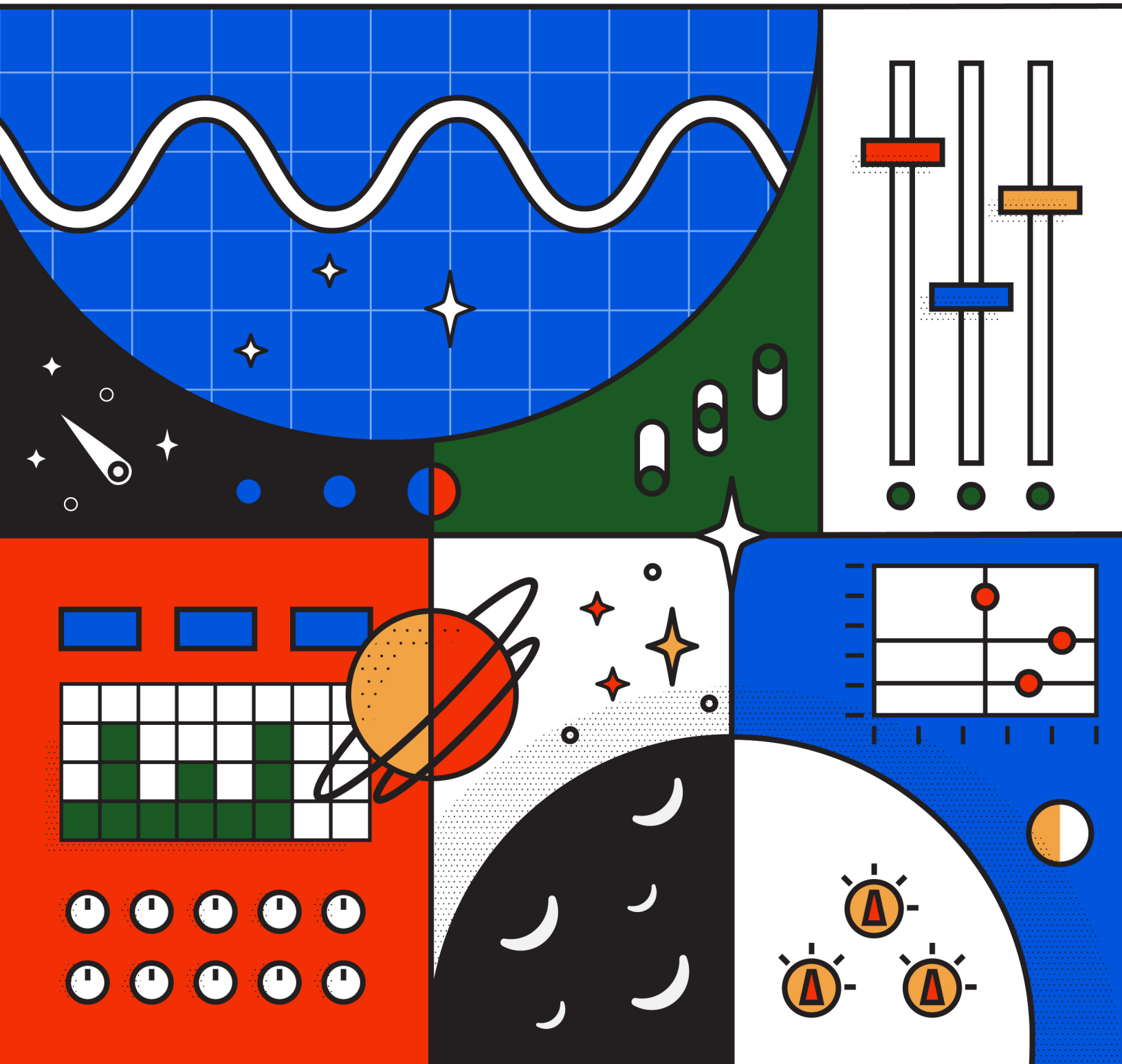
CoSchedule

Customizing CoSchedule:

How to Set up Your Calendar for Better Visibility

2



In this lesson:

Customizing Your Calendar Checklist

Introduction

Color Labels

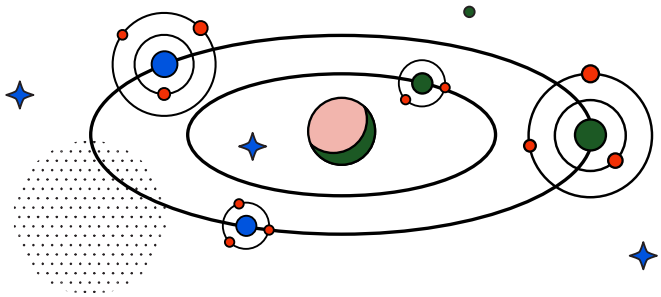
- Choosing Your Color Label Strategy
- Applying Color Labels to Your Calendar

Project Types

- Choosing Your Custom Project Types
- Applying Your Custom Project Types

Tags

- Choosing Your Tagging Strategy



Customizing Your Calendar Checklist

Before we get started, use this checklist as you begin customizing your CoSchedule calendar. It follows the content in this lesson step-by-step to help you get acquainted with your CoSchedule calendar.

STEP	COMPLETED	ACTION ITEM	INSTRUCTIONS	
	☑	*Complete all steps on your CoSchedule Calendar.*		
1	☐	**Choose your Color Label Strategy**	Use the worksheet in this guide to find a color label set-up that fits the needs of your specific marketing team. (See pages 19-21)	
2	☐	**Create a Saved View for Each Color Label**	Click the last item in the breadcrumb menu and add a 'Label' filter category.	
3	☐	**Choose your Custom Project Types**	Use the worksheet in this guide to list all the projects your team needs to plan and execute in CoSchedule. (See page 25)	
4	☐	**Create a Saved View for a Project Type**	Click the last item in the breadcrumb menu and add a 'Type' filter category.	
5	☐	**Choose your Tag Structure**	Use the worksheet in this guide to create your tagging structure in CoSchedule. (See page 28)	
6	☐	**Create a Saved View for a Tag**	Click the last item in the breadcrumb menu and add a 'Tag' filter category.	

Introduction

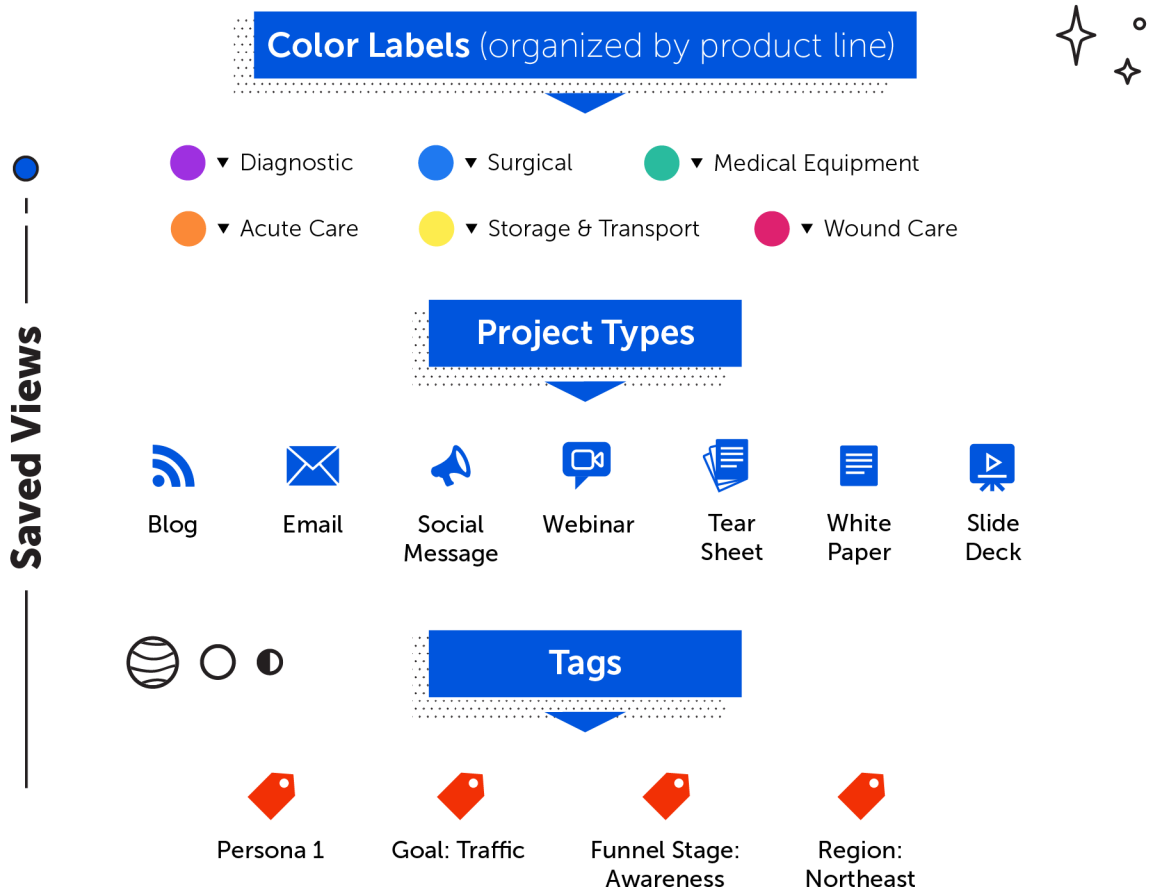
What is this guide? This lesson dives into how to set up your CoSchedule calendar to help you organize, visualize, and report on your marketing strategy.

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

What you'll learn:

- The best color label strategy for your company's needs.
- How to setup and use project types.
- How to best utilize tags for an added level of organization.
- What a saved view is and four different ones your team might need.

Before diving in, it's beneficial to understand how color labels, tags, and project types work together to organize your marketing.

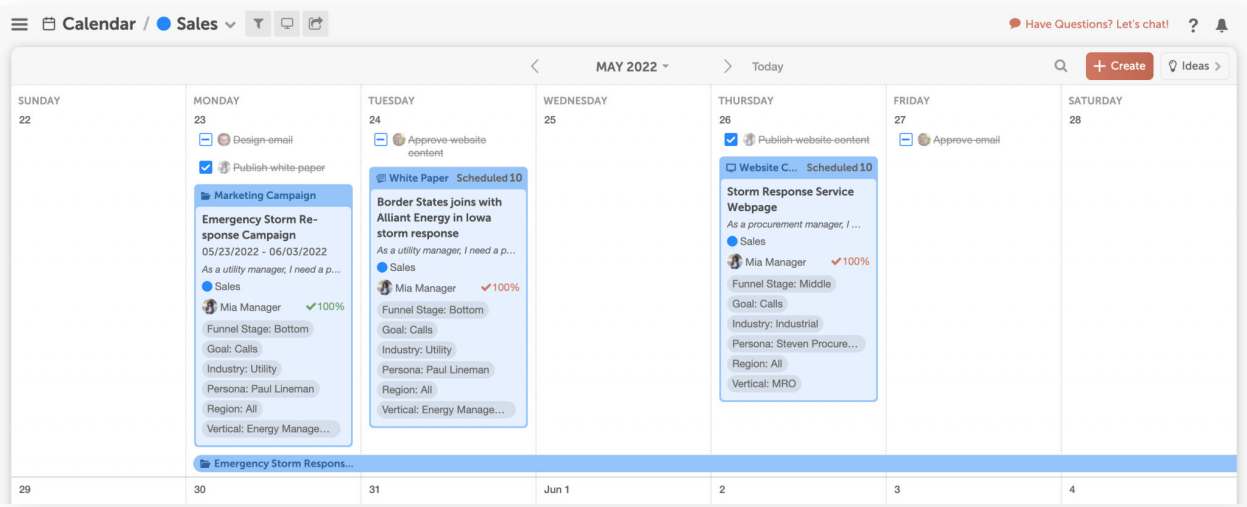


These things give you ways to organize and filter your calendar to make reporting, planning, and tracking easy by using something called a saved view.

Here are a couple of examples of saved views you can create based on color labels, project types, and tags.

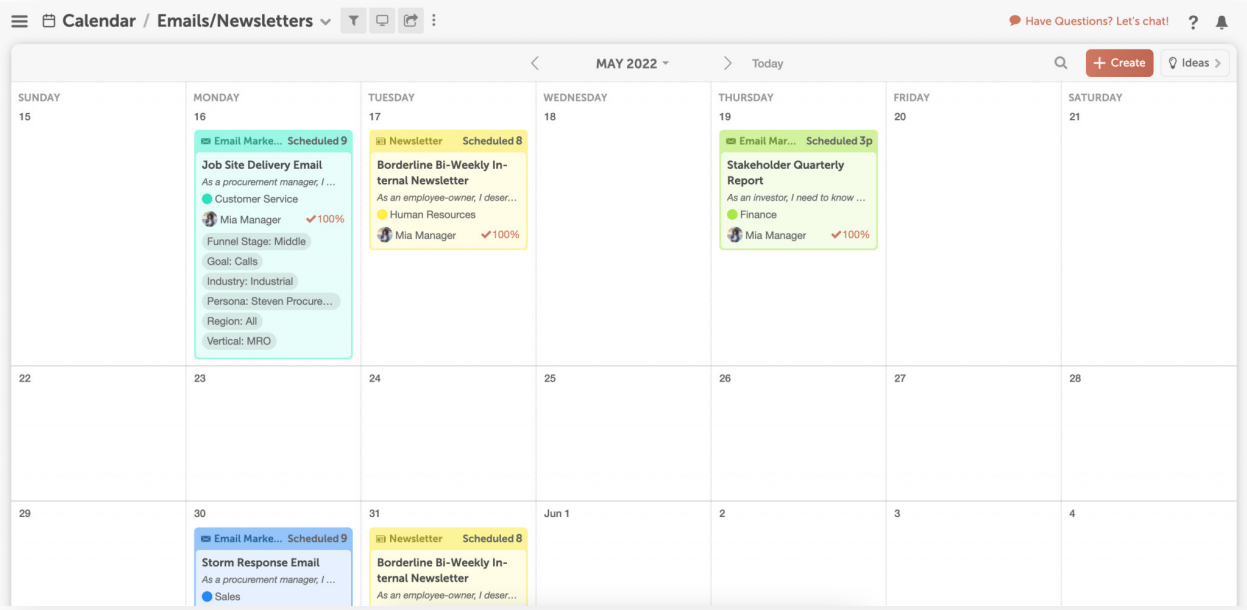
Filter Based on Color Label: A Saved View for Each Department You Work With

This saved view gives you visibility into the work your team does on behalf of another departments so you can quickly provide timelines for projects.



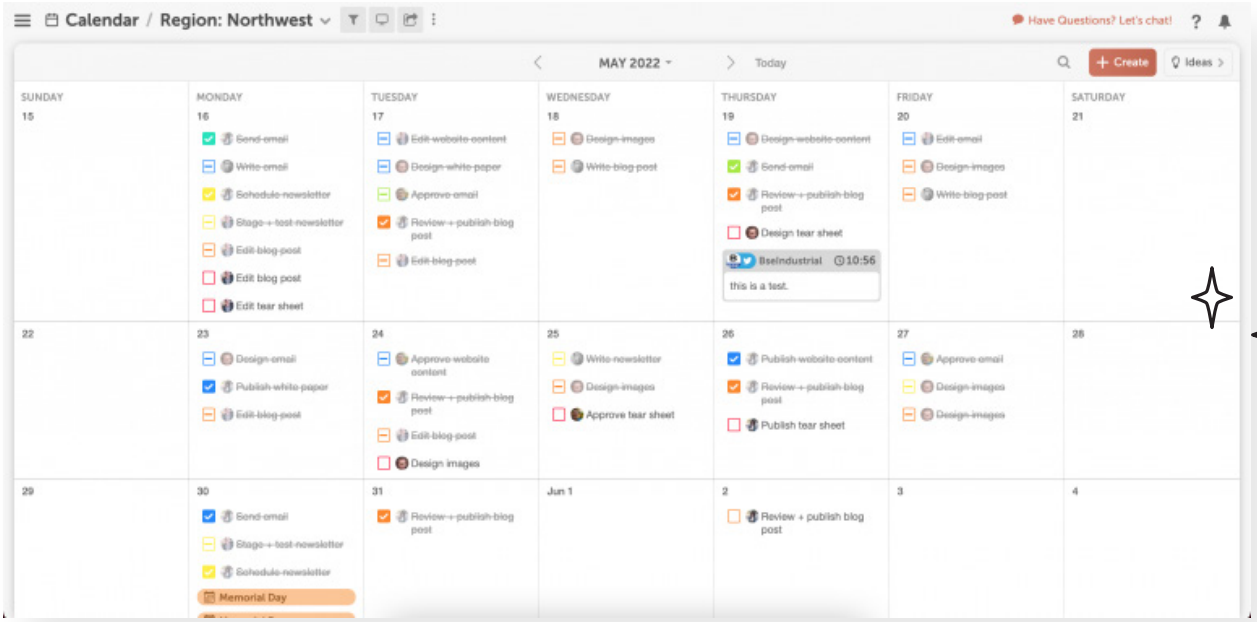
Filter Based on Project Types: A Saved View of All Emails and Newsletters

This saved view shows you all the emails your team will send so you can avoid collisions and sending too often to the same audience. Here's what it looks like on the calendar:



Filter Based on Tags: A Saved View of Every Project That Contributed to a Certain Region

This saved view pulls every project that is tagged with a specific region so you can prove to stakeholders all the activities your team is doing per region.



Color Labels

As mentioned above, color labels are the highest and most general level of organizing your calendar. These are concrete categories that are applied to all your marketing activities – meaning these categories are not likely to change over time.

Here are a few of the most important things color labels can do for you:

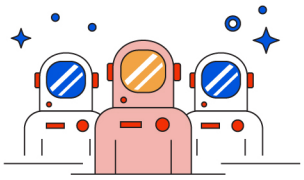
- Allow you to quickly visualize which activities are tied to certain departments, business units, or teams.
- Help you report on what your team is working on.
- Easily see how all the pieces of your marketing strategy fit together.

Choose Your Color Label Strategy

To make it easier to set-up, we have a suggested color label structure for three different types of marketing teams. Read the descriptions and select the one that best fits your marketing team.

Team Type 1

We Are the Whole Marketing Team

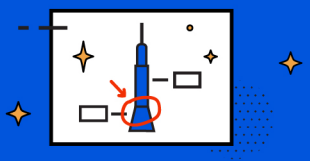


This is your team if:

1. You own your roadmap and set your own strategy.



2. You decide what projects your team will focus on.



3. Your team faces very little bureaucracy when managing or handing off projects.



If this description matches your marketing team, we recommend you setup color labels by product line or business vertical.

Here are examples of both:

Product Line:

- Diagnostic
- Surgical
- Medical Equipment
- Acute Care
- Storage & Transport
- Wound Care

Business vertical:

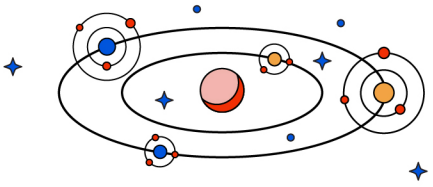
- Energy
- Manufacturing
- Transportation
- Oil & Gas
- Government
- Engineering

To make it easier for you, use this worksheet to write down the product lines or business verticals your team promotes to create your own color labels.

- Add a label name
- Add a label name
- Add a label name
- Add a label name
- Add a label name
- Add a label name

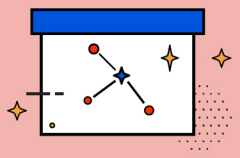
Team Type 2

We Are a Team of Teams



This is your team if:

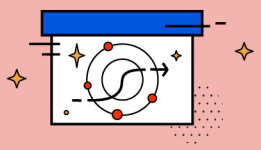
- [x] **1** Your team can be described as an "internal agency" that creates assets based on requests from other departments.



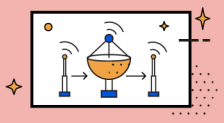
- [x] **2** Project ideas start with another department and then come to your team for execution.



- [x] **3** Business units outside of marketing define your roadmap.



- [x] **4** Your projects need to go through a complex hand off process from one team to another.



If this description matches your marketing team, we recommend you setup color labels by the business functions or departments that your team executes projects on behalf of.

Here's an example:

Departments:

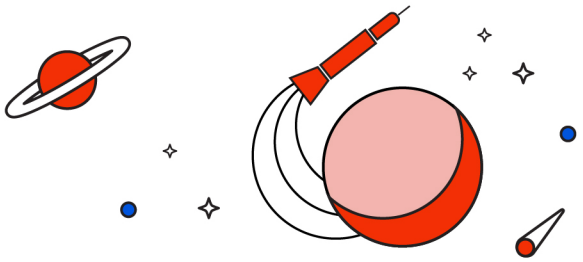
- Social Responsibility
- Finance
- Sales
- Human Resources
- Customer Support
- Vendor Partnerships

To make it easier for you, use this worksheet to write down the business functions or departments your team serves to create your own color labels:

- Add a label name
- Add a label name
- Add a label name
- Add a label name
- Add a label name
- Add a label name

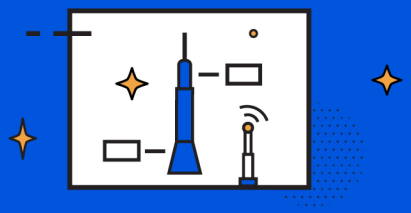
Team Type 3

We Are an Agency



This is your team if:

1. You execute marketing projects on behalf of clients.



If this description matches your marketing team, we recommend you setup color labels by the business functions or departments that your team executes projects on behalf of.

Here's an example:

Departments:

- Jester Bros. Brewery
- County Table Breads
- Lynx Heavy Machinery
- DHS Properties
- Hock & Bothen Law
- Jefferson Group

To make it easier for you, use this worksheet to write down the clients your team serves.

- *Add a label name*
- *Add a label name*
- *Add a label name*
- *Add a label name*
- *Add a label name*
- *Add a label name*

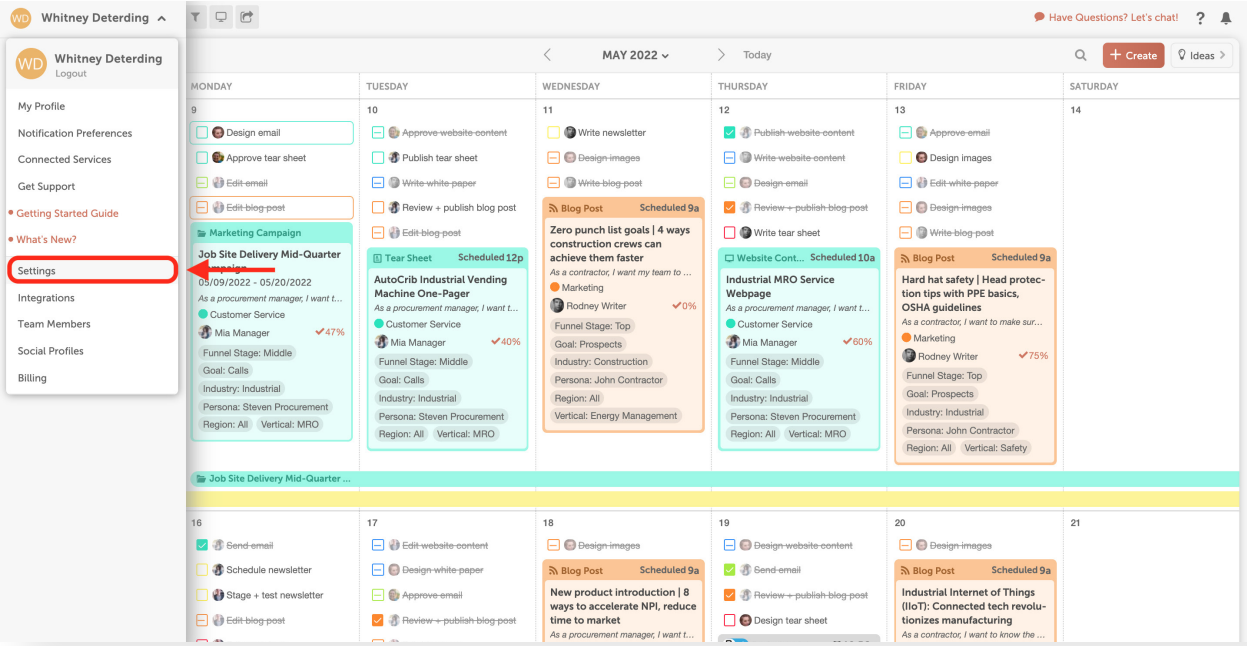




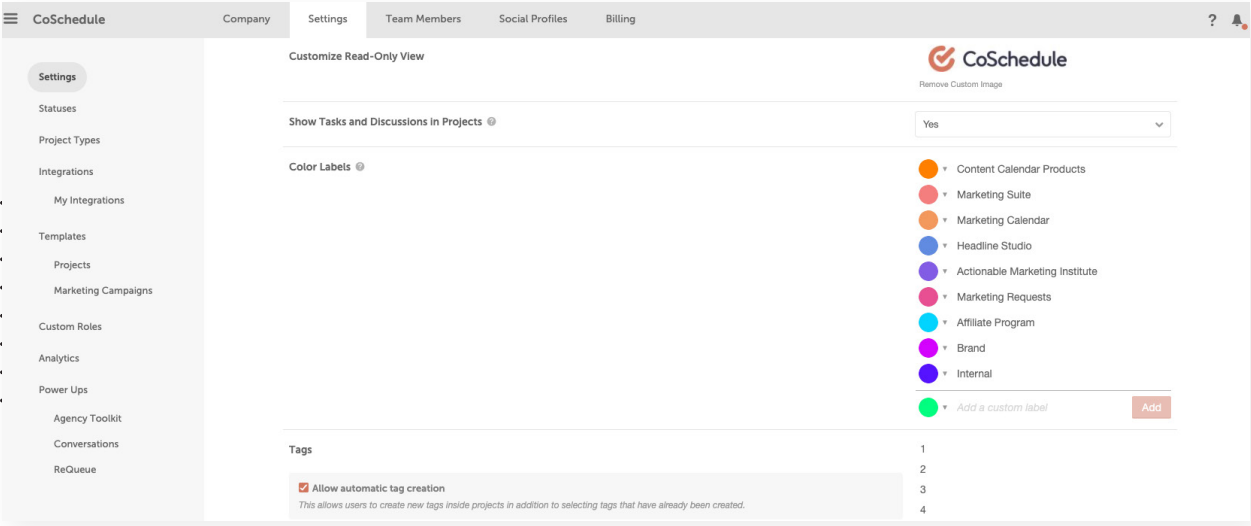
Apply Color Labels to Your Calendar

Now that you know what your color labels will be, here's how to set them up on your calendar.

Click the hamburger menu and toggle down your name. Select "Settings".



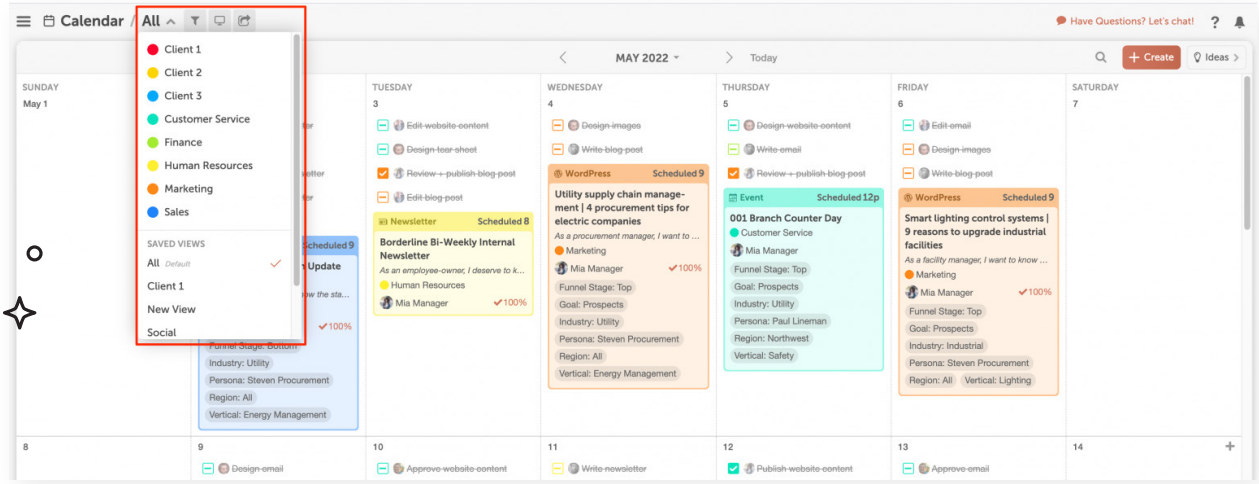
Under the Color Labels section, name your label and apply a color.



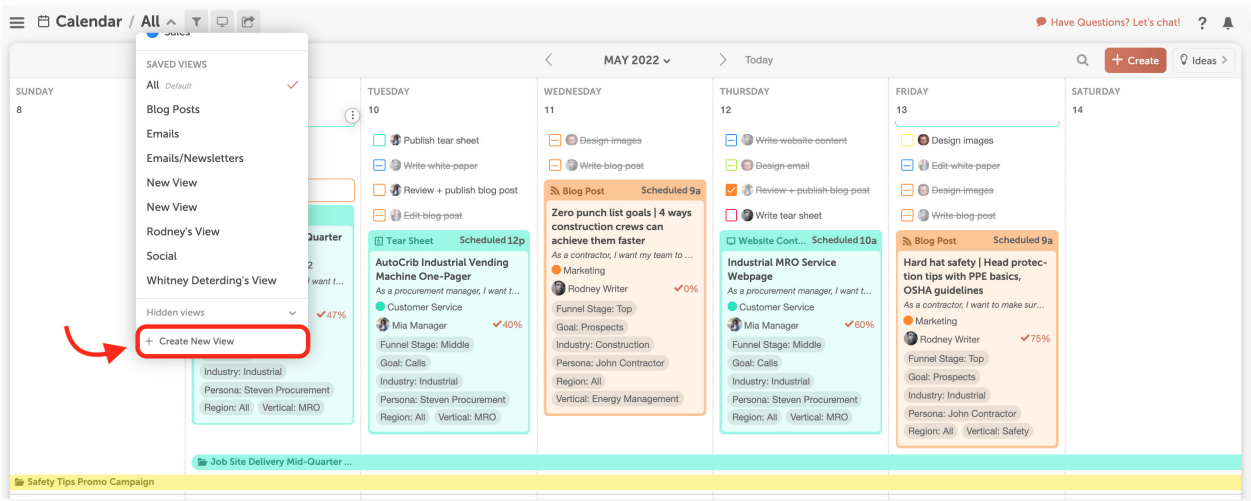
Your CoSchedule calendar will automatically create a Saved View for each of your designated color labels.

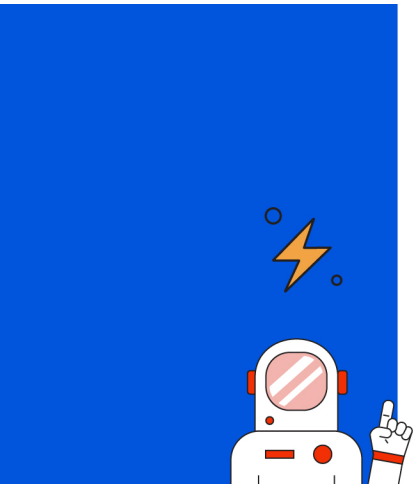
Create a Saved View for Each Color Label

To create a new saved view, click the last item in the breadcrumb menu. This is where you can navigate between saved views and create new ones.



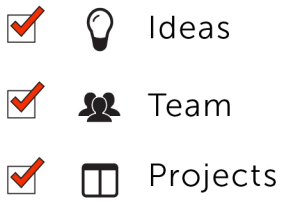
To create a new Saved View, select **Create New View**. Give the new view a name and make selections to the Filter Content (i.e. "Color Label") and/or Calendar Display Settings. Whatever options you select will appear on your calendar immediately and whenever you are using this Saved View.





TIP

If you have other organizers in CoSchedule, make sure you apply your saved views to these areas by checking "Ideas, Team, and Projects" in the settings of your saved view.



Continue that process until you have created a saved view for each of your color labels.

This allows you to easily report on all the marketing projects you have planned for each department or business vertical.

Project Types

A project type describes the type of asset that is being created. There are a few valuable ways project types help you get organized:

- Adds an additional filtering layer to your calendar.
- Helps you show marketing activities to stakeholders.
- Allows you to better visualize your marketing strategy.
- Informs team members what type of asset they are creating.

Choose Your Custom Project Types

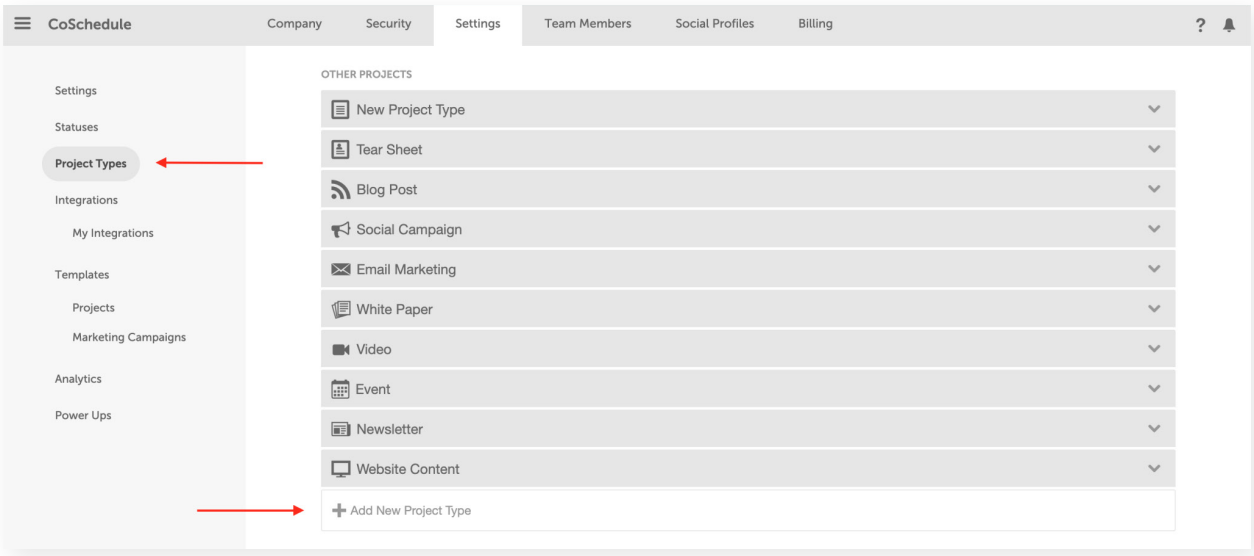
To make it easier to set-up, place a checkmark by every type of asset/event your marketing team creates. These will become your project types in CoSchedule.

- [x] Blog posts *(Standard)*
- [x] Videos *(Standard)*
- [x] Articles *(Standard)*
- [x] Emails *(Standard)*
- [x] Newsletters *(Standard)*
- [x] Podcasts *(Standard)*
- [x] Marketing Campaigns *(Standard)*
- [x] Whitepapers *(Standard)*
- [x] Social Media *(Standard)*
- [ ] TV Ads
- [ ] Case Studies
- [ ] Courses
- [ ] Promotions
- [ ] Guest Posts
- [ ] Influencer Marketing
- [ ] Interviews
- [ ] Twitter Chat
- [ ] Testimonials
- [ ] Product Announcements
- [ ] Contests
- [ ] Press Releases
- [ ] Microsites
- [ ] Annual reviews
- [ ] Workshops
- [ ] Polls
- [ ] Tear sheets
- [ ] Social Ads
- [ ] Google Ads
- [ ] Slide Decks
- [ ] Brochures
- [ ] Reports
- [ ] Events
- [ ] Conferences
- [ ] Logos
- [ ] Landing Pages
- [ ] Websites
- [ ] Infographics
- [ ] eBooks
- [ ] Webinars
- [ ] Case Studies
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

Apply Your Custom Project Types

To add your list of custom project types you created above, toggle down your name and navigate down to “Settings”. Next, find the “Project Types” option in the left-hand menu. Scroll to the bottom and add a new project type.

Start adding each item you checked on the list above and choose a custom icon from the dropdown menu.



Filter Types

Each Filter will only filter the content that pertains to it. For example, only Projects and Marketing Campaigns have the ability to add Tags. If you filter by a specific Tag, saved calendar views will filter all Projects and Marketing Campaigns by that selected Tag, but will still display calendar items that do not have the ability to be Tagged. To filter more, add additional filter types to reach your preferred outcome.

1. **Color Label:** Displays any calendar item with the selected color label.

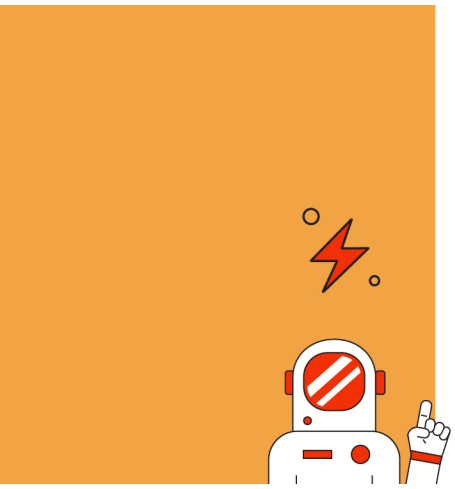
2. **Project Type:** Displays the Project type that is selected.

3. **Team Member:** Displays items that can have team members assigned. (Projects and tasks.)

4. **Tag:** Displays items that can have tags. (Projects and Marketing Campaigns.)

5. **Status:** Will display items that can have a status. (Projects and Social Messages.)

6. **Social Profiles:** Will display Social Messages with the selected social profile.



TIP

If you know you want to add a social campaign to every new blog post that is added to the calendar, add a social campaign as a default attachment to the 'blog post' project type.



Create a Saved View for Project Types

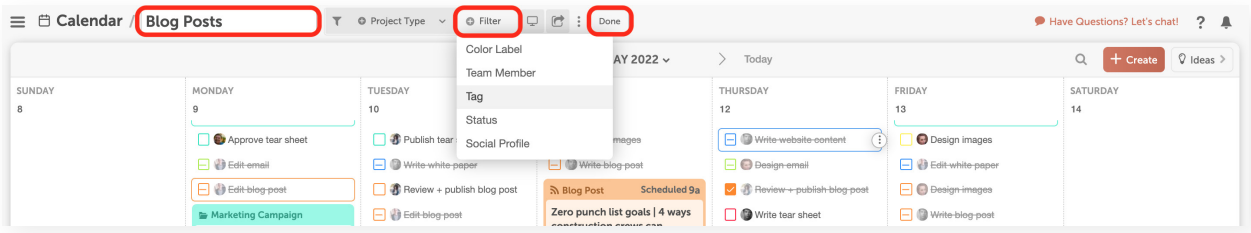
To create a new saved view, click the last item in the breadcrumb menu and click 'Create New View'.

Name the view after the project type you want to track (ex. Blog Posts).

Next, add one of the project types you just created as a new filter category. Here's how:

1. Add a filter category.
2. Choose the 'Type' option.
3. Apply the relevant project type from the drop-down list.

This allows you to see all the items you have planned for any given content type.



Tags

Tags offer an additional way to filter and track your projects.

Think of it this way: tags are additional categories that you might need to track which aren't covered by color labels and project types.

Here are a few ways tags add value to your CoSchedule calendar.

- Provide more context to each project.
- Allow you to create additional saved views.
- Help you quickly find all projects that are tagged with a certain keyword.

Choose Your Tagging Structure

To make it easier to set-up, place a checkmark by every tag you might need to track or report on. These will become your tags in CoSchedule.

- ◯ Region/Branch Location (ex. North America, EMEA, Latin America and the Caribbean, Asia Pacific)
- ◯ Funnel Stage (ex. Awareness, Discovery, Evaluation, Intent, Purchase, Loyalty)
- ◯ Buyer Persona (ex. Contractor Chris, Procurement Paula, Lineman Lenny, COO Cindy)
- ◯ Goal (ex. Traffic, Prospects, Leads, Calls, Retention)
- ◯ Product *(if not included as your color label)*
- ◯ Business Vertical *(if not included as your color label)*
- ◯ Department *(if not included as your color label)*
- ◯ Priority Level (ex. 1, 2, 3)

After you've checked all the boxes that could apply to your marketing projects, list out each tag below:

Goal 1: _____
Goal 2: _____
Goal 3: _____
Goal 4: _____
Goal 5: _____

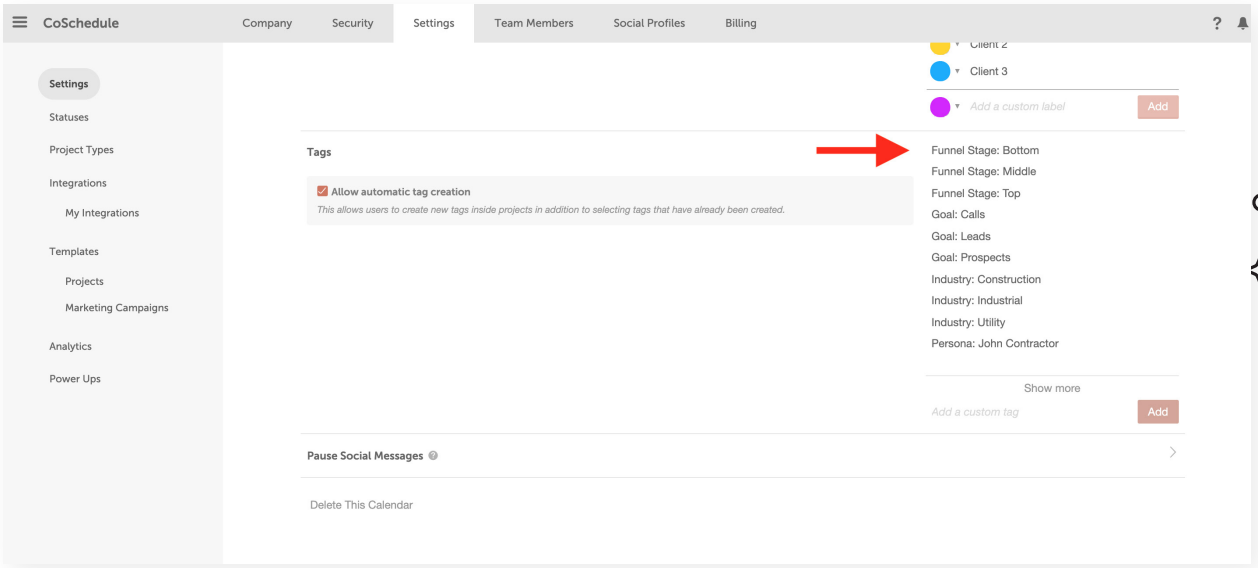
Persona 1: _____
Persona 2: _____
Persona 3: _____

Region 1: _____
Region 2: _____
Region 3: _____
Region 4: _____
Region 5: _____

Funnel Stage 1: _____
Funnel Stage 2: _____
Funnel Stage 3: _____
Funnel Stage 4: _____
Other: _____
Other: _____
Other: _____
Other: _____
Other: _____
Other: _____
Other: _____
Other: _____

Apply Your Tagging Structure

To create a new tag, toggle down your name and navigate down to “Calendar Settings”. Under the color labels section, you’ll find an area to add tags. Enter each one from your list on the worksheet above. Only Owners, Managers, and Admins can add or edit templates (social, task, project, marketing campaigns). *Templates vary based on what’s available to you in your plan.*



Create a Saved View for Project Tags

To create a new saved view, click “All” in the breadcrumb menu and click “Create New View”.

Name the view after the project type you want to track (ex. Blog Posts).

Next, add one of the project types you just created as a new filter category. Here’s how:

1. Click the plus sign in the filter option to your right.
2. Choose the “Tag” option.
3. Apply the relevant project type from the drop-down list.

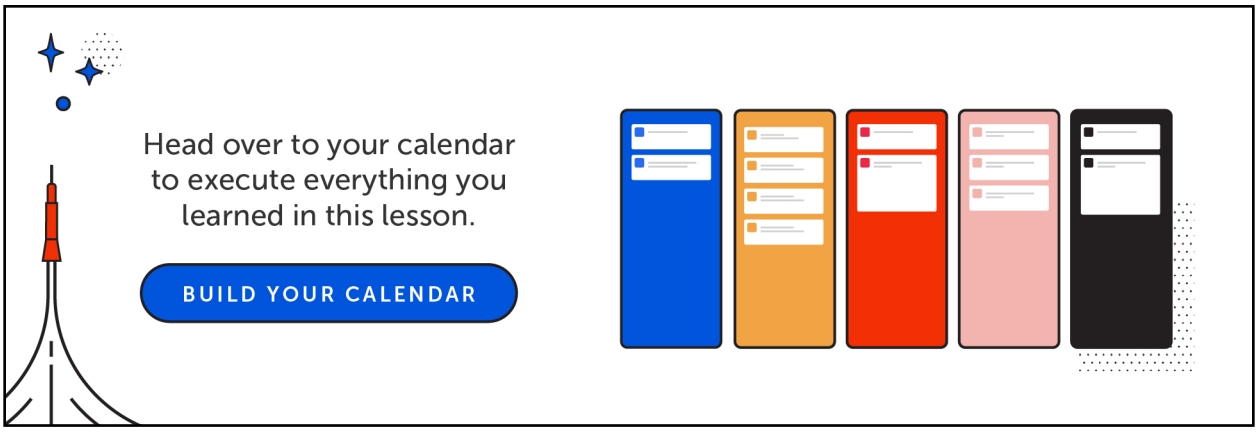
This allows you to see all the items you have planned for any given content type. Click “Done” once you are finished to create your new saved view.

Mix and Match Saved Views

Now that you've created a saved view for color labels, project types, and tags, here's something else you can do with a saved view, try mixing and matching various filters together to report on anything you need.

Here's an example:

Create a saved view with content type + tag: Add blog posts as a project type filter AND one of your goal tags to see all the content you published that contributed a specific goal.



OR

