Collaborate With Your Marketing Team

CoSchedule



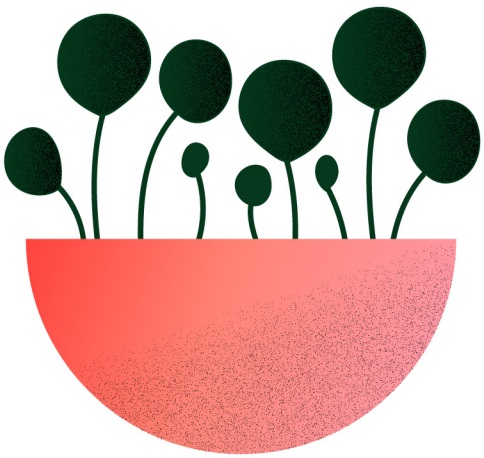
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Delegate Projects To Your Team

Add A Discussion

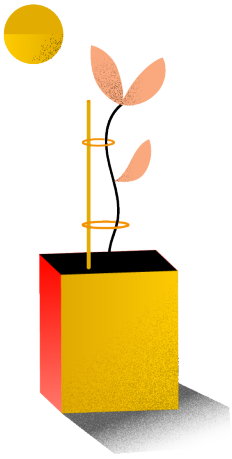
Explore Your Home Dashboard

Create A Personal Saved View



Marketing Calendar Collaboration 101

Collaborating is important, whether you have a few people on your team or it's just you and your boss. CoSchedule Marketing Calendar makes it easy to be accountable for your work and keep others in-the-know.



What is this guide?

This lesson will walk you through tips to help you collaborate better in 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.

Delegate Projects To Your Team

Your marketing team is made up of writers, designers, social strategists, content marketers, PR pros, and SEO specialists.

Each member is responsible for executing different stages of your team's workflow process.

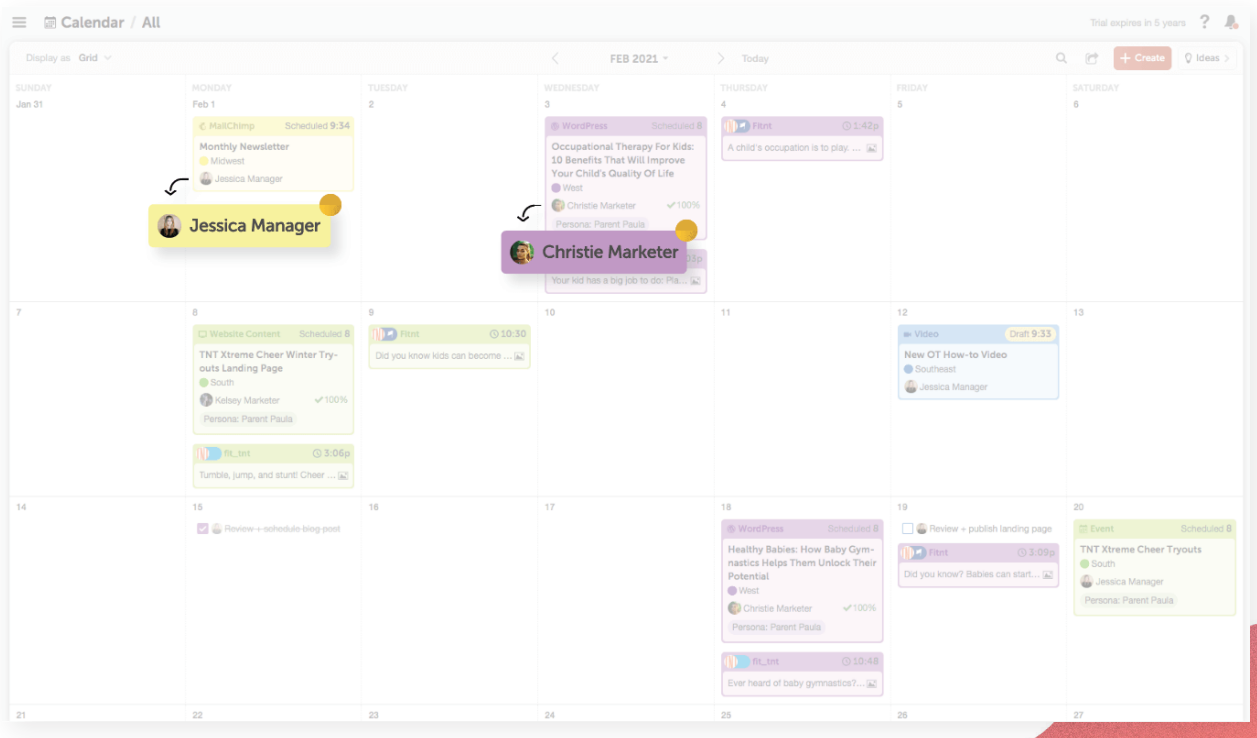
You can use Marketing Calendar to delegate project ownership, so everyone knows who is responsible for getting a specific project completed.
This helps you:

1. See who is working on what at a glance.

2. Allocate work effectively.

3. Keep yourself accountable for completing things on time.

The project owner is easy to identify on a project card.

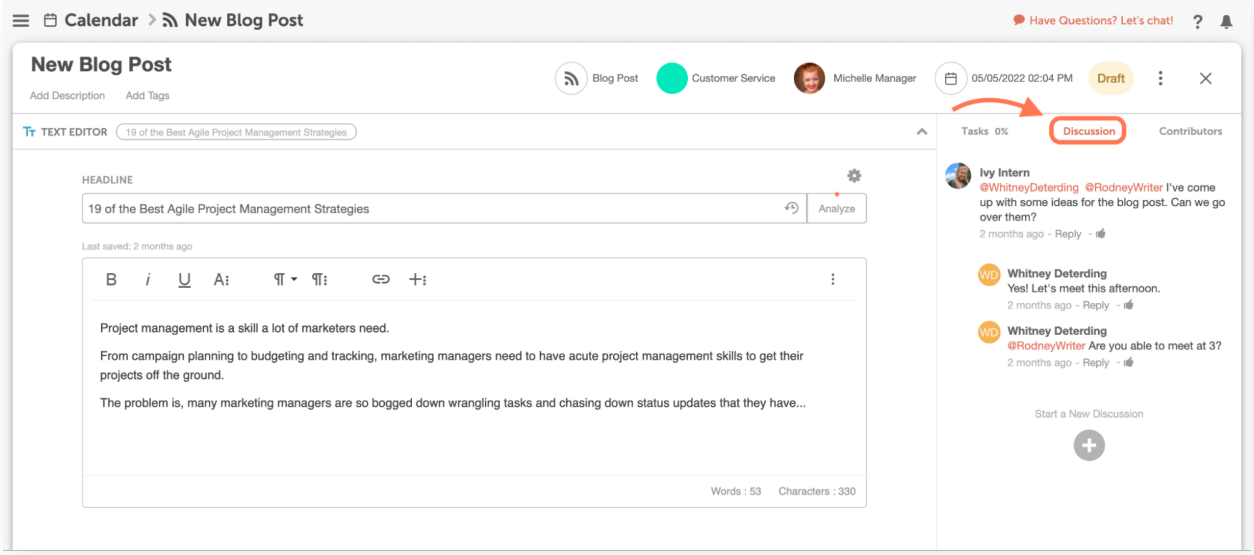


Add A Discussion

Discussions are available in projects and are a great way to collaborate with your team. Use discussions to 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 share files directly in a discussion like images, new text changes, or any type of document that pertains to the project.

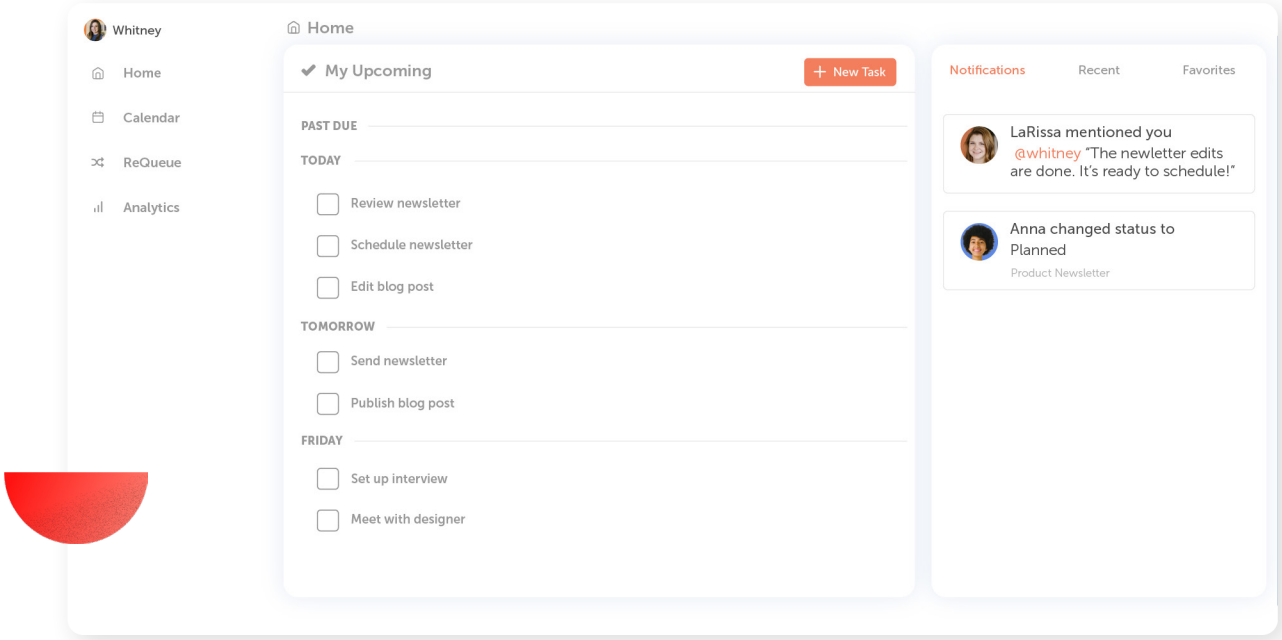


Explore Your Home Dashboard

The Home Dashboard in Marketing Calendar is your mission control. It contains a list of all your upcoming tasks, notifications, and favorite projects. Visit your Home Dashboard

first thing in the morning, so you can see what you need to get accomplished that day. Your Home Dashboard includes:

- **Personal to-do list** – Your daily tasks and what's coming in the days ahead.
- **Your notifications** – Comments that need your attention, tasks that have been completed by team members, etc.
- **Your recent projects** – A list of all the marketing projects you've recently been working on. This makes it easy to jump back into where you left off.
- **Your favorite projects** – If you need fast access to a project, add it to your favorites list to quickly find it from your Home Dashboard.



Create A Personal Calendar View

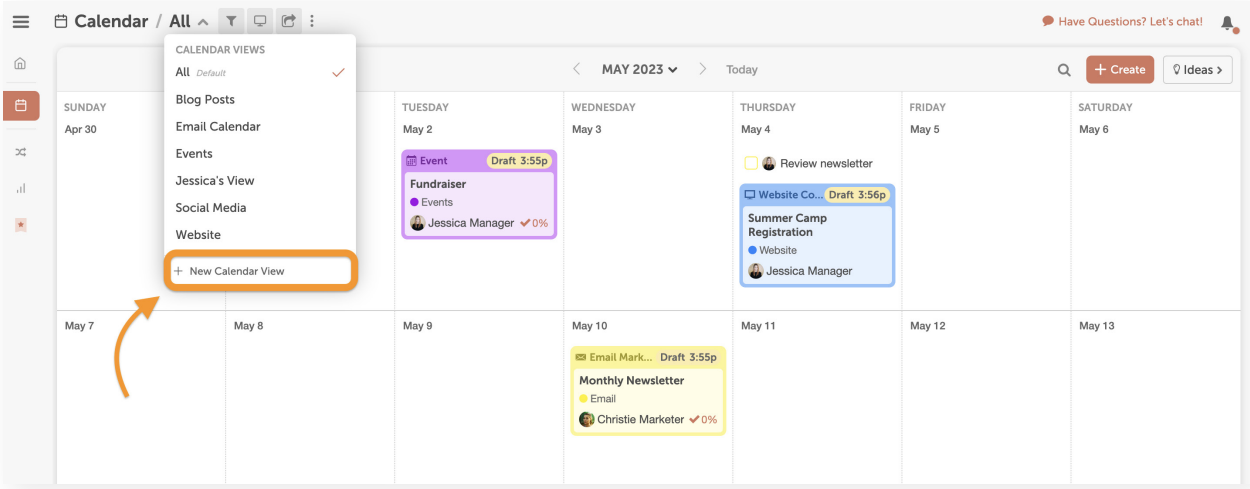
A personal Calendar View is a filtered view of your calendar that only contains your projects and tasks. It clears out the clutter of the calendar so you can focus on the things that pertain to you.

It's a good idea to have all Marketing Calendar users on your team create a personal Calendar View for themselves.

Here's how:

1. On your main Calendar view, click All.

2. Scroll to the bottom, and click + New Calendar View.

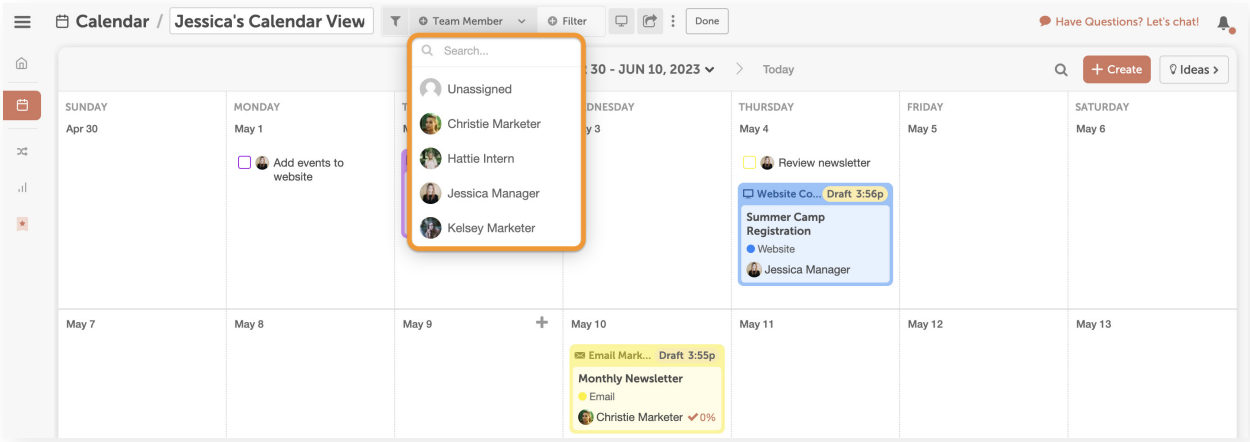


3. Name the Calendar View "[Your Name]'s View."

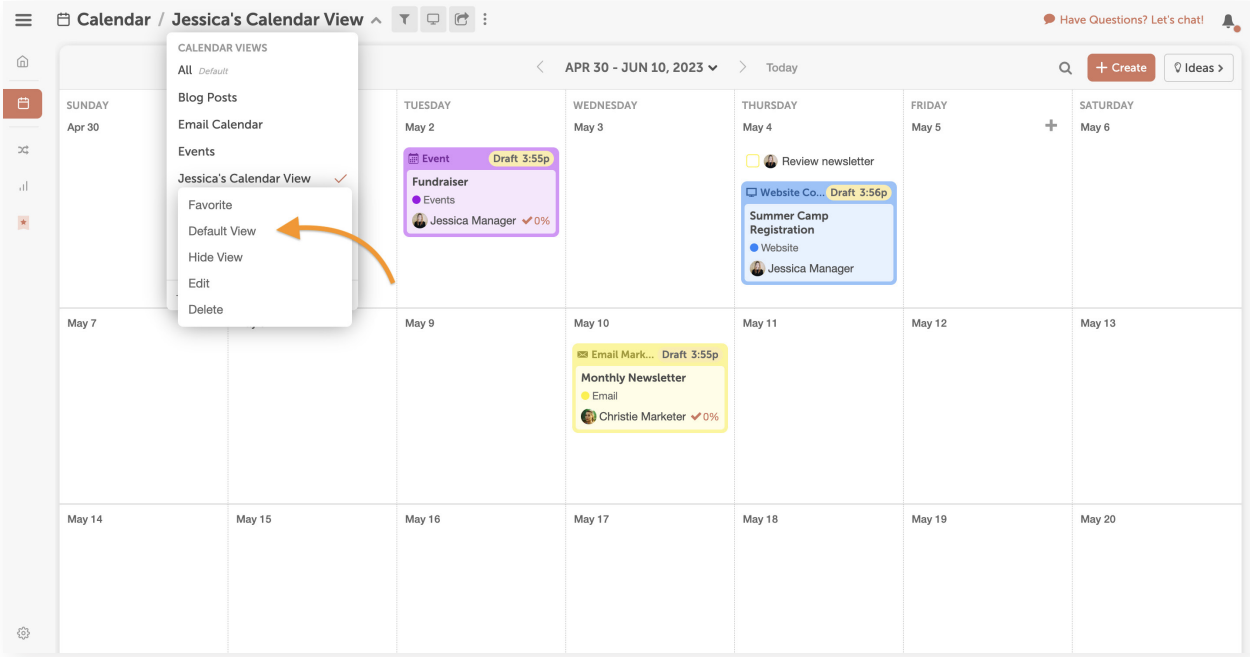
4. Click Filter to customize the filters for this view.

5. Click Team Member and find your name.

6. Then click Done.



To make this your default view, click the Calendar Views dropdown, find your personalized view, then click the 3 dots next to it and select, Default view.



Head Over to Your Calendar to Implement the Items in This Chapter

GO TO MY CALENDAR

