Getting Started

with CoSchedule



CoSchedule

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Welcome to...

CoSchedule



In this lesson:

Welcome to... CoSchedule?

Why is My Team Using CoSchedule?

How Can CoSchedule Help Me?

Welcome to... CoSchedule? The First Step to Getting Started

You probably just received an email from your manager inviting you to use CoSchedule.

You're likely thinking things like...



We're gonna try to address all your questions in this getting started guide.

What is this guide? This guide will walk you through what value CoSchedule provides.

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

What you'll learn:

- What CoSchedule is.
- Why your team is using CoSchedule.
- How CoSchedule can help solve some common marketing problems.

Why is My Team Using CoSchedule?



The short answer?

CoSchedule is going to help you spend less time on the unproductive parts of your job that you hate.

The long answer?

More is being expected of you recently — more marketing materials, more graphics, more ads, more blog posts, more everything. Problem is, your organization isn't adding more marketing staff.

So what's that mean? Simple. You've got to do more work in the same amount of time. But how does that happen? Well, that's less simple. You essentially have two choices:

1. Reprioritize your work schedule to handle the new tasks.

OR

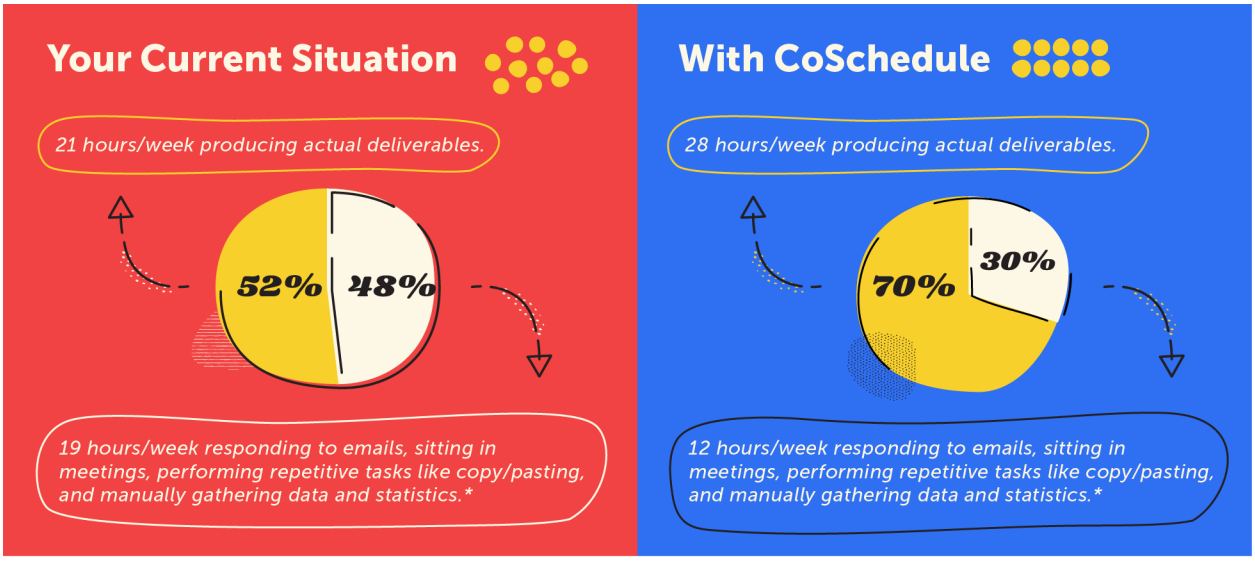
2. Stay late.

CoSchedule is here to make sure you fall into the first category.

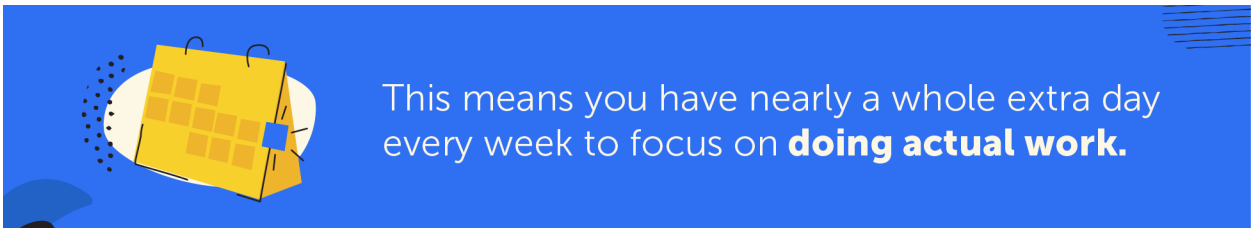
Here's how: The reality is you're wasting far too much time on non-productive things like meetings, emails, gathering data and dealing with spreadsheets.

Let's compare your time at work to a pie chart. You only have 40 (ish) hours to work with. With CoSchedule, you can spend less time on unproductive things so you have more time to actually work.

You're not adding more hours to your work schedule (i.e. staying late), you're just spending less time on the parts of your job that make you want to rip your hair out.



The average worker using CoSchedule has decreased their time spent in meetings and on unproductive tasks by 18%.



How Can CoSchedule Help Me?

You're likely thinking right now that adding another tool to your job is the last thing you want to do.

But the truth is, CoSchedule is going replace quite a few of your existing tools and make your job a lot easier.



Let's Put an End to Last Minute Fire Drills, Shall we?

CoSchedule puts an end to fire drills in two ways –

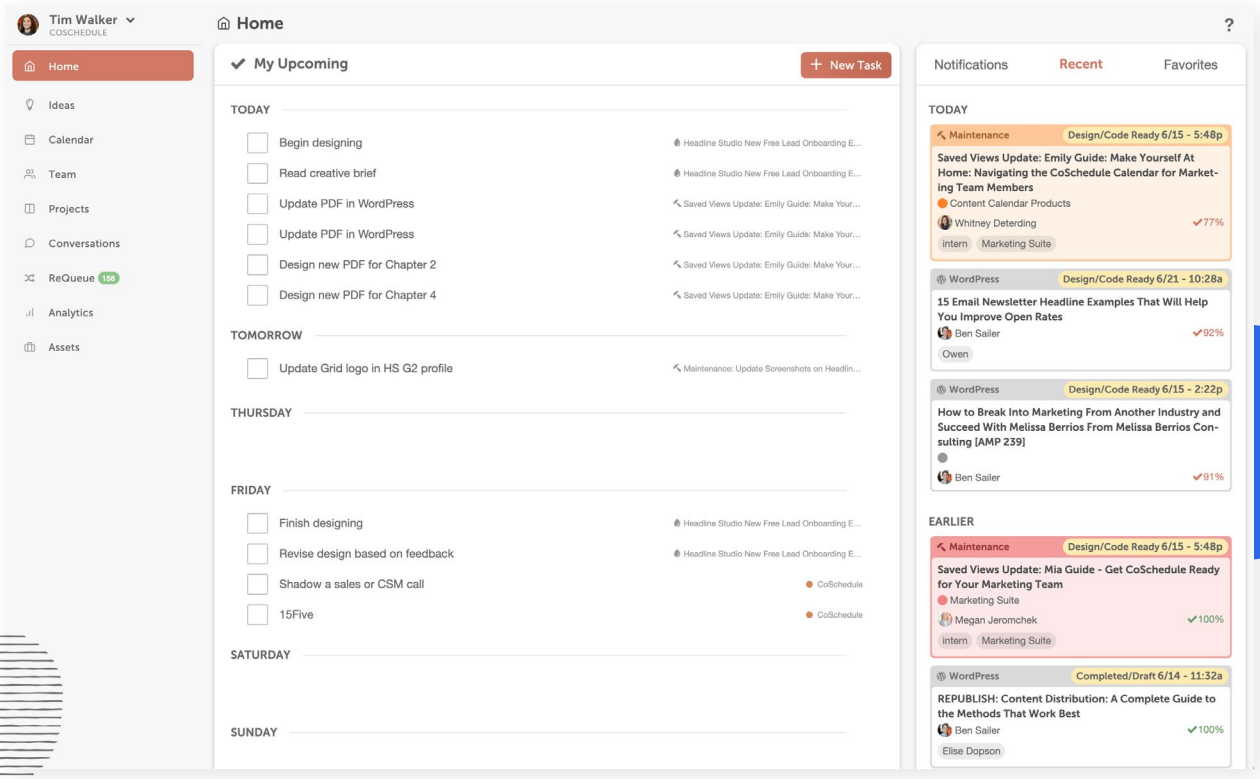
1. CoSchedule clarifies workflows and project to-do lists. Everyone's tasks are delivered on time. This means that projects won't get dropped on you to deliver last minute graphics or social media messages because someone else didn't meet their deadline.

2. CoSchedule improves communication. With CoSchedule, changes are caught in real-time and stakeholders can be kept in the loop on progress throughout the duration of the project.

Here's an example how CoSchedule helps end last minute fire drills:

The CoSchedule Home Dashboard visualizes all the tasks you have due, so everyone on your team is held accountable for their part of the project.

CoSchedule will also notify you about changes and discussions happening to all your projects in real-time.



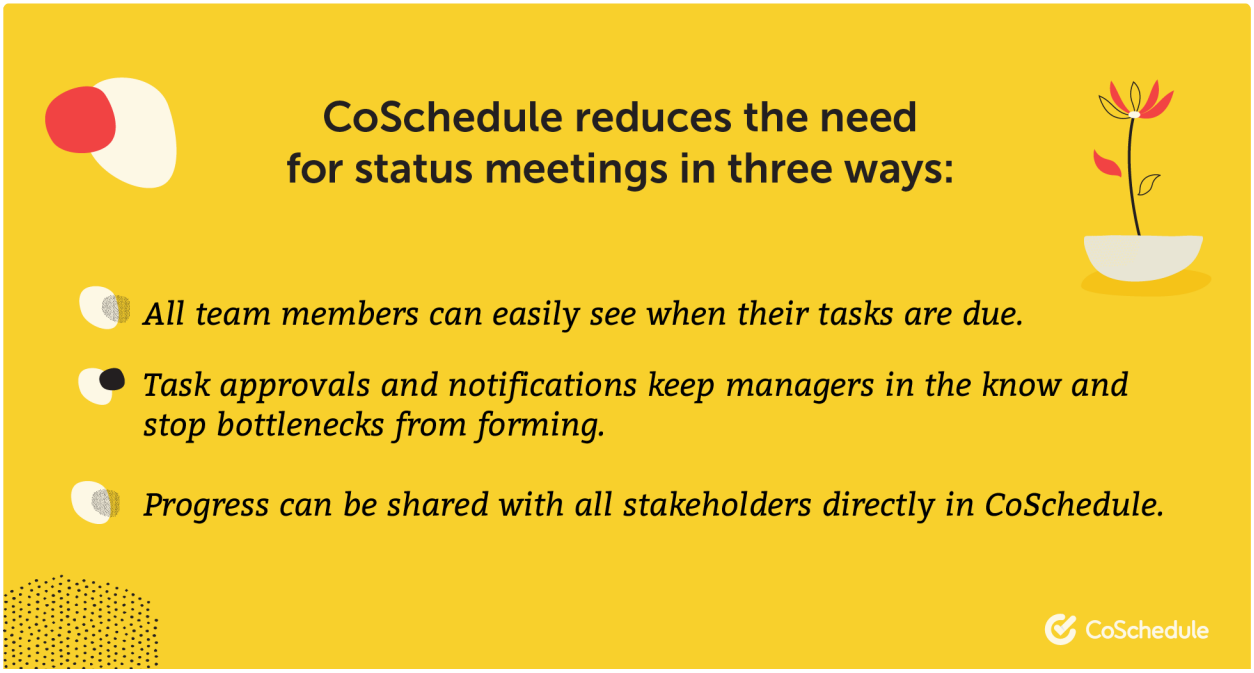
If you're not familiar with the term fire drill, here's what we mean:



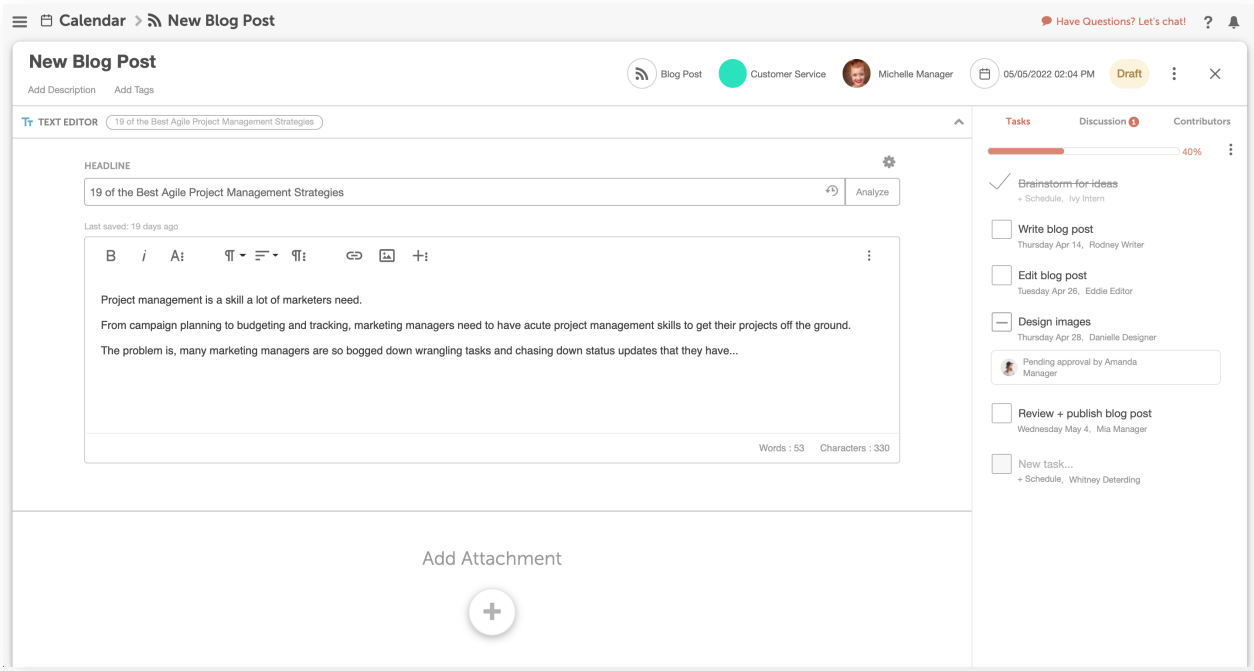
Fire drills are those dreaded, unplanned, unexpected, changes to projects that shred your to-do lists, wreak havoc on your productivity, and cause you to stay late.
No more. That ends with CoSchedule.

Stop Sitting in Pointless Meetings

The average worker spends about 5 hours per week sitting in meetings – most of which are totally unnecessary.



Below you'll see what a project looks like in CoSchedule. You can see all the content, comments, attachments, social media messages, task list, and contributors.



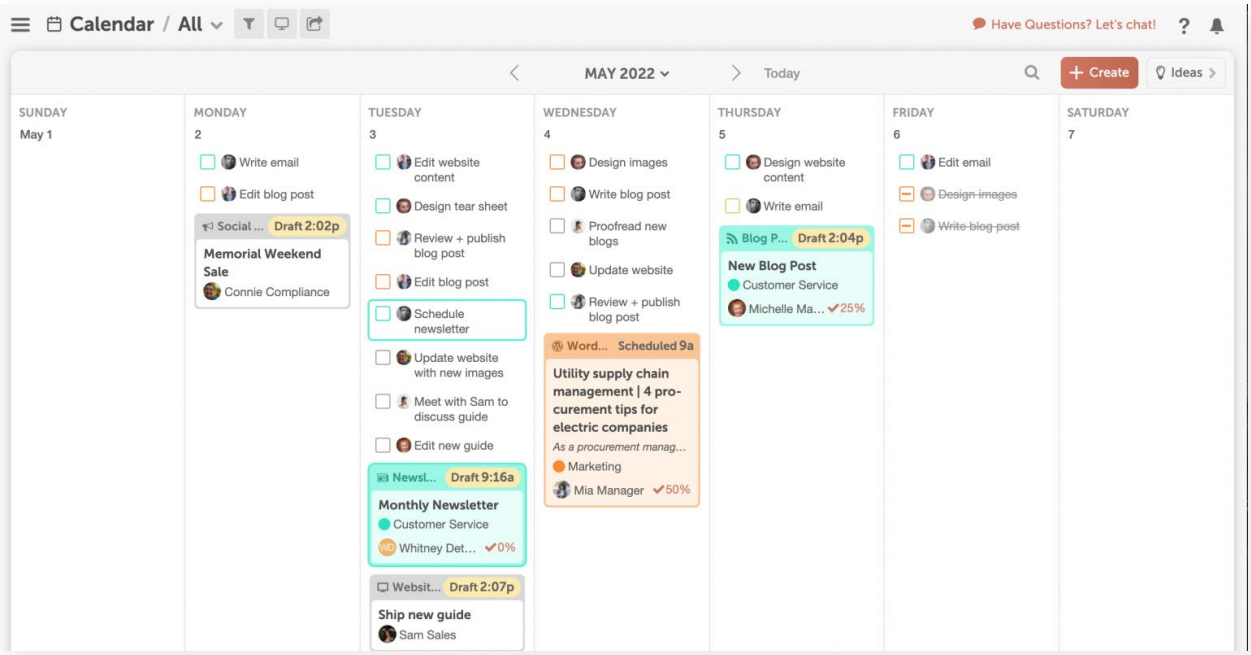
Make Unrealistic Deadlines a Thing of the Past

As it stands now, your boss doesn't have very good visibility into your workload... if any. This lack of visibility means they have no idea how busy you are or what you're working on everyday.

When your boss doesn't know what you have going on, it's easy to over promise things and set unrealistic deadlines.

CoSchedule allows your boss to see exactly what you're working on so you're never over extended or underutilized.

Here's what the CoSchedule calendar view looks like. You'll see every project, the due date, tasks, social messages... basically everything your marketing team is working on.



Clarify Expectations so You Can Get to Work

CoSchedule serves as the central hub for all your projects so you know exactly WHAT your role is, WHEN your tasks are due, and WHY the project is needed in the first place.

Have you ever had a project dropped on you where you had no idea what the purpose of the project even was?

It makes it awfully hard to deliver awesome graphics or social media messages if you don't have a clue why you're producing it in the first place.

This usually results in a time consuming hunt and a lot of back and forth to figure out what is needed from you.

CoSchedule is the place you'll turn to from now on –

- No more dropped balls.
- No more asking yourself, "Wait what?! I didn't know that task was due yesterday..."
- No more missing puzzle pieces.



Make Yourself at Home:

Navigating The CoSchedule Calendar



In this lesson:

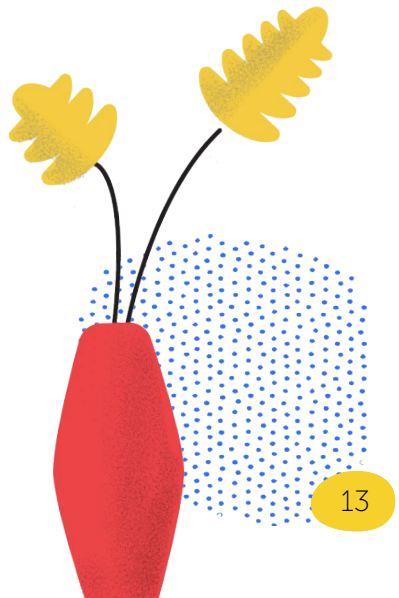
Navigating Your Calendar Checklist

Introduction

The Calendar View

The Home Dashboard

Customizing Your Notification Preferences



Navigating Your Calendar Checklist

Before we get started, use this Navigating Your CoSchedule Calendar Checklist to follow along step-by-step. It will help guide through the process of getting acquainted with your CoSchedule calendar.

Step	Completed	Action Item	Instructions
	✓	*Complete all steps on your CoSchedule Calendar.*	
1		Add a task from your home dashboard.	From the home dashboard, click the orange + New Task button and add a task. 
2		Create a read-only link.	Click the share icon in the corner of your calendar and create a link. Copy and paste the link into a new browser tab to see how it works. 
3		Favorite a project.	From the calendar, click the three dots in the corner of the project and add it to your favorites. 
4		Customize your notifications.	Toggle down your name in the left-hand corner and choose notification preferences. 

Introduction

What is this guide? This guide will walk you through the different areas of CoSchedule to help you feel comfortable navigating the tool.

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

What you'll learn:

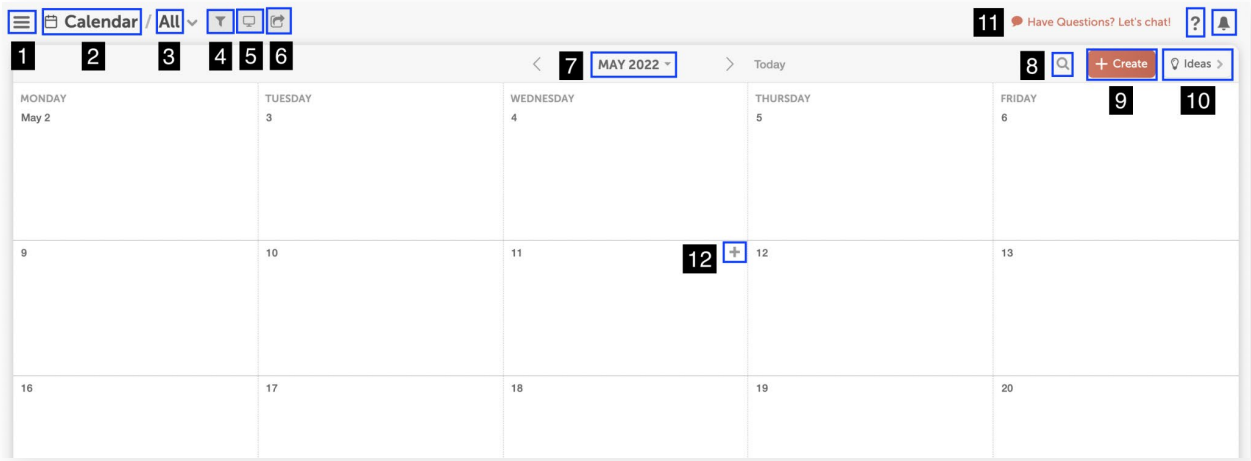
- How to navigate your calendar.
- How to use your home dashboard.
- How to customize your notification preferences.

Why you should read this guide?: This guide will teach you how to quickly navigate CoSchedule, so you feel comfortable getting your work done in the tool.

The Calendar View

CoSchedule is the only marketing software that allows you to see everything you have scheduled in a calendar view.

Let's explore its features to help you navigate your calendar.



1. **Hamburger menu:** This is where you will find your calendar settings, email preferences, and profile information.

2. **Breadcrumb navigation – tools:** Quickly navigate to different features of CoSchedule. Here you will find things like your analytics & reports, social media conversations, ReQueue, and the Kanban board.

3. **Breadcrumb navigation – saved views:** Choose specific saved views of your calendar to filter out the info you don't need.

4. **Filtering:** Organize your Saved Views your way using filters by adding & customizing your filter settings.

5. **Display settings:** Easily choose how far out you want to view your projects and declutter your calendar by hiding items you don't need to see.

6. **Read-only sharing:** Once you save your new view, you can create a read-only link and share your work with your team.

7. **Date navigation:** Choose specific months/years or navigate forward/backward through your calendar. For example, use this to easily see what you delivered last month.

8. **Search:** Find past or future marketing projects on your calendar using keywords. For example, if a recently published blog post needs an edit, search the title to find it.

9. **Create:** Add projects to your calendar like new blog posts, social media messages, and newsletters.

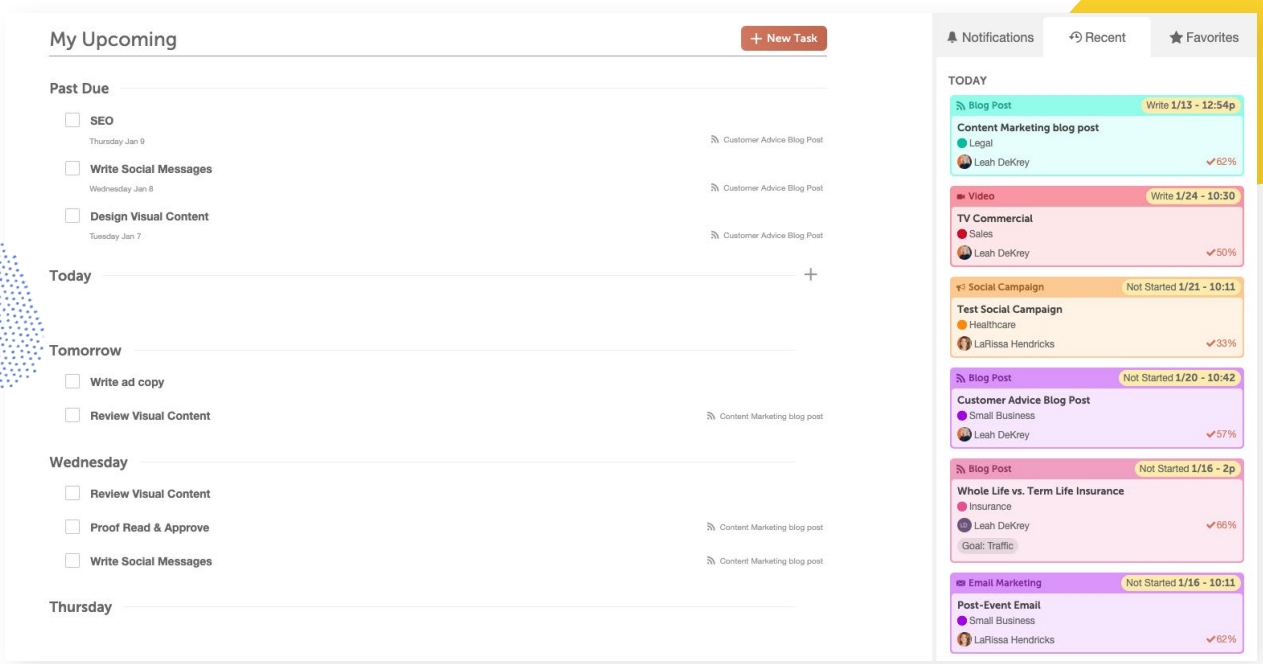
10. **Ideas:** The ideas bin is where all project ideas live. When the project is ready to be scheduled, it can be dragged to the calendar. Tip: Use this to see projects that will be coming down the pipeline.

11. **Support center & notifications:** Use the question mark icon to get best practice advice or message the CoSchedule support desk. Use the bell icon to see notifications, recent projects, and favorites.

12. **Create a project on a specific date:** Know the date you want to schedule a project? Add items to specific days using the plus sign on a date.

The Home Dashboard

The Home Dashboard in CoSchedule gives you a snapshot of all your tasks and helps you quickly find projects on your calendar.



1. **My upcoming list:** Find a list of all your daily priorities.

2. **Add task:** Quickly add a task to your to-do list. Tip: Add personal tasks to remind yourself about emails that need a response to or one-off items that cannot be forgotten.

3. **Notifications:** Find items that need your attention like new changes to your CoSchedule calendar or new discussions with team members.

4. **Recent:** A list of all the projects you've recently been working on. This makes it quick to jump in where you left off.

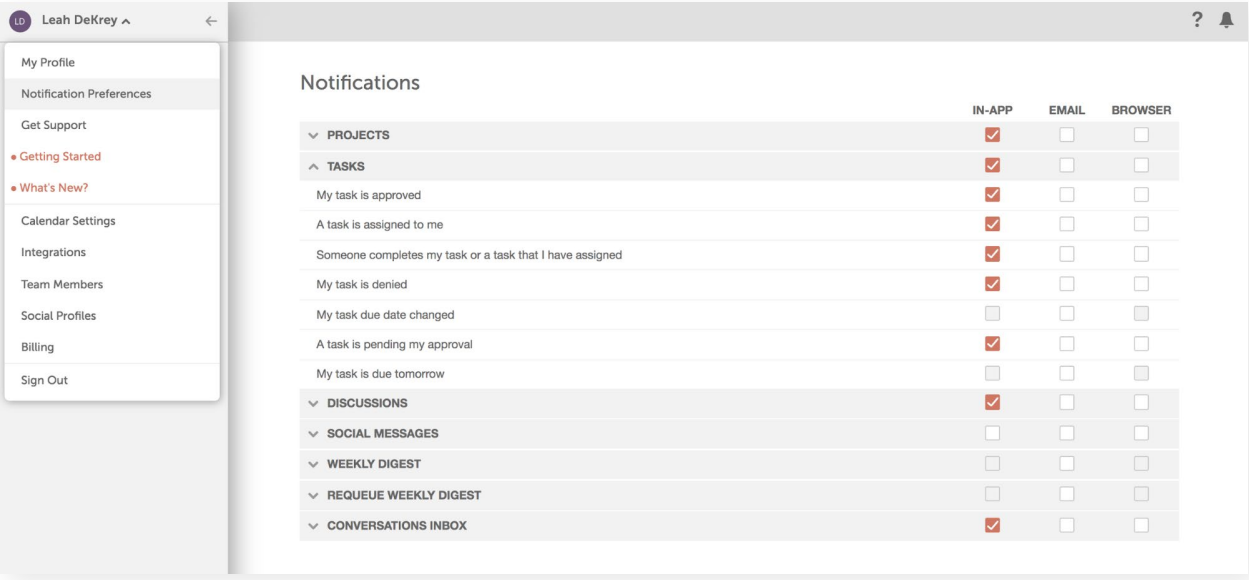
5. **Favorites:** A list of all the projects you've marked as your favorites. Tip: Have a recurring project that you need to quickly duplicate on a regular basis? Add it to your favorites to save time searching the calendar.

Customizing Your Notification Preferences

Notifications are a powerful way to stay up-to-date on relevant discussions and get notified when you're about to miss a deadline.

BUT, too many messages make it difficult to catch the most important things for your role.

CoSchedule lets you customize your notifications so you have the right info at the right time.



To set your notifications, toggle down your name in the top left-hand corner and choose notification preferences.

Click Around Your Own Calendar to Explore.

OPEN YOUR CALENDAR



OR

Ready to Start Getting Some Work Done?

Head to the Next Lesson to Learn How to Start Managing Your Work in CoSchedule.

NEXT LESSON



Ready, Set, Go:

Planning Your Work in CoSchedule



In this lesson:

Introduction

CoSchedule Activities

Adding a New Project to The CoSchedule Calendar

Completing a Task in CoSchedule

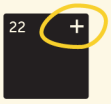
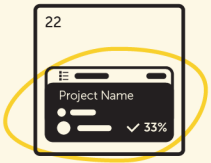
Discussions in CoSchedule

Attachments in CoSchedule



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:

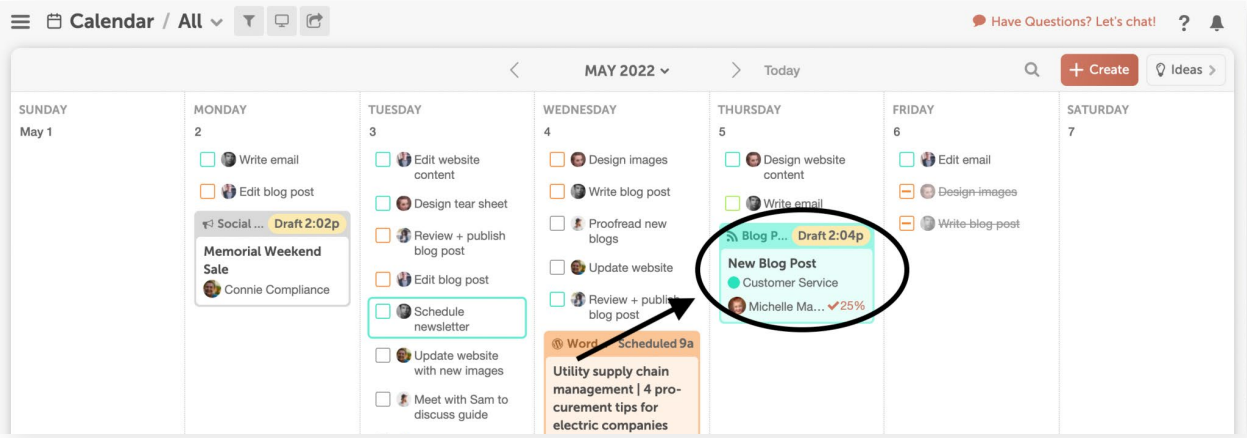
- How to plan new projects in CoSchedule.
- Where to find your tasks.
- How to collaborate better using discussions and attachments.

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.

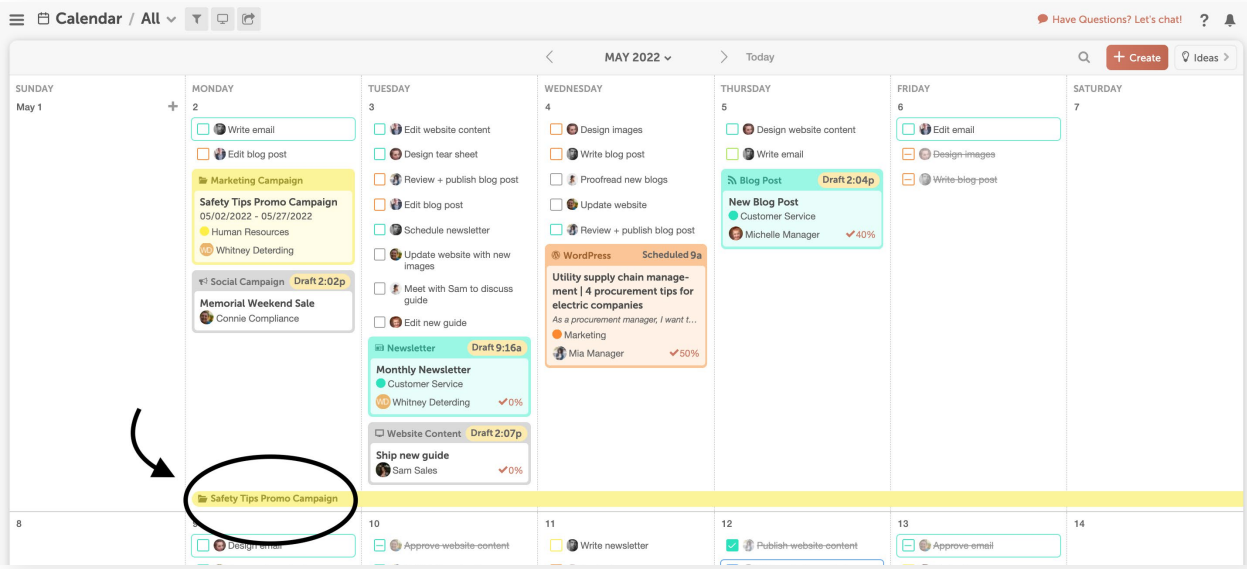


A project in CoSchedule is anything that the marketing team will produce. It could be blog posts, white papers, eBooks, conference tear sheets, promotional swag, brochures, paid search ads, or anything in between.

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



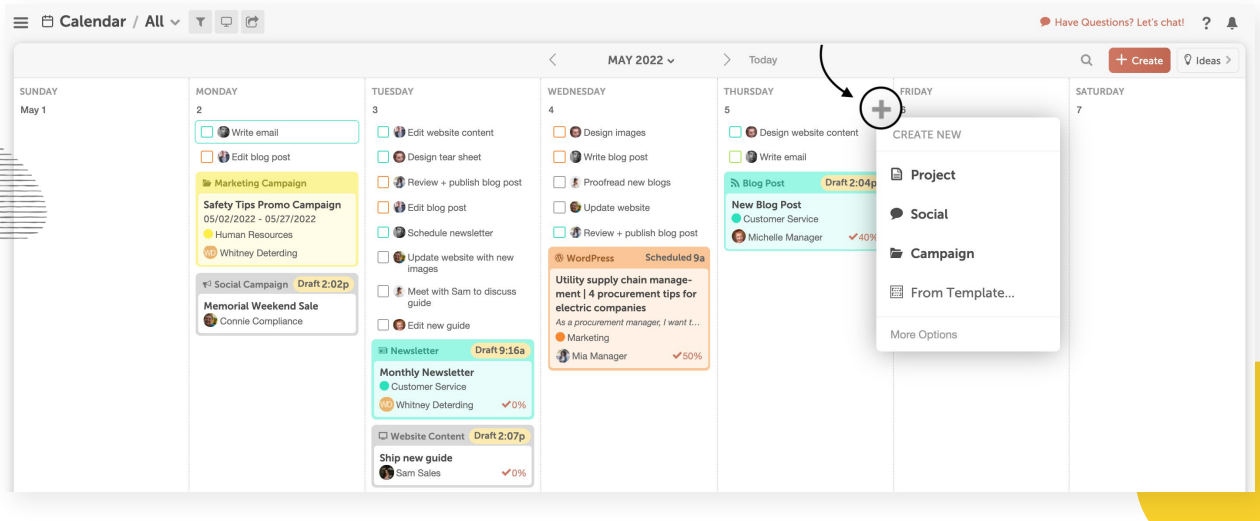
Used for: working towards a scheduled deadline or goal.

Based on When the Project Begins



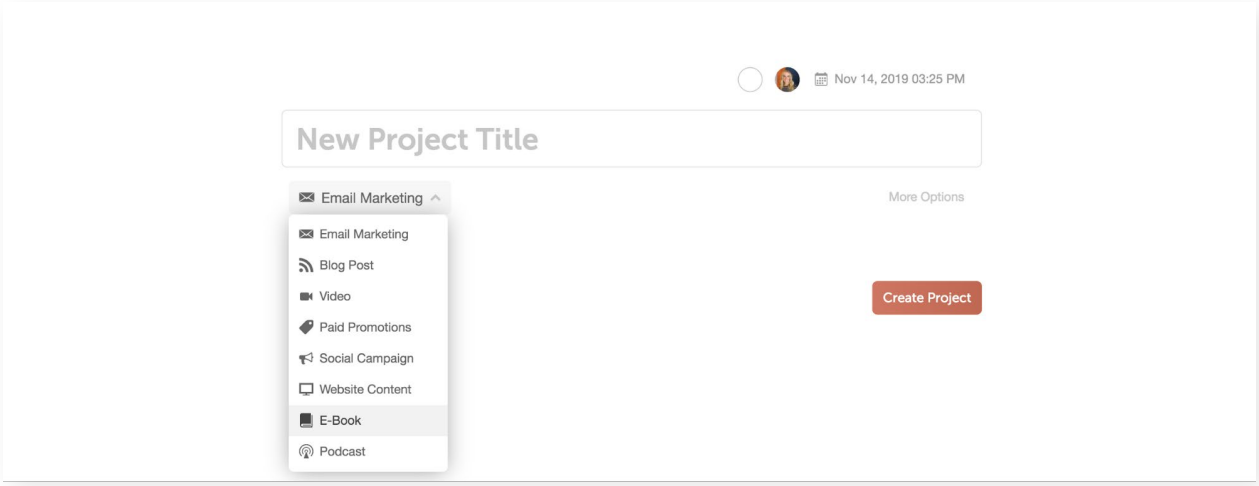
Used for: working from a start date without needing a scheduled deadline.

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.

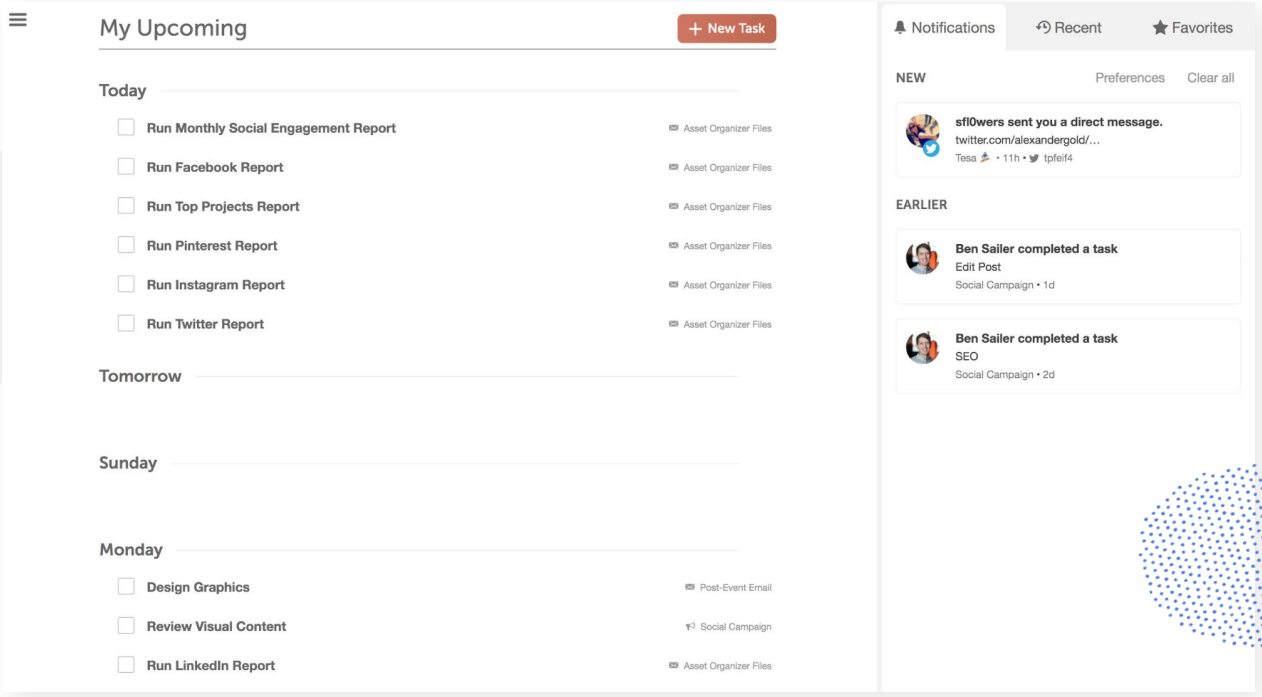
If you choose "Projects", you'll be able to choose the specific asset you're creating on the next page by using the drop down menu.



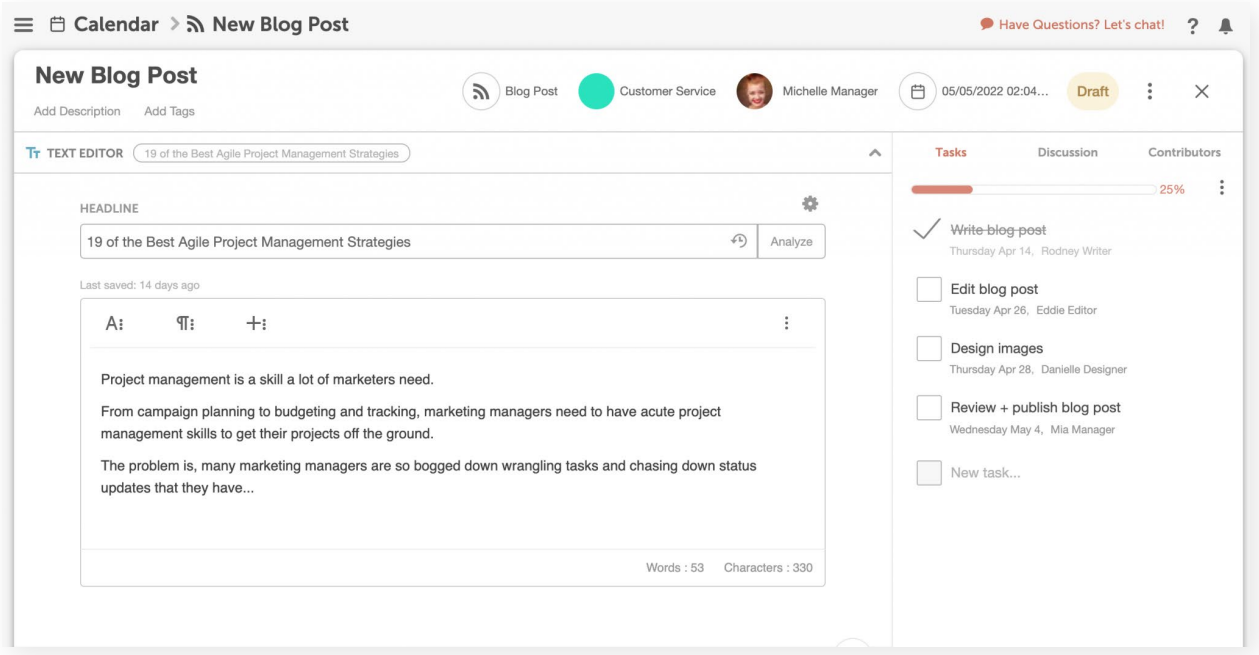
Completing a Task in CoSchedule

This is where your home dashboard becomes vital.

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

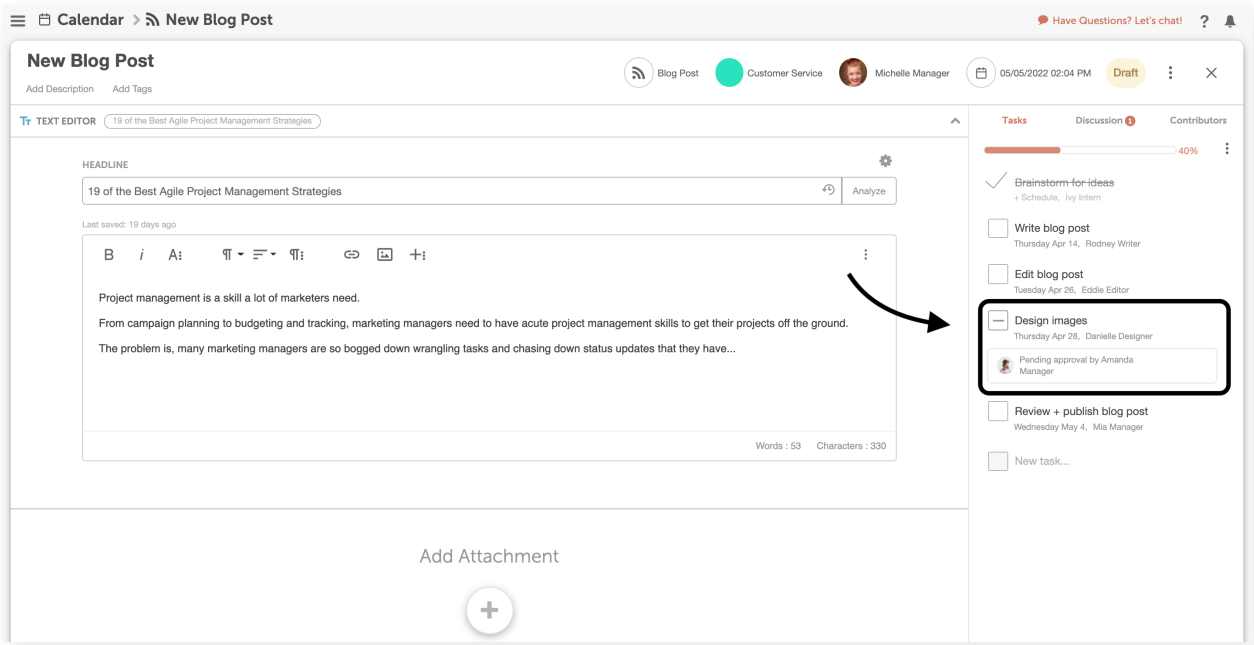


To start working on one of your tasks, click into the task. This will bring you to the project view where you can complete your task.



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.

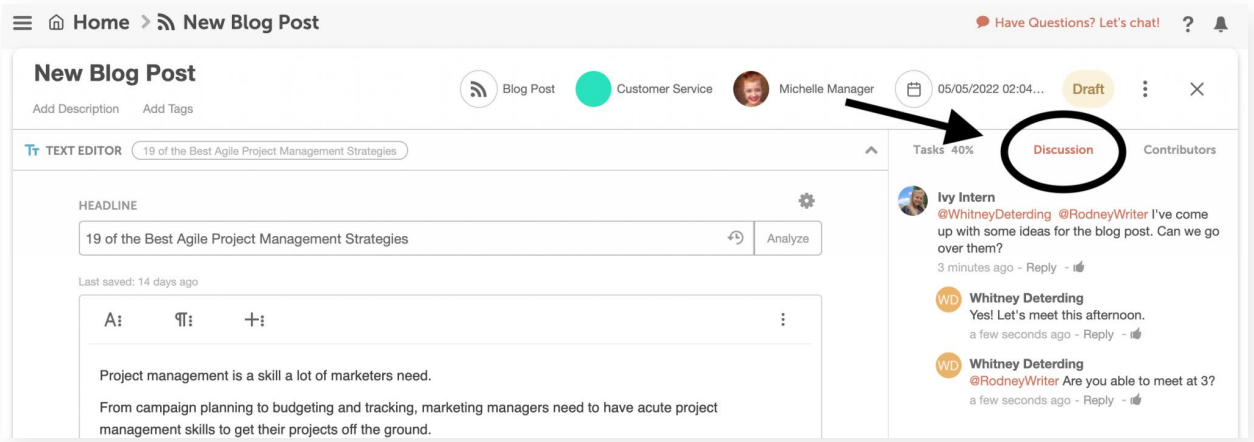


Discussions in CoSchedule

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.

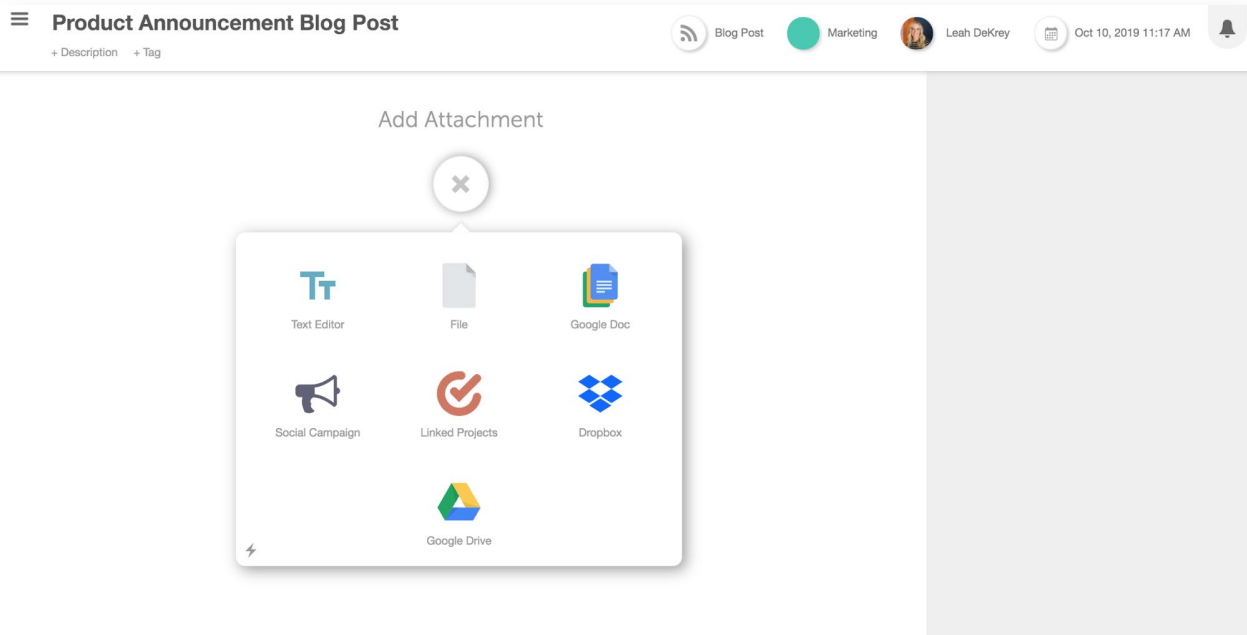
It also makes it easy to jump into a project and quickly get up to speed.

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

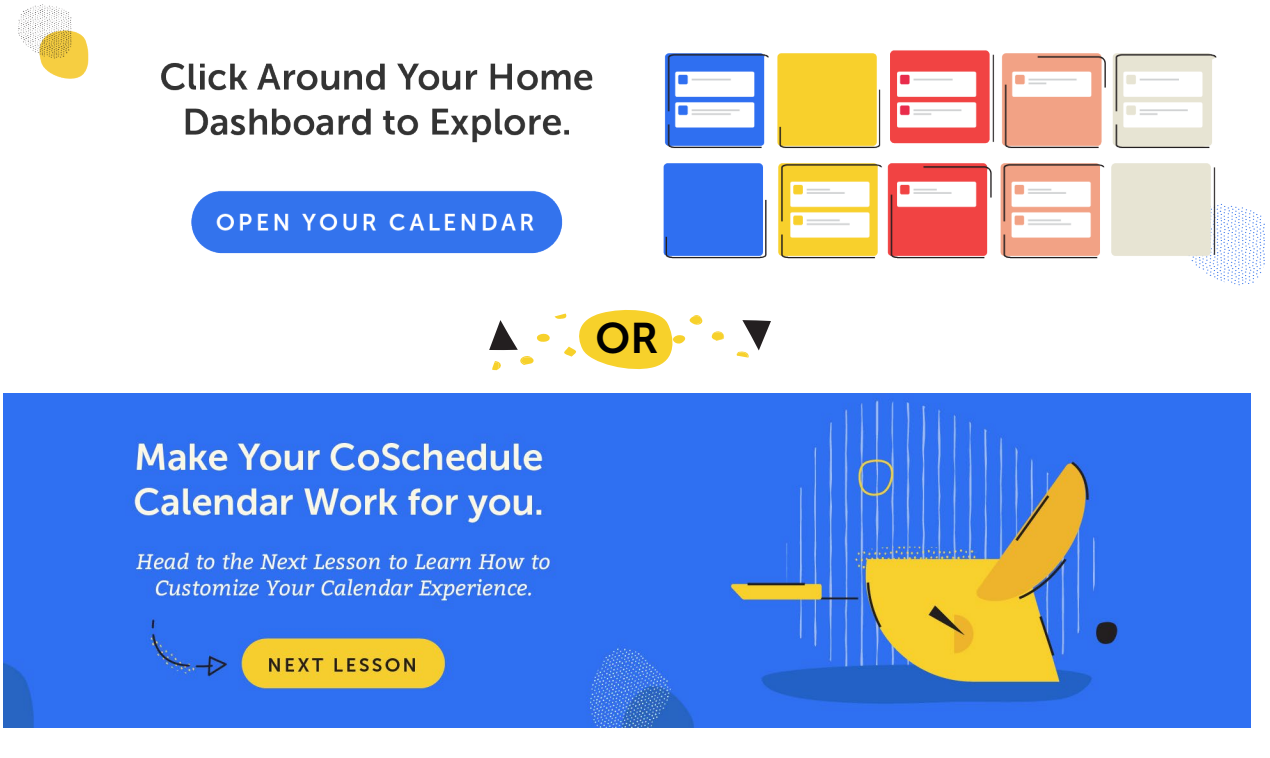


Attachments in CoSchedule

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.



Make Your CoSchedule Calendar Work For You:

Tips & Tricks to Execute Your Work Quickly



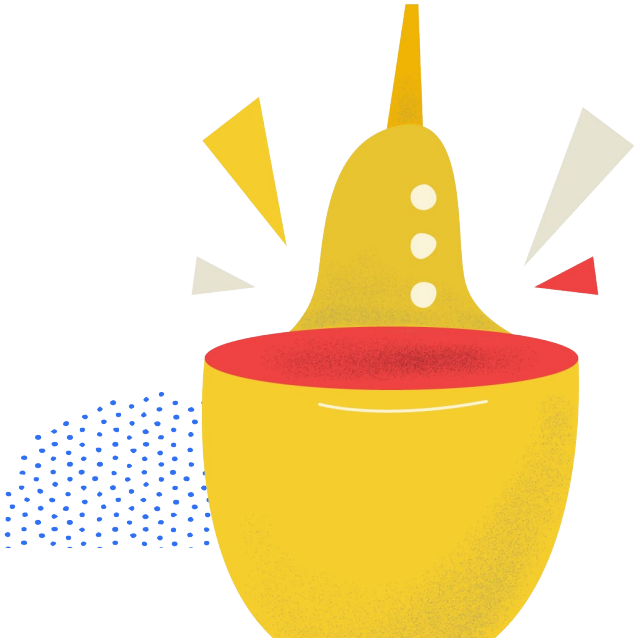
In this lesson:

Make Your CoSchedule Calendar Work For You

Marketing Campaigns in CoSchedule

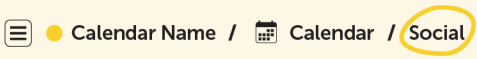
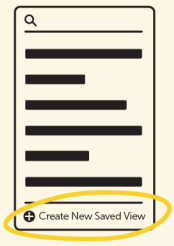
Saved Views in CoSchedule

Rescheduling in CoSchedule



Introduction

To start, use this checklist to discover the best way to make the CoSchedule calendar work for you. It will help you understand the value the marketing calendar provides and how to customize your experience.

Step	Completed	Action Item	Instructions
	✓	*Complete all steps on your CoSchedule Calendar.*	
1		Navigate to a saved view.	From the calendar, click the saved view option in the breadcrumb menu. Visit a different saved view on your calendar. 
2		Create your own saved view.	From the saved view drop down in the breadcrumb menu, choose create new saved view. Choose a team member filter and select yourself. 

What is this guide? Learn all about the CoSchedule Marketing Calendar and how to make it fit your everyday needs.

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

What you'll learn:

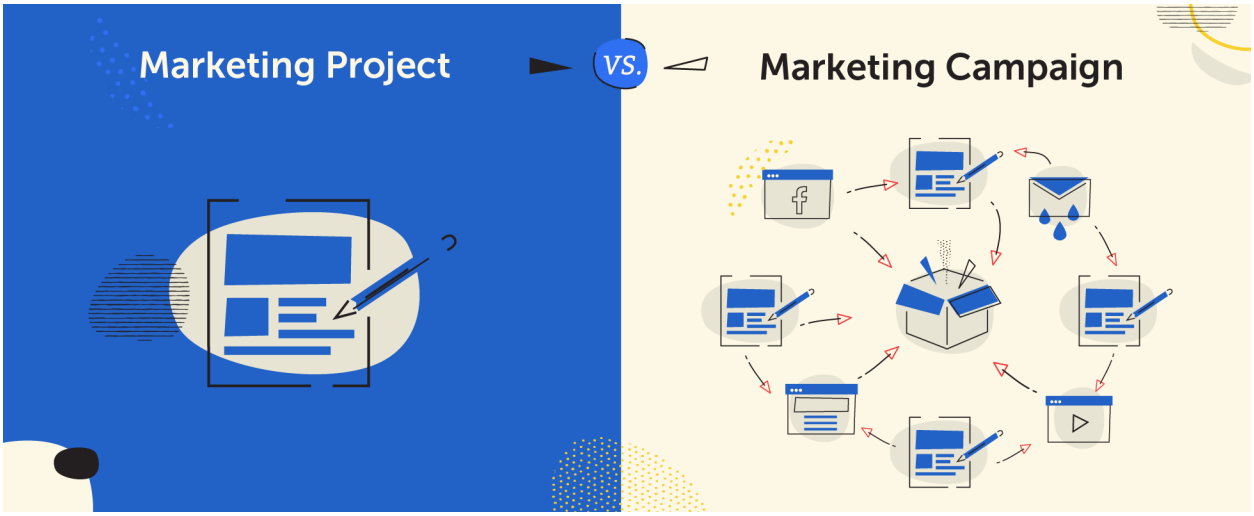
- How and when to use the Marketing Campaign activity.
- How to use and create custom saved views.
- How to drag and drop to reschedule.

Why you should read this guide?: This guide is a great place to start for new users looking to make better use out of their CoSchedule Marketing Calendars.

Marketing Campaigns in CoSchedule

In lesson three, you learned a little about marketing campaigns in CoSchedule. If you need a refresher, here's how a marketing campaign works in CoSchedule.

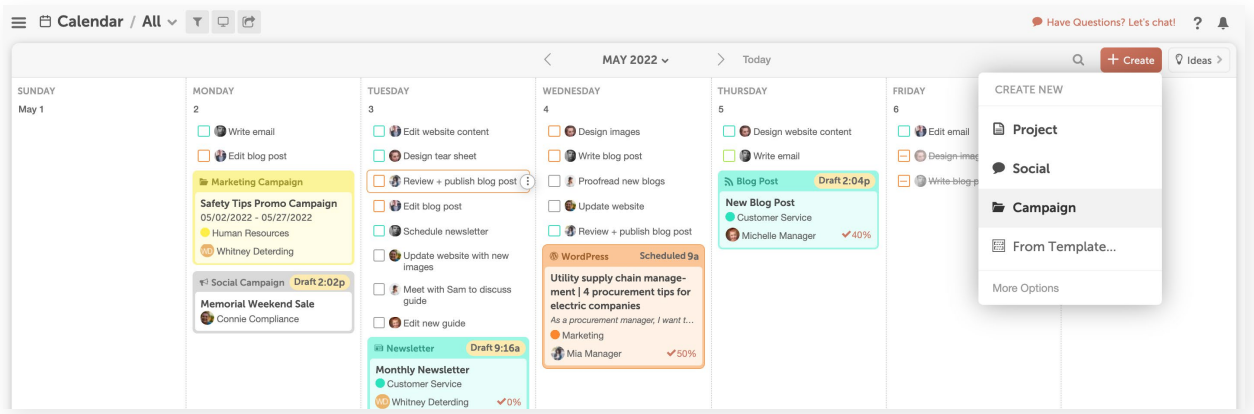
A marketing campaign is made up of a series of marketing projects. They usually have a start/end date and work together to promote a single initiative.



A good example of a marketing campaign is a new product launch. These campaigns usually contain a series of associated projects like emails, social ads, search ads, blog posts, social messages, maybe even commercials and print materials and run over an extended period of time.

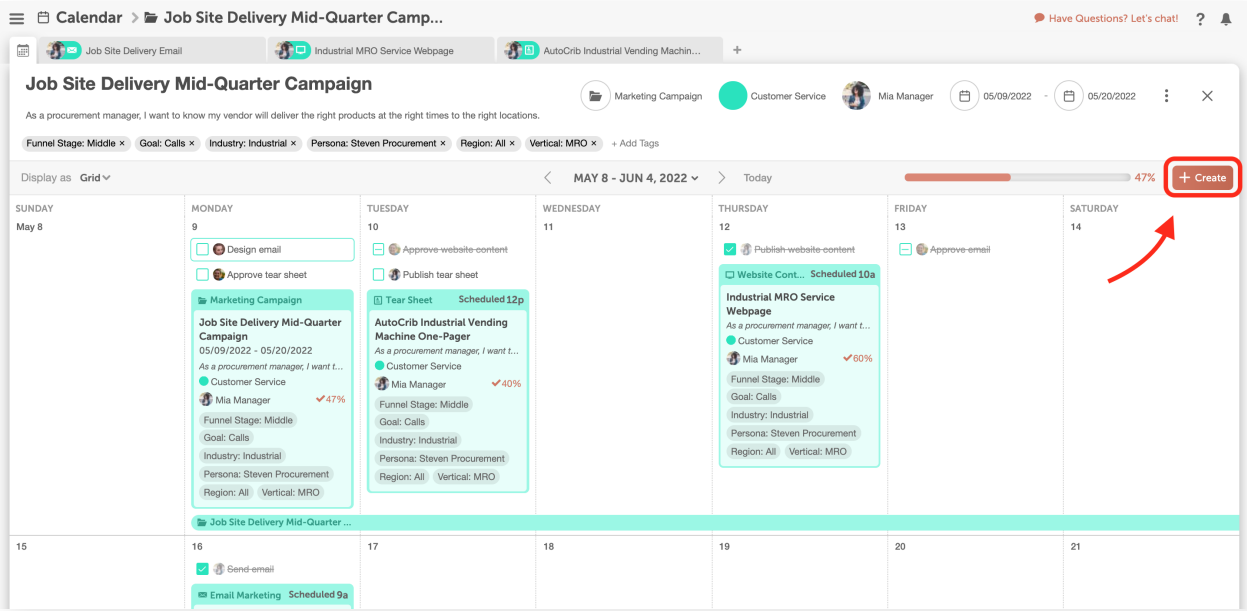
Planning a Marketing Campaign

To start planning a marketing campaign, click the plus sign on a date on your calendar. Then, navigate down to the option that says "Campaign".



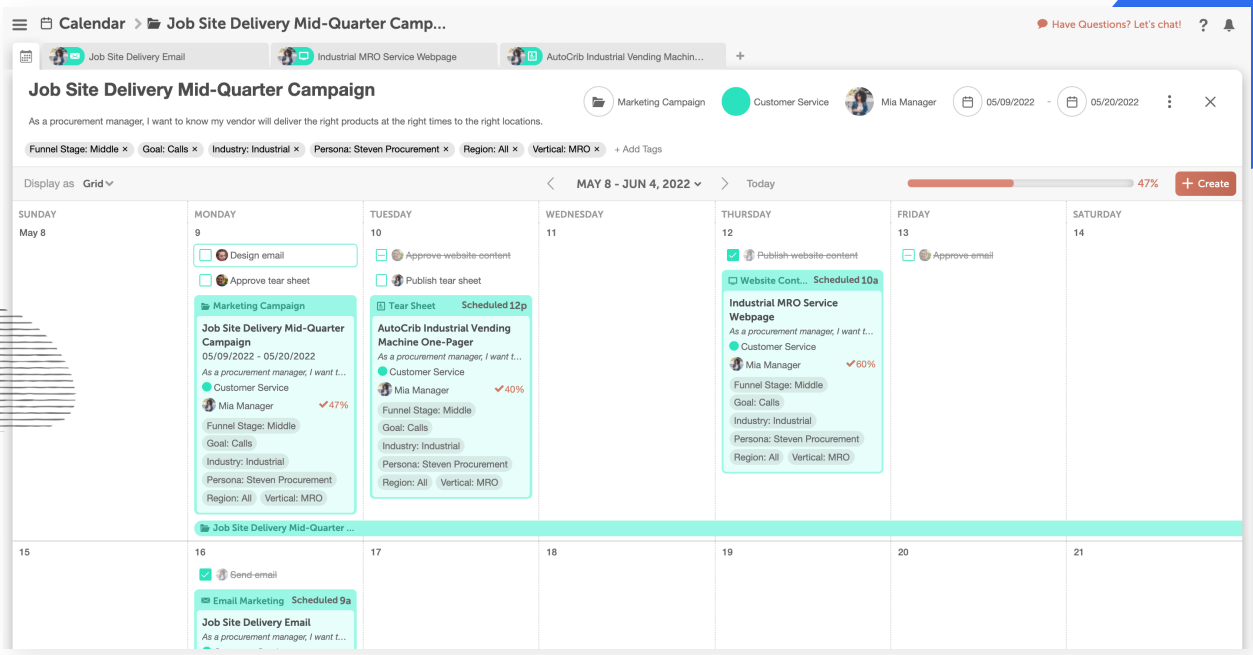
On the next screen, enter the name of your campaign add its start and end dates.

Each marketing campaign in CoSchedule will have its own calendar view. This helps visualize when each project will launch and offers a clutter-free, focused view of your marketing campaign.



From the marketing campaign calendar, click the plus sign on a date to continue adding projects to your campaign. You can also click the plus tab on the top to add a project.

Here's a look at what a marketing campaign might look like in CoSchedule. You'll see a bunch of marketing projects all working towards promoting the same initiative.

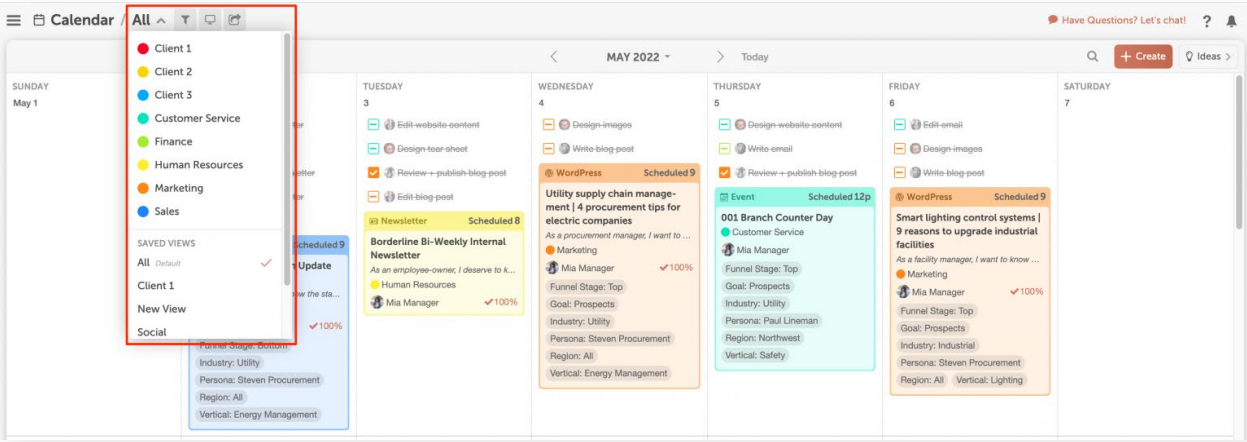


Saved Views in CoSchedule

A saved view offers a way to filter your calendar to only see certain projects. Some common saved views that you might have set up on your calendar include:

- Social messages
- Blog posts
- Individual departments
- Newsletters

To navigate to a saved view, click the saved view option in your main calendar navigation.



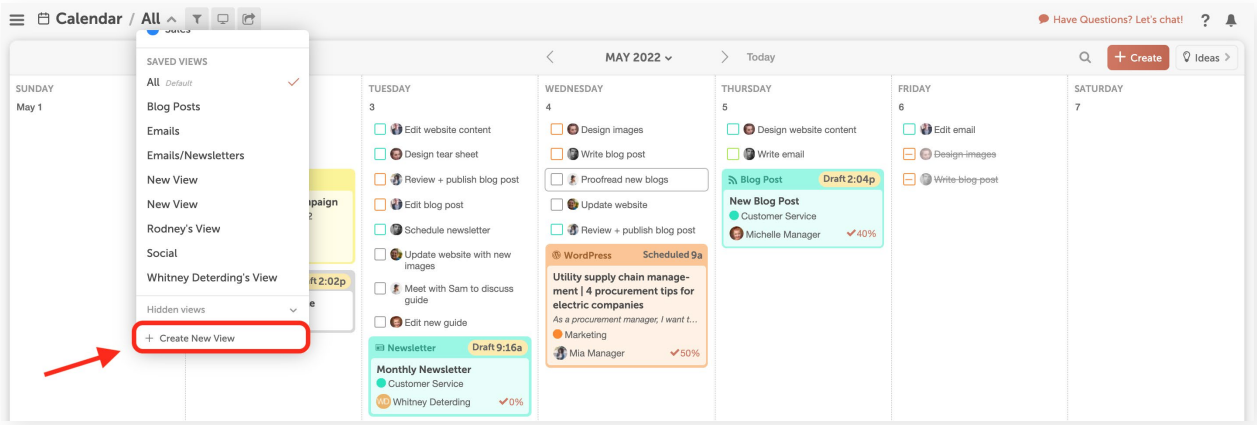
Create a Custom Saved View of All Your Projects

Creating a custom saved view of all your individual projects is one of the most valuable ways to use the feature. This allows you to filter out projects that you're not involved so you can focus your own priorities.

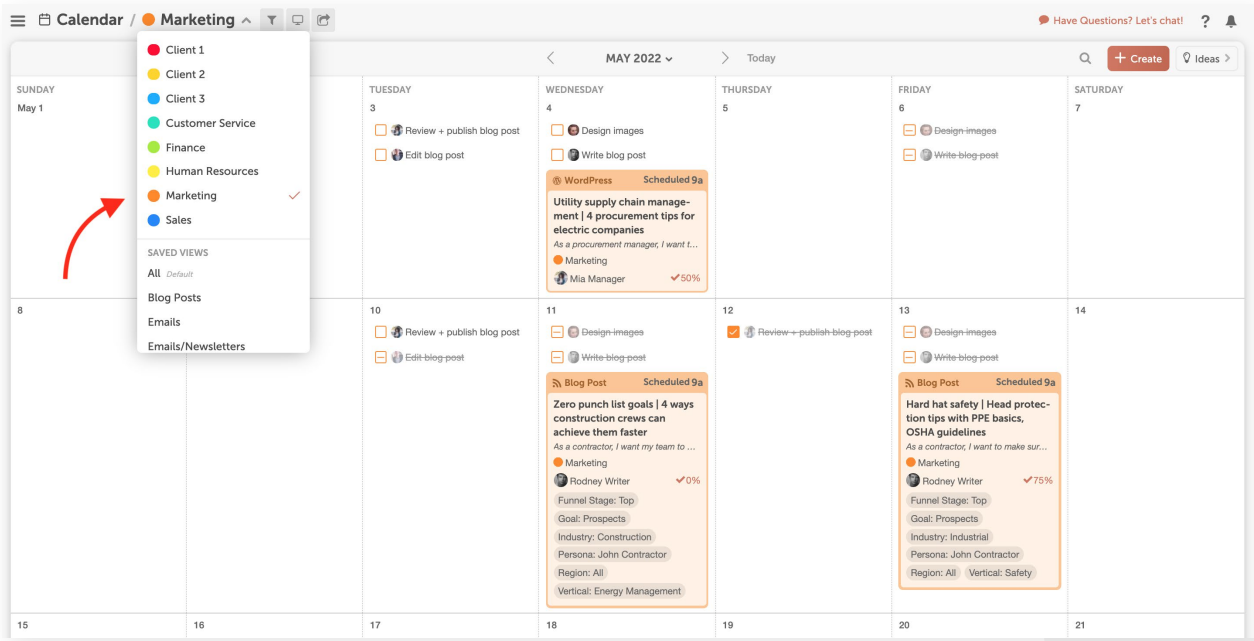
Here's how to do it:

To create a new Saved View, select **Create New View**. Give the new view a name and make selections to the Filter Content and/or Calendar Display Settings.

Whatever options you select will appear on your calendar immediately and whenever you are using this Saved View.



This will give you a filtered view of all your projects, tasks and campaigns. To find your saved view, click on it from the saved view breadcrumb menu.



Rescheduling in CoSchedule

One of the best features in CoSchedule is the ability to easily reschedule a project and all it's associated tasks, social messages, etc with the drag and drop functionality.

If a due date changes, it no longer takes a thousand clicks is several tools just to move a launch date.

All your have to do is drag and drop the project to a new date and everything will automatically reschedule. The best part? Everyone's tasks will also update in their CoSchedule accounts.

