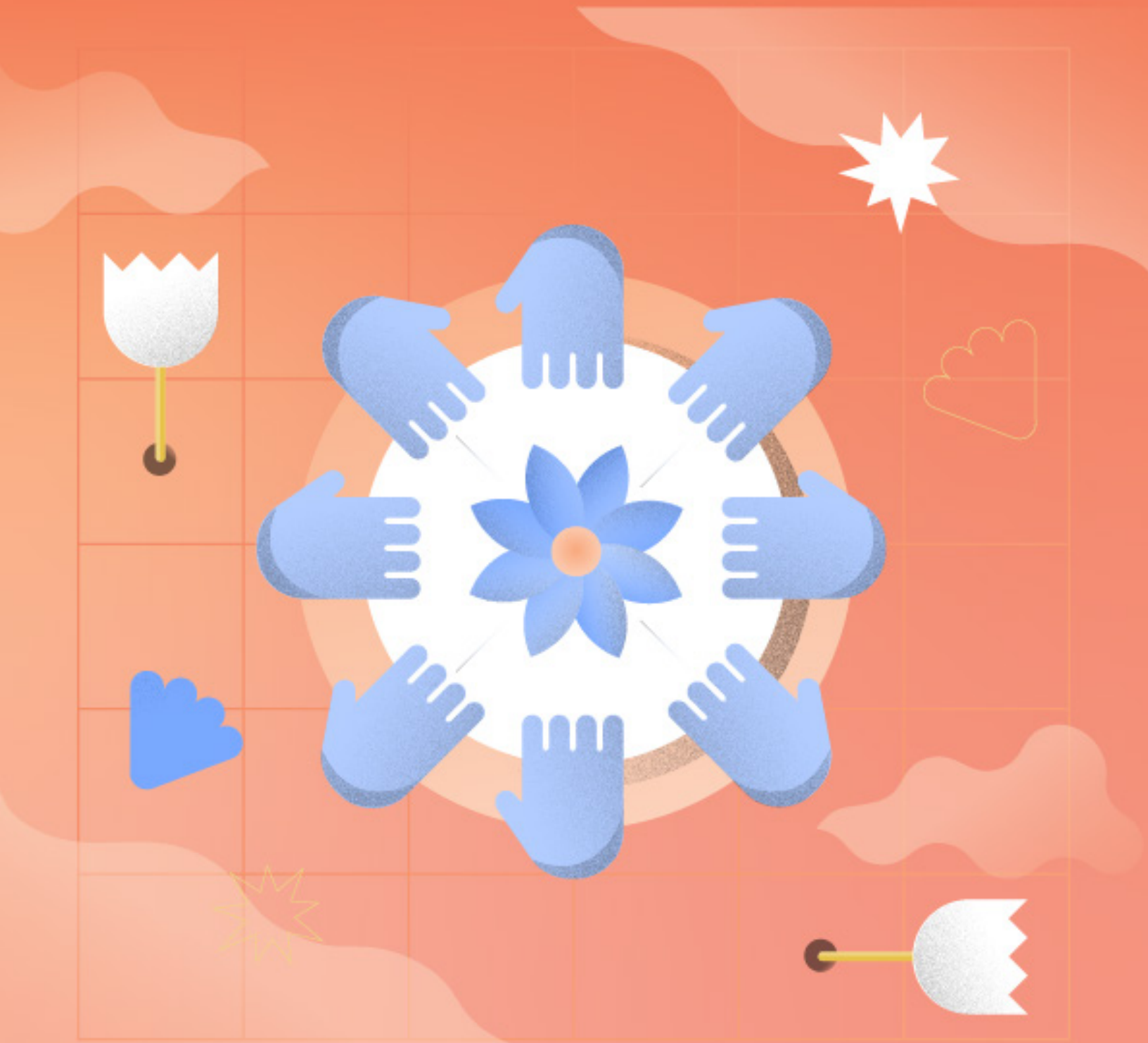
Invite Team Members to Join Your Social Calendar

CoSchedule

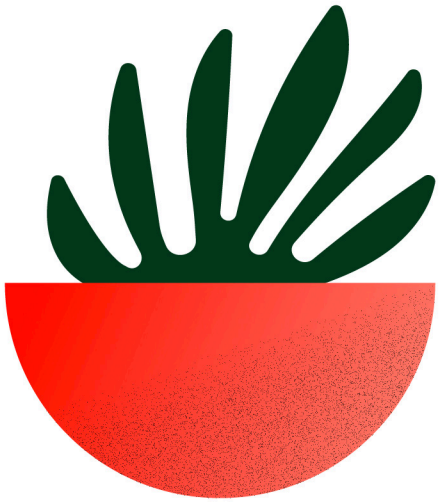


In This Lesson

Understand User Roles

Onboard Your Team

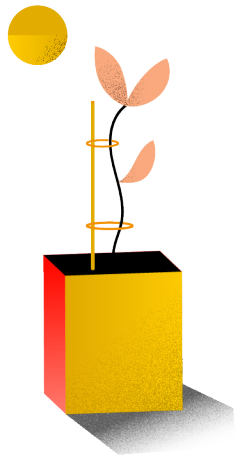
Action Items For Each Team Member



Getting CoSchedule Marketing Calendar Ready for Your Team

Congrats! You're ready to invite your team to your CoSchedule Marketing Calendar. Users should include marketing team members that need to regularly execute their work in Marketing Calendar.

Team members can assign work to your team, collaborate on projects, & easily share marketing updates with your boss. To get started, invite your team to join your calendar.



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 Marketing Calendar.

Who is this guide for?

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

Understand User Roles

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 - plus a breakdown of every user role in CoSchedule Marketing Calendar.



Owner

An owner in Marketing Calendar is the individual with the highest access rights.

- Inherits all base permissions from the user Manager role.
- This team member can assign and modify the manager role.

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.

- Inherits all base permissions from the user Admin role.

- This team member can delete calendars.
- This team member can manage billing and subscription details.
- This team member can delete team members from Marketing Calendar.
- This team member can modify admins, users, and guests.

Example: A team lead or team members in marketing operations roles.

Admin

- Inherits all base permissions from the User role.
- This team member has permission to manage settings.
- This team member can create tasks, projects, and social templates to be reused by their team.
- This team member does not have permission to remove team members.
- This team member does not have permission to access billing.

Example: Your marketing coordinator or a similar position that helps you with planning and execution.

User

- This team member can view and create content on the calendar.
- This team member can manage Saved Views.
- This team member can view, create, publish, duplicate, move to campaign, and delete projects.

- This team member can view, create, assign, and complete tasks.
- This team member can apply task, project, and social templates.
- This team member can add or remove projects in a Marketing Campaign.
- This team member has access to social profile accounts and social content within the app.
- This team member can manage assets.
- This team member **does not have permission** to templatize projects, tasks, and social messages.
- This team member **does not have permission** to add or remove social profiles or team members.
- This team member **does not have permission** to manage billing or subscriptions.
- This team member **does not have permission** to access settings.

Example: Interns, writers, graphic designers, and other team members who get assigned tasks ***but*** don't need to create and manage project details.

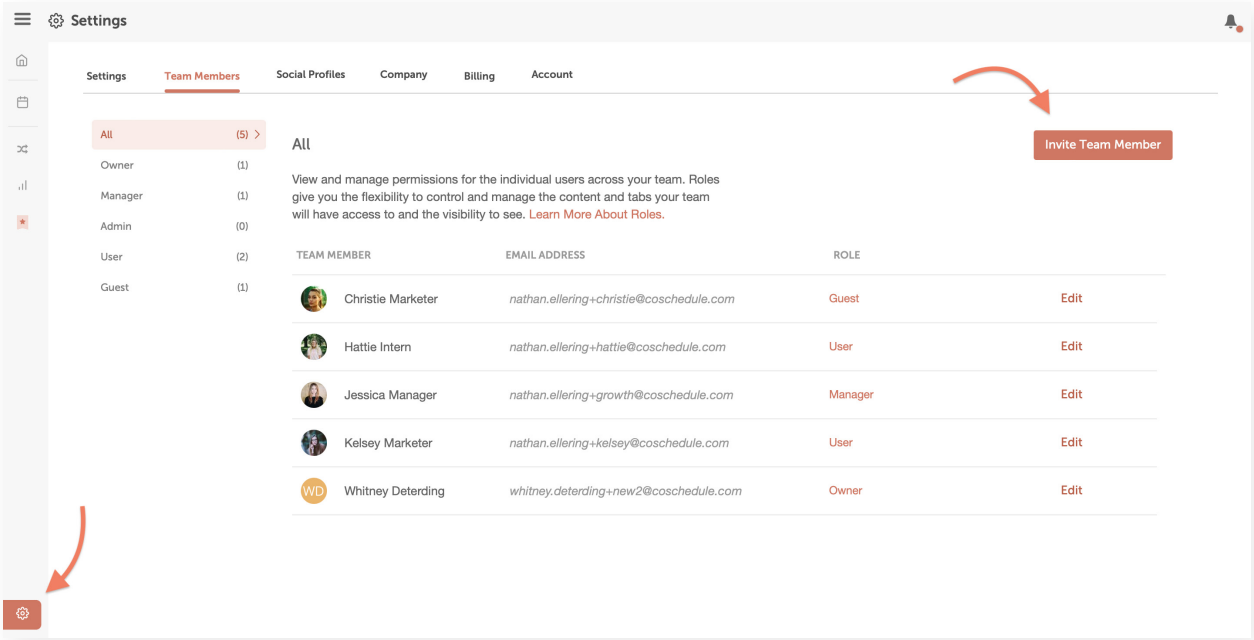
Where to Invite Users and Set Roles

When you're ready to invite team members to join Marketing Calendar, user roles are defined from your Settings page.

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

2. Select *Team Members* from the top menu.

3. From here, you can invite team members, assign their role, and edit their role to match their position needs.

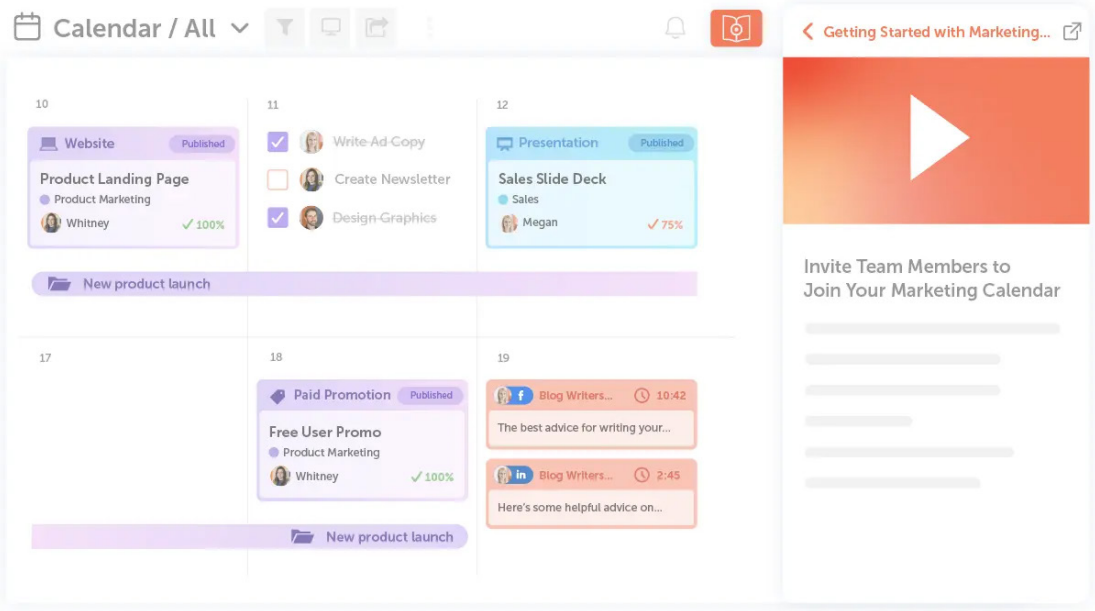


Onboard Your Team

Once you've invited your team to use Marketing Calendar, it's important that they get the onboarding and training needed to adapt the new software into their day-to-day routine.

Have your entire team read & watch the videos found in the Getting Started Guide within the first seven days.

It's also available as a digital version or PDF for those who prefer to learn by reading.

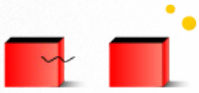


Action Items For Each Team Member

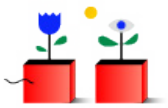


Owner (You)

- [ ] Set up your environment

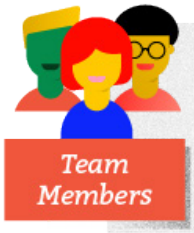


- [ ] Add a few projects to your calendar
- [ ] Connect your social media channels and other integrations



- [ ] Schedule and send invites to onboarding meeting





Team Members

- [ ] Attend team onboarding meeting



- [ ] Visit Getting Started Guide In-App & Watch Training Videos



- [ ] Download mobile app

