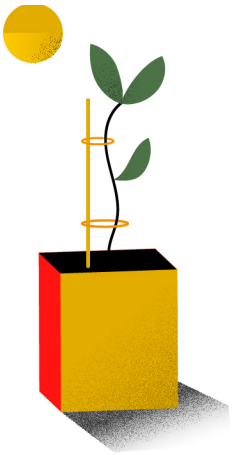
Step 2: Onboard Your Team to CoSchedule



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?

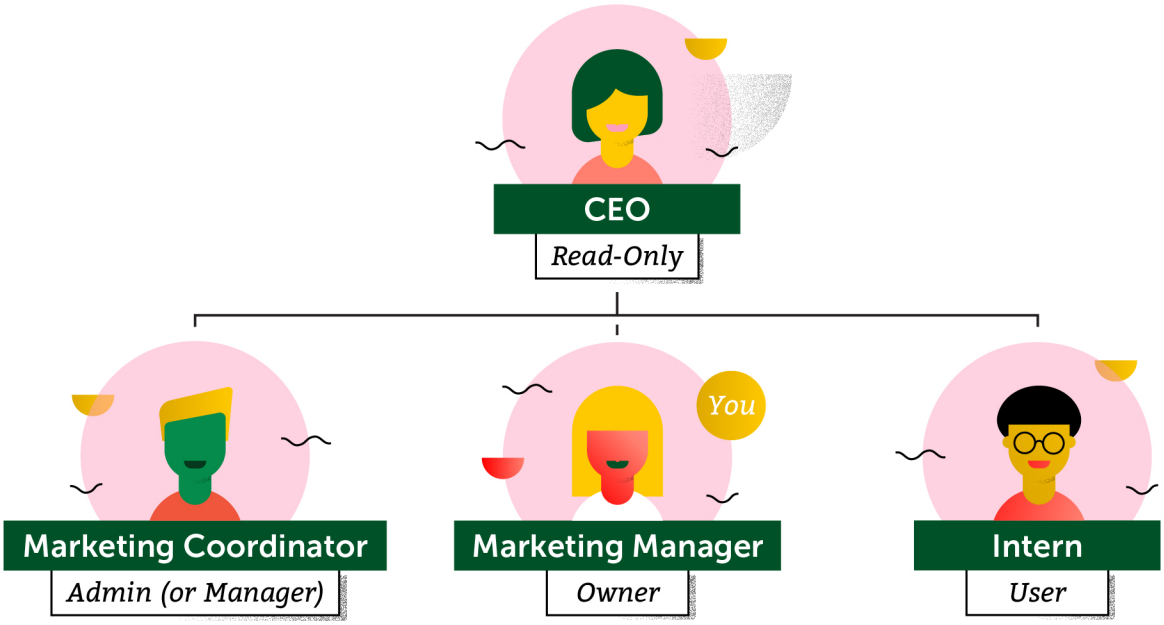
This lesson will walk you through a to-do list that needs to be completed before you invite your team to start using CoSchedule.

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:

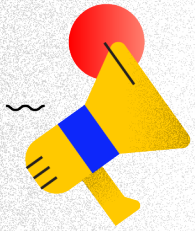
- Change the subscription plan, update billing information, and delete calendars
- View, edit, publish, and delete projects
- View, edit, publish, and delete social messages
- Create and assign tasks to all team members
- Change calendar settings
- Administer social profiles, including the ability to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



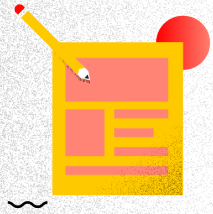
Who Should Have Admin Access Rights?

- 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



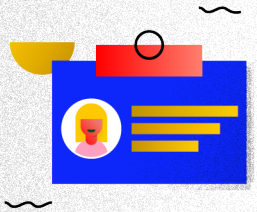
Who Should Have User Access Rights?

- 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.

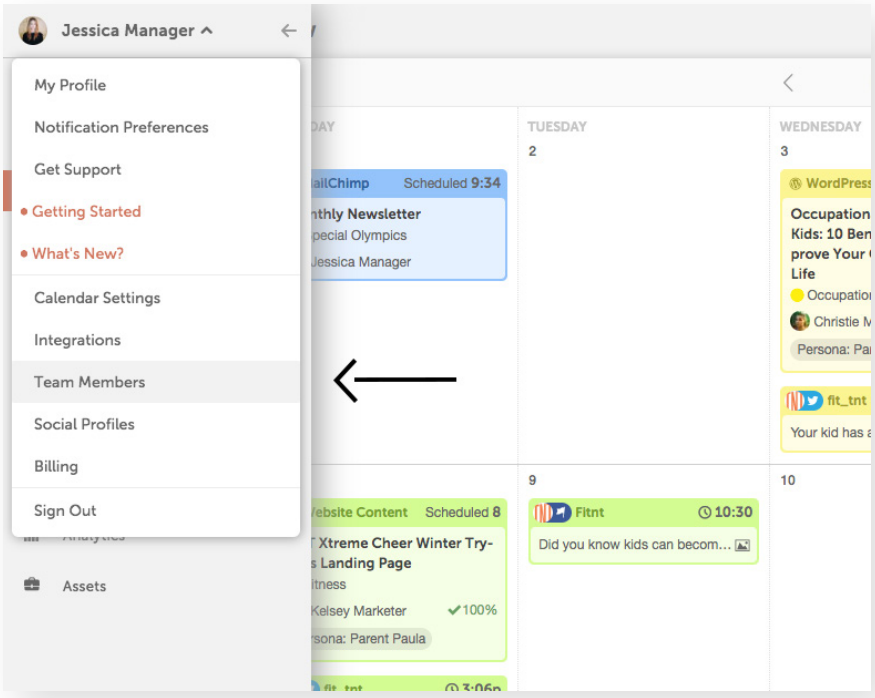


Who Should Have Guest Access Rights?

- 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