Getting Started With Your Free Calendar

CoSchedule



In This Guide

Implementation Chapter 1: Build Your Own Marketing Calendar

Implementation Chapter 2: Take Control Of Your Process With Your Marketing Calendar

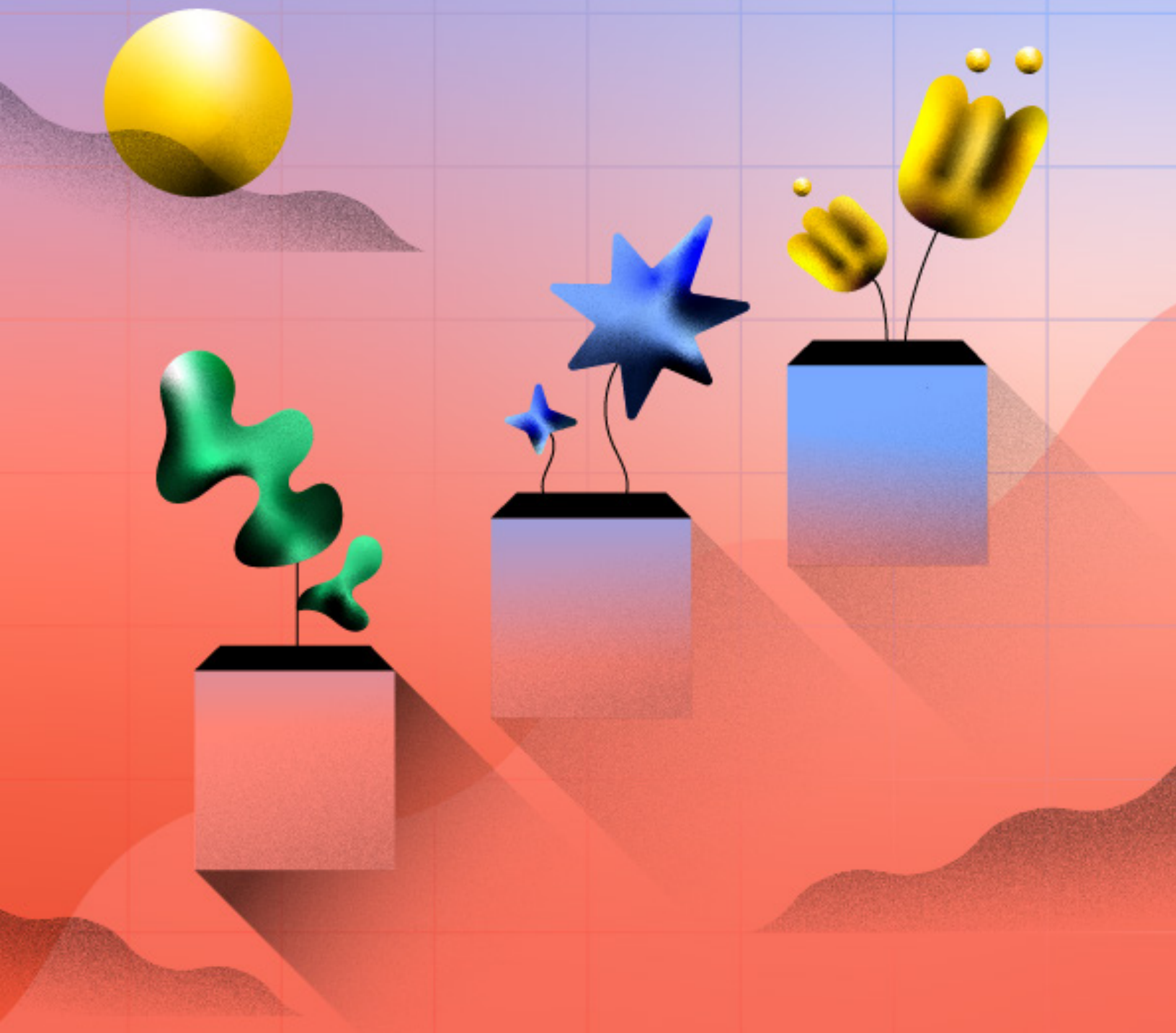
Implementation Chapter 3: Maximize Your Social Media Strategy with CoSchedule Marketing Calendar

Implementation Chapter 4: Get Organized & Keep Everything In One Place With Projects

Implementation Chapter 5: The Best Way To Manage A Project From Start To Finish

Build Your Own Marketing Calendar

CoSchedule



In This Lesson

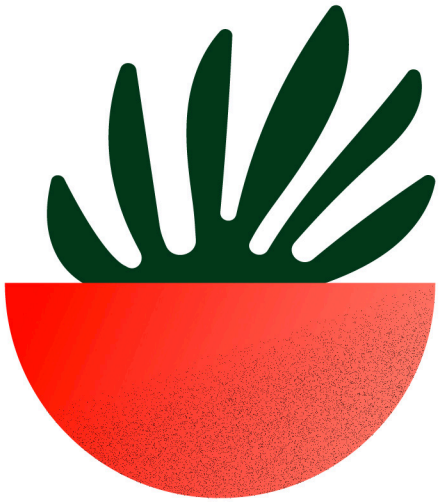
Bulk Import Existing Projects & Content On Your Marketing Calendar

Add A Project To Your Calendar On The Publish Date

Give Your Project A Name

See The Big Picture & What's Coming Next: Project Card Breakdown

Add Your Integrations

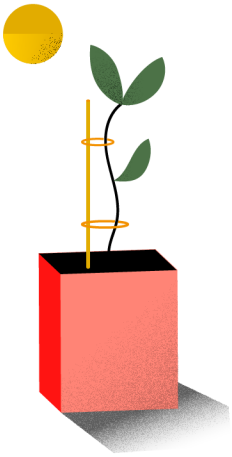


Core Concept: Put Everything In Your CoSchedule Marketing Calendar

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

With CoSchedule Marketing Calendar, you now have a place to manage every project and request that comes your way. Once you get in the habit of putting everything in Marketing Calendar, it becomes your single source of truth for your marketing.

Throughout this guide, you're going to learn step-by-step how to build your own marketing calendar so you can get visibility into *everything* you are doing and when.



What is this guide?

This lesson will walk you through how to use CoSchedule Marketing Calendar to see all your projects & social messages on a single calendar.

Who is this guide for?

Marketers who wear many hats and struggle to coordinate their marketing work as their task list grows.

Bulk Import Existing Projects & Content On Your Marketing Calendar

If you already have projects and content in a different platform such as Google Sheets, Excel, or a different project management platform, you can bulk import this content to your Marketing Calendar.

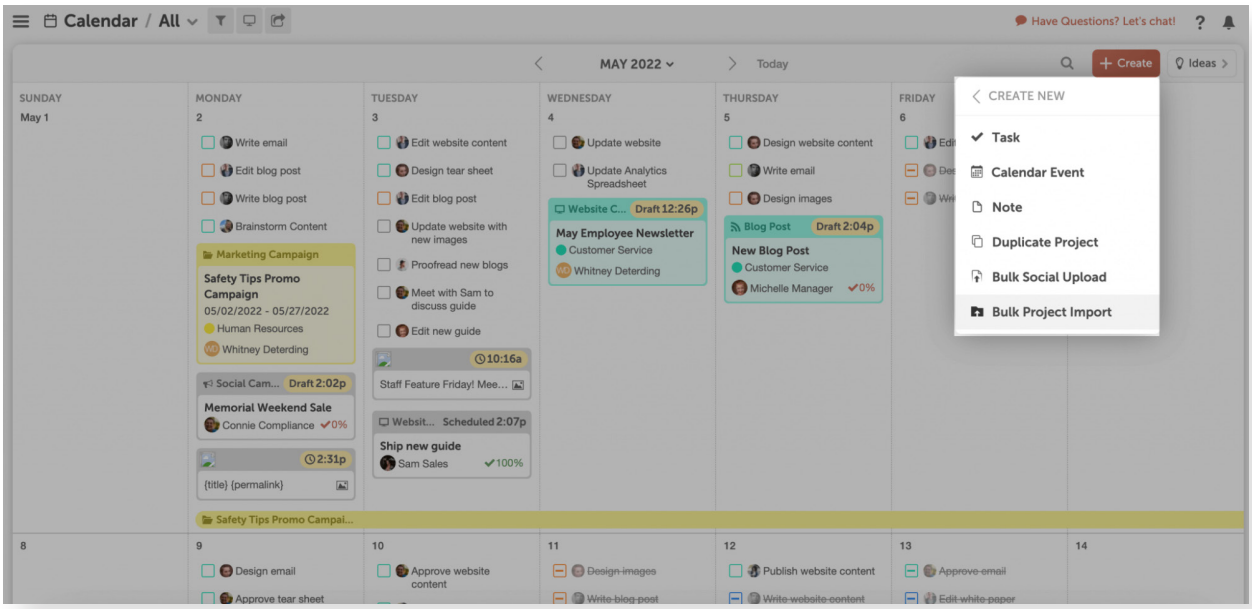
This is made easy with Marketing Calendar's **Bulk Project Import** feature.

To import projects, follow these steps:

1. Select Bulk Project Import in the Create drop down menu.

2. Choose which platform to import your projects.

3. Follow the provided directions to import all your content into Marketing Calendar.



Now that your existing projects have been added to your marketing calendar, all new projects need to be added to your Calendar

Add A Project To Your Calendar On The Publish Date

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

Here's why:

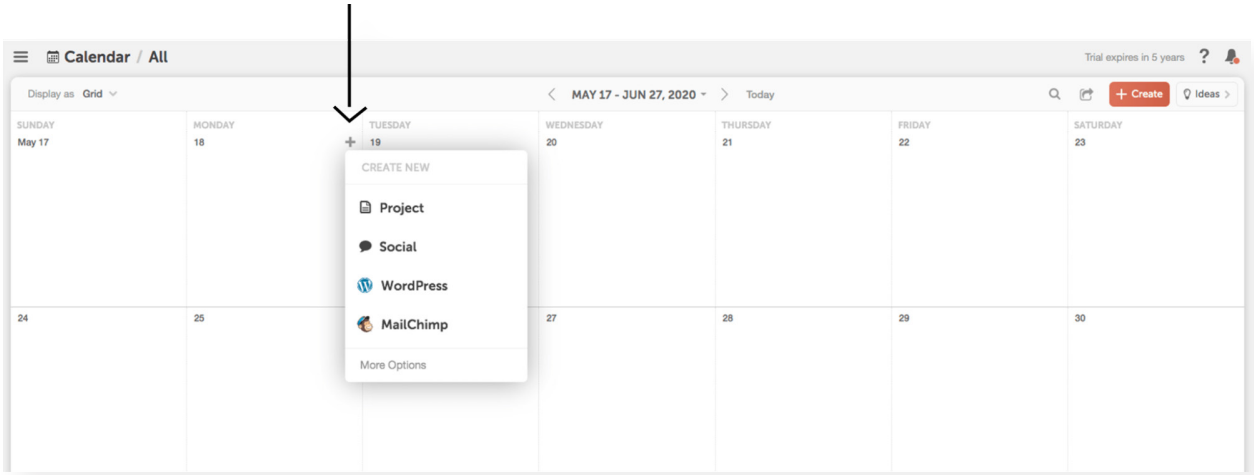
- This provides visibility, so you (and others) know what's going live and when.
- It helps set priorities (i.e. the next upcoming project should be your priority).
- It creates a deadline – which increases the likelihood of accomplishing a project on time.

Think of an upcoming blog post, newsletter, event, etc. that you are currently working on. Now it's time to add it to your Calendar.

To add a new project, click the plus sign on the specific date on your calendar you want the project to publish or go live. Then select the project type.



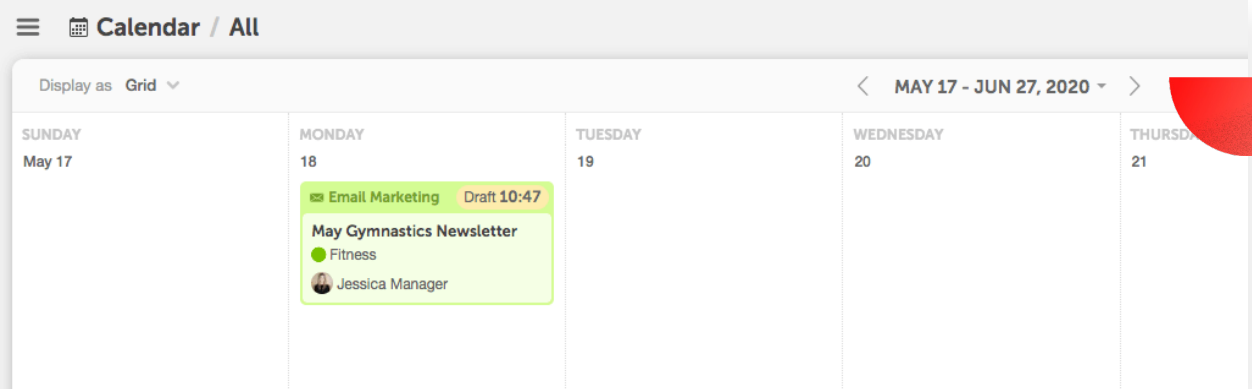
Onboarding Milestone: Create Your First Project



Give Your Project A Name

After you've clicked the plus sign on the publish date and selected the project type, you'll need to give your project a name.

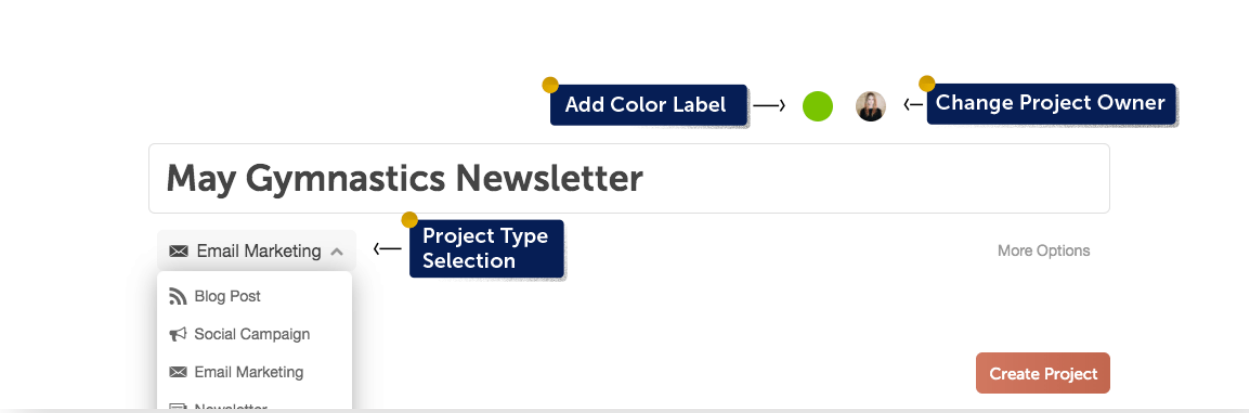
The project name shows up on your project card when you are on the Calendar view.



Continue adding planned marketing projects to your calendar to create visibility into all of your projects.

Project Card Breakdown: See The Big Picture & What's Coming Next

The project card gives you all the details you just filled out like the project name, Color Label (which we'll learn about in Chapter 2), and Project Type.



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

Why is a Project Type important?

- It shows the tactics that contribute to your marketing strategy.
- It helps inform others what you're working on for better visibility.
- It highlights project frequency so your strategy can be more balanced.
- It allows you to create saved, filtered views of your calendar (i.e. social messages only, email calendar, etc.).

Add Your Integrations

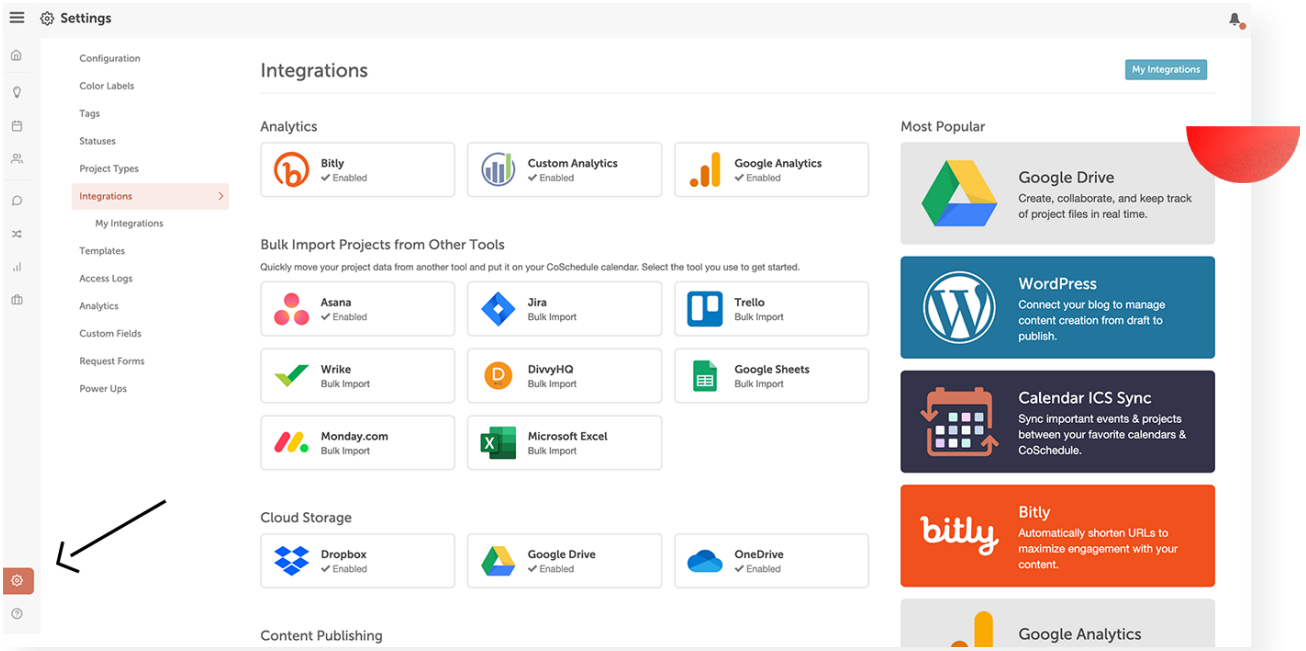
Integrations enhance your projects by syncing activities from outside tools like MailChimp, WordPress, and Social Media to your calendar – which means you don't have to waste your time duplicating work.

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

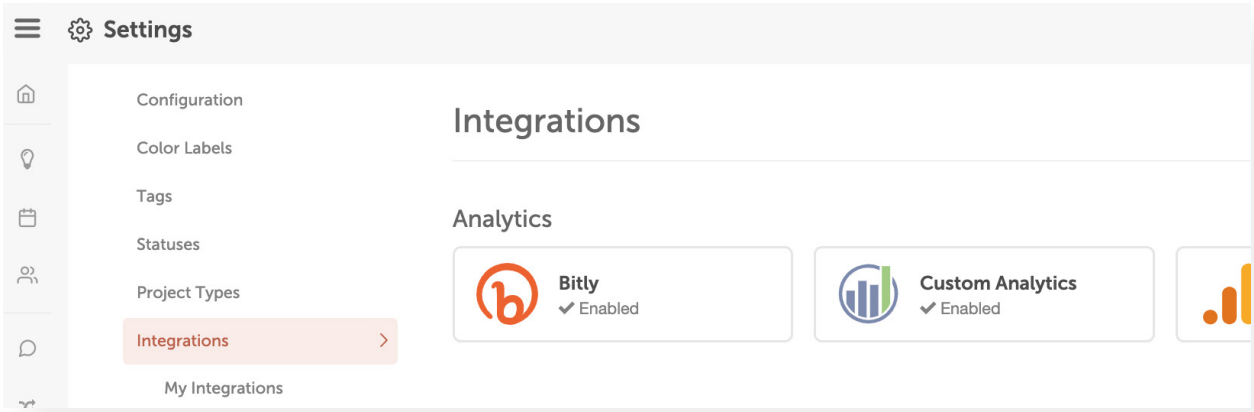
- **WordPress & HubSpot** – Whenever someone creates a new blog post in WordPress or HubSpot, it will automatically appear on your Marketing Calendar.
- **Email Marketing** – Whenever someone creates a new email in Mailchimp, HubSpot, Constant Contact, or Campaign Monitor, a new project card will appear on your Marketing Calendar.
- **Social Media** – Marketing Calendar connects to your social media channels, so you plan, create, and schedule your social messages alongside your other marketing projects.

To connect an integration:

1. Click the *Settings* button in the left-side panel.

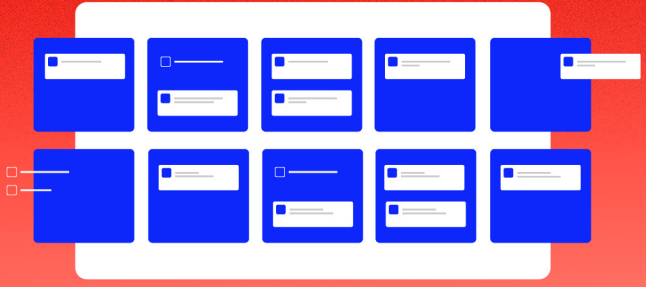


2. Select *Integrations* from the menu list under Settings.



Add Some Tasks and Social Messages to Your Calendar

GO TO MY CALENDAR



Take Control of Your Process With Your CoSchedule Calendar

CoSchedule



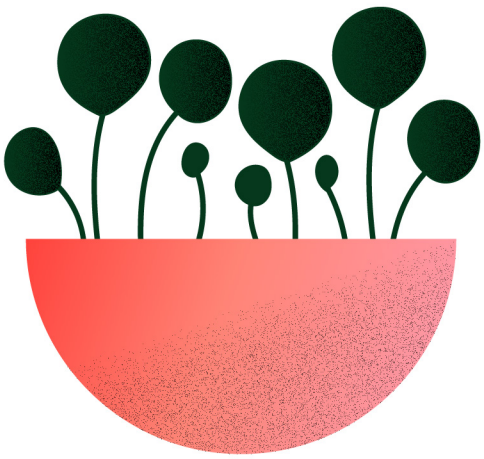
In This Lesson

Change The Status Of A Project

Choose Your Color Labels

Apply Color Labels To Your Marketing Calendar

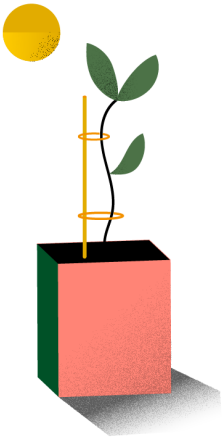
Bonus Step: Apply Additional Metadata To Your Projects



Core Concept: Get Your Process In Order

When you suffer from a lack of process, it can feel like your to-do list & projects are out-of-control.

It feels impossible to define your priorities or know when projects will be done. In this chapter, you'll learn how to use your CoSchedule Marketing Calendar to get a solid marketing process in place.



What is this guide?

This lesson will walk you through how to use CoSchedule Marketing Calendar to see all your projects & social messages on a single calendar.

Who is this guide for?

Marketers who wear many hats and struggle to coordinate their marketing work as their task list grows.

Change The Status of a Project

The Project Status shows what you are working on, and when it will be published. This helps you prioritize your work, and keep things from going live before you are ready.

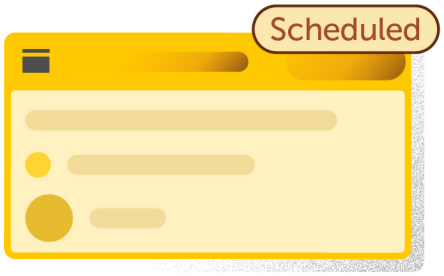
There are four statuses in your Marketing Calendar:



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.

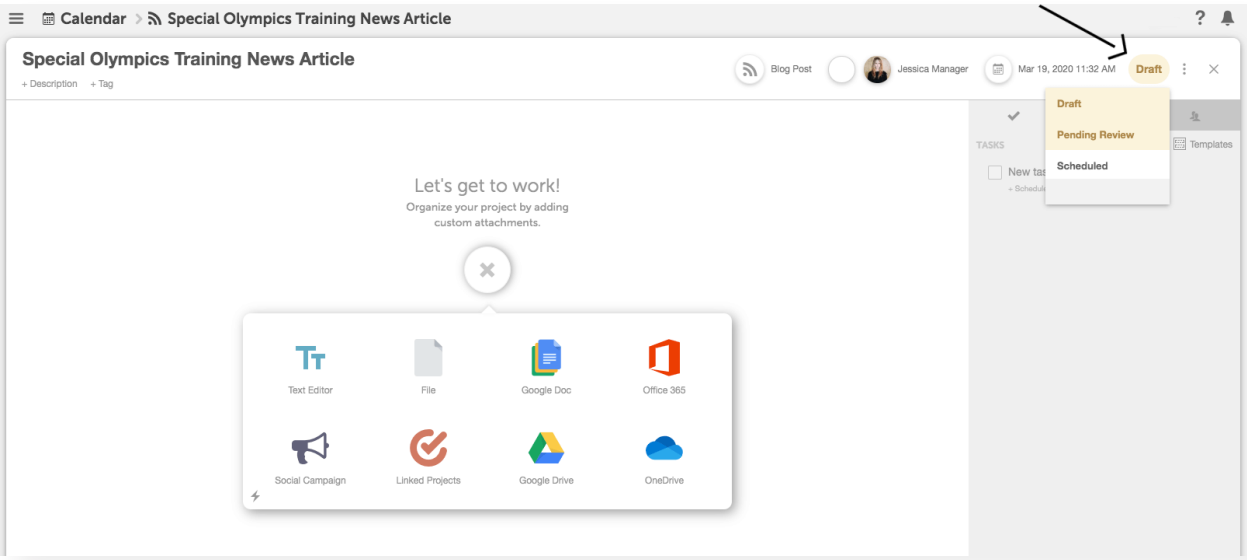


Published - Had been published, sent, or is live on your website/social media channels. Best used to mark which projects have been fully completed by your team.

To change the status of a project:

1. The Project Status shows what you are working on, and when it will be published. This helps you prioritize your work, and keep things from going live before you are ready.

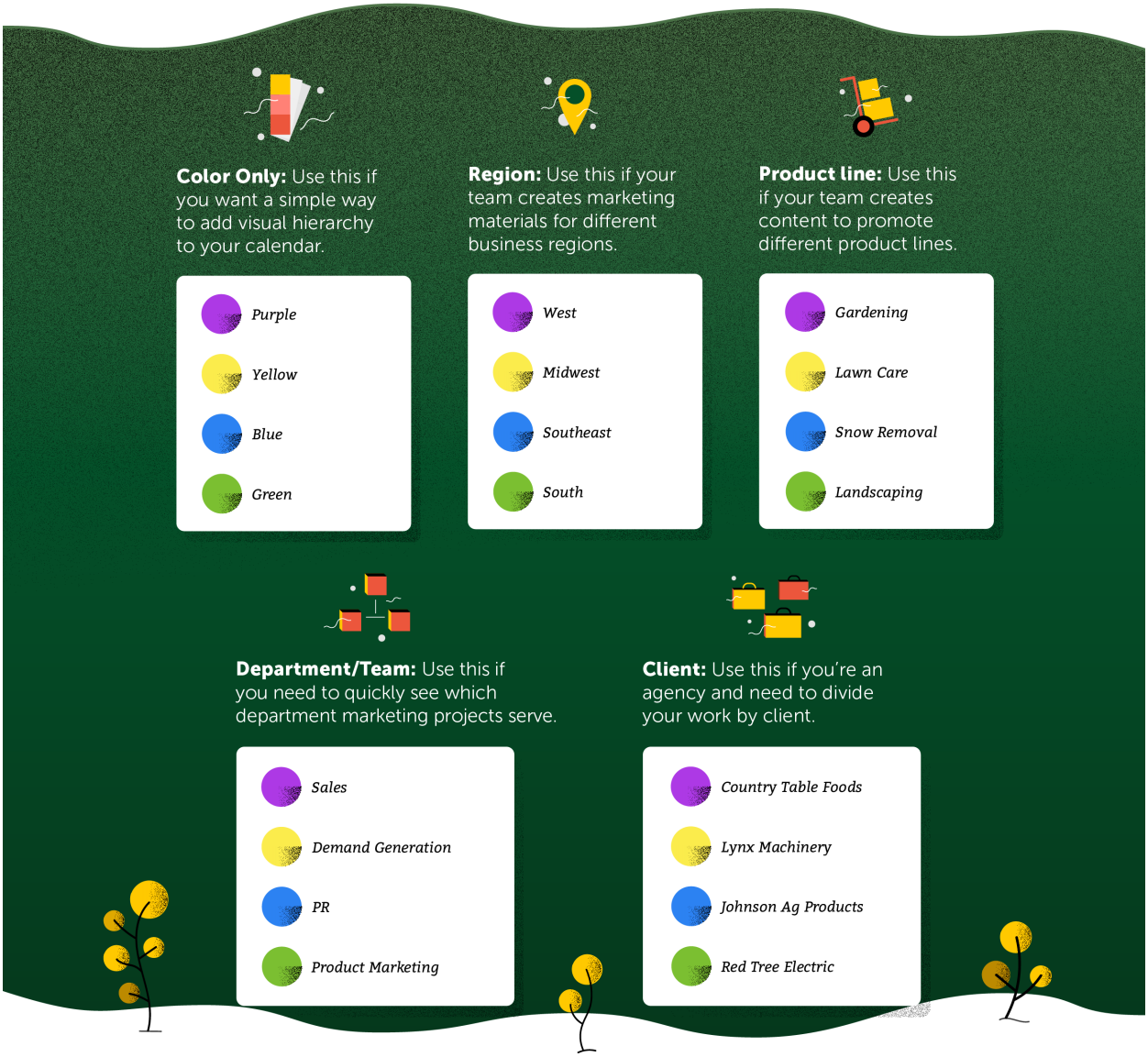
2. There are four statuses in your Marketing Calendar:



Choose Your Color Labels

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 of the most common ways people use them:



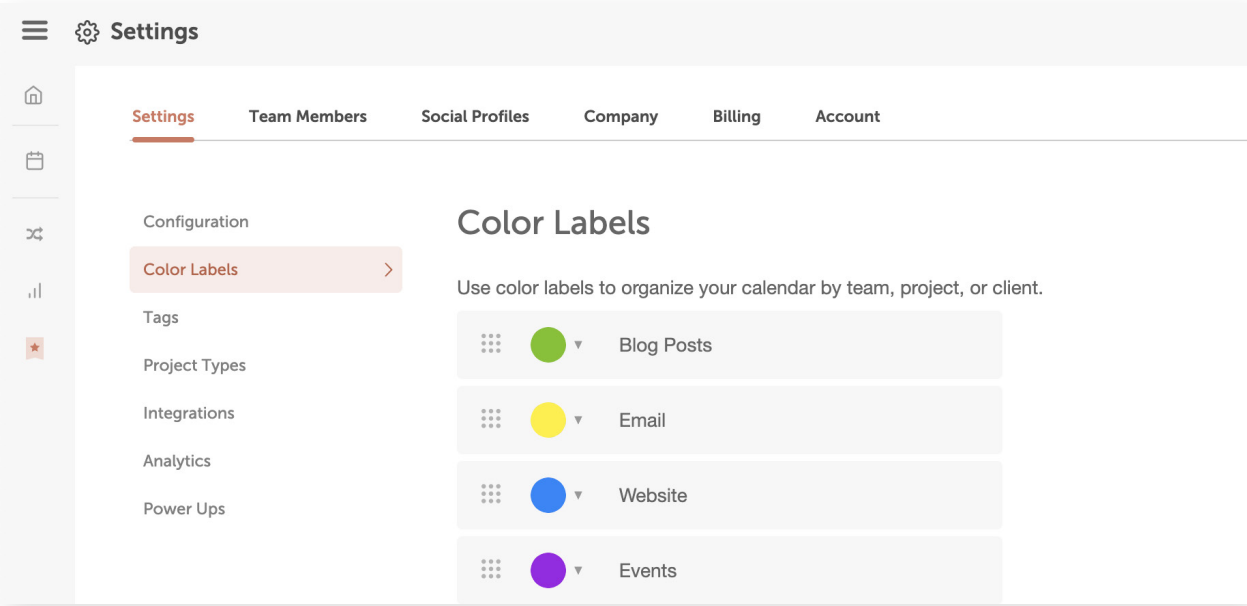
Onboarding Milestone: Customize Your Calendar

Apply Color Labels To Your Marketing Calendar

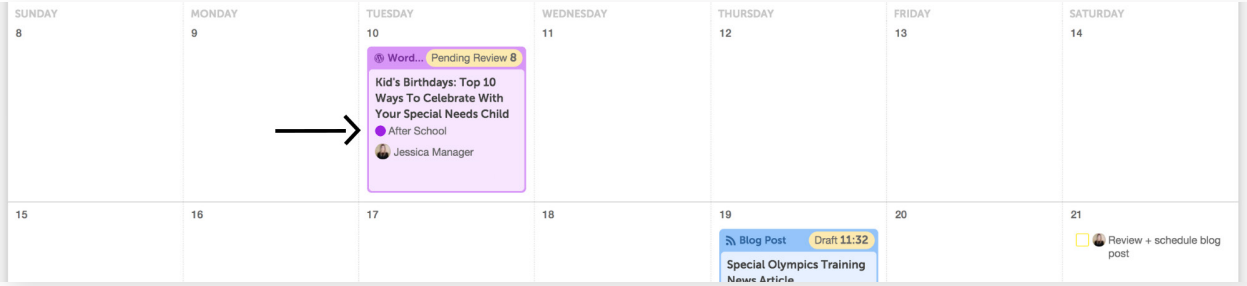
To set up color labels:

1. Click the Settings button in the left-side panel.

2. Select Color Labels from the menu list under Settings.

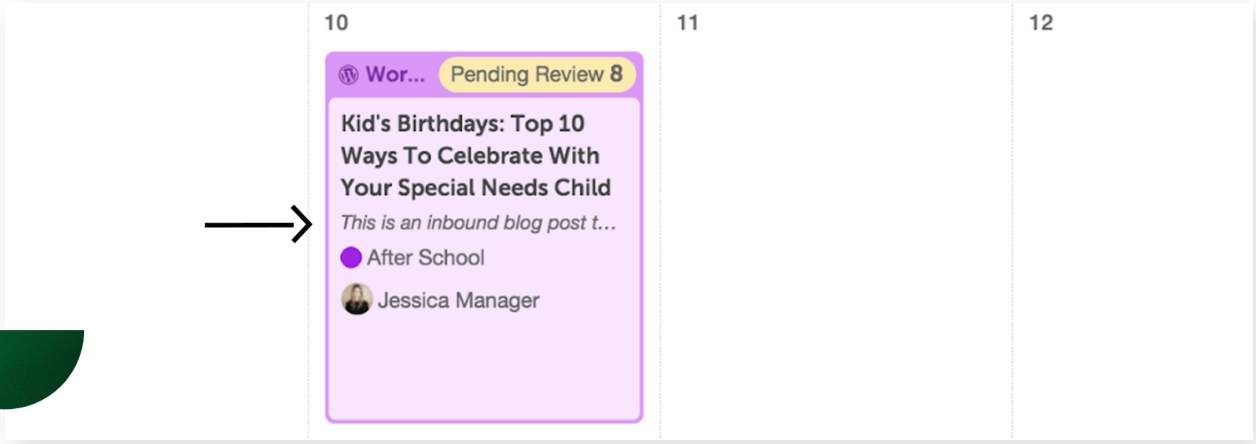


After you've set up color labels, you can apply them to your projects to visually distinguish between different projects on your calendar.



Descriptions

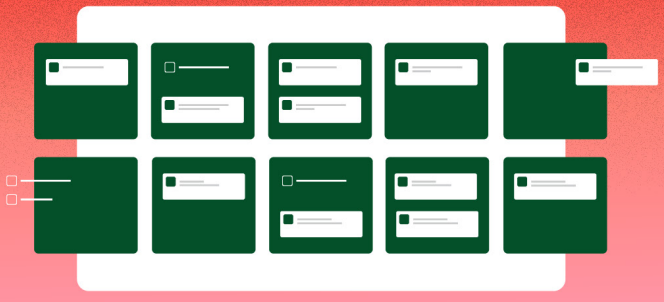
Use Project Descriptions to add more context or details to a specific project's Project Card. This helps you quickly know an important summary of your project.



Descriptions can be added by clicking "More Options" when creating a new project or below the project name within a project card.

Start Implementing Your New Marketing Process

GO TO MY CALENDAR



Maximize Your Social Media Strategy with Your CoSchedule Calendar

CoSchedule



In This Lesson

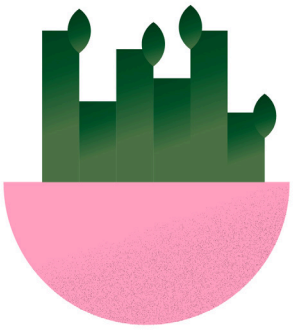
Create Social Messages On Your Calendar

Schedule a Stand-Alone Message

Schedule A Social Media Campaign

Advanced Social Strategy

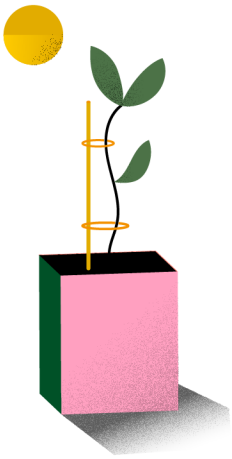
Social Analytics Report



Core Concept: Plan All Your Social Media In CoSchedule Marketing Calendar

CoSchedule Marketing Calendar is the only marketing calendar that lets you plan all your marketing projects AND write, schedule, and publish your social messages in the same place.

This chapter highlights the best ways Marketing Calendar helps you get proactive, so you can stop 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 Marketing calendar.

Who is this guide for?

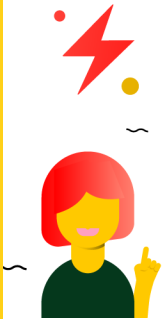
Marketers who wear many hats and struggle to coordinate their marketing work as their task list grows.

Create Social Messages On Your Calendar

There are two different ways to create social messages on your Marketing Calendar – a stand-alone social message and a social campaign.

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

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



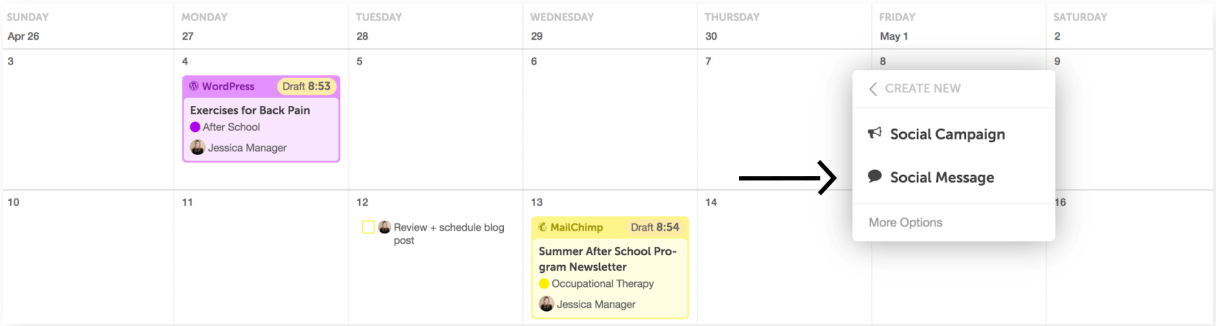
Pro Tip:

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

Schedule A Stand-Alone Message

To schedule a stand-alone social message:

1. Click to create a new project on your Marketing Calendar.
2. Choose Social and then Social Message.
3. This will open the social composer where you can create a stand-alone social media message.



Schedule a Social Media Campaign

Social Campaigns allow you to send multiple messages using your different social media platforms over a designated period of time. Using campaigns ensures your audience is more likely to see your content. This drives more traffic and helps improve the return on investment for all your hard work.

There are two ways to schedule a Social Campaign in your Marketing Calendar.

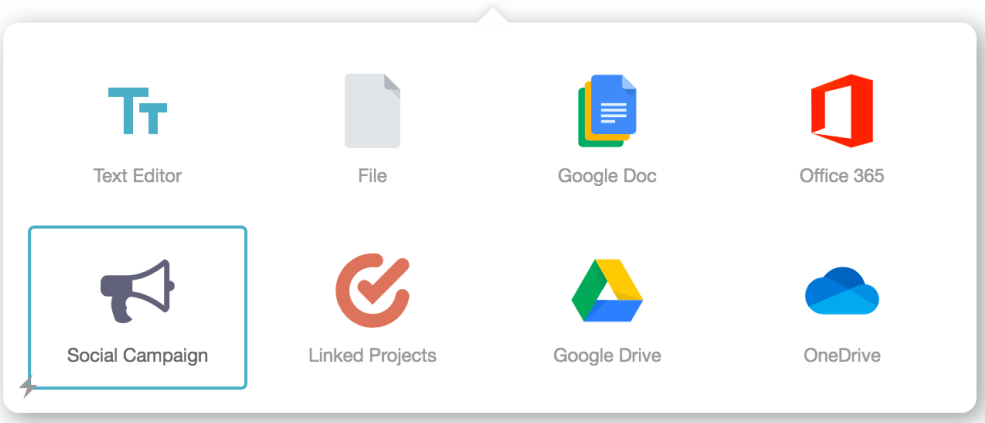
1. Attach a Social Campaign to a Marketing Project

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

In this example, you'll learn how to create a social media campaign to promote a blog post.

1. Open the project on your calendar.

2. Add a "Social Campaign" attachment

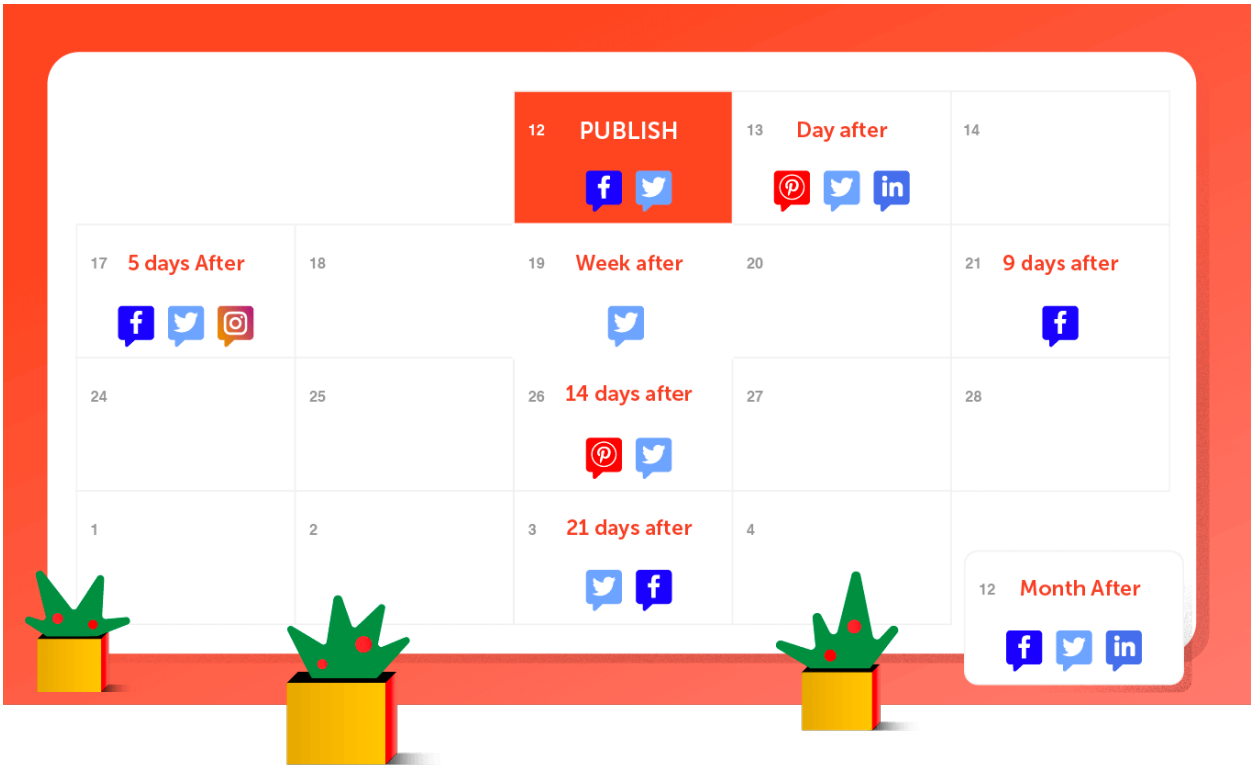


3. Next, click the **plus sign** to add a social message on a specific day.

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 customized based on the social channels you use.

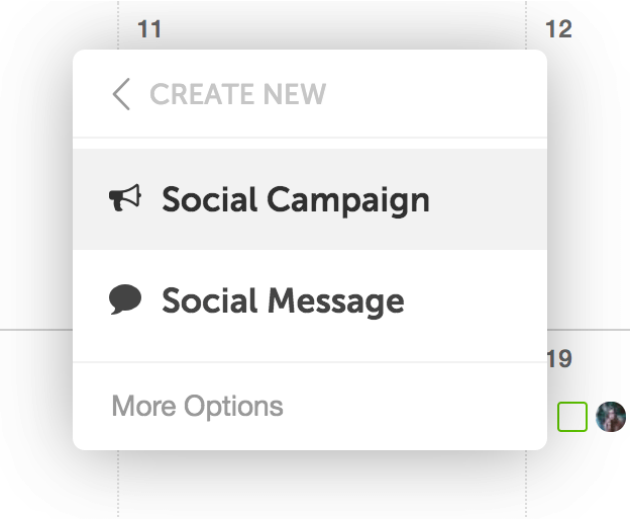


2. Schedule a Stand-alone Social Campaign

Create a stand-alone Social Campaign for a campaign that doesn't promote a marketing project that's set up in your Marketing Calendar. This could be a campaign that promotes partner content, a recent news story that pertains to your business, or 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**"



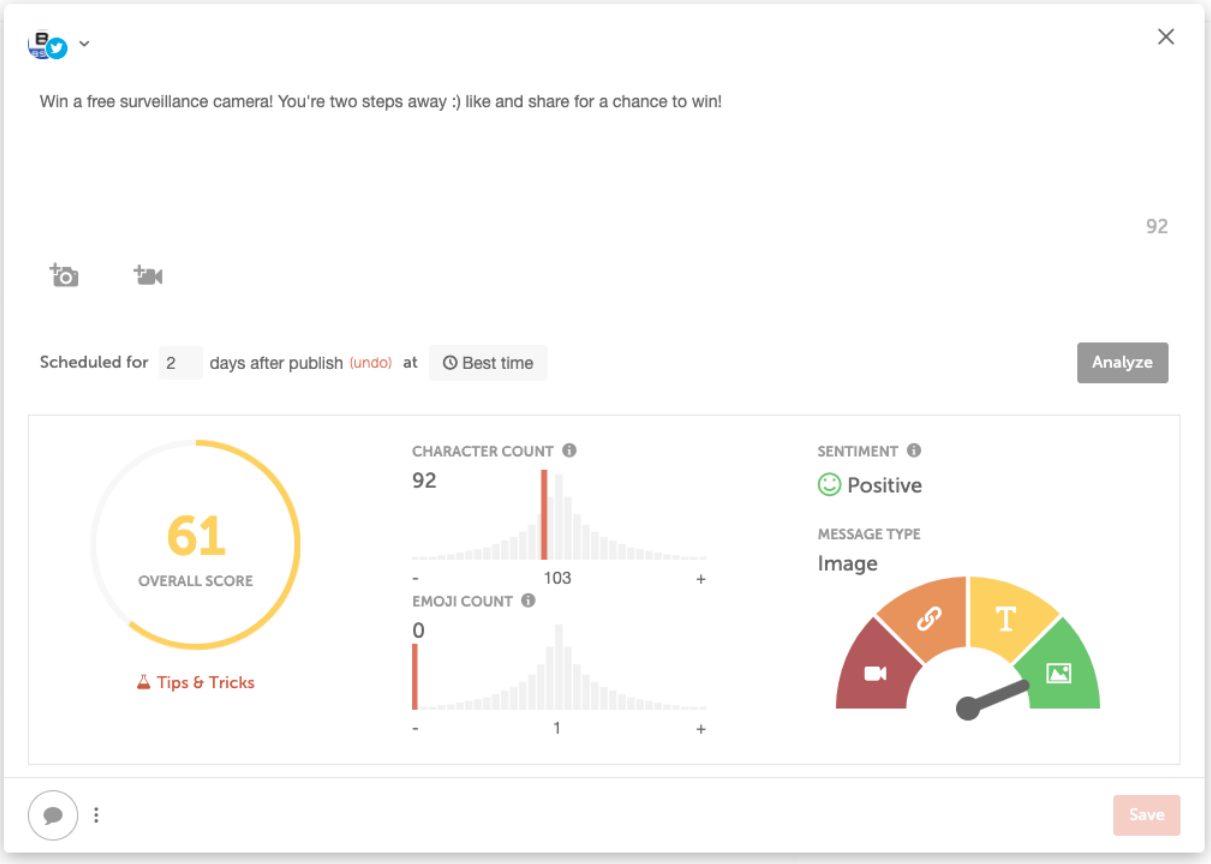
3. Name your social campaign and apply any details (like a color label or description).
4. Click the plus signs to add messages just like you did in the previous section.

Advanced Social Strategy

Use Social Message Optimizer To Write Better Messages

The Social Composer has a built-in optimizer that helps you write more engaging social messages.

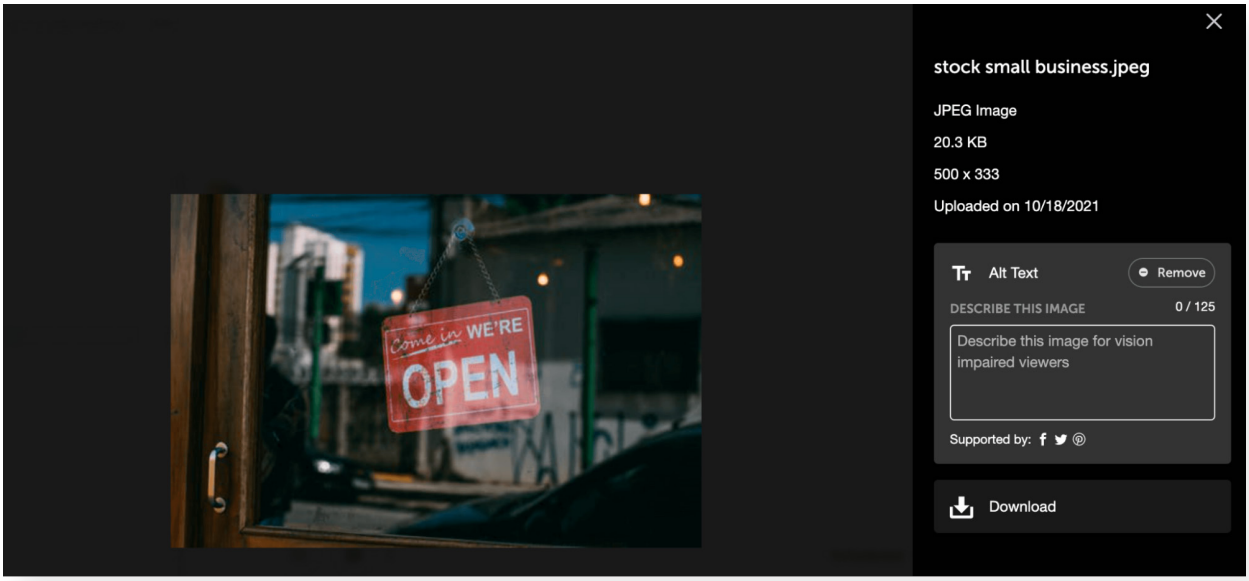
Once you've written your social media message, click Analyze. From here, you can fine-tune your message so it will perform even better on social media.



Add Alt Text To Your Social Messages

When previewing your content in full size using the Media Previewer, you will have the option to add Alt Text to your social messages.

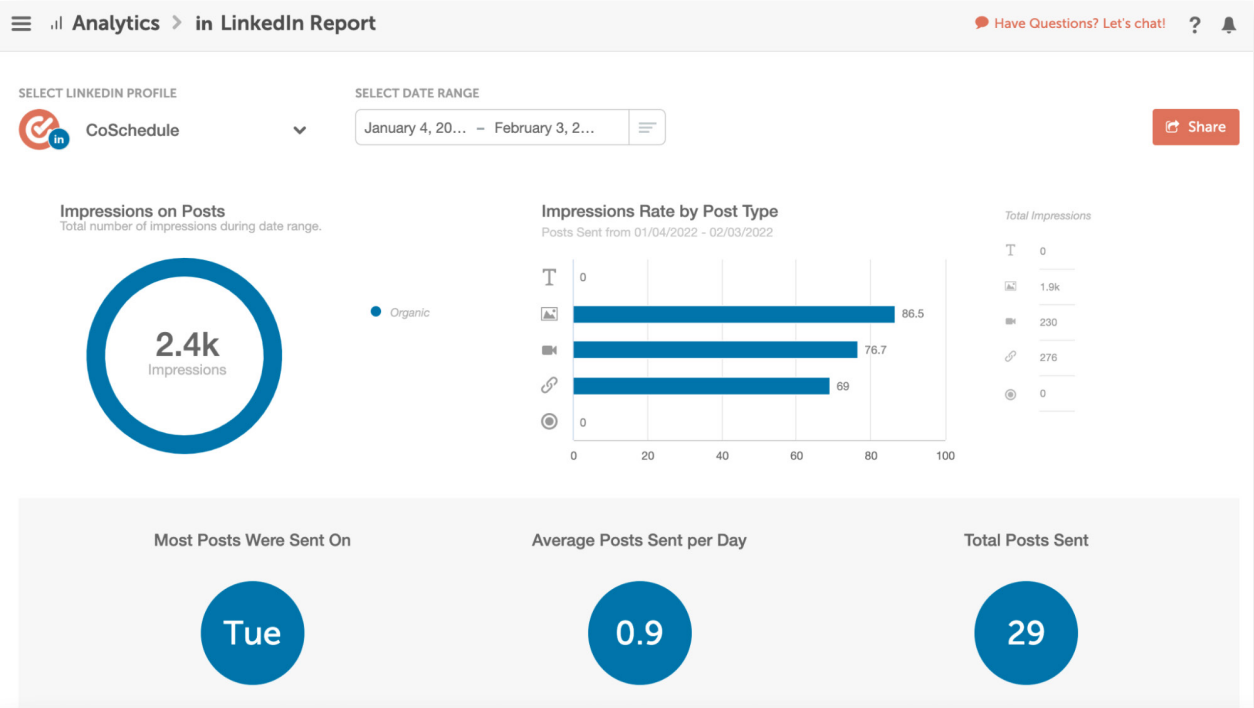
By implementing Alt Text, screen readers will be able to assist visually impaired individuals with image recognition within your CoSchedule Marketing Calendar as well as posts to Twitter, Facebook, and Pinterest.



Use Best Time Scheduling To Post At The Right Times

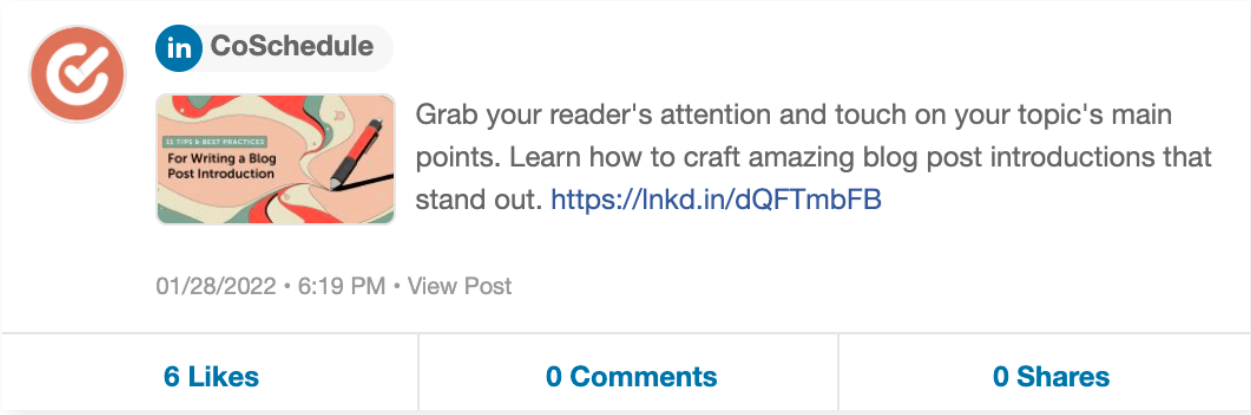
Marketing Calendar has built-in automation that allows you to post to your social media channels at the best times. This takes the guesswork out of posting your social media messages.

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.



Social Message Analytics

Social Engagement Analytics will be tracked for messages scheduled to Facebook, Twitter, LinkedIn, and Instagram. You can use this information to make small changes to your promotion schedule for better results.



Head Over to Your Calendar to Start Scheduling your Social Media

GO TO MY CALENDAR



Keep Everything in One Place with Projects

CoSchedule



In This Lesson

Get Started With Project Attachments

Create Your Content With the Text Editor

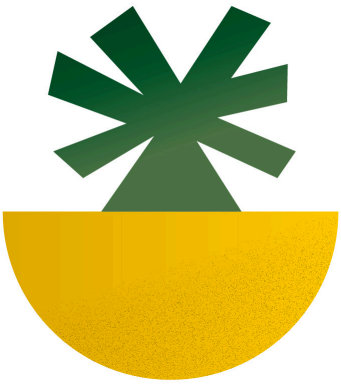
Include All Related Assets and Files

Compose Your Content With Google Docs

Attach Office 365 Documents

Group Related Marketing Projects Together as a Campaign

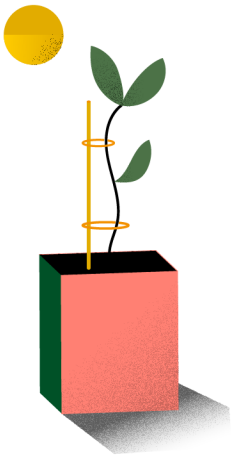
Make Social Messages Part Of The Content Creation Process



Core Concept: Keep Everything in One Place With Projects

Projects in Marketing Calendar 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 out of planning your marketing projects in your Marketing Calendar.



What is this guide?

This lesson will walk you through tips and tricks to organize & execute your marketing projects in Marketing Calendar.

Who is this guide for?

Marketers who wear many hats and struggle to coordinate their marketing work as their task list grows.

Get Started With Project Attachments

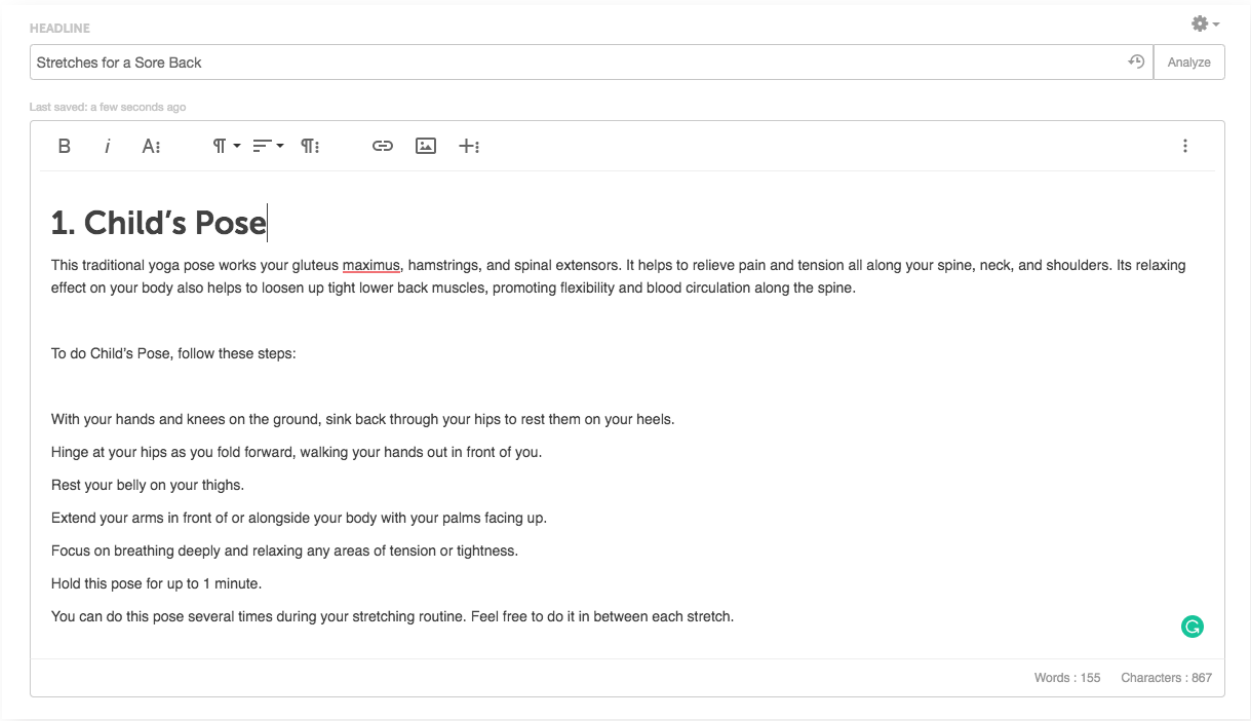
When you open a project on your calendar, you'll see a list of attachments pop up.

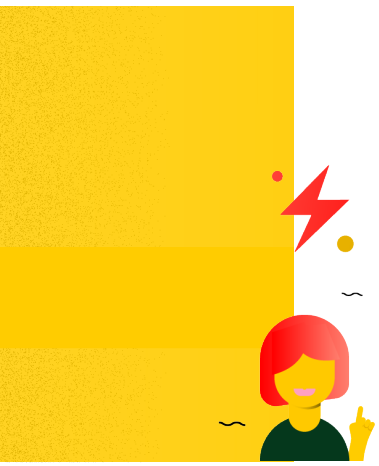
Attachments make it easier to execute your projects by keeping everything in one place.

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

Text Editor - Create Your Content

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

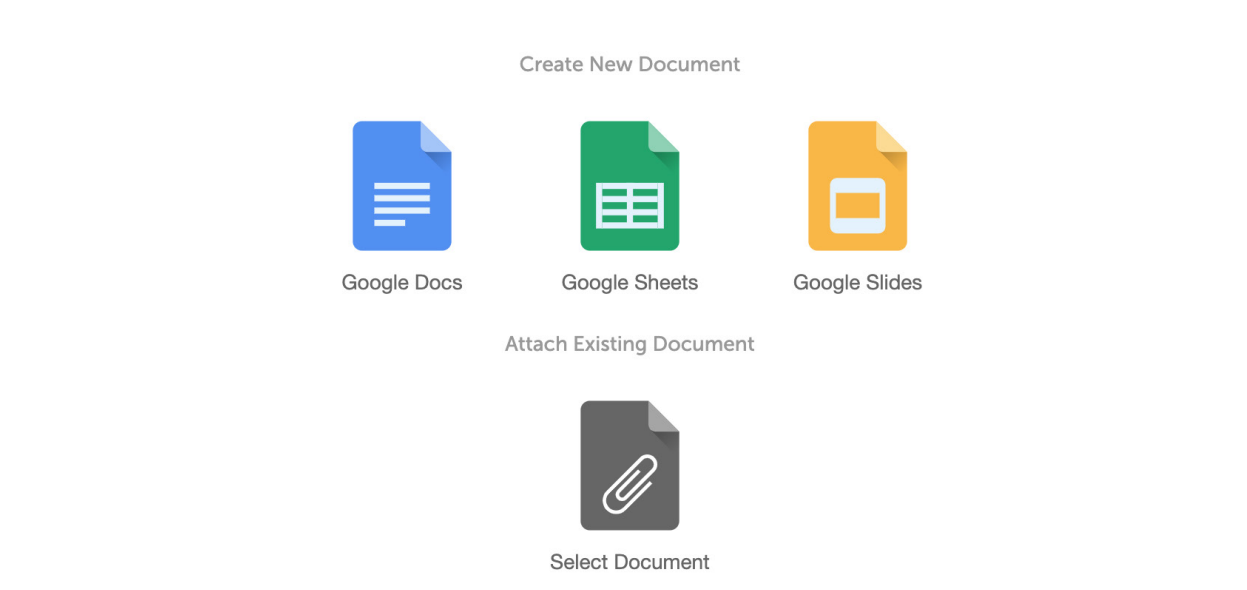
Include All Related Assets & Files

Attach files to keep a project's supporting documents in one place. There are a few different ways you can attach files to your marketing projects in your calendar.

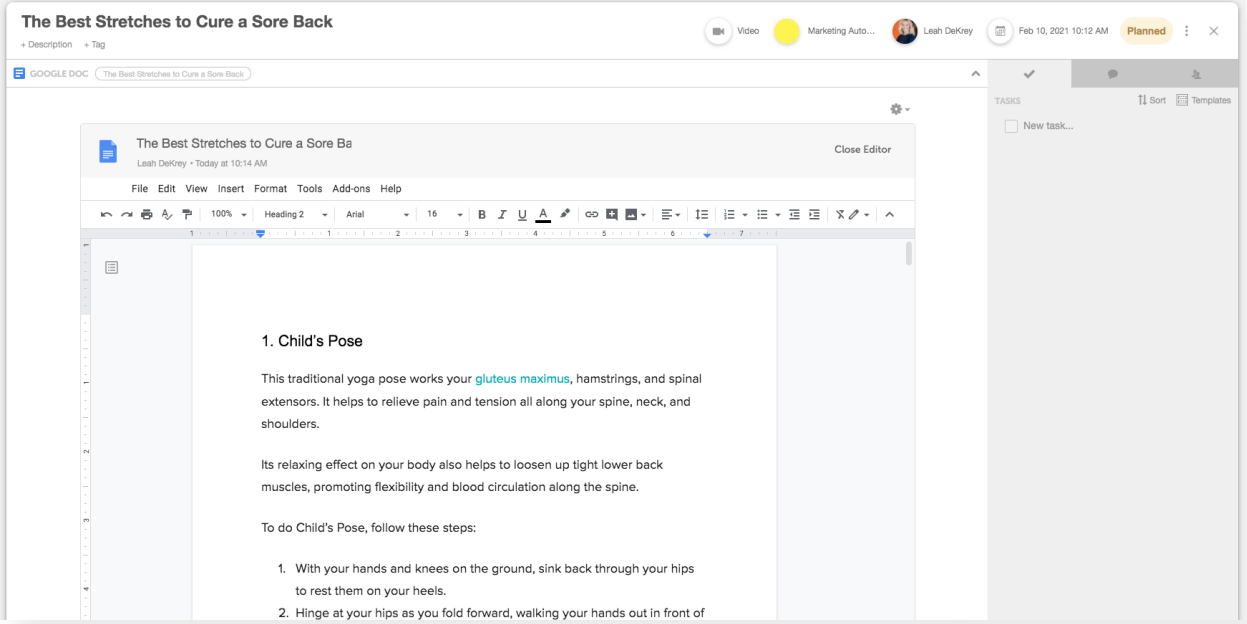
1. **File** - This allows you to attach a file directly from your computer's hard drive.
2. **Google Drive** - This allows you to attach a file from your Google Drive account.
3. **One Drive** - This allows you to attach a file from your Microsoft OneDrive account.

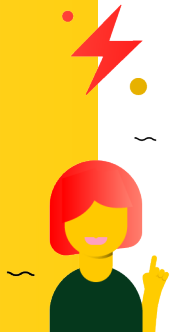
Compose Content With Google Docs

Select a Google content option to create a new document in your Google Drive without having to leave Marketing Calendar. 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 project. This unlocks all the features of the Google Doc editor without having to open another tab.





Pro Tip: Convert Content To A WordPress Blog Post

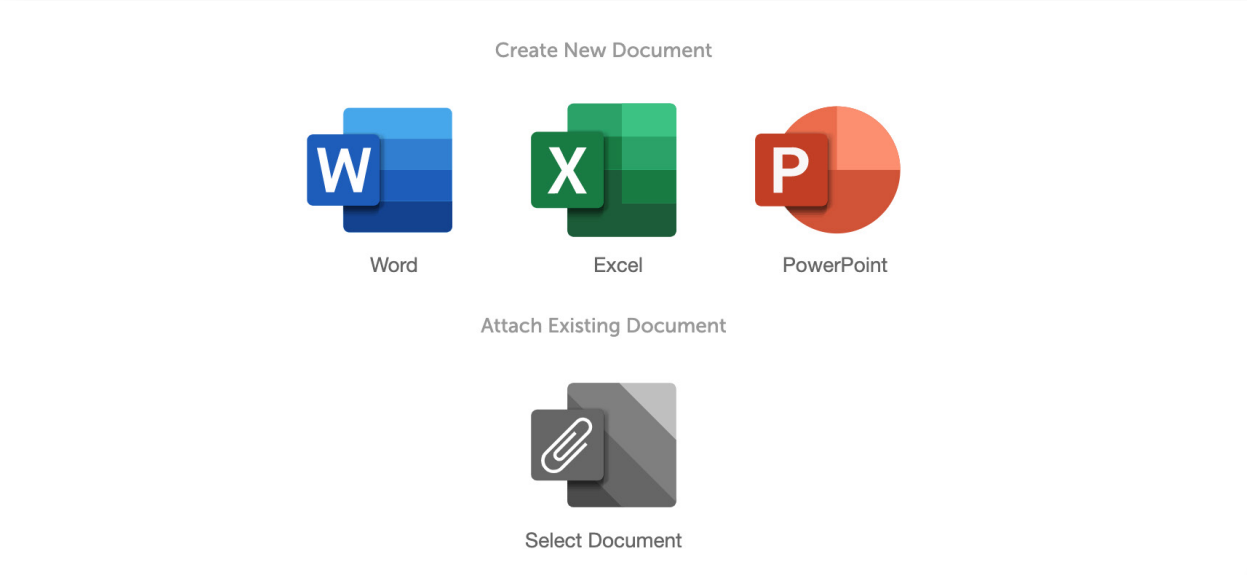
Click the gear after you’ve added a Google Doc or text editor attachment to convert the content to a WordPress blog post. CoSchedule will grab all the images, text, and links and automatically create a post over in your WordPress account.

Attach Office 365 Documents

Office 365 attachments function 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.

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.

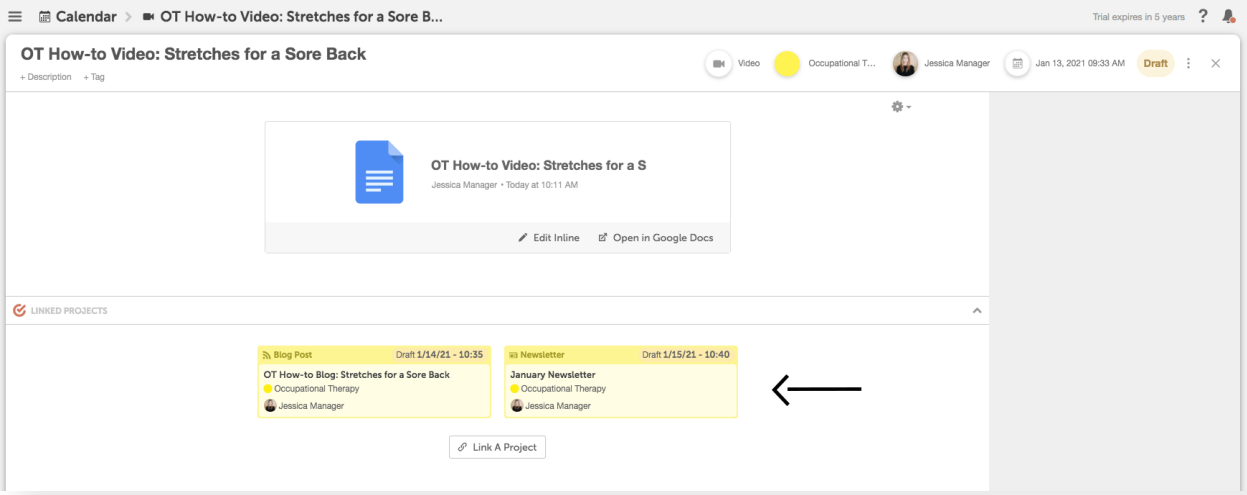


Group Related Marketing Projects Together As A Campaign (Linked Projects)

Add a Linked Project to connect two or more projects that either support one another or 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



Link projects together to easily find and reference projects that work toward the same goal.

Make Social Messages Part Of The Content Creation Process

As we discussed in Chapter 3, Marketing Calendar 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.

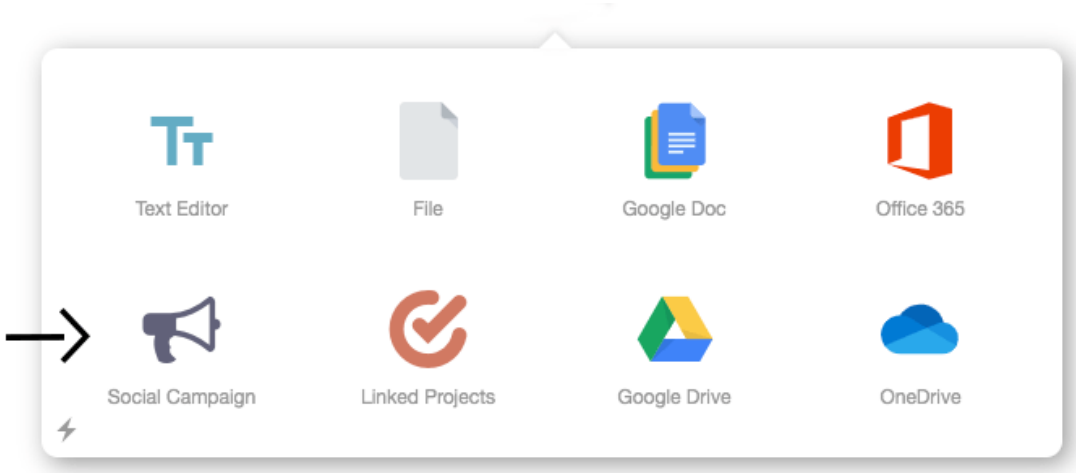


Pro Tip:

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.

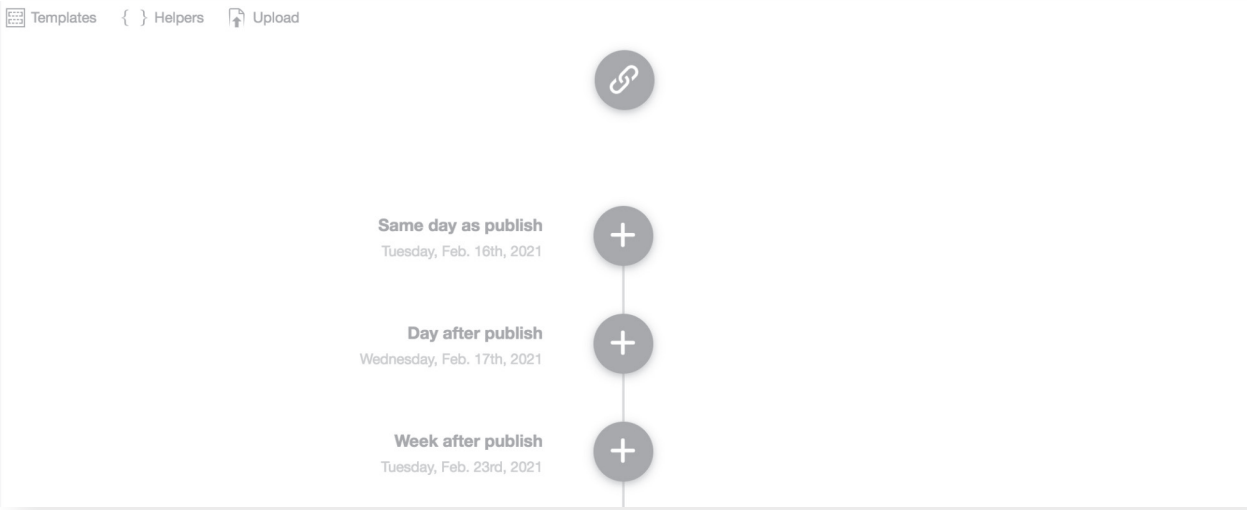
Here's a reminder on how to add a Social Campaign to a marketing project.

1. Choose the attachment option that says "Social Campaign".



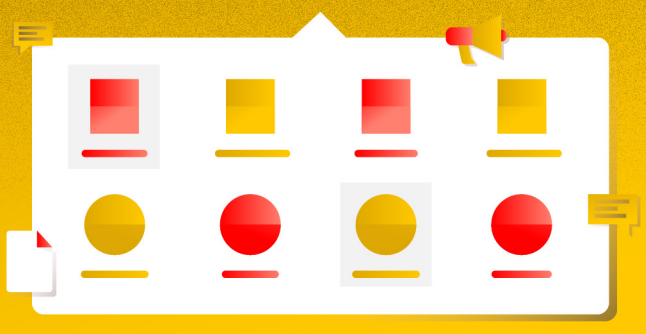
2. Click the plus sign on a day you'd like to schedule a social message.

3. Use the social composer to create your social message.



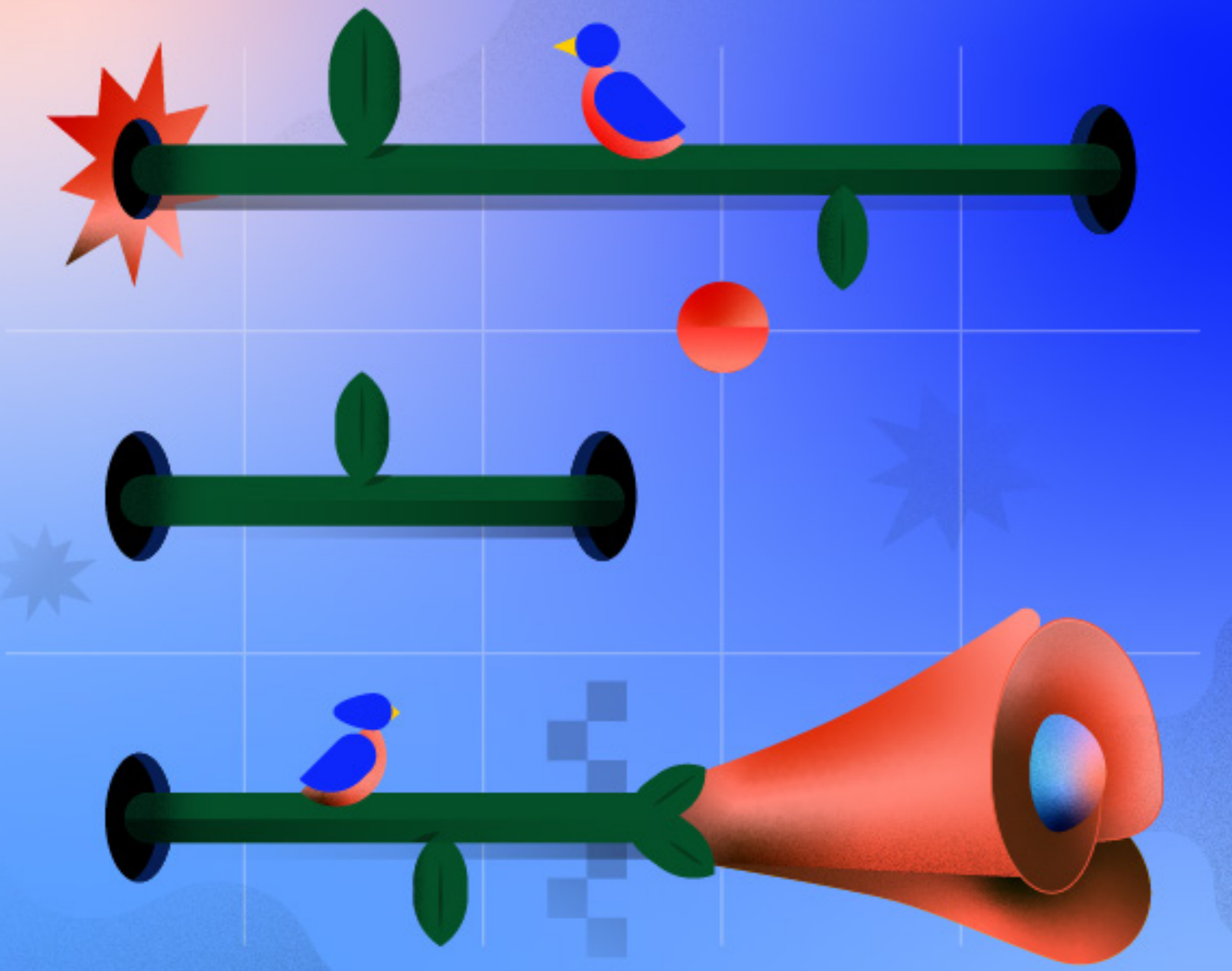
Head Over to Your Calendar to Add Some Attachments

GO TO MY CALENDAR



The Best Way to Manage a Project From Start to Finish

CoSchedule



In This Lesson

Step 1: Add Projects To Your Marketing Calendar

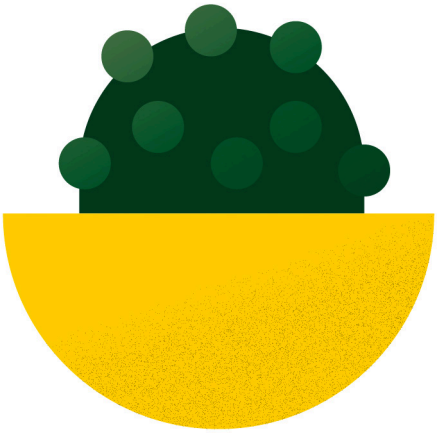
Step 2: Add A To-Do List To Your Project

Step 3: Create A New Google Doc Attachment

Step 4: Add A Social Media Campaign Attachment

Step 5: Schedule Your Project & Let CoSchedule Marketing Calendar Do The Rest

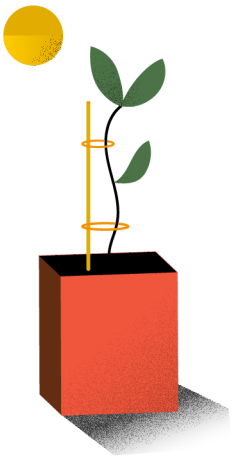
Bonus: Core Concept: Stay Flexible When Projects Change



Core Concept: Use Marketing Calendar To Plan A Project From Start To Finish

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

Who is this guide for?

Marketers who wear many hats and struggle to coordinate their marketing work as their task list grows.

Step 1: Add Projects To Your Marketing Calendar

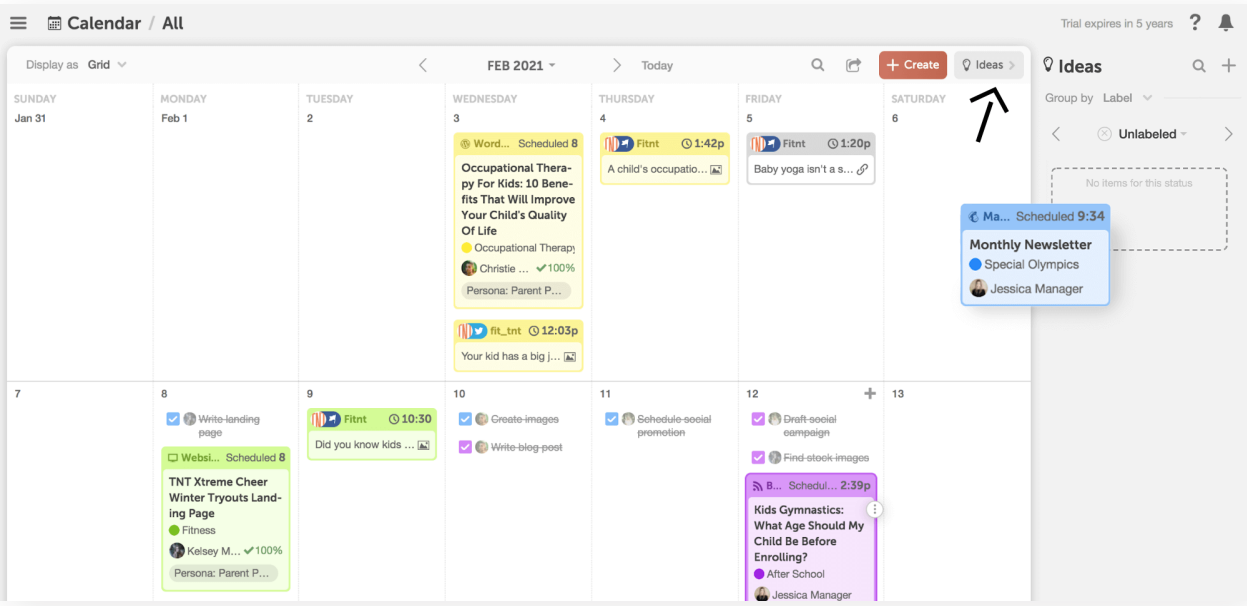
As we learned in Chapter 1, you can use Marketing Calendar for every project you are working on. Here are some common recurring marketing projects that you may want to add to your calendar if applicable.

- Weekly or monthly newsletters
- Upcoming events
- Blog post topics you want to write about
- Product landing page
- Conference slide deck

Once a project is on your calendar, it isn't set in stone. You can easily move projects that are on hold over to your Idea Bin.

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.

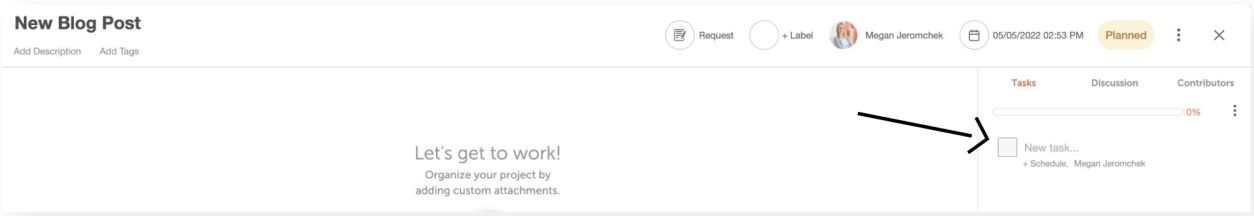


Step 2: Add A To-Do List To Your Project

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

Manually Add Tasks

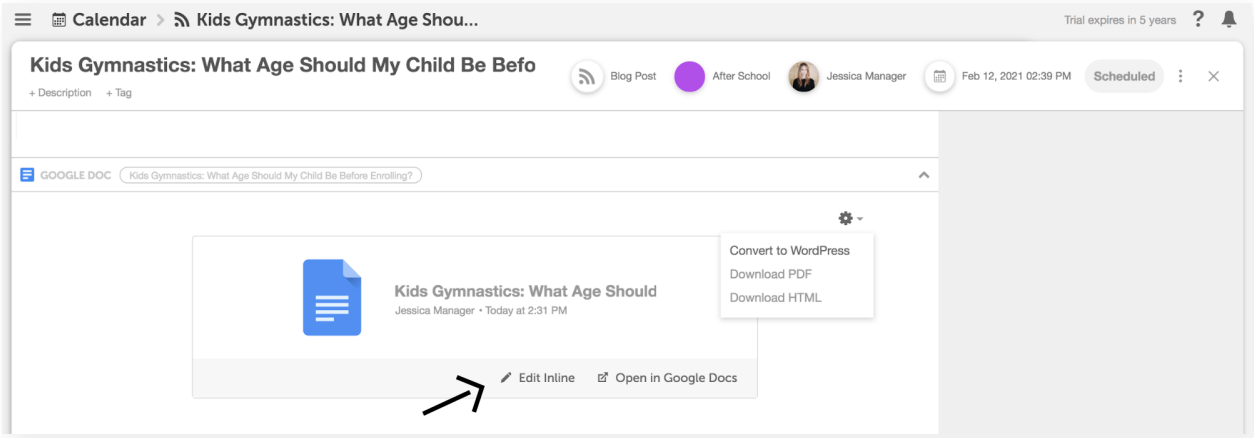
Within a project, you can add individual tasks and deadlines. Add all the tasks needed to complete the project.

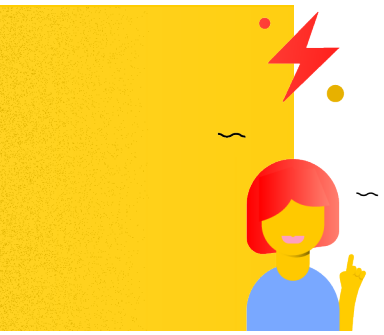


Step 3: Create A New Google Doc Attachment

Next, you'll 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 your Marketing Calendar.





Pro Tip:

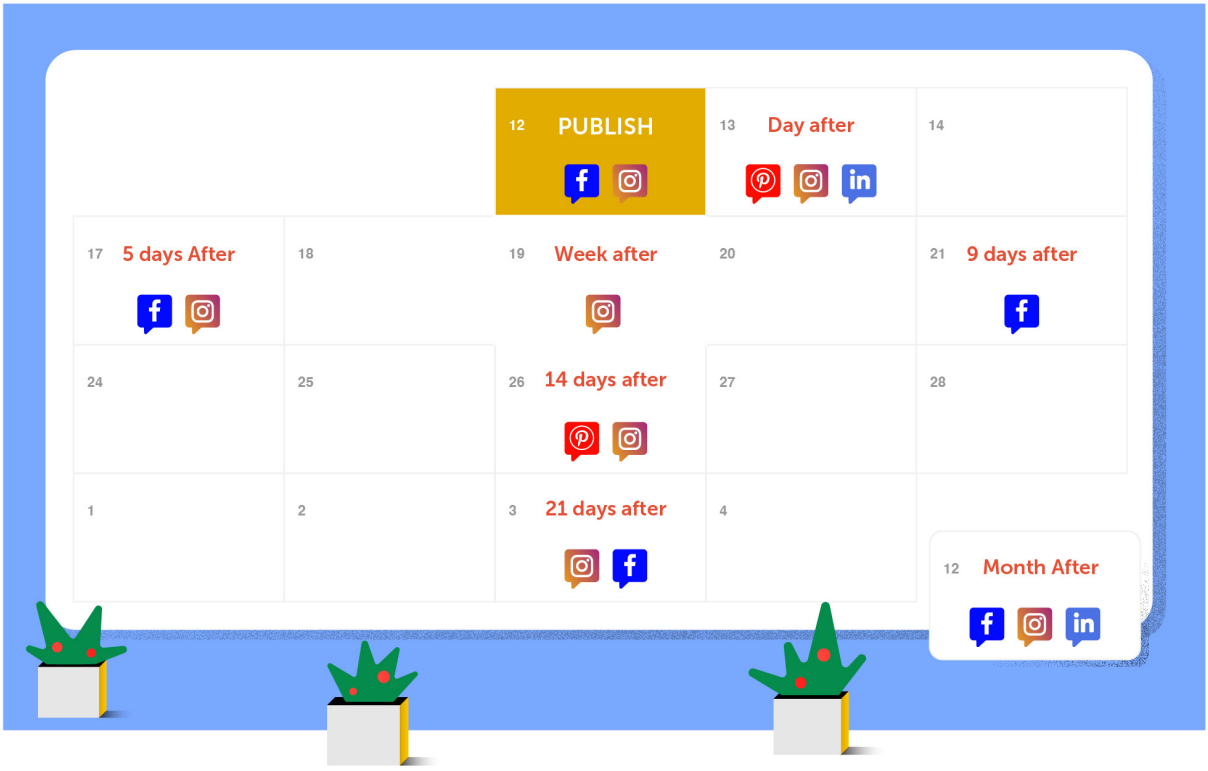
You can also use the Text Editor or Word Doc attachments to write your content, if you prefer.

Step 4: Add A Social Media Campaign Attachment

Now you can add a social media campaign to your project. This allows you to write, collaborate, and promote your content related to the marketing project (i.e. blog post, podcast, press release, or event)

Using the exact social message cadence we discussed in chapter 3, add your social messages one by one to create a social media campaign.

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

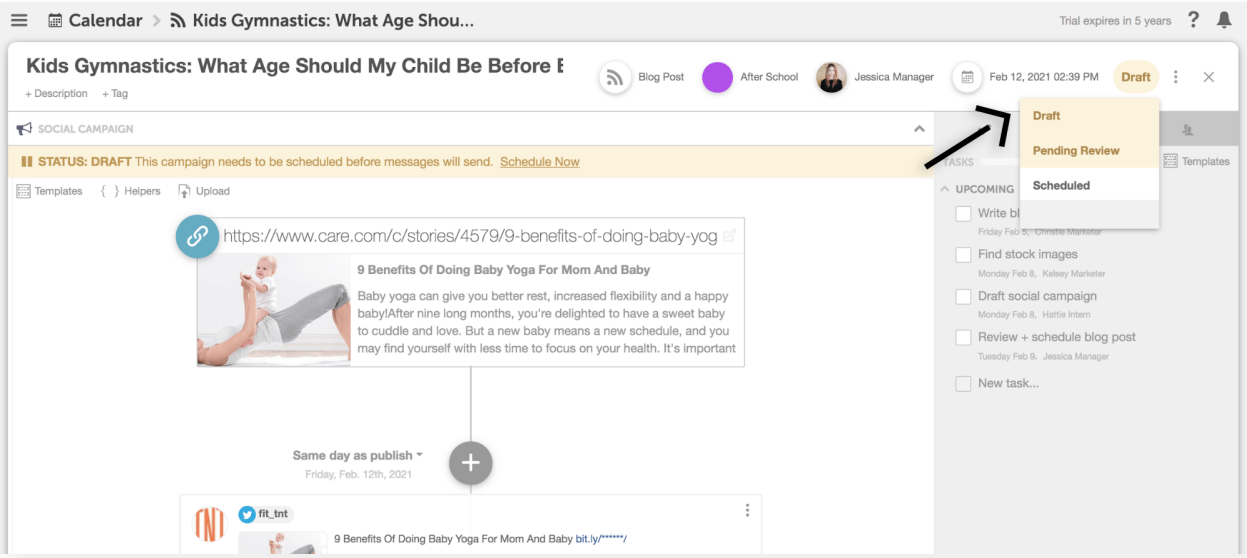


Step 5: Schedule Your Project & Let CoSchedule Marketing Calendar Do The Rest

Once you've completed all the previous steps in this lesson, it's time to schedule your project. This will not only schedule a piece of content 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:

1. Click the Status
2. Choose Scheduled

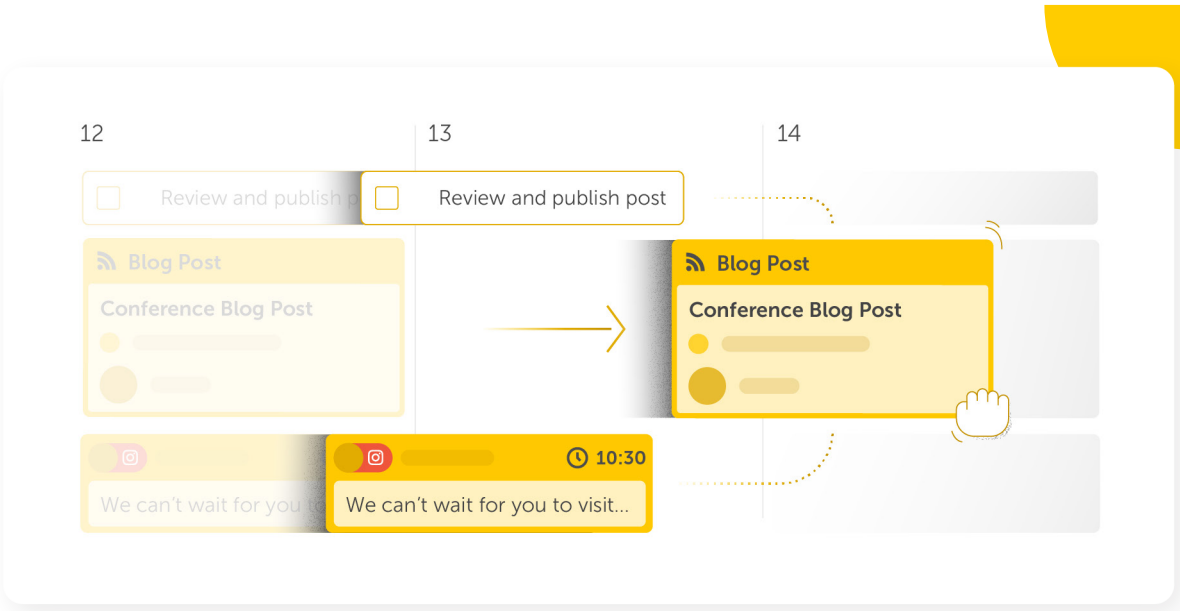


This lets you schedule your projects so Marketing Calendar can push everything live when it's time.

Bonus: Core Concept: Stay Flexible When Projects Change

Use the **Drag and Drop** feature on your calendar to easily move around projects, tasks, and social messages when plans change.

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.



Get Started Planning A Project in Marketing Calendar

GO TO MY CALENDAR

