Chapter 5:

Tips For Team Collaboration in CoSchedule

CoSchedule



In This Lesson

CoSchedule Collaboration 101

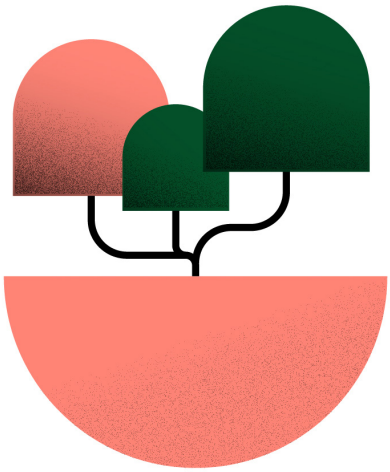
Step 1: Assign a Task

Step 2: Add a Discussion

Step 3: Explore Your Home Dashboard

Step 4: Create a Personal Saved View

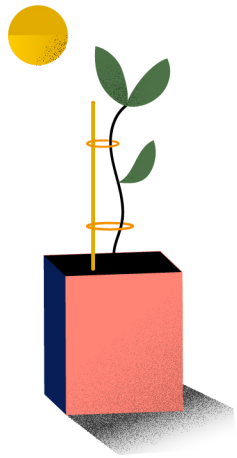
Step 5: Download the Mobile App



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.

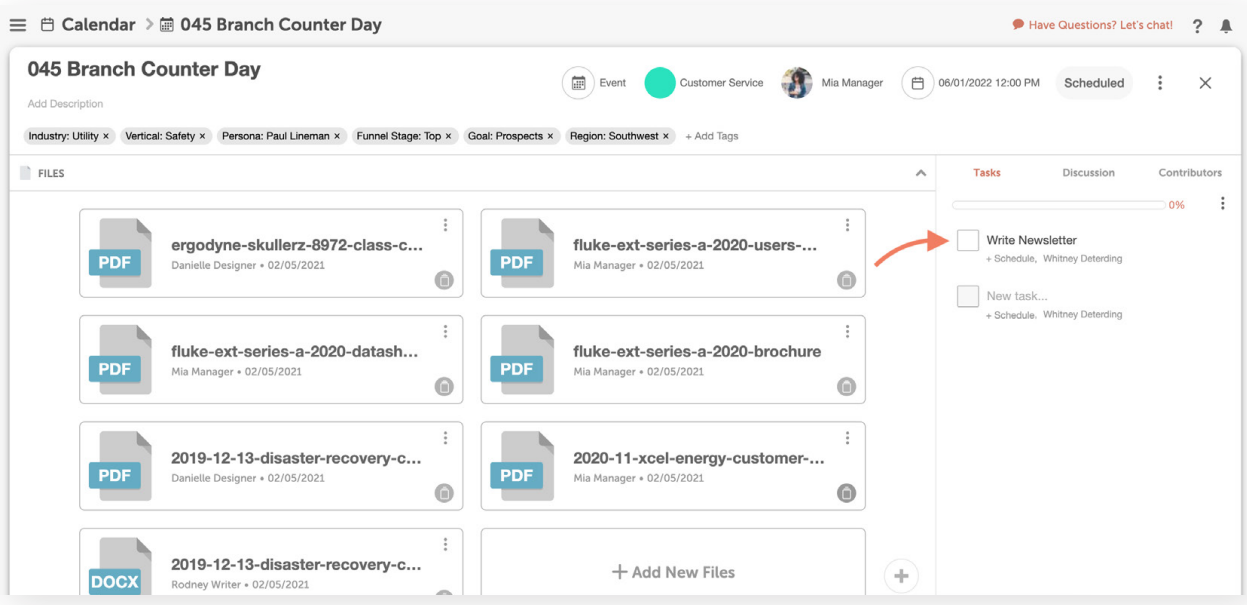
If you are a team of one, applying tasks helps you manage your daily workload with a simple checklist.



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

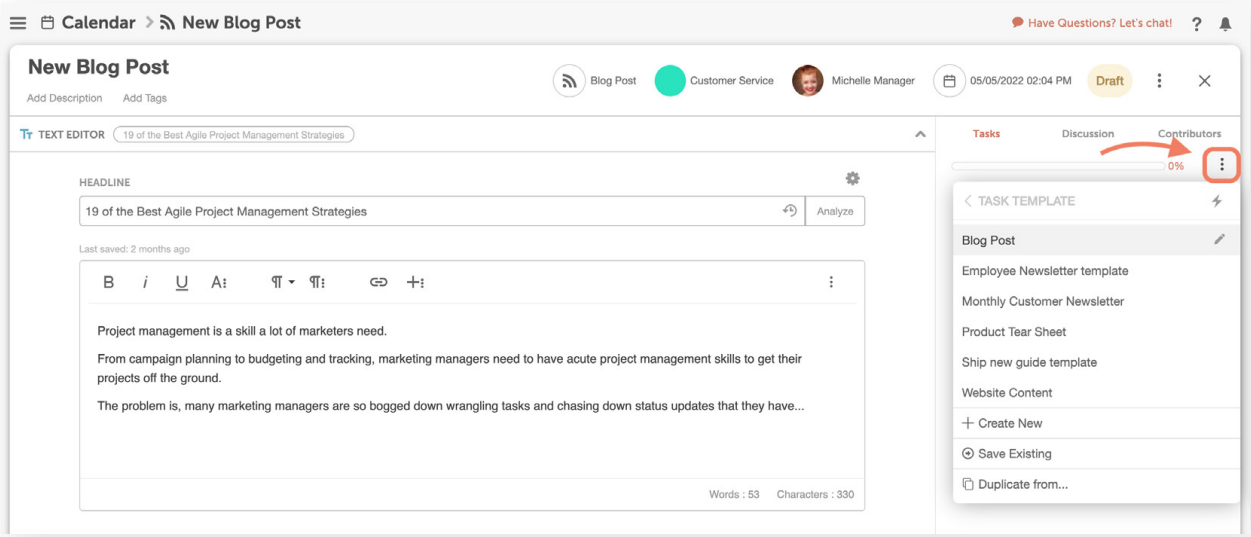
To add a task to a project,

- 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.

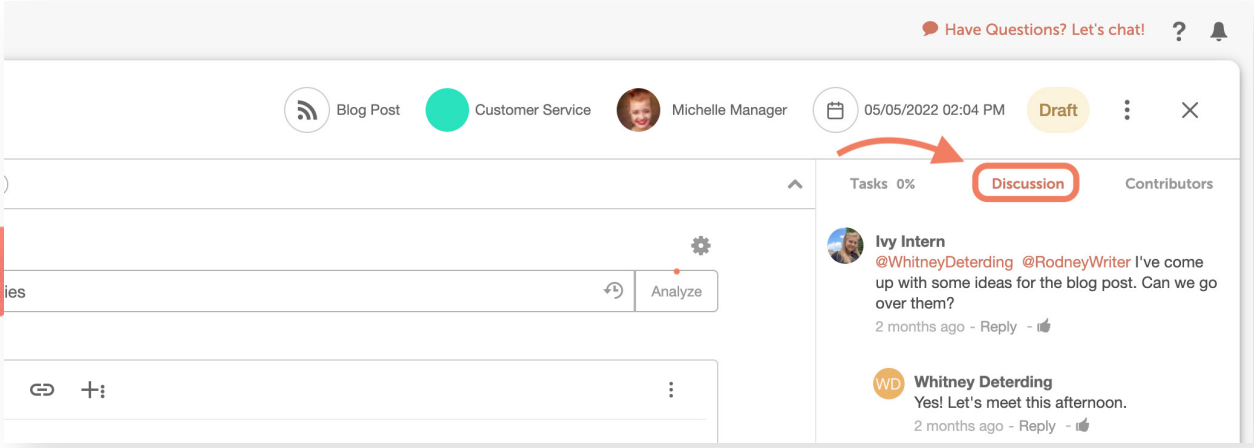


Step 2: Add a Discussion

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.

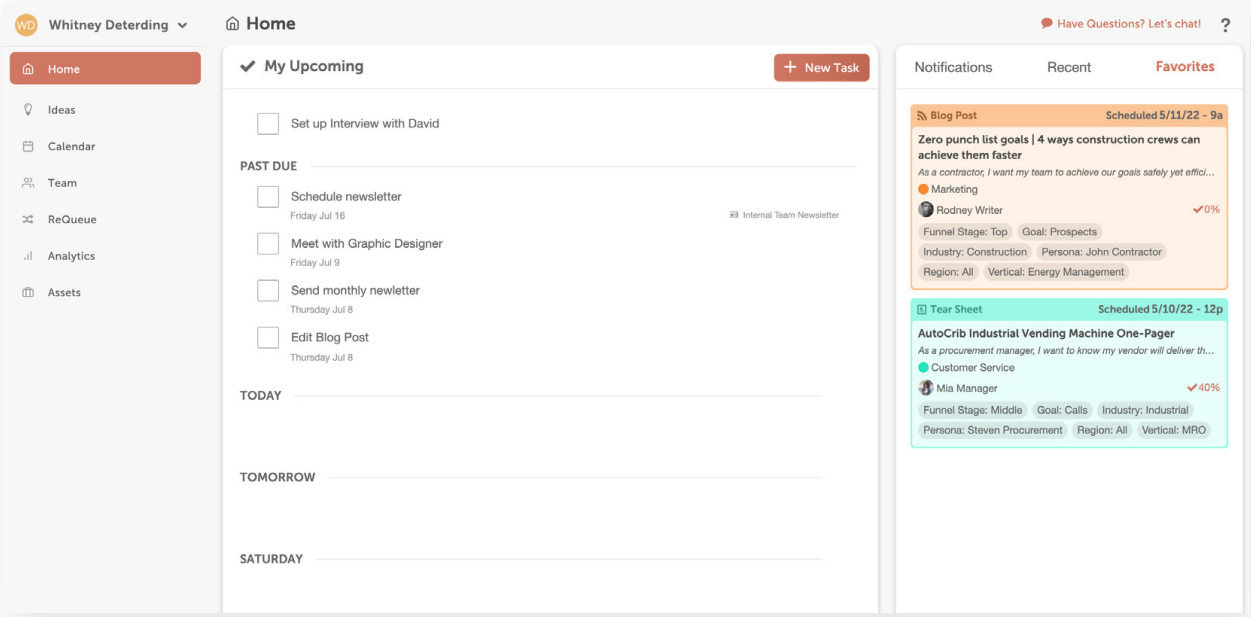


Step 3: Explore Your Home Dashboard

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.



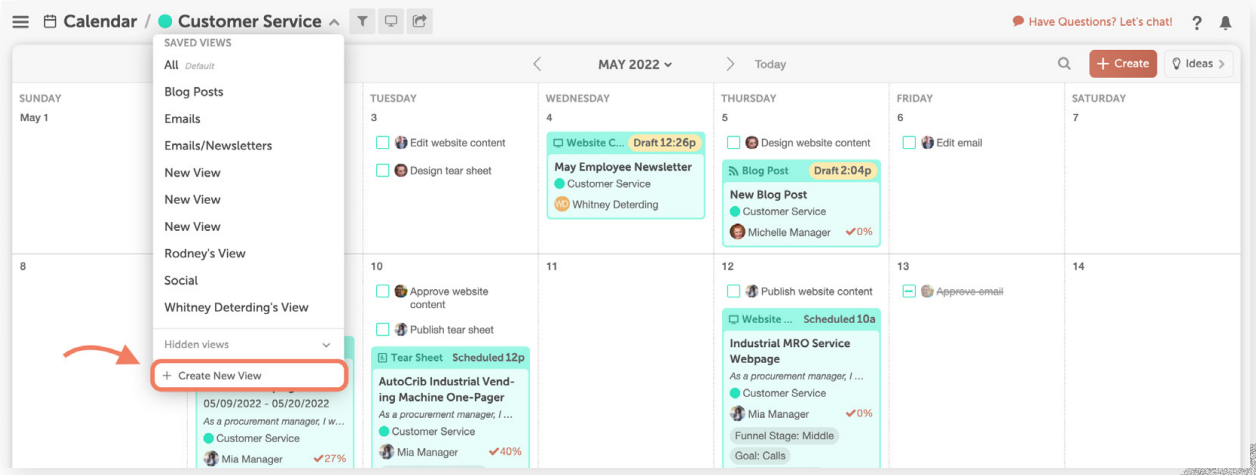
Step 4: Create a Personal Saved View

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.

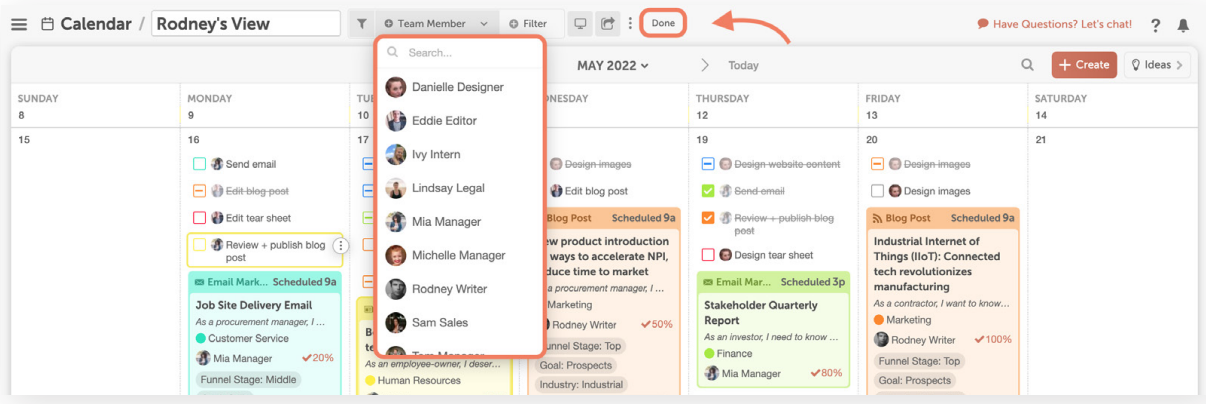
It's a good idea to have all Coschedule users on your team to create a personal saved view for themselves.

Here's how to do it.

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



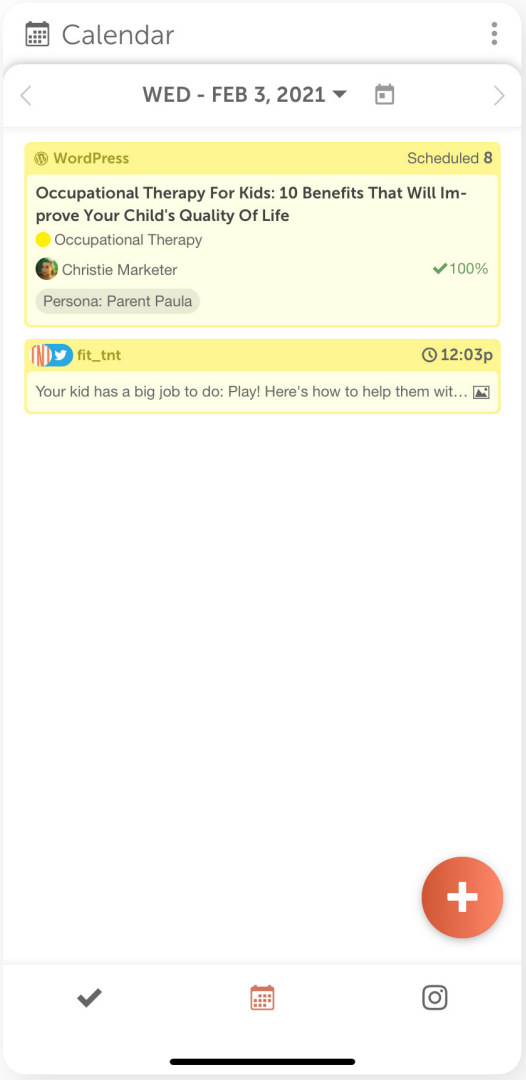
3. Name the saved view "(Your Name)'s View".
4. Click "Filter" to customize the filters for this view.
5. Click "Team member" and find your name.
6. Then click "Done".



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

