Ready, Set, Go:

Planning Your Work in CoSchedule



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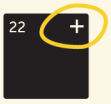
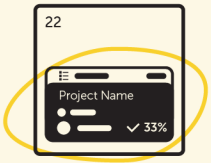
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Introduction

As you work through this guide, use this checklist to learn how to plan your daily work in CoSchedule. It will help you become accustomed to what your daily life will look like working in the tool.

Step	Completed	Action Item	Instructions
	✓	*Complete all steps on your CoSchedule Calendar.*	
1		Add a test project to your calendar.	From the calendar, click the plus sign in the corner of a date. Add a new text project to your calendar. 
2		Click into a project from the home dashboard.	From your task list, click navigate to the project by clicking on the project name to the right of the task. 
3		Find where tasks, discussions and attachments live from the project view.	Click into a project from your home dashboard or your calendar. 

What is this guide? This guide will walk you through how you can use CoSchedule to manage your daily tasks and projects.

Who's this guide for?: New CoSchedule users that are on a marketing team.

What you'll learn:

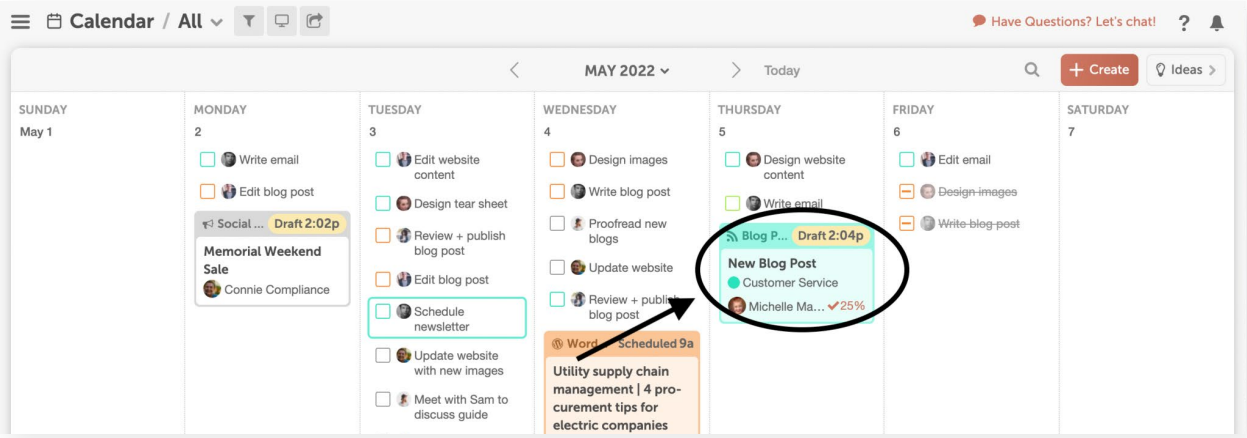
- How to plan new projects in CoSchedule.
- Where to find your tasks.
- How to collaborate better using discussions and attachments.

Why you should read this guide?: This guide is a great place to start for new users wondering how they should use CoSchedule on a daily basis.

CoSchedule Activities

Marketing Projects

In CoSchedule, projects are the backbone of the calendar. Each block on the calendar represents a marketing project that your team is responsible for.

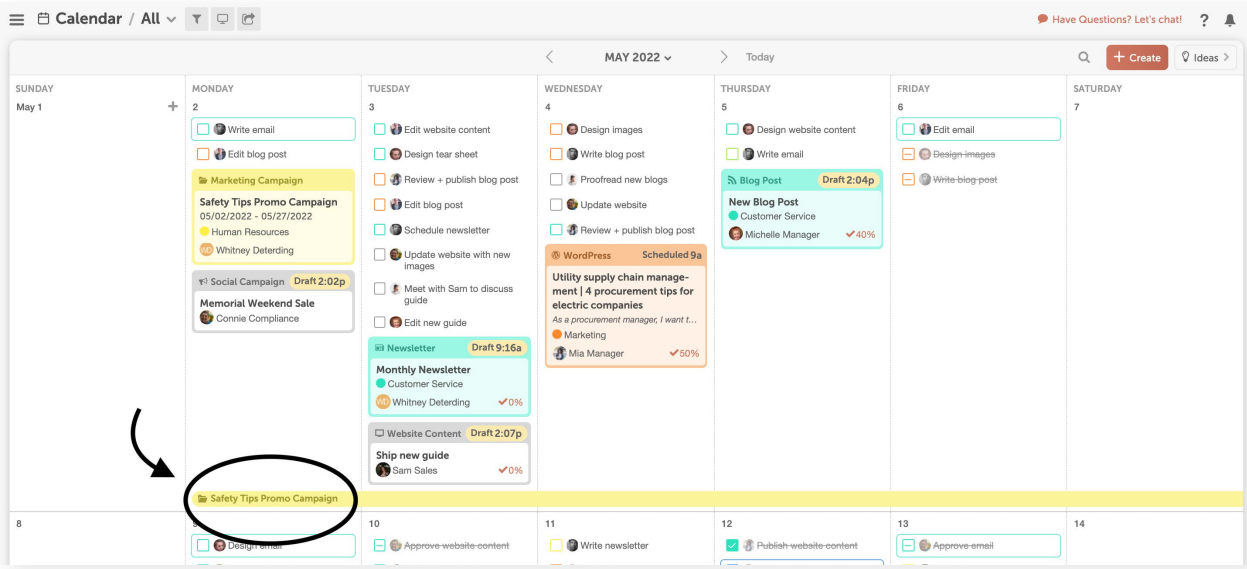


A project in CoSchedule is anything that the marketing team will produce. It could be blog posts, white papers, eBooks, conference tear sheets, promotional swag, brochures, paid search ads, or anything in between.

Marketing Campaigns

A marketing campaign is made up of a series of projects and has a beginning and end date. Think of it this way: if you're launching a new product, you usually have a series of associated projects like emails, social ads, search ads, blog posts, social messages, maybe even commercials and print materials. These things run over an extended period of time.

A marketing campaign is a way to group projects together to stay organized and to visualize the duration of the campaign.



Adding a New Project to the CoSchedule Calendar

When you want to add a new project to the calendar, simply click the plus sign on a day.

There are two ways to think of planning projects and tasks in CoSchedule:

- Add the project on the launch date. (Great for things that have a hard publish date like blog posts.)
- Add the project on the start date. (Great for things that have ongoing activities and no hard launch date.)

Based on When the Project Publishes



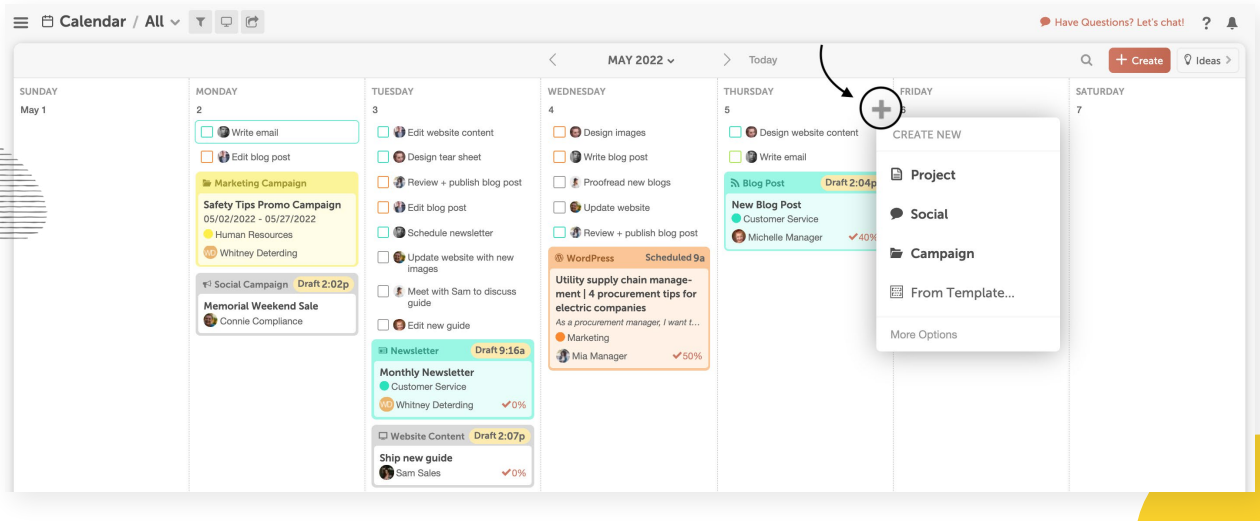
Used for: working towards a scheduled deadline or goal.

Based on When the Project Begins



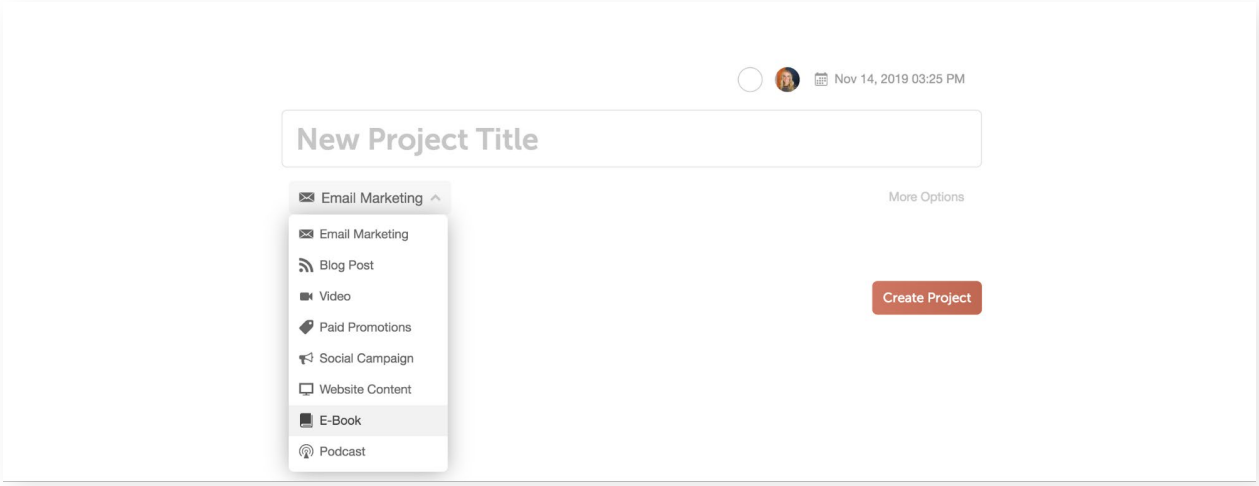
Used for: working from a start date without needing a scheduled deadline.

Once you click the plus sign on the calendar date, you'll see a list of options appear.



- Choose "Project" to add a marketing project like a blog post, video, paid ad, etc.
- Choose "Social" to add a stand alone social media message or a social media campaign.
- Choose "Campaign" if you want to create a series of projects that are related to each other or promote the same initiative.
- Choose "Mailchimp" if you want to create an email in Mailchimp.
- Choose "Hubspot" if you want to create a new email, blog post, or landing page in your Hubspot account.
- Choose "WordPress" if you want to create a blog post on your calendar AND a new post in your WordPress account.

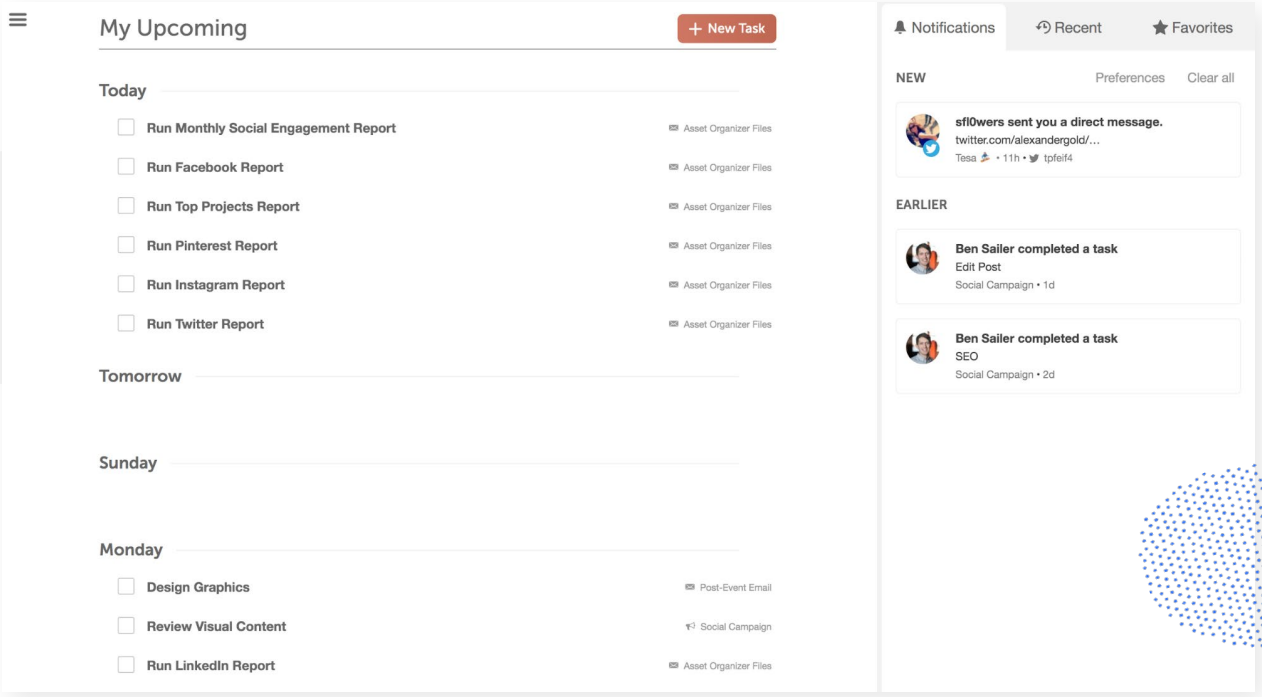
If you choose "Projects", you'll be able to choose the specific asset you're creating on the next page by using the drop down menu.



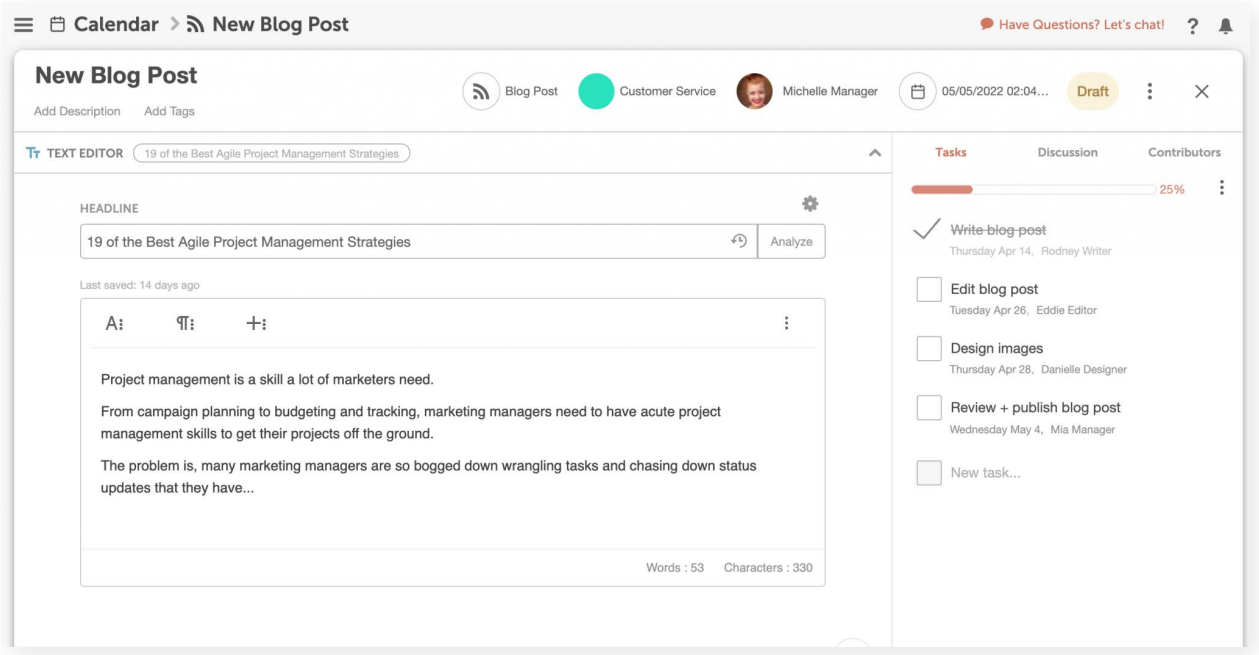
Completing a Task in CoSchedule

This is where your home dashboard becomes vital.

Head over to your CoSchedule Home Dashboard to see all of your daily priorities and tasks.

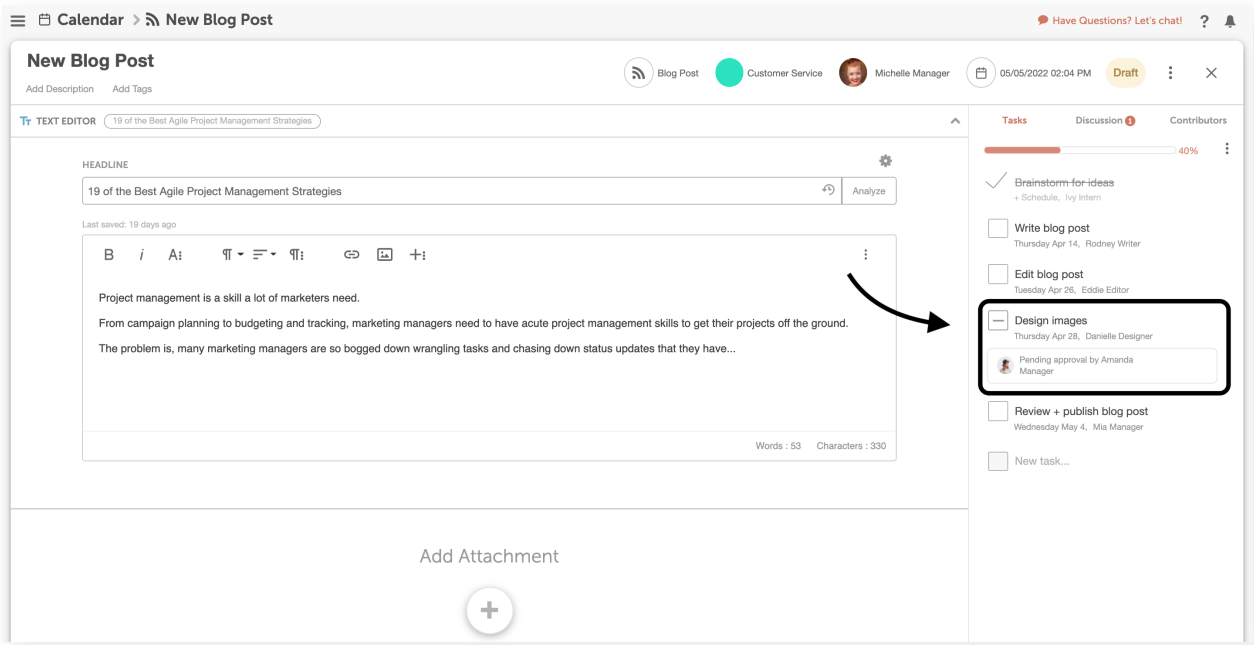


To start working on one of your tasks, click into the task. This will bring you to the project view where you can complete your task.



In the project view, you'll see a workflow on the right-hand side. This holds people accountable for hitting their deadlines.

There is also the ability to have approvals built into the workflow. Once you check off your task, the individual responsible for approving it will automatically be notified. This eliminates bottlenecks that often form when approvals are necessary.

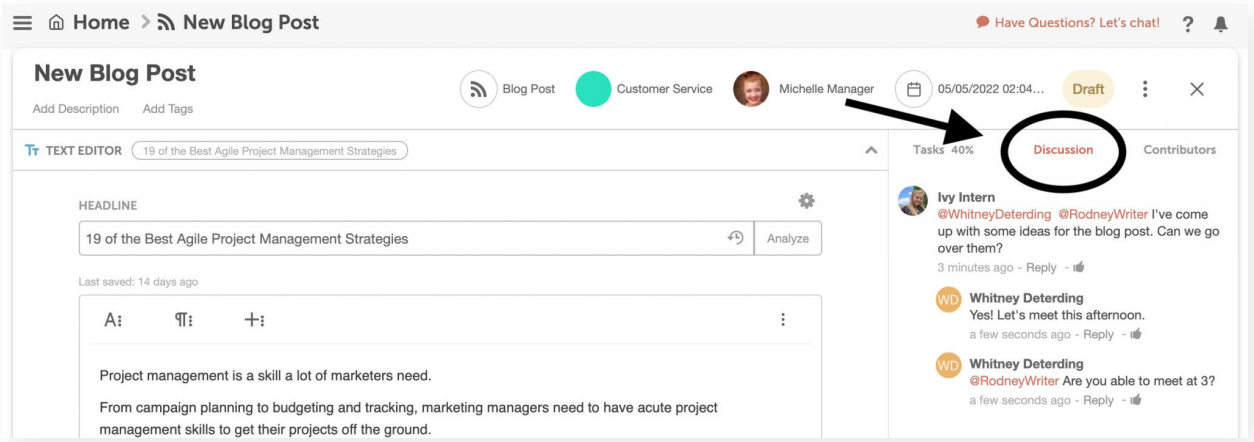


Discussions in CoSchedule

Discussions are a powerful way to cut down on the need for status updates and to make sure you have everything you need to complete your task.

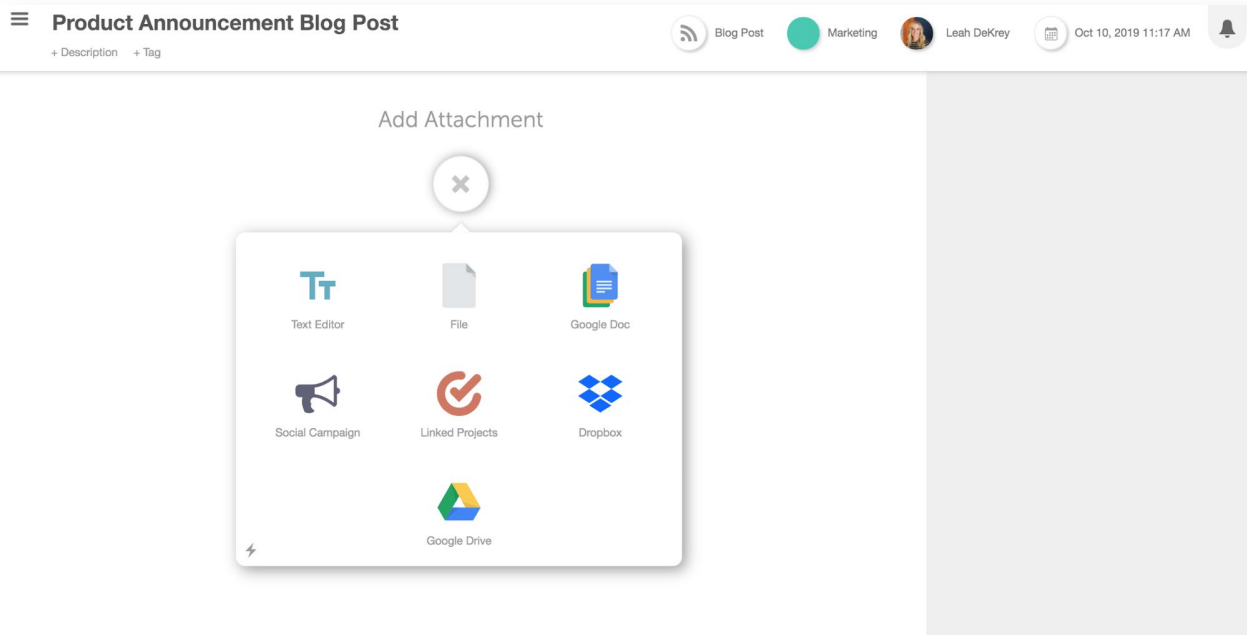
It also makes it easy to jump into a project and quickly get up to speed.

Discussions can be found by clicking the "discussion" tab.



Attachments in CoSchedule

Under the attachments area, you can add things like Google docs, files from your CoSchedule Asset Organizer, a Dropbox file, or add a social campaign.



Adding a social campaign allows you to write your social messages directly in the project so you don't have to bounce over to another tool to promote your content.

