Assign Work To Your Team

CoSchedule



In This Lesson

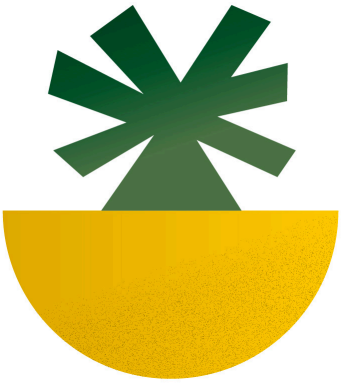
Assign Tasks To Your Team

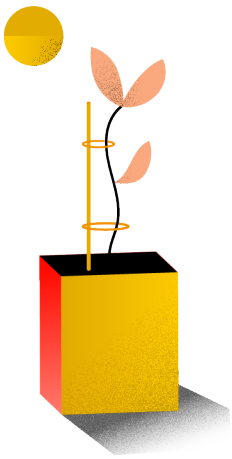
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What is this guide?

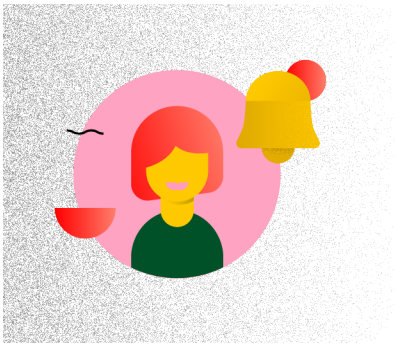
This lesson will walk you through tips to help you work with your team and manage project tasks in CoSchedule Marketing Calendar.

Who is this guide for?

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

Assign Tasks To Your Team

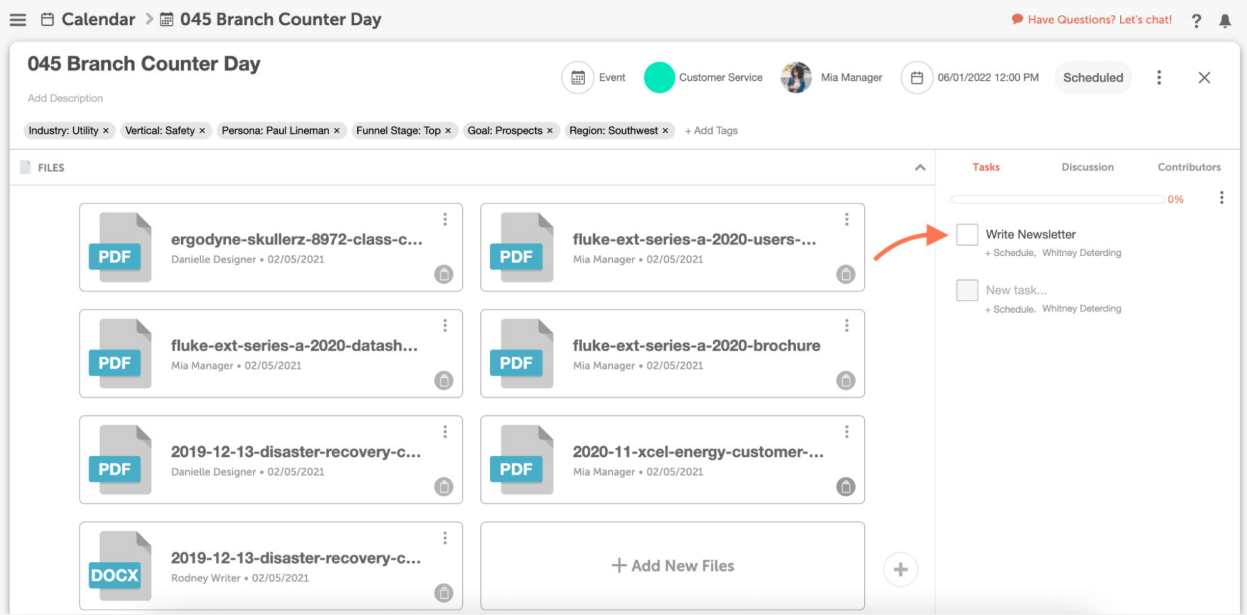
Tasks in Marketing Calendar are attached to Projects and allow you to designate duties to help you keep you and your team on track. If you have a small team, assigning tasks is a great way to make sure that projects are completed on time.



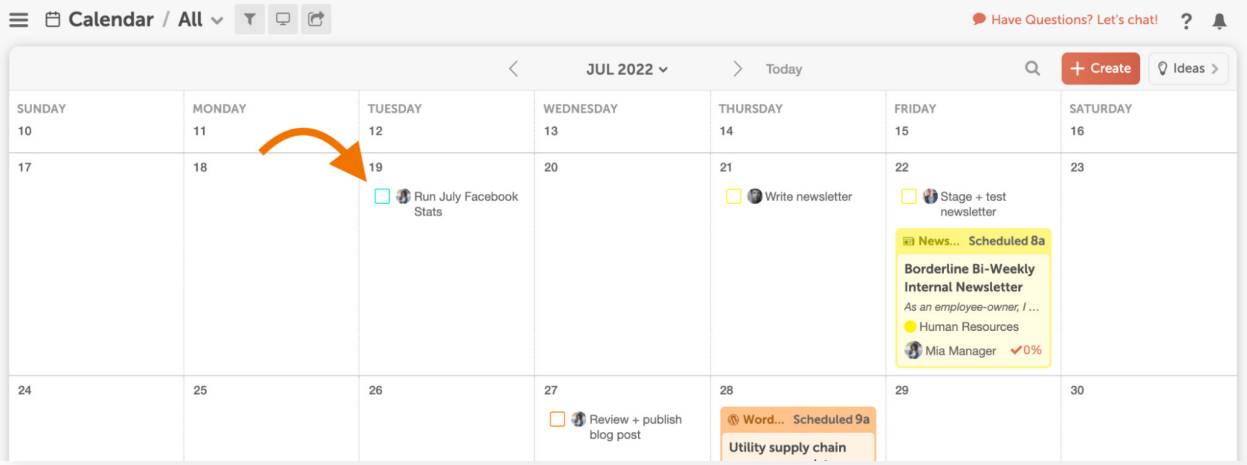
Team members get notified when a task is assigned to them. They also get a notification when the task is past due.

To assign a task:

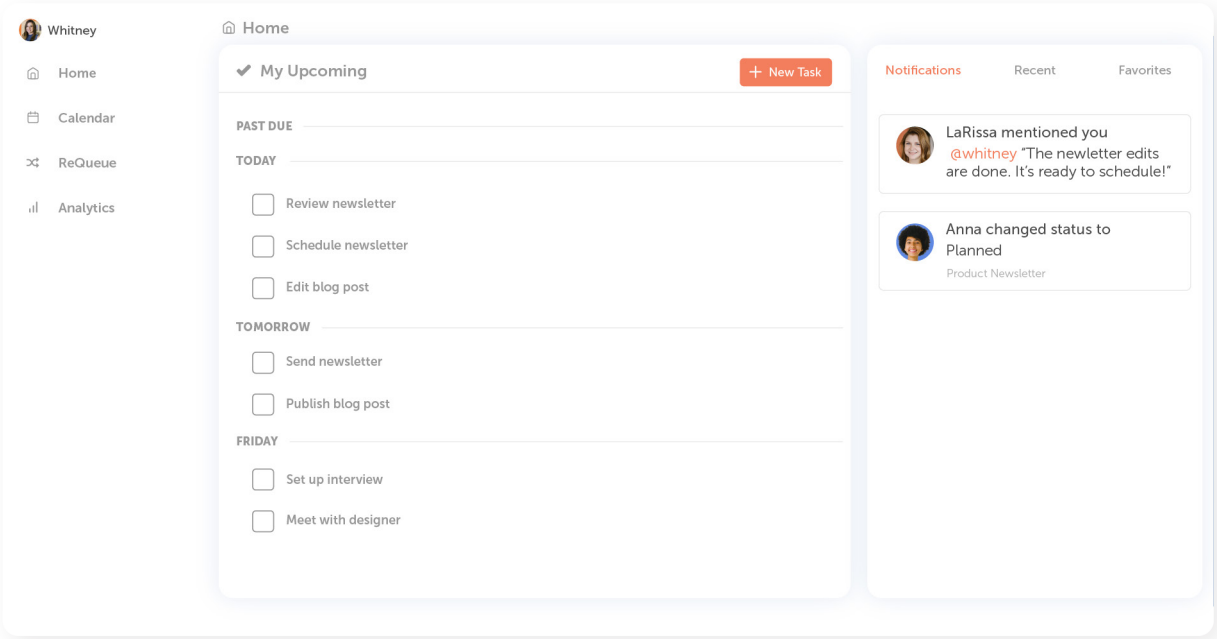
- Open a project on your calendar.
- On the right-hand side, you can add a new task.
- Then add a due date and assign a team member who will be responsible for executing the task.



Once a task is assigned, the task will automatically appear on the team member's calendar.



The week that the task is due, the task will also pull into the team member's Home Dashboard. This makes it easy for your team members to know exactly what they should be working on.

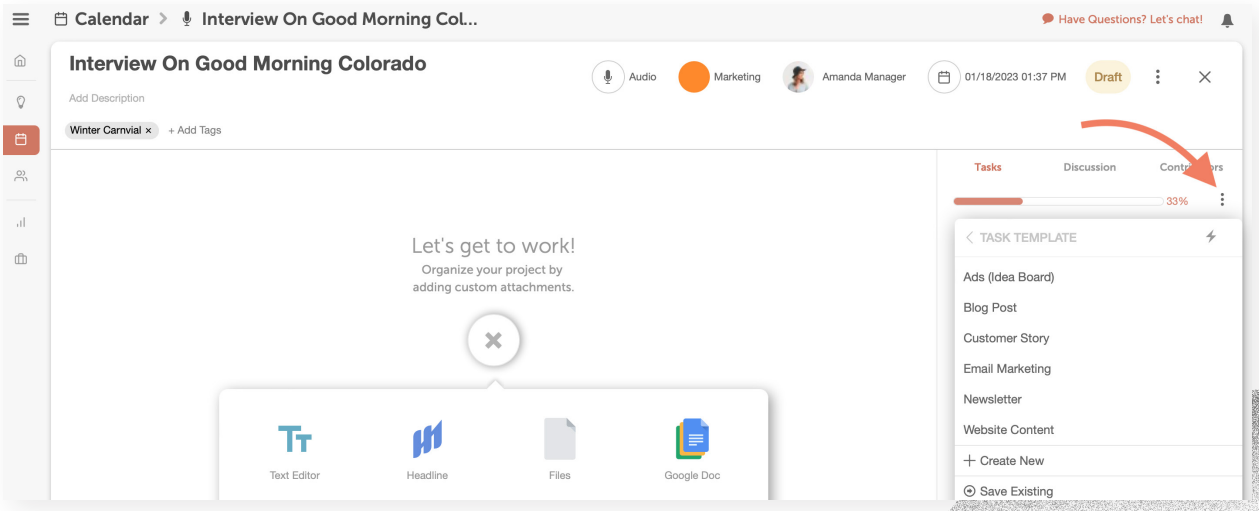


Apply A To-Do List To Your Project

After you've created one task in a project, continue adding a list of tasks to track everything that needs to be done to complete a specific project.

Apply An Existing Task Template

Marketing Calendar has a pre-set list of task templates that contain commonly needed tasks for various types of marketing projects. Once you've applied the task template, you can easily delete unnecessary tasks, add new ones, and apply due dates.

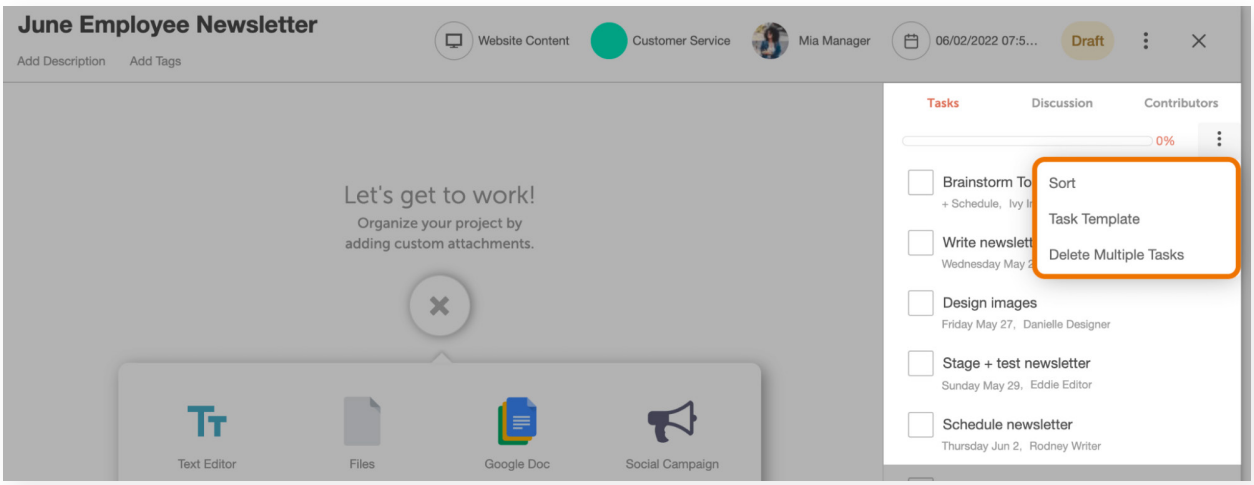


Save A Task List As A Task Template

Instead of manually adding the same to-dos one at a time, you can save a task checklist as a template to reuse again and again. This is especially useful for recurring projects, like social campaigns, blog posts, landing pages, and email campaigns.

Here's how to save the workflow you just created as a template:

1. Click on the 3 dots in the top right-hand corner of your Task section.
2. Select *Task Template.*
3. Click *Save Existing.*



To apply your task template on future projects:

1. Create a new project on your calendar.
2. Click the "Templates" icon in the taskbar.
3. Apply the task template you just created.



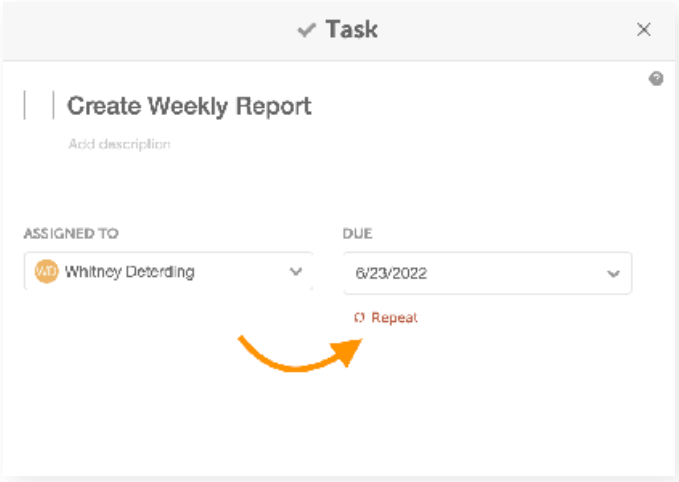
Schedule A Recurring Task

You can schedule a recurring task for events or tasks that need to be completed on a regular basis.

Choose how far in the future you'd like these events or tasks to automatically appear on your calendar. This gives you better visibility of your upcoming work and future bandwidth to take on new tasks.

To create a recurring task:

1. Create a new task on your calendar.
2. Click *Repeat.*
3. Choose how often you want to repeat the task and how far into the future you'd like to see tasks populate on your calendar.



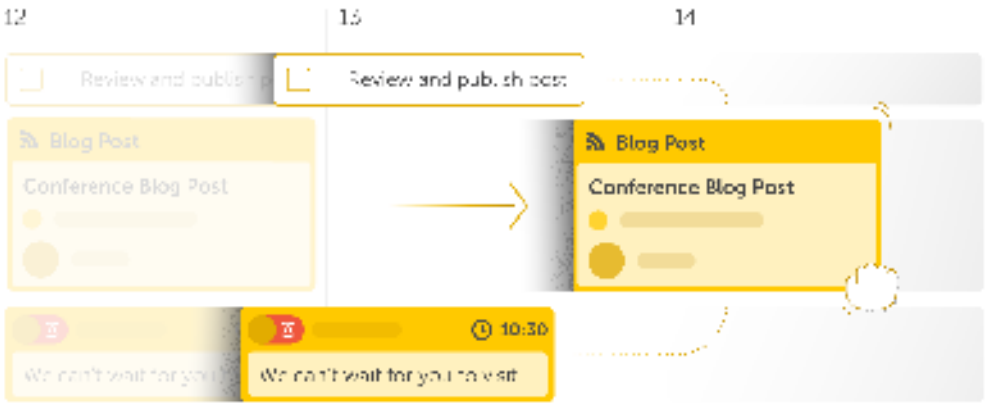
When editing a recurring task, choose This Task to edit only the individual instance of the task you have selected. To edit all of the tasks in the recurring series, select This and following Tasks.

Reschedule Projects When Plans Change

There's an added benefit when you add your tasks to a specific project - rescheduling becomes a breeze!

When you add tasks before the project's due date, all your work is done prior to the project publishing. But sometimes last-minute project requests take priority or timelines 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.



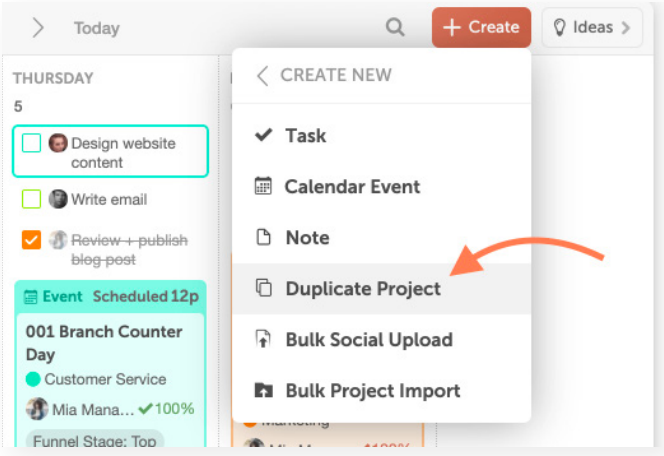
Duplicate A Project

Simplify the process of adding new projects to your calendar with the duplication feature.
Easily copy the project details (title, tasks, attachments, etc.) of an existing project without having to manually recreate it.

For example, this works great if you are repeating a conference or webinar and all the tasks will stay the same (but dates and details may change slightly).

Option 1: Duplicate a project using the + Create button

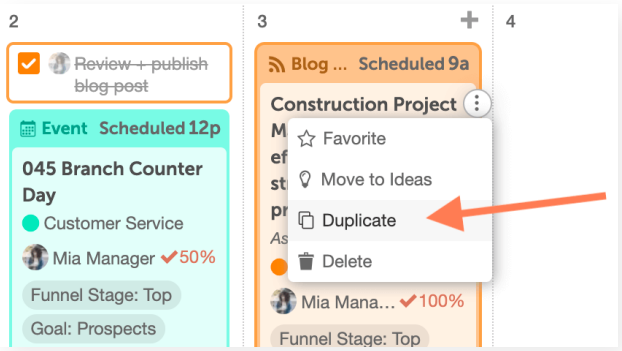
1. Go to your main Calendar view.
2. Click + *Create*.
3. Select *More Options.*
4. Click *Duplicate Project.*
5. From the Duplicate menu, search for and select the project you want to duplicate.



Option 2: Duplicate from an existing project card

1. Click the 3 dots in the top right corner of the project card.

2. Select *Duplicate.*



When you duplicate a project, everything that was included in the project you selected to duplicate from will copy.

The word "copy" will be initially included in the project title, but this can be updated at any time.

Using Project Duplication can help you create new projects on your calendar faster by pulling in all the key details in seconds.

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

GO TO MY CALENDAR

