CoSchedule

Getting Started with CoSchedule:

A Giant Leap Toward Organization



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CoSchedule

CoSchedule 101:

Build Your Foundation

1



In this lesson:

Introduction

The Home Dashboard

The Marketing Calendar



CoSchedule's Organization Tools

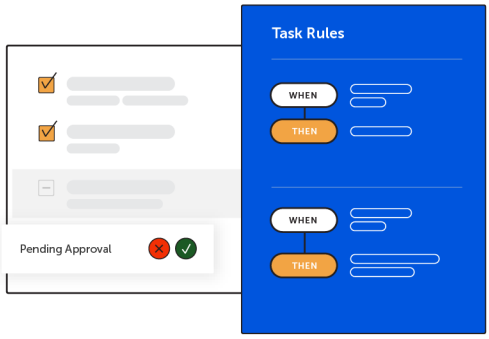
Marketing Calendar

Cross-functional calendar for global visibility of every project.



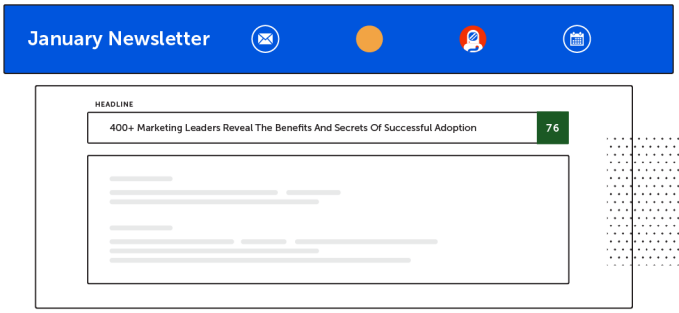
Work Organizer

Team collaboration and work management software to automate workflows.



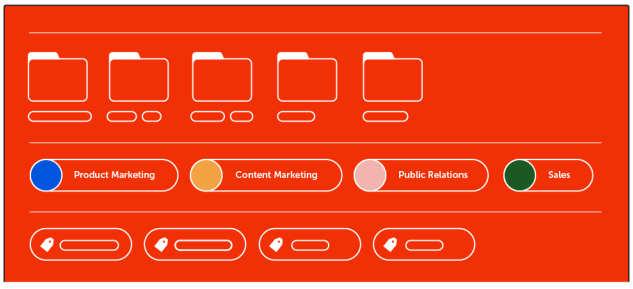
Content Organizer

Content marketing software to drive strategy and growth.



Asset Organizer

Digital asset management software for marketing teams.



Introduction

You've come to CoSchedule with the promise of:

- Completing more work.
- Delivering projects on time.
- Proving the value of your marketing team.

This getting started guide will walk you through how to get off on the right foot and lay the foundation to achieve these outcomes.

You won't learn everything you can do in CoSchedule, but rather the most important things to set yourself up for success. Think of this like a 101 class from your undergrad days.

In this chapter, you'll learn a few basics of the CoSchedule calendar.

What is this guide? This guide will walk you through the initial steps to set up your CoSchedule calendar.

Who's this guide for? New CoSchedule power users that will be implementing the tool for their marketing team.

What you'll learn:

- What the home dashboard is and how it will be used by you and your team.
- When to plan a marketing project vs. a marketing campaign.
- How to get started with the marketing calendar.

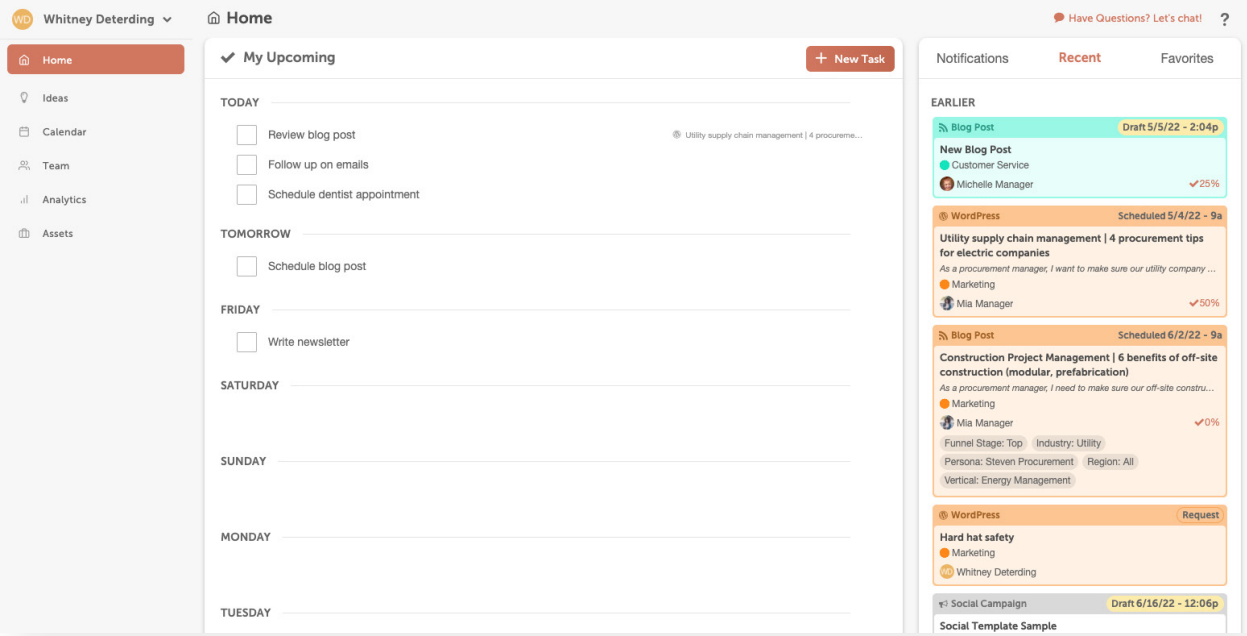
The Home Dashboard

The home dashboard is one of the most important areas for ensuring the on-time delivery of projects.

It's the first place your team members will turn to when setting their daily priorities.

Everyone will see a list of their tasks for the day, a list of notifications to stay in-the-know on all their projects, and a list of their recent/favorite projects to make it easier to jump back in where they left off.

You can also use this to set tasks for yourself or strategically favorite projects to keep an eye on your team's progress.



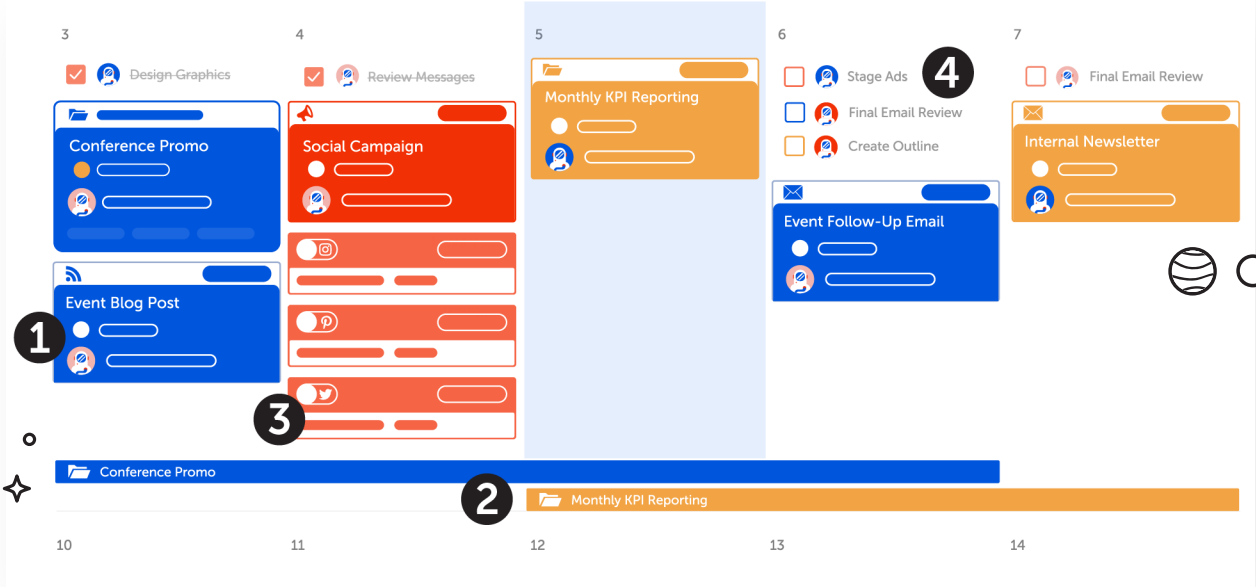
To add a new, private task (like a reminder to respond to an email), click on the orange "New Task" button on your home dashboard.

The Marketing Calendar

CoSchedule's marketing calendar is the single most important thing that will increase visibility into what your team is working on.

It serves as the blueprint for all of your events, content, social media, and more.

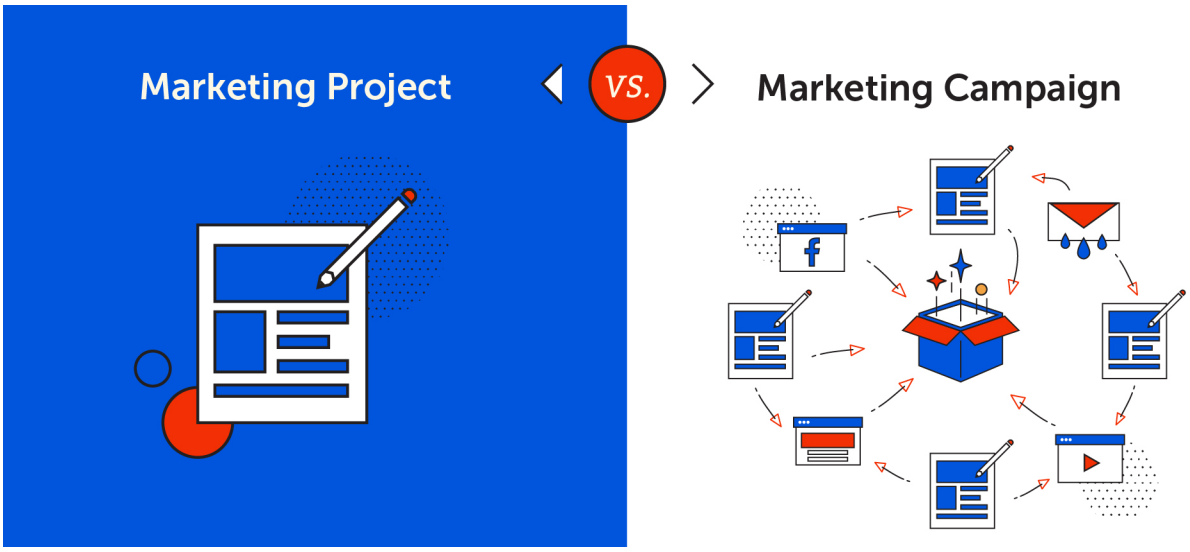
Finally, you'll have visibility into how every project interacts, overlaps, and supports your goals at a glance—confirming your team is working on the right priorities at the right time.



Here are some things you should know about the marketing calendar.

Your calendar will be made up of four items:

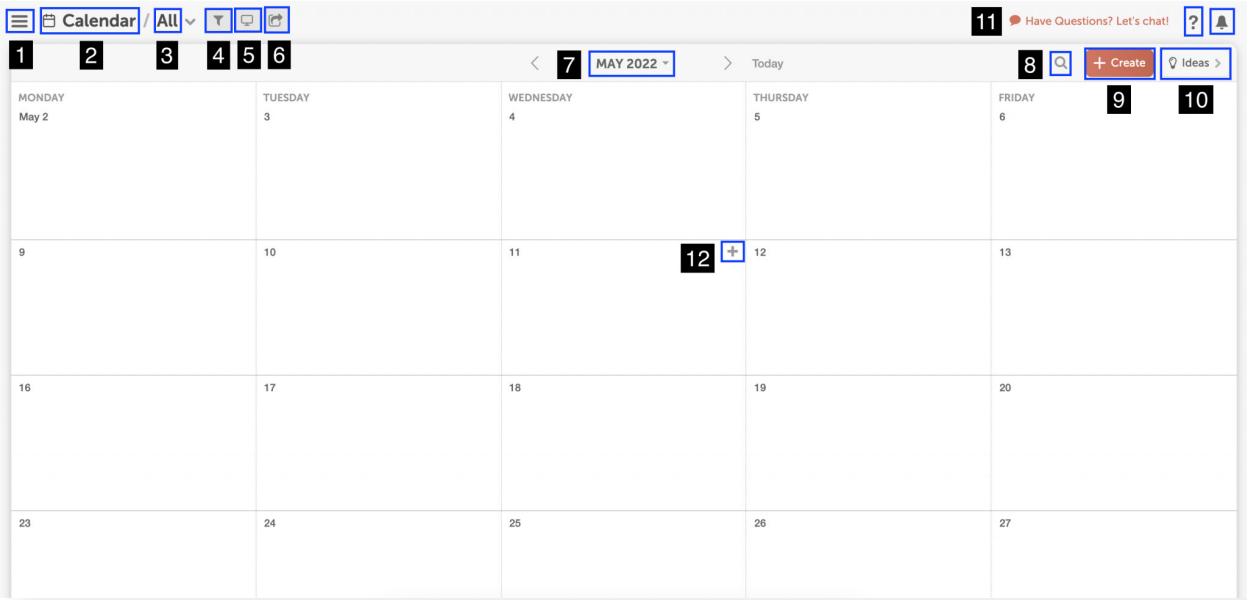
1. **Marketing Projects** - These are one off projects like sales slide decks or new tear sheets.
2. **Marketing Campaigns** - These are comprised of multiple projects like social campaigns, blog posts, emails, ads, etc. that all work towards one goal – like the launch of a new product.
3. **Social Media Messages** - CoSchedule has powerful social media scheduling capabilities so your social team doesn't have to plan their work in an entirely different tool.
4. **Tasks** - Team members will see a list of all the tasks they need to accomplish every day.



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.

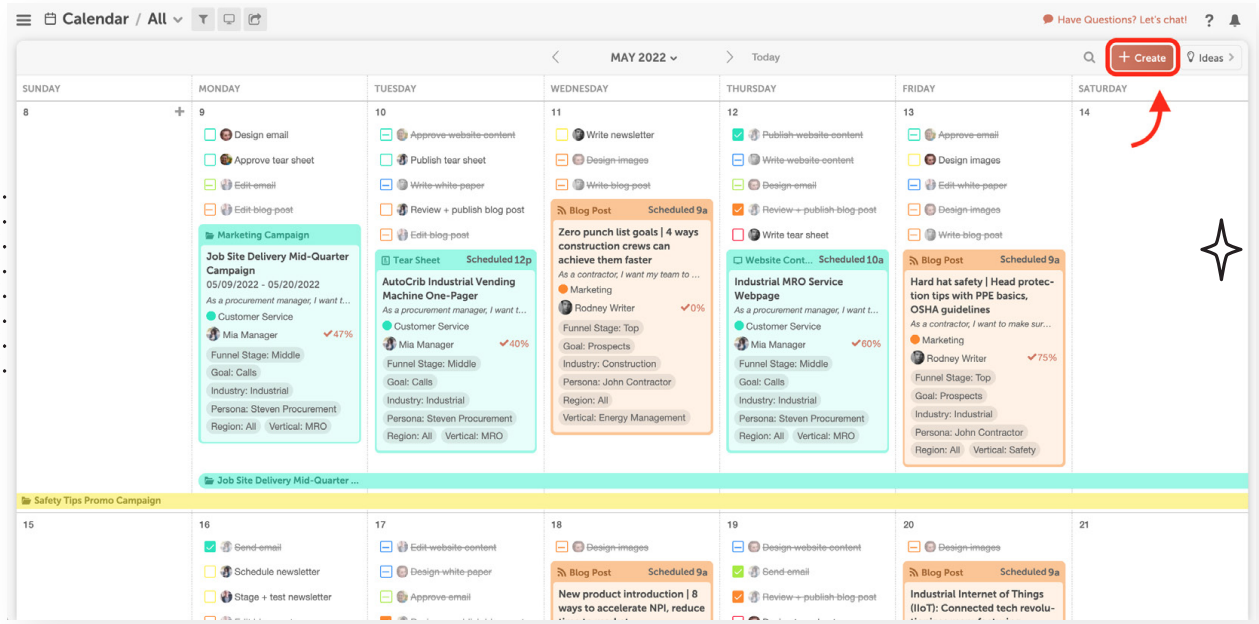


1. **Hamburger menu:** This is where you will find your calendar settings, email preferences, and profile information.
2. **Breadcrumb navigation – tools:** Quickly navigate to different features of CoSchedule. Here you will find things like your analytics & reports, ReQueue, and the Kanban board.
3. **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.

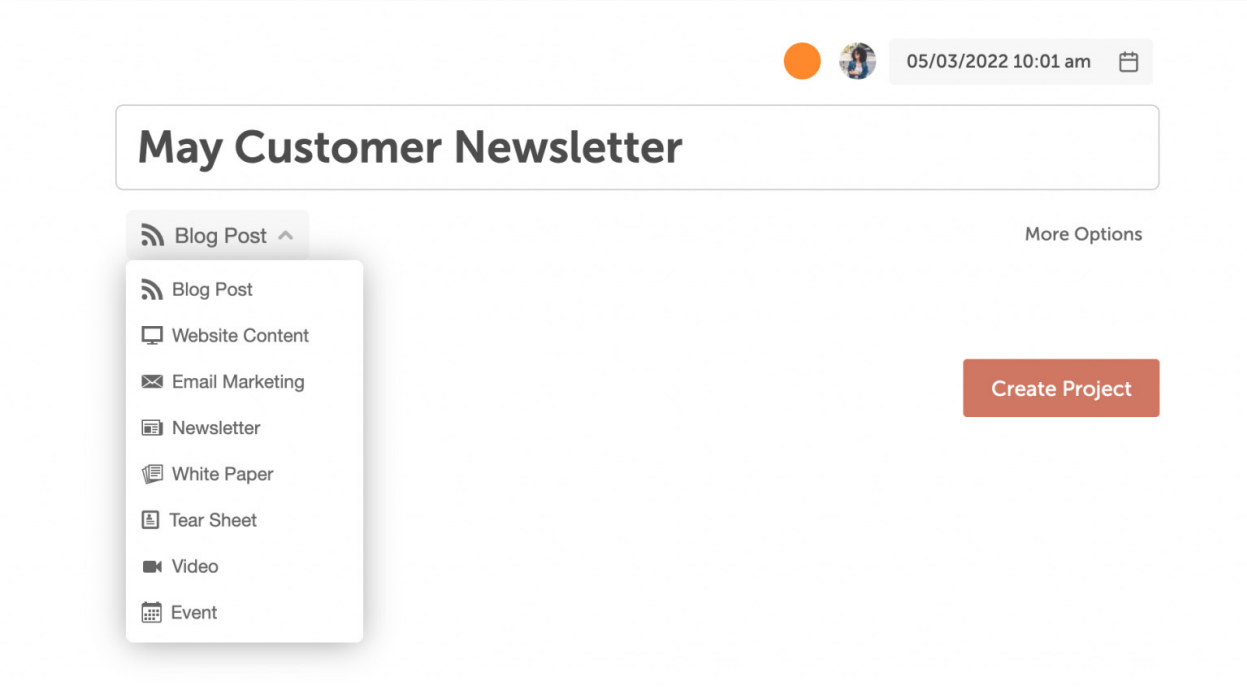
9. **Create:** Add projects to your calendar like new blog posts, social media messages, and newsletters.
10. **Ideas:** The ideas bin is where all project ideas live. When the project is ready to be scheduled, it can be dragged to the calendar. Tip: Use this to see projects that will be coming down 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.

Planning a Marketing Project

To add a new marketing project to your calendar, click the orange "+Create" button in the top corner or click the plus sign on a date on your calendar.



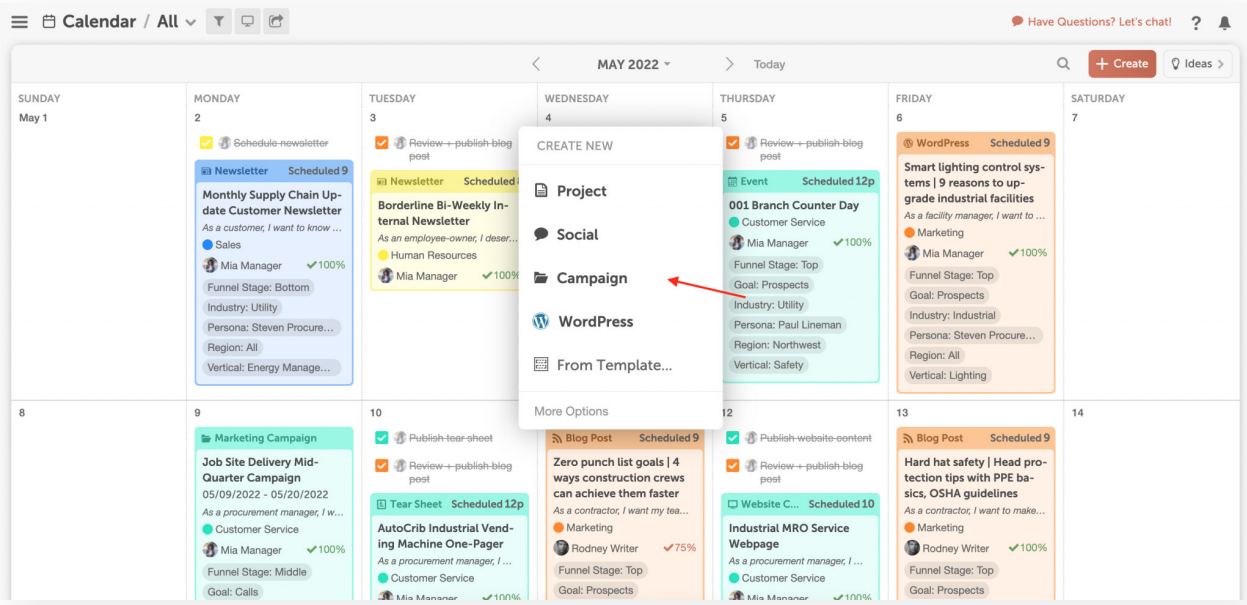
Choose the option that says “Project”. Then, use the dropdown menu to pick which type of project you’re planning. Choose a color label and name your project.



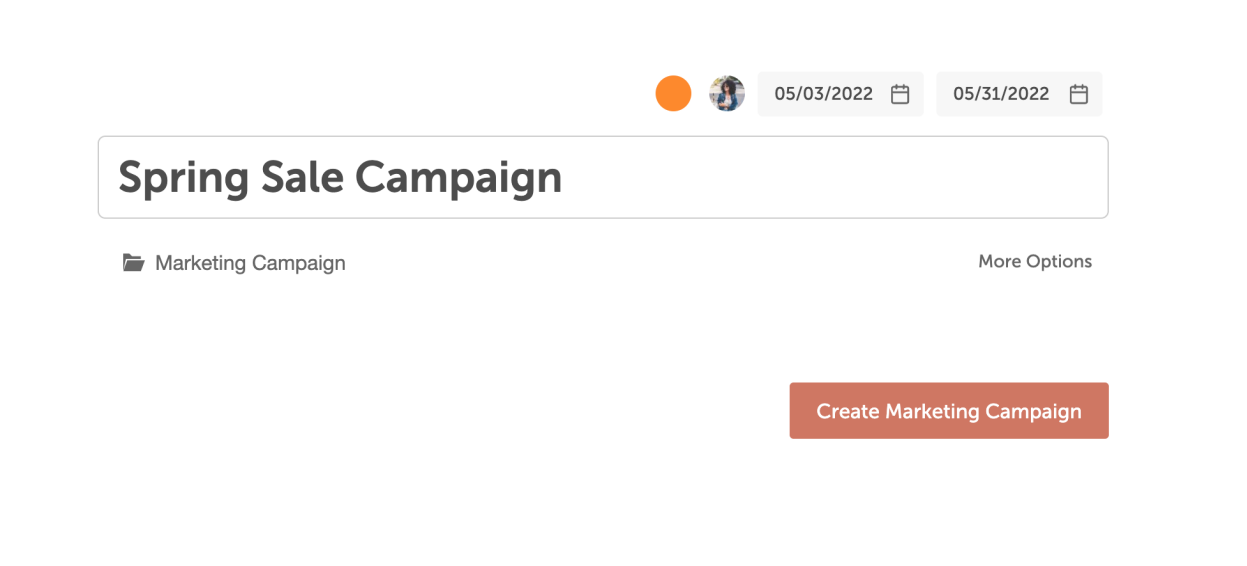
Planning a Marketing Campaign

Marketing campaigns have a lot of moving parts. Here’s how to plan one in CoSchedule to make sure everything moves like a well-oiled machine.

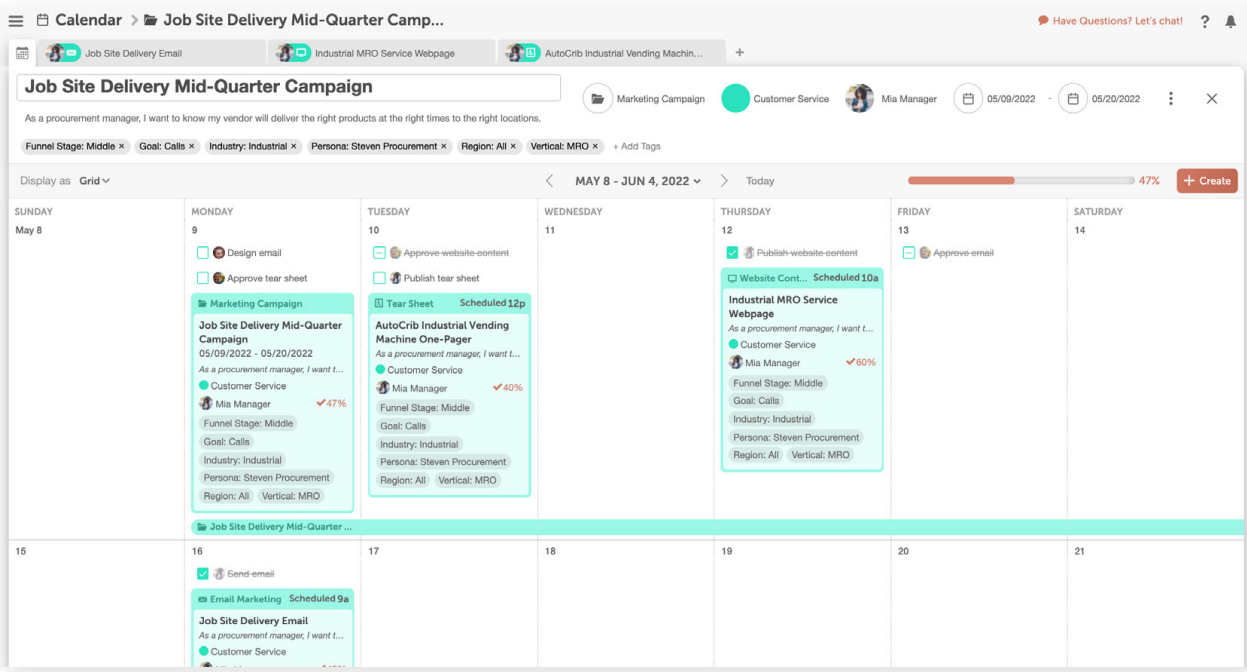
Add a new marketing campaign to your calendar just like you did with a marketing project. From the dropdown list, choose the “Campaign” option.



Give the campaign start and end dates, add a color label, and name it.

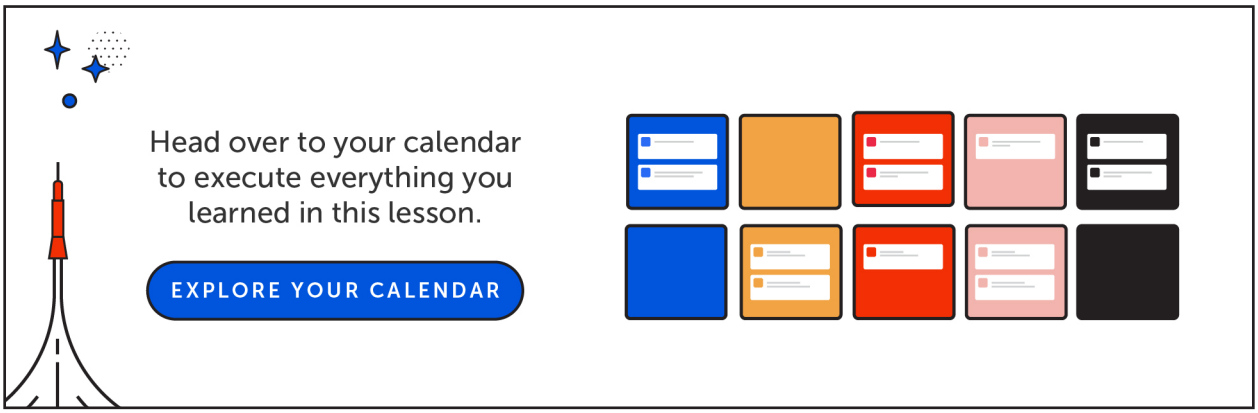


This will create a campaign calendar containing all of the projects associated with the campaign.

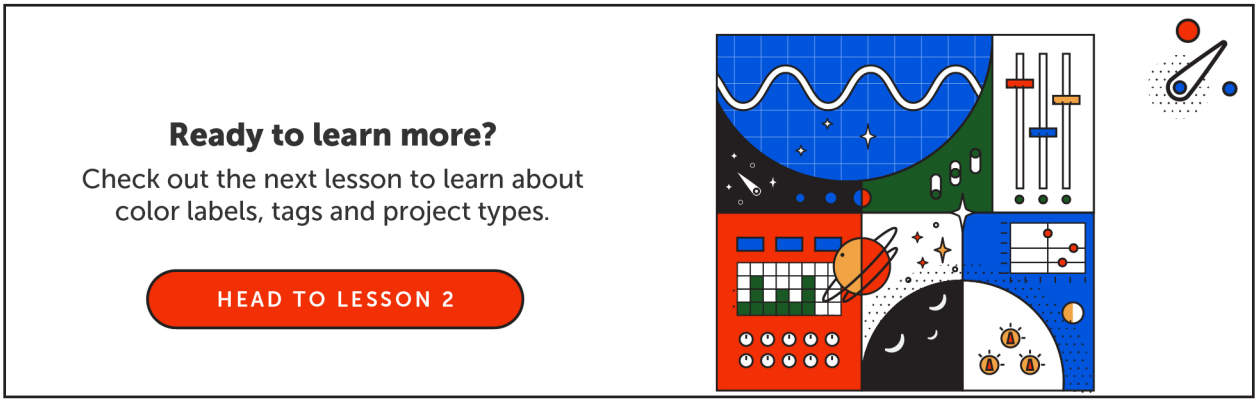


From here, start adding marketing projects to the campaign. Once you've got some projects in your marketing campaign, you'll see the strategy to come to life.

Now that you know a little bit about how to start setting up your CoSchedule calendar, why not get started in real life?



OR

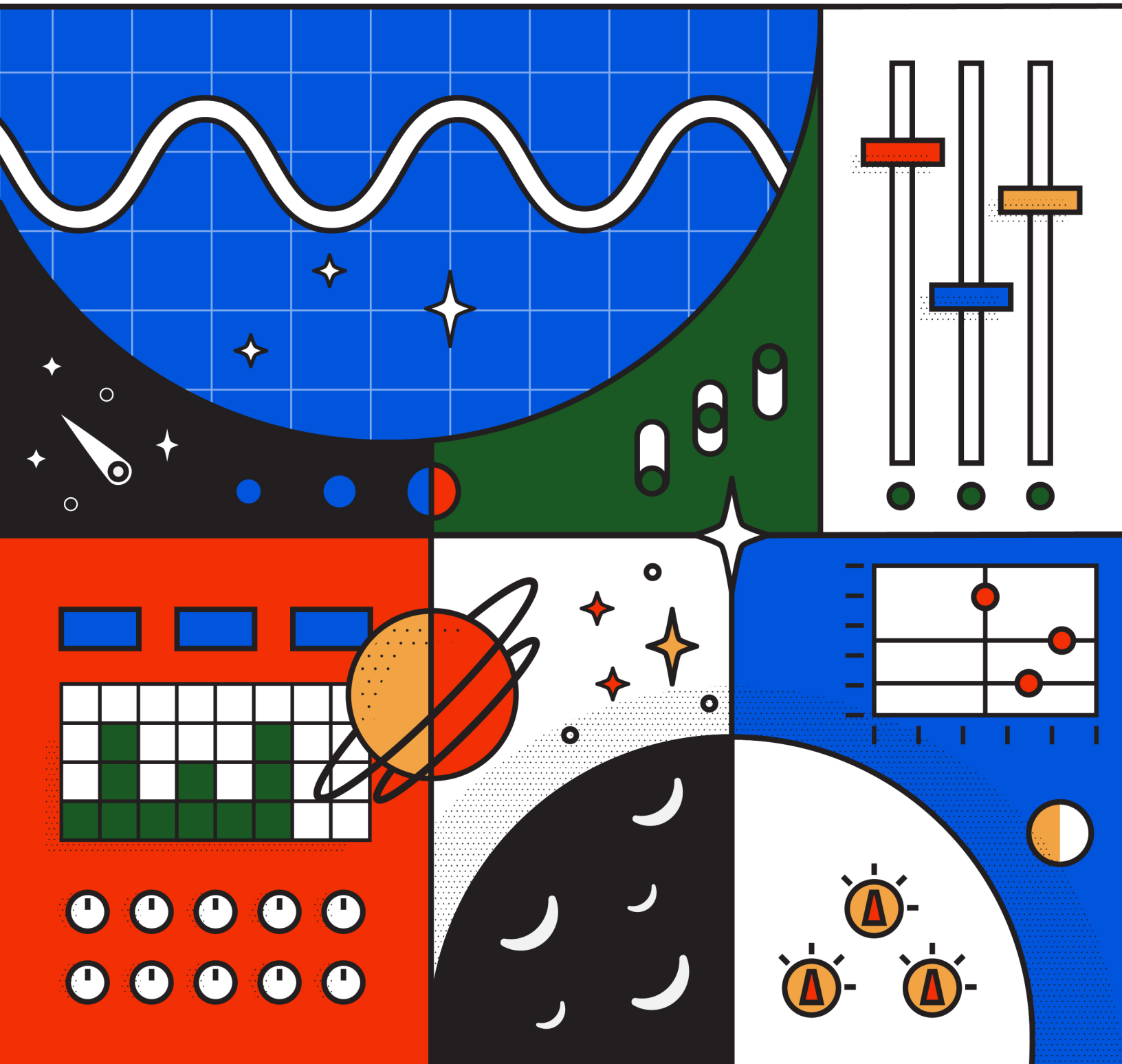


CoSchedule

Customizing CoSchedule:

How to Set up Your Calendar for Better Visibility

2



In this lesson:

Customizing Your Calendar Checklist

Introduction

Color Labels

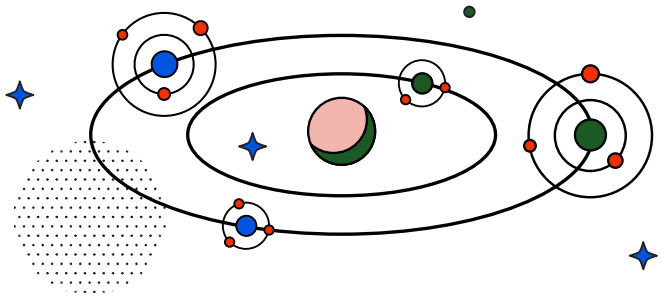
- Choosing Your Color Label Strategy
- Applying Color Labels to Your Calendar

Project Types

- Choosing Your Custom Project Types
- Applying Your Custom Project Types

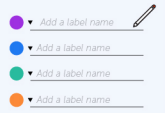
Tags

- Choosing Your Tagging Strategy



Customizing Your Calendar Checklist

Before we get started, use this checklist as you begin customizing your CoSchedule calendar. It follows the content in this lesson step-by-step to help you get acquainted with your CoSchedule calendar.

STEP	COMPLETED	ACTION ITEM	INSTRUCTIONS	
	☑	*Complete all steps on your CoSchedule Calendar.*		
1	☐	**Choose your Color Label Strategy**	Use the worksheet in this guide to find a color label set-up that fits the needs of your specific marketing team. (See pages 19-21)	
2	☐	**Create a Saved View for Each Color Label**	Click the last item in the breadcrumb menu and add a 'Label' filter category.	
3	☐	**Choose your Custom Project Types**	Use the worksheet in this guide to list all the projects your team needs to plan and execute in CoSchedule. (See page 25)	
4	☐	**Create a Saved View for a Project Type**	Click the last item in the breadcrumb menu and add a 'Type' filter category.	
5	☐	**Choose your Tag Structure**	Use the worksheet in this guide to create your tagging structure in CoSchedule. (See page 28)	
6	☐	**Create a Saved View for a Tag**	Click the last item in the breadcrumb menu and add a 'Tag' filter category.	

Introduction

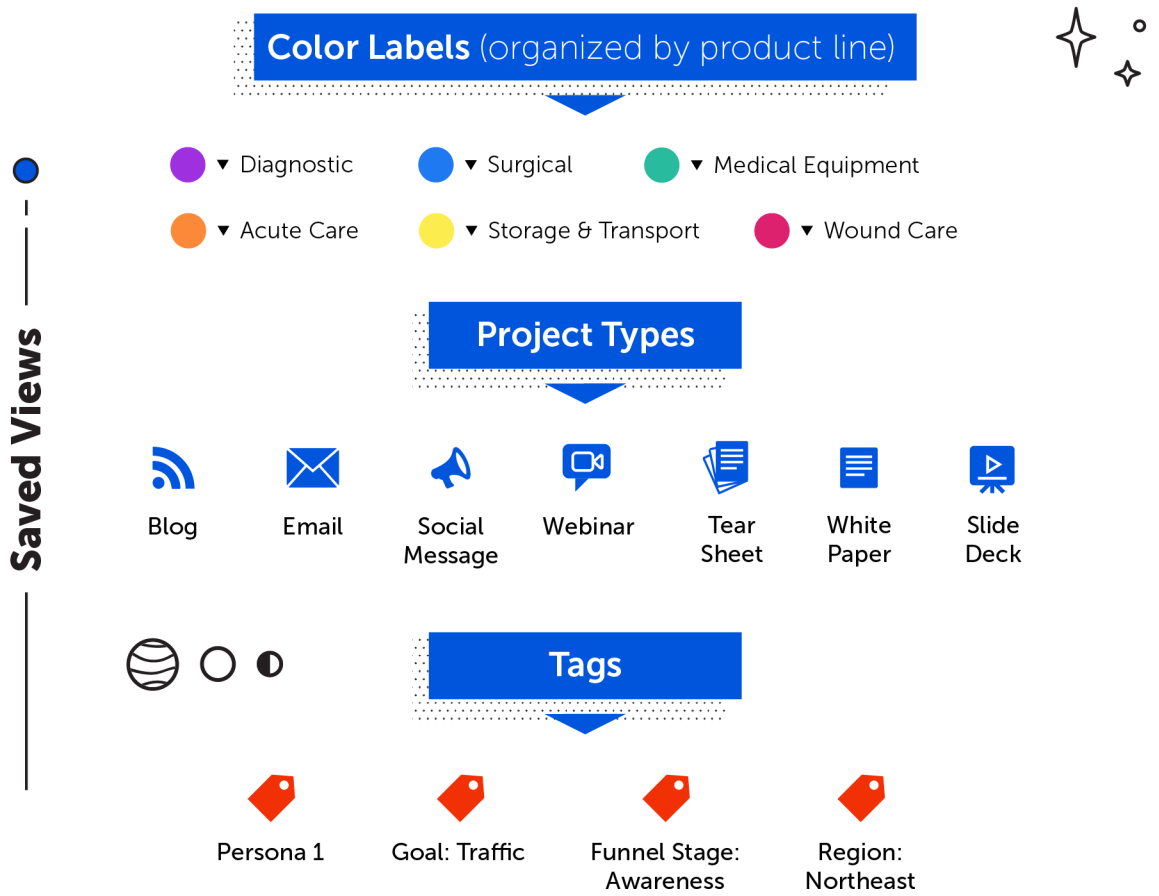
What is this guide? This lesson dives into how to set up your CoSchedule calendar to help you organize, visualize, and report on your marketing strategy.

Who's this guide for? New CoSchedule power users that will be implementing CoSchedule for their marketing team.

What you'll learn:

- The best color label strategy for your company's needs.
- How to setup and use project types.
- How to best utilize tags for an added level of organization.
- What a saved view is and four different ones your team might need.

Before diving in, it's beneficial to understand how color labels, tags, and project types work together to organize your marketing.

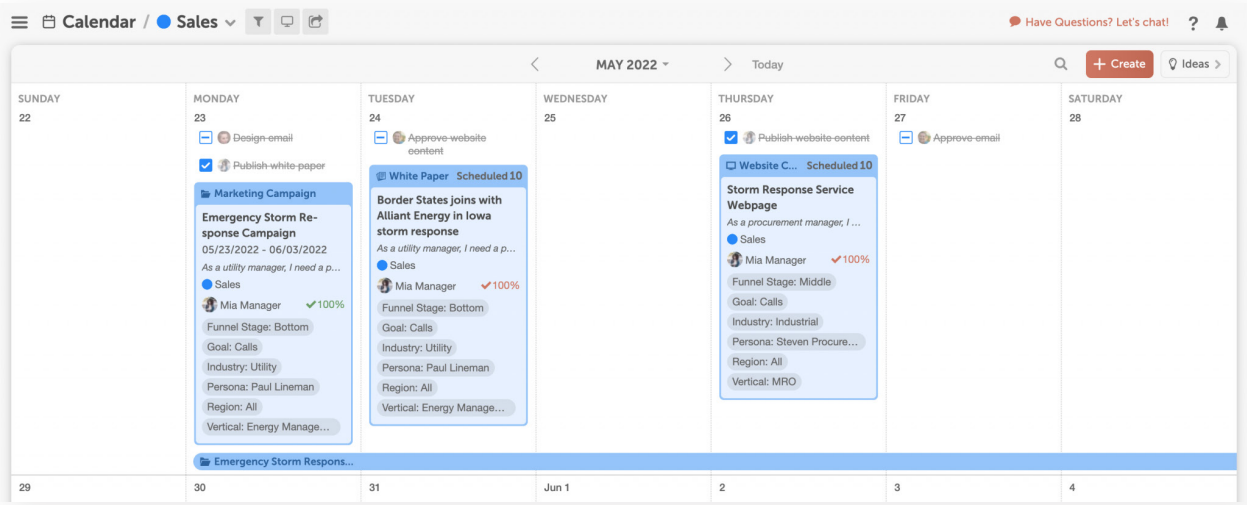


These things give you ways to organize and filter your calendar to make reporting, planning, and tracking easy by using something called a saved view.

Here are a couple of examples of saved views you can create based on color labels, project types, and tags.

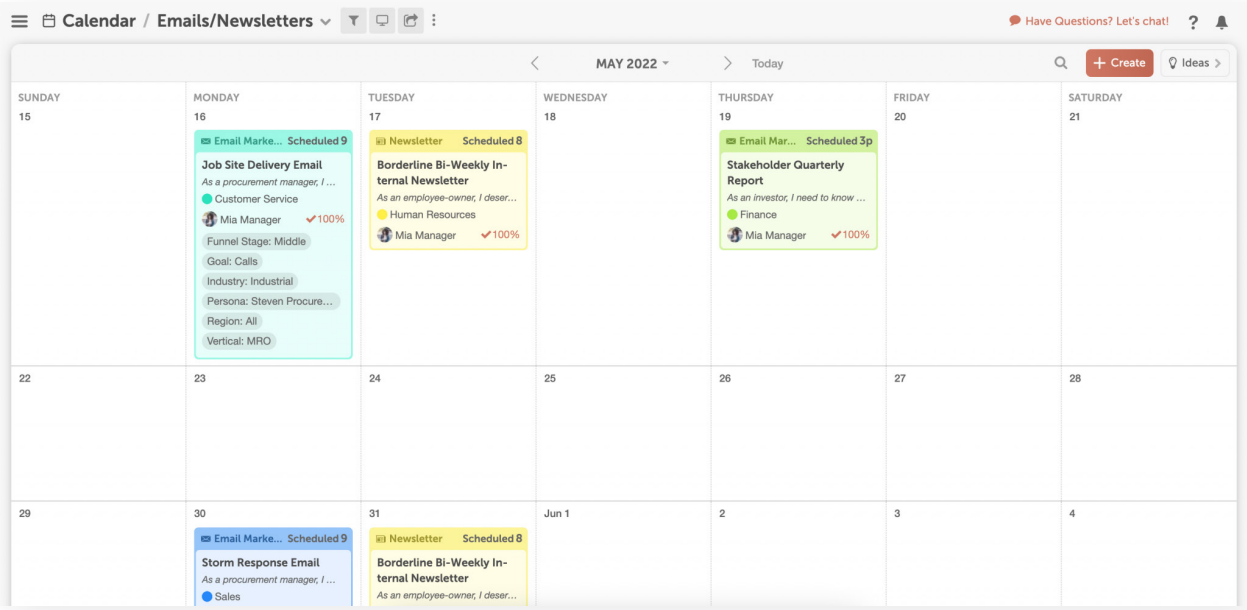
Filter Based on Color Label: A Saved View for Each Department You Work With

This saved view gives you visibility into the work your team does on behalf of another departments so you can quickly provide timelines for projects.



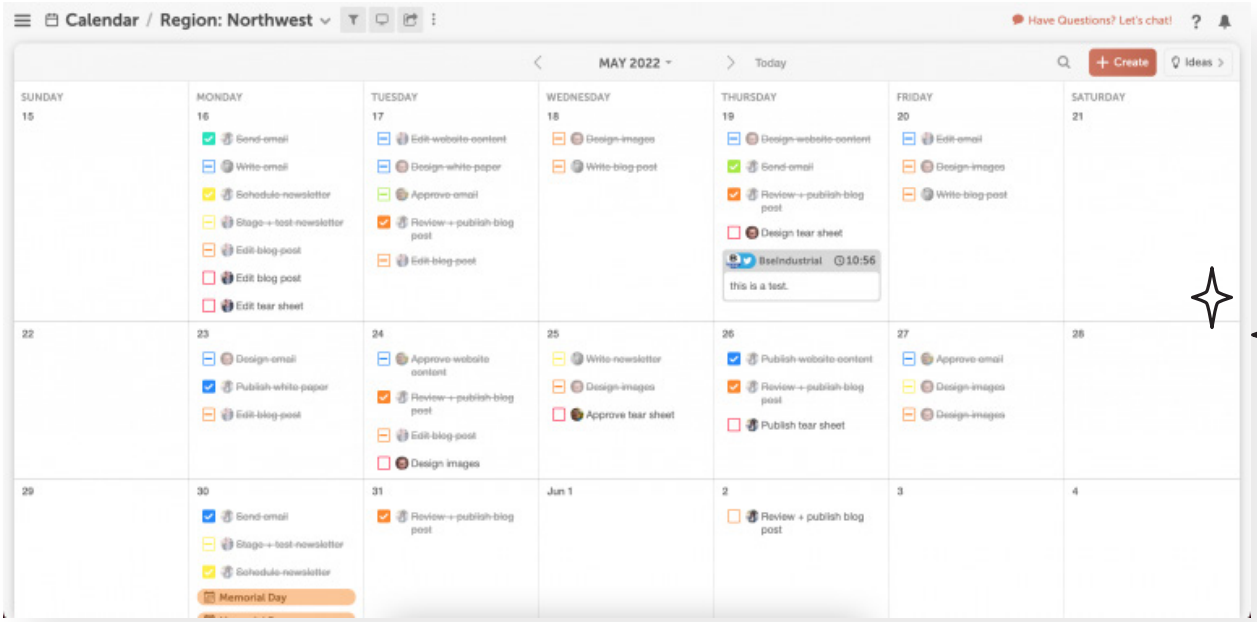
Filter Based on Project Types: A Saved View of All Emails and Newsletters

This saved view shows you all the emails your team will send so you can avoid collisions and sending too often to the same audience. Here's what it looks like on the calendar:



Filter Based on Tags: A Saved View of Every Project That Contributed to a Certain Region

This saved view pulls every project that is tagged with a specific region so you can prove to stakeholders all the activities your team is doing per region.



Color Labels

As mentioned above, color labels are the highest and most general level of organizing your calendar. These are concrete categories that are applied to all your marketing activities – meaning these categories are not likely to change over time.

Here are a few of the most important things color labels can do for you:

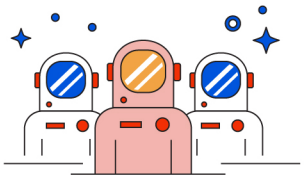
- Allow you to quickly visualize which activities are tied to certain departments, business units, or teams.
- Help you report on what your team is working on.
- Easily see how all the pieces of your marketing strategy fit together.

Choose Your Color Label Strategy

To make it easier to set-up, we have a suggested color label structure for three different types of marketing teams. Read the descriptions and select the one that best fits your marketing team.

Team Type 1

We Are the Whole Marketing Team

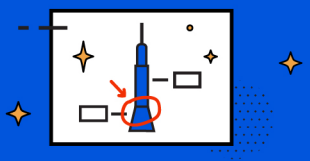


This is your team if:

1. You own your roadmap and set your own strategy.



2. You decide what projects your team will focus on.



3. Your team faces very little bureaucracy when managing or handing off projects.



If this description matches your marketing team, we recommend you setup color labels by product line or business vertical.

Here are examples of both:

Product Line:

- Diagnostic
- Surgical
- Medical Equipment
- Acute Care
- Storage & Transport
- Wound Care

Business vertical:

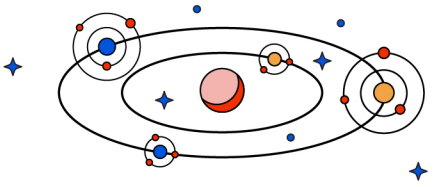
- Energy
- Manufacturing
- Transportation
- Oil & Gas
- Government
- Engineering

To make it easier for you, use this worksheet to write down the product lines or business verticals your team promotes to create your own color labels.

- Add a label name
- Add a label name
- Add a label name
- Add a label name
- Add a label name
- Add a label name

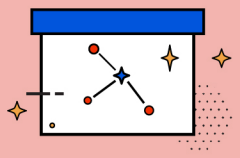
Team Type 2

We Are a Team of Teams



This is your team if:

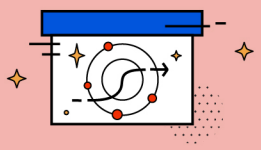
- [x] **1** Your team can be described as an "internal agency" that creates assets based on requests from other departments.



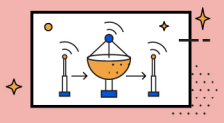
- [x] **2** Project ideas start with another department and then come to your team for execution.



- [x] **3** Business units outside of marketing define your roadmap.



- [x] **4** Your projects need to go through a complex hand off process from one team to another.



If this description matches your marketing team, we recommend you setup color labels by the business functions or departments that your team executes projects on behalf of.

Here's an example:

Departments:

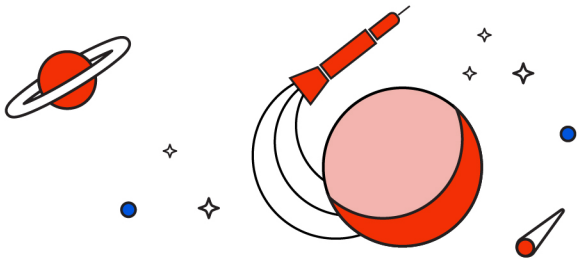
- Social Responsibility
- Finance
- Sales
- Human Resources
- Customer Support
- Vendor Partnerships

To make it easier for you, use this worksheet to write down the business functions or departments your team serves to create your own color labels:

- Add a label name
- Add a label name
- Add a label name
- Add a label name
- Add a label name
- Add a label name

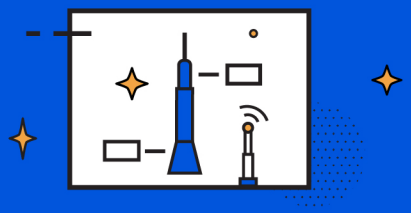
Team Type 3

We Are an Agency



This is your team if:

1. You execute marketing projects on behalf of clients.



If this description matches your marketing team, we recommend you setup color labels by the business functions or departments that your team executes projects on behalf of.

Here's an example:

Departments:

- Jester Bros. Brewery
- County Table Breads
- Lynx Heavy Machinery
- DHS Properties
- Hock & Bothen Law
- Jefferson Group

To make it easier for you, use this worksheet to write down the clients your team serves.

- *Add a label name*
- *Add a label name*
- *Add a label name*
- *Add a label name*
- *Add a label name*
- *Add a label name*

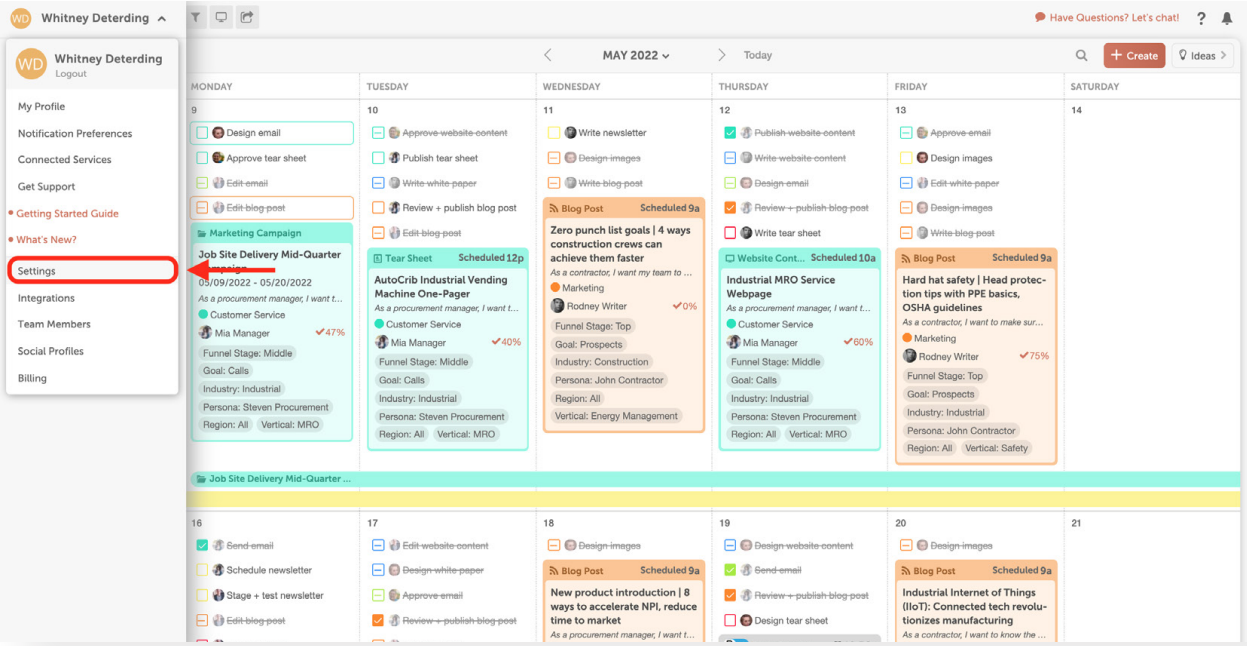




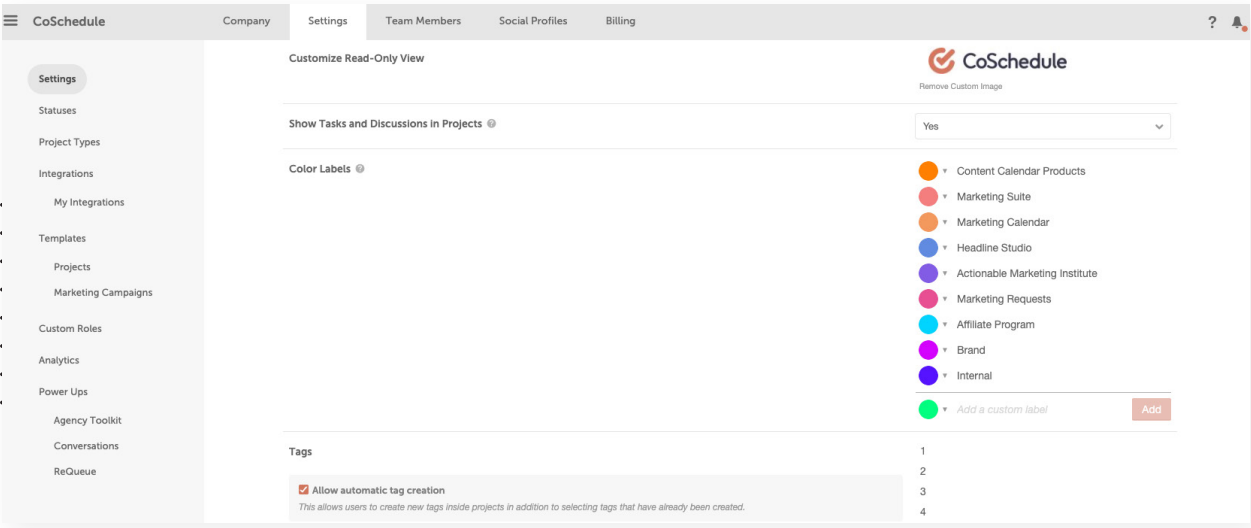
Apply Color Labels to Your Calendar

Now that you know what your color labels will be, here's how to set them up on your calendar.

Click the hamburger menu and toggle down your name. Select "Settings".



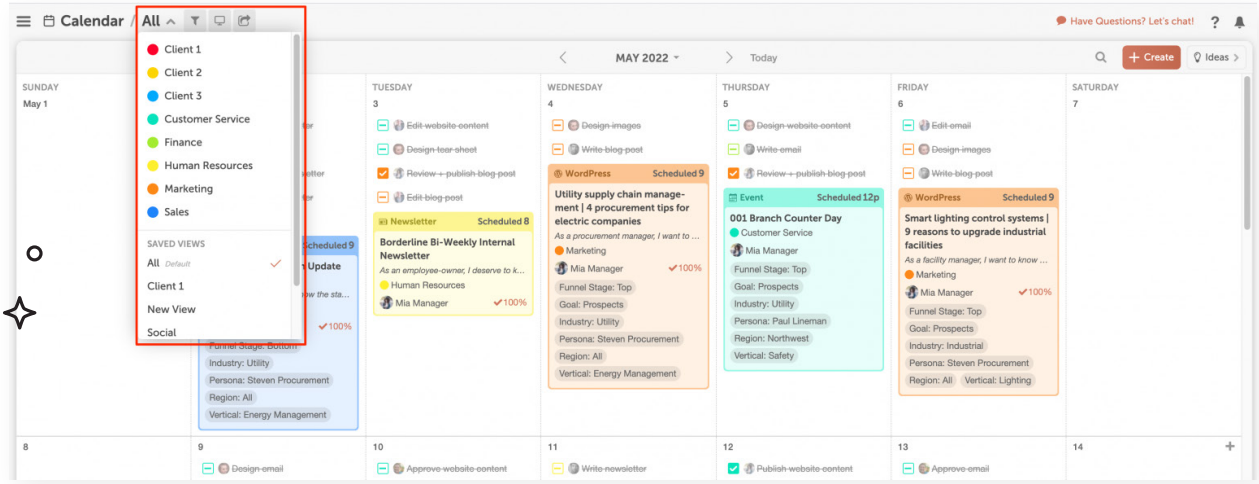
Under the Color Labels section, name your label and apply a color.



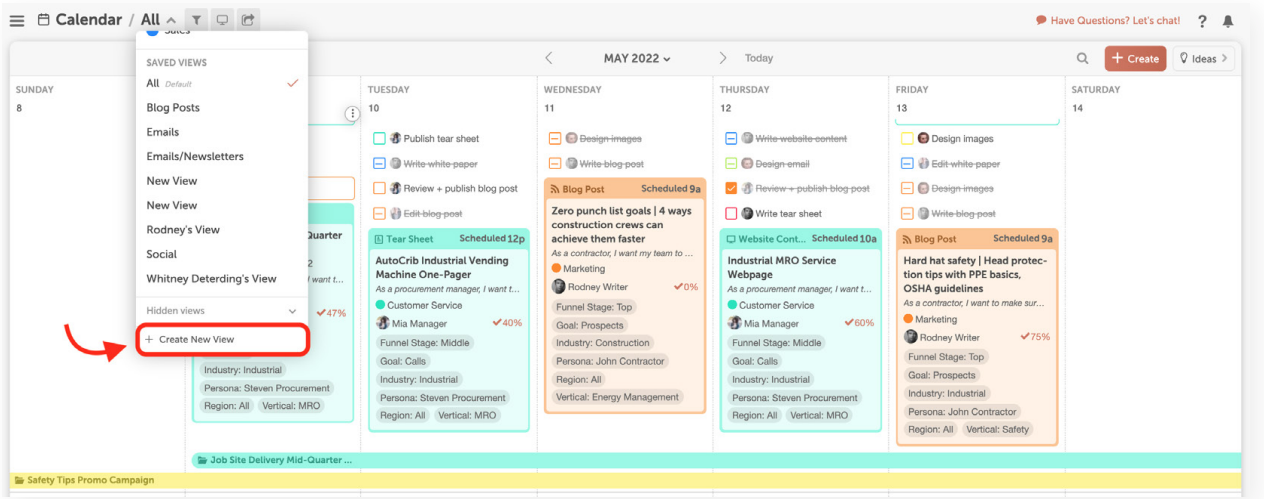
Your CoSchedule calendar will automatically create a Saved View for each of your designated color labels.

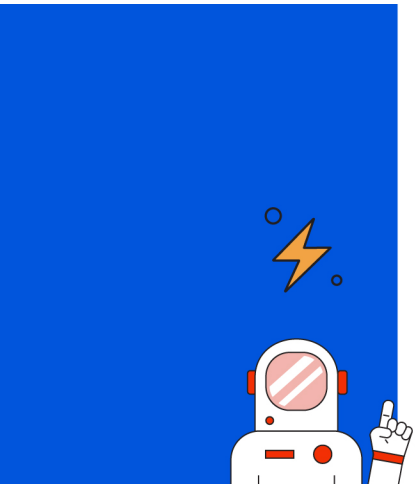
Create a Saved View for Each Color Label

To create a new saved view, click the last item in the breadcrumb menu. This is where you can navigate between saved views and create new ones.



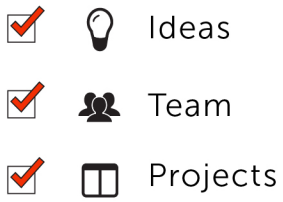
To create a new Saved View, select **Create New View**. Give the new view a name and make selections to the Filter Content (i.e. "Color Label") and/or Calendar Display Settings. Whatever options you select will appear on your calendar immediately and whenever you are using this Saved View.





TIP

If you have other organizers in CoSchedule, make sure you apply your saved views to these areas by checking "Ideas, Team, and Projects" in the settings of your saved view.



Continue that process until you have created a saved view for each of your color labels.

This allows you to easily report on all the marketing projects you have planned for each department or business vertical.

Project Types

A project type describes the type of asset that is being created. There are a few valuable ways project types help you get organized:

- Adds an additional filtering layer to your calendar.
- Helps you show marketing activities to stakeholders.
- Allows you to better visualize your marketing strategy.
- Informs team members what type of asset they are creating.

Choose Your Custom Project Types

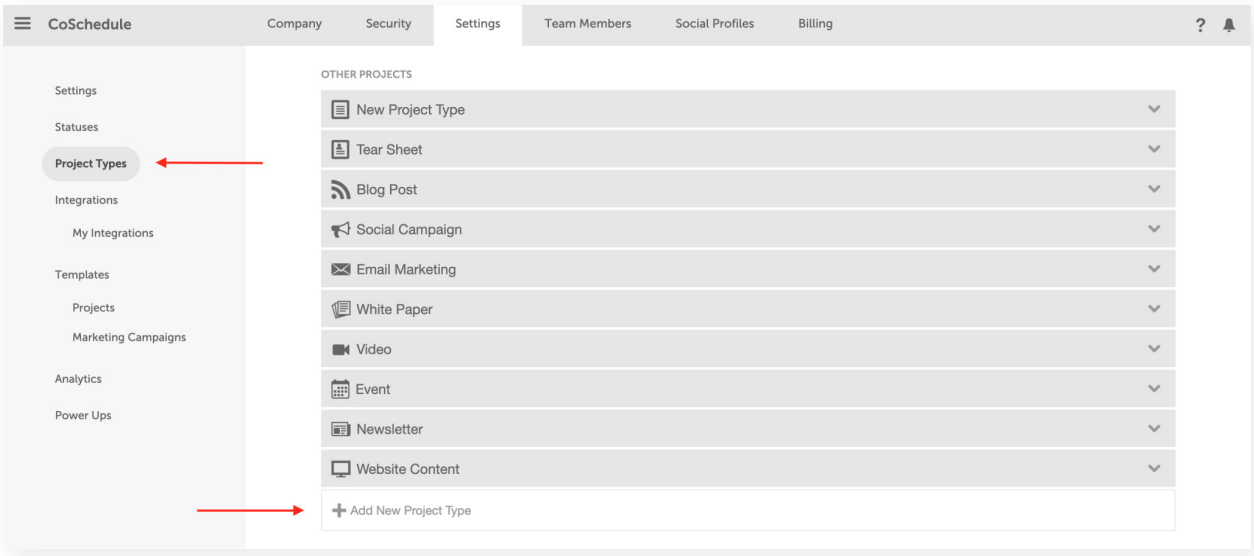
To make it easier to set-up, place a checkmark by every type of asset/event your marketing team creates. These will become your project types in CoSchedule.

- [x] Blog posts *(Standard)*
- [x] Videos *(Standard)*
- [x] Articles *(Standard)*
- [x] Emails *(Standard)*
- [x] Newsletters *(Standard)*
- [x] Podcasts *(Standard)*
- [x] Marketing Campaigns *(Standard)*
- [x] Whitepapers *(Standard)*
- [x] Social Media *(Standard)*
- [ ] TV Ads
- [ ] Case Studies
- [ ] Courses
- [ ] Promotions
- [ ] Guest Posts
- [ ] Influencer Marketing
- [ ] Interviews
- [ ] Twitter Chat
- [ ] Testimonials
- [ ] Product Announcements
- [ ] Contests
- [ ] Press Releases
- [ ] Microsites
- [ ] Annual reviews
- [ ] Workshops
- [ ] Polls
- [ ] Tear sheets
- [ ] Social Ads
- [ ] Google Ads
- [ ] Slide Decks
- [ ] Brochures
- [ ] Reports
- [ ] Events
- [ ] Conferences
- [ ] Logos
- [ ] Landing Pages
- [ ] Websites
- [ ] Infographics
- [ ] eBooks
- [ ] Webinars
- [ ] Case Studies
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

Apply Your Custom Project Types

To add your list of custom project types you created above, toggle down your name and navigate down to “Settings”. Next, find the “Project Types” option in the left-hand menu. Scroll to the bottom and add a new project type.

Start adding each item you checked on the list above and choose a custom icon from the dropdown menu.



Filter Types

Each Filter will only filter the content that pertains to it. For example, only Projects and Marketing Campaigns have the ability to add Tags. If you filter by a specific Tag, saved calendar views will filter all Projects and Marketing Campaigns by that selected Tag, but will still display calendar items that do not have the ability to be Tagged. To filter more, add additional filter types to reach your preferred outcome.

1. **Color Label:** Displays any calendar item with the selected color label.

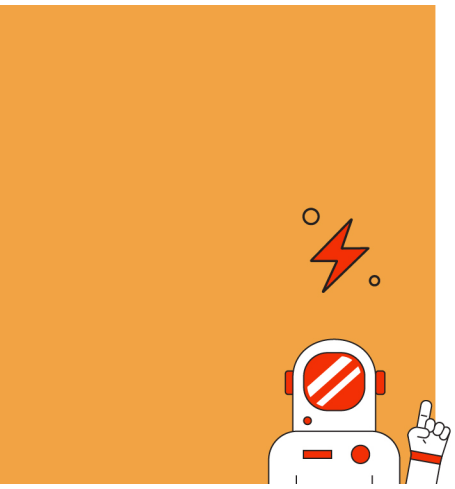
2. **Project Type:** Displays the Project type that is selected.

3. **Team Member:** Displays items that can have team members assigned. (Projects and tasks.)

4. **Tag:** Displays items that can have tags. (Projects and Marketing Campaigns.)

5. **Status:** Will display items that can have a status. (Projects and Social Messages.)

6. **Social Profiles:** Will display Social Messages with the selected social profile.



TIP

If you know you want to add a social campaign to every new blog post that is added to the calendar, add a social campaign as a default attachment to the 'blog post' project type.



Create a Saved View for Project Types

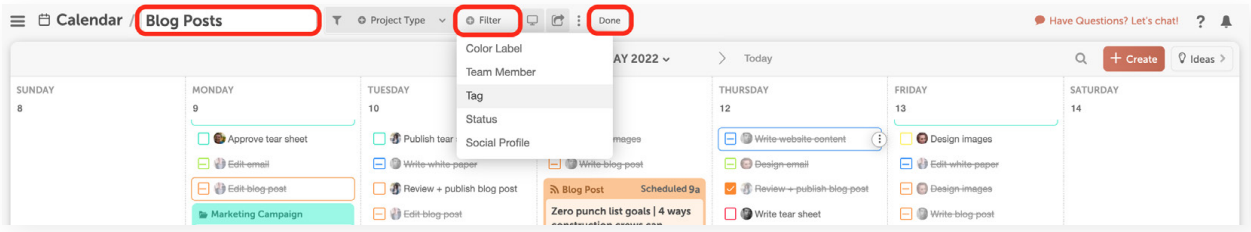
To create a new saved view, click the last item in the breadcrumb menu and click 'Create New View'.

Name the view after the project type you want to track (ex. Blog Posts).

Next, add one of the project types you just created as a new filter category. Here's how:

1. Add a filter category.
2. Choose the 'Type' option.
3. Apply the relevant project type from the drop-down list.

This allows you to see all the items you have planned for any given content type.



Tags

Tags offer an additional way to filter and track your projects.

Think of it this way: tags are additional categories that you might need to track which aren't covered by color labels and project types.

Here are a few ways tags add value to your CoSchedule calendar.

- Provide more context to each project.
- Allow you to create additional saved views.
- Help you quickly find all projects that are tagged with a certain keyword.

Choose Your Tagging Structure

To make it easier to set-up, place a checkmark by every tag you might need to track or report on. These will become your tags in CoSchedule.

- ◯ Region/Branch Location (ex. North America, EMEA, Latin America and the Caribbean, Asia Pacific)
- ◯ Funnel Stage (ex. Awareness, Discovery, Evaluation, Intent, Purchase, Loyalty)
- ◯ Buyer Persona (ex. Contractor Chris, Procurement Paula, Lineman Lenny, COO Cindy)
- ◯ Goal (ex. Traffic, Prospects, Leads, Calls, Retention)
- ◯ Product *(if not included as your color label)*
- ◯ Business Vertical *(if not included as your color label)*
- ◯ Department *(if not included as your color label)*
- ◯ Priority Level (ex. 1, 2, 3)

After you've checked all the boxes that could apply to your marketing projects, list out each tag below:

Goal 1: _____
Goal 2: _____
Goal 3: _____
Goal 4: _____
Goal 5: _____

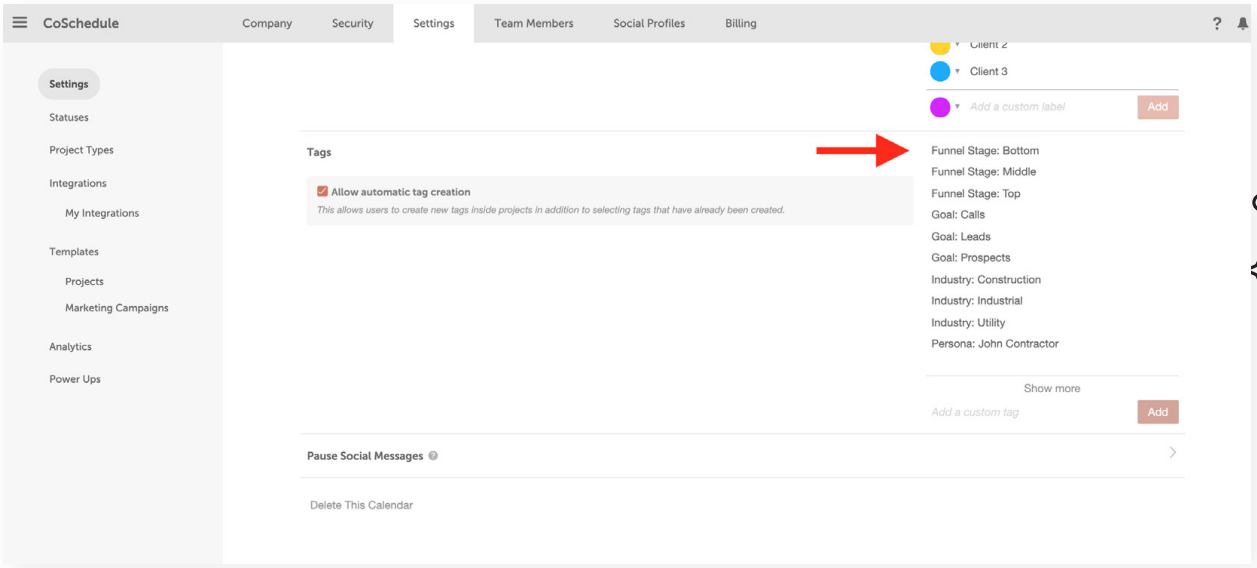
Persona 1: _____
Persona 2: _____
Persona 3: _____

Region 1: _____
Region 2: _____
Region 3: _____
Region 4: _____
Region 5: _____

Funnel Stage 1: _____
Funnel Stage 2: _____
Funnel Stage 3: _____
Funnel Stage 4: _____
Other: _____
Other: _____
Other: _____
Other: _____
Other: _____
Other: _____
Other: _____
Other: _____

Apply Your Tagging Structure

To create a new tag, toggle down your name and navigate down to “Calendar Settings”. Under the color labels section, you’ll find an area to add tags. Enter each one from your list on the worksheet above. Only Owners, Managers, and Admins can add or edit templates (social, task, project, marketing campaigns). *Templates vary based on what’s available to you in your plan.*



Create a Saved View for Project Tags

To create a new saved view, click “All” in the breadcrumb menu and click “Create New View”.

Name the view after the project type you want to track (ex. Blog Posts).

Next, add one of the project types you just created as a new filter category. Here’s how:

1. Click the plus sign in the filter option to your right.
2. Choose the “Tag” option.
3. Apply the relevant project type from the drop-down list.

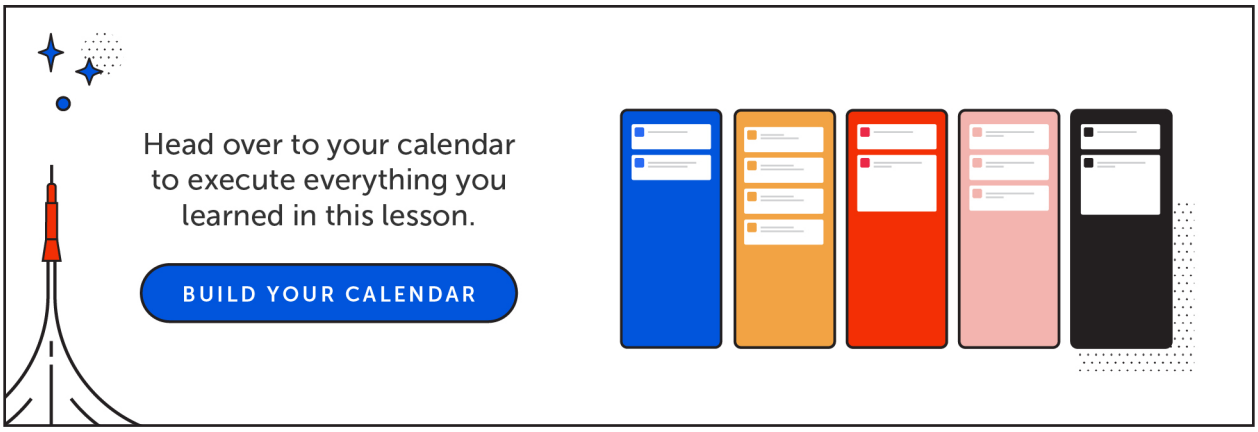
This allows you to see all the items you have planned for any given content type. Click “Done” once you are finished to create your new saved view.

Mix and Match Saved Views

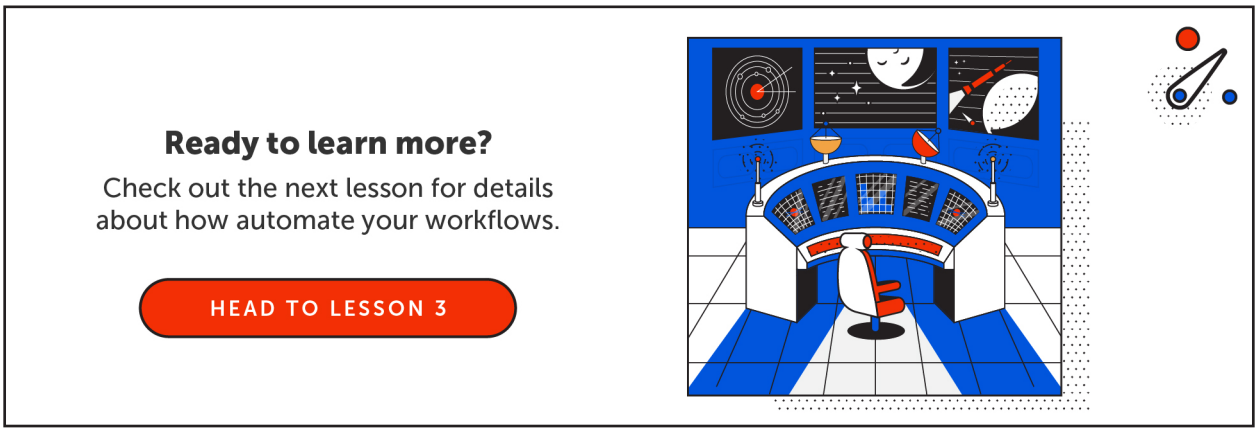
Now that you've created a saved view for color labels, project types, and tags, here's something else you can do with a saved view, try mixing and matching various filters together to report on anything you need.

Here's an example:

Create a saved view with content type + tag: Add blog posts as a project type filter AND one of your goal tags to see all the content you published that contributed a specific goal.



OR



CoSchedule

Task Management in CoSchedule:

Finally Get Insight Into Team Priorities



In this lesson:

Task and Workflow Checklist

Introduction

Basic Task Management in CoSchedule

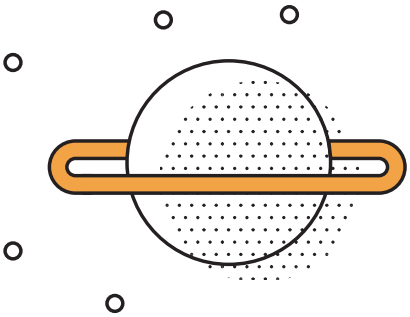
- Add a Stand Alone Task to the Calendar
- Add a Task to a Marketing Project
- Create a List of Tasks in a Marketing Project

Saving a Task List as a Task Template

Task Approvals

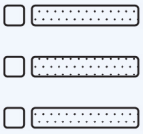
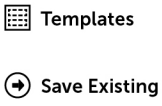
Task Rules - Automate Your Workflows

- Use a Task Rule to Speed Up Project Completion
- Use a Task Rule to Streamline Project Handoffs Between Teams
- Use a Task Rule to Automatically Reschedule Overdue Tasks



Task and Workflow Checklist

Before we get started, use this checklist as you start to set up your team's tasks. It follows the content in this lesson to help you set-up everything from basic task management to task rules and approvals.

STEP	COMPLETED	ACTION ITEM	INSTRUCTIONS	
	☑	*Complete all steps on your CoSchedule Calendar.*		
1	☐	**Add a Stand Alone Task to the Calendar**	Click the orange create button, choose more options, then click task.	
2	☐	**Add a Task to a Marketing Project**	Open a project on your calendar, add a task, due date, and team member in the gray task bar on the right.	
3	☐	**Add a List of Tasks to a Marketing Project**	Create a full list of tasks that must be completed before the project goes live.	
4	☐	**Save List of Tasks as a Task Template**	If you have the work organizer, click the 'Template' button and click 'Save Existing' to use this task list as a template in the future.	
5	☐	**Add a Task Approval to a Task Template**	Open a project on your calendar, click 'Templates', choose a task template, use the arrow over button on a task to add a task approval.	
6	☐	**Add a Task Rule to a Task Template**	Open a project on your calendar, click 'Templates', choose a task template, use the arrow over button on a task to add a task rule.	

Introduction

What is this guide? This lesson covers how to manage your team's tasks with things like task templates and workflow automation.

Who's this guide for? New CoSchedule power users that will be implementing CoSchedule for their marketing team.

What you'll learn:

- How to add a stand-alone new task to the calendar.
- How to add a task to a project.
- How to create a list of tasks in a project.
- How to create task templates with approvals and task rules.

Basic Task Management in CoSchedule

The first thing you're going to learn about is how to accomplish basic task delegation in CoSchedule.

Every CoSchedule power user will get value from this section, regardless of what CoSchedule plan you have.

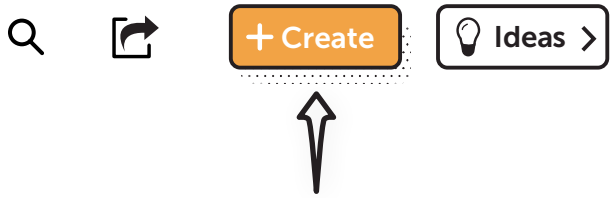
Learning about basic task management and delegation in CoSchedule helps you accomplish better task visibility so everyone on your team knows what they are doing and when they are doing it.

Add a Stand Alone Task to the Calendar

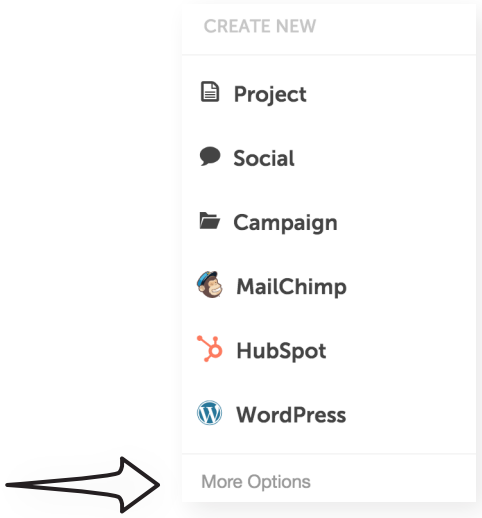
Adding a stand alone task to the calendar is the most basic form of task delegation.

When to do this:
Add a stand alone task to the calendar when you need to remind a team member to do a one-off task that is not attached to a project.

How to do it:
Click the orange 'Create' button on the calendar.

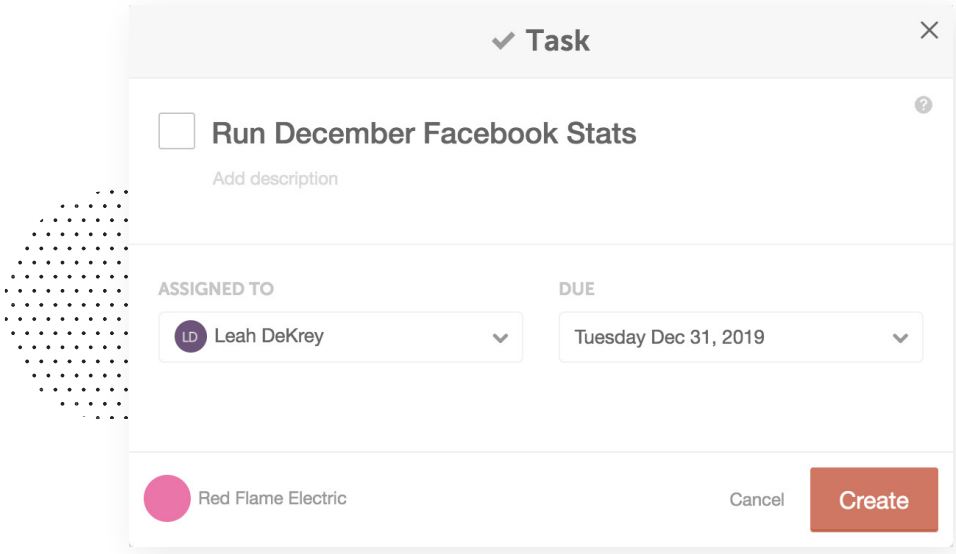


Then, select ‘More Options’ at the bottom of the drop-down list.

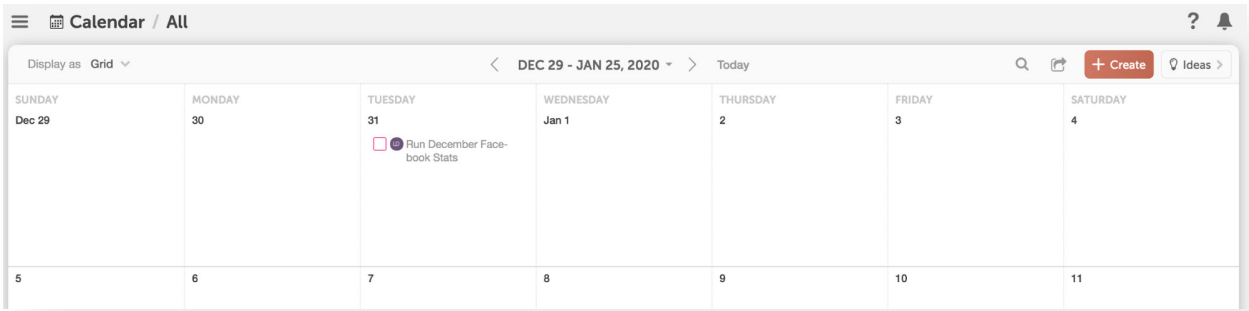


Finally, choose the option that says ‘Task’.

Name the task, add a color label (if necessary), assign it to a team member, and add a due date.



The task will automatically appear on the team member’s to-do list.

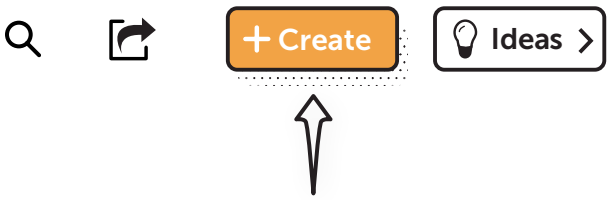


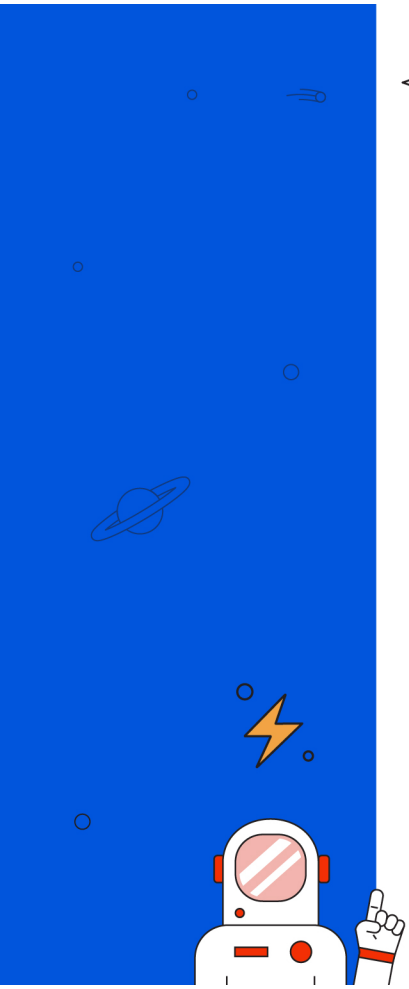
Add a Task to a Marketing Project

Adding a task directly in a marketing project creates a central hub where everyone can go to see who is doing what and when their tasks are due.

This clarity ultimately puts an end to weekly status updates so you're always in the loop.

To start, open a project on your calendar. If you don't have any projects on your calendar yet, create one using the orange create button.





TIP

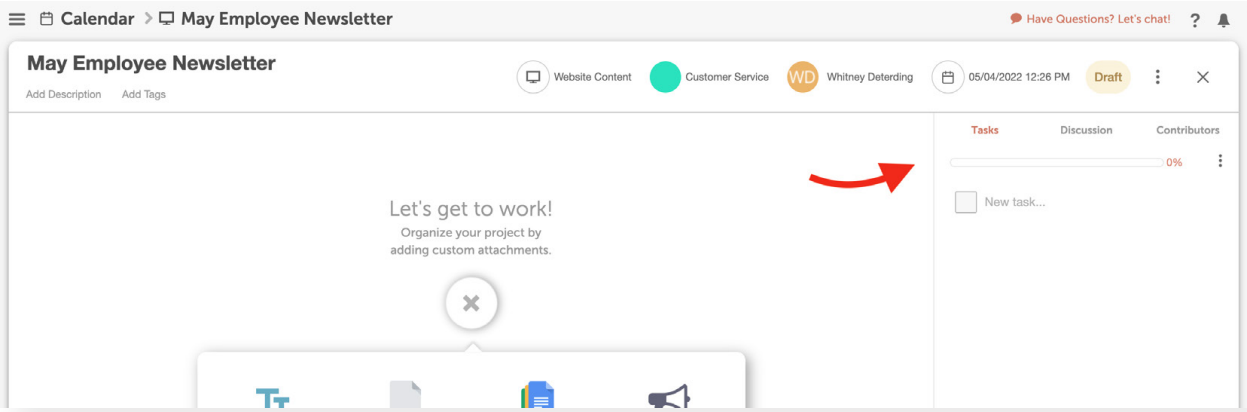
CoSchedule is the only marketing calendar that has powerful publishing capabilities. For this reason, we recommend you add projects to the calendar based on when the project will publish.

Here's an example:

			13	14 Brainstorm content
17	18	19	20	21 Write draft
24	25 Update design	26	27 Stage + send test	28 Proof test email
1	2 Schedule	3	4 PUBLISH	

✦ Pull statistics - 7 days after ✦

Once you have a project open from your calendar, you'll see a taskbar along the right-hand side.



Start by adding a single task to the project. Add a due date and assign a team member who will be responsible for executing the task.

The Four Fundamentals of Tasks

1. Be short and clear. Always start with a verb (ex. Plan, write, build, create, design, develop, etc.)

Design Graphics

+Schedule, +Assign

2. Tasks should be assigned to one person.

New Task...

+Schedule, **Danny Designer**

3. Tasks should always be due on a specific date.

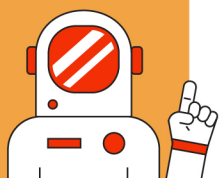
New Task...

Friday, Nov 15, +Assign

4. Include a definition of done to provide context.

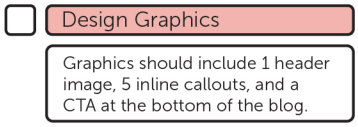
Design Graphics

Graphics should include 1 header image, 5 inline callouts, and a CTA at the bottom of the blog.



TIP

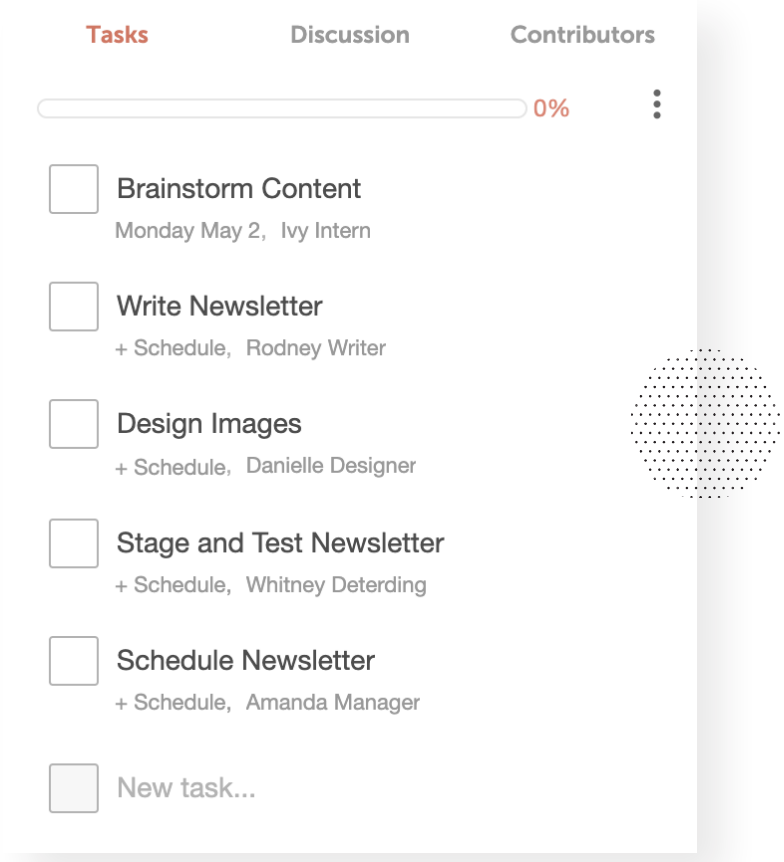
To include a definition of done, click the arrow over on a task to add more details. This allows you to add more context like:



Create a List of Tasks in a Marketing Project

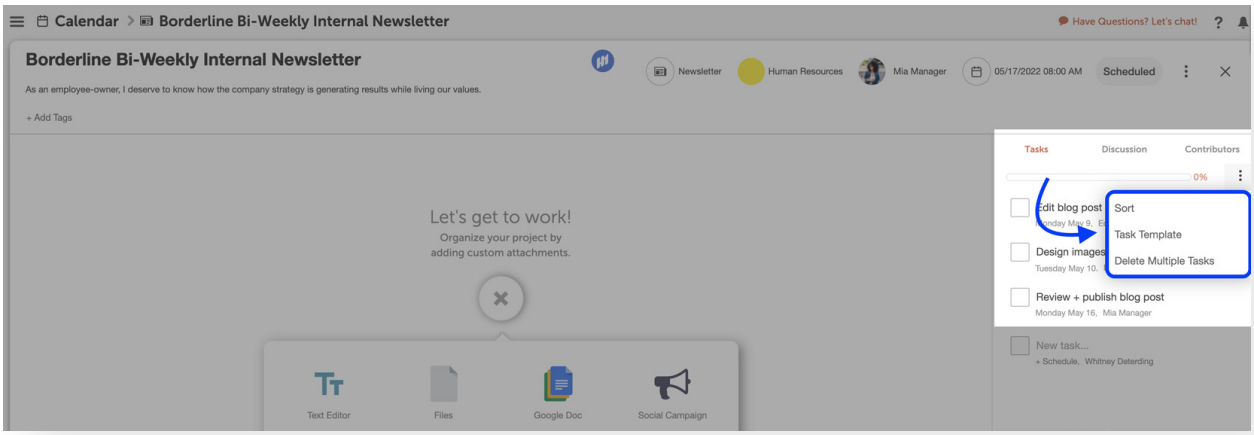
After you've created one task in a project, continue adding a list of tasks to build out an entire workflow for the project.

Here's what it could look like when you're done.



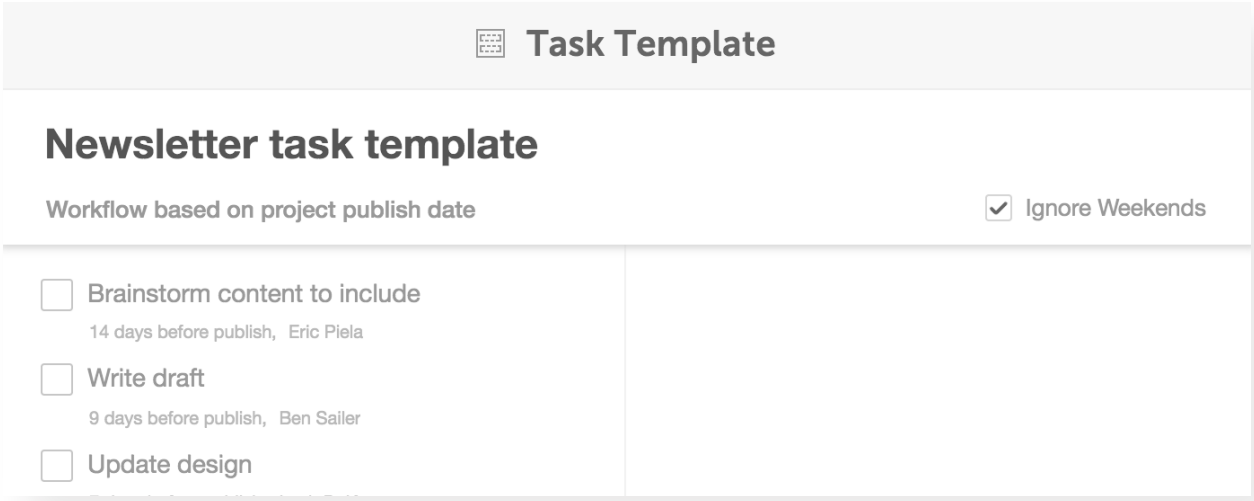
Saving a Task List as a Task Template

This step takes task planning a step further by showing you how to create a task template from the list you just created.



To save the workflow you just created as a template, click on the 'Templates' icon, and select the option that says, 'Save Existing'.

Give the task template a generic name like 'Newsletter task template' so it can be applied to any newsletter you plan in the future.



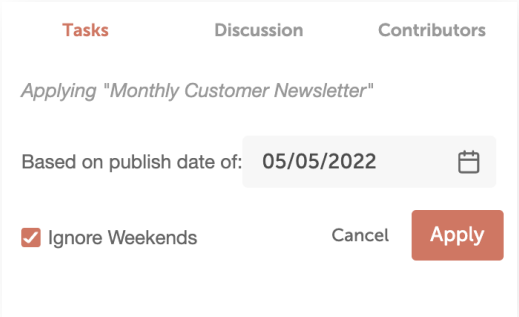
Once you've populated your first task template, it's ready to be applied to all future newsletters. This means you can apply the entire workflow and delegate all the tasks with a click of a button.

You'll see all the tasks magically apply, team members get automatically assigned their responsibilities, and due dates auto-populate based on the project's date.

If the date of the project changes, the task due dates can also automatically update, which means you won't have to click into each task to manually reschedule.

To apply your task template on future projects:

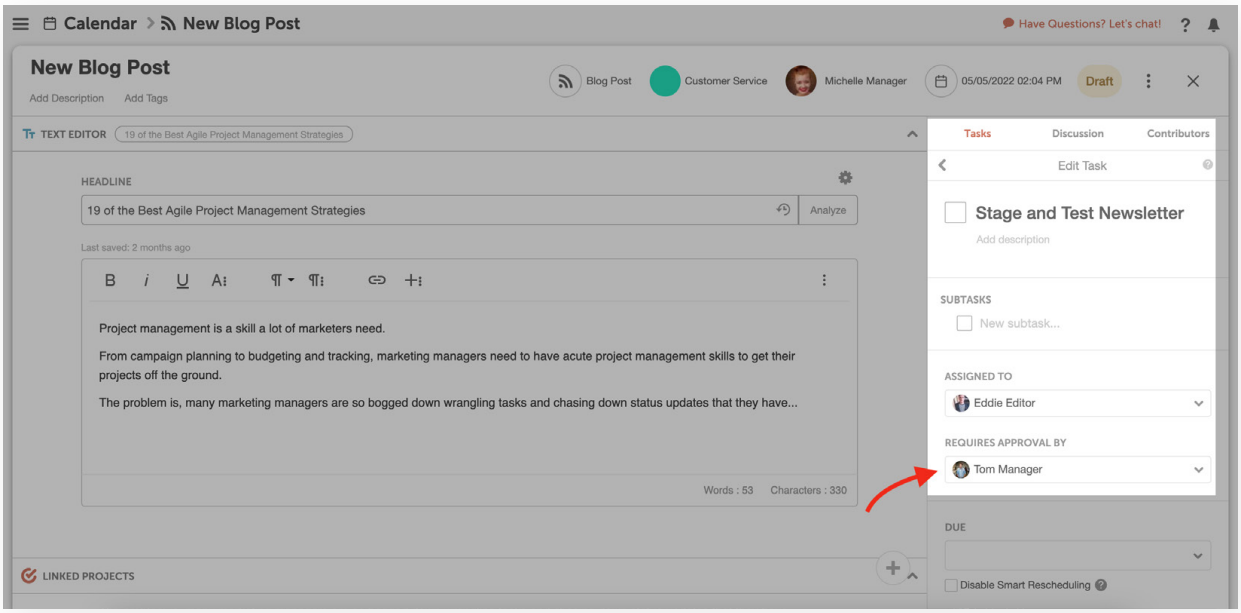
1. Plan a new newsletter project on your calendar.
2. Click the 'Templates' icon in the task bar.
3. Apply the task template you just created.



Task Approvals

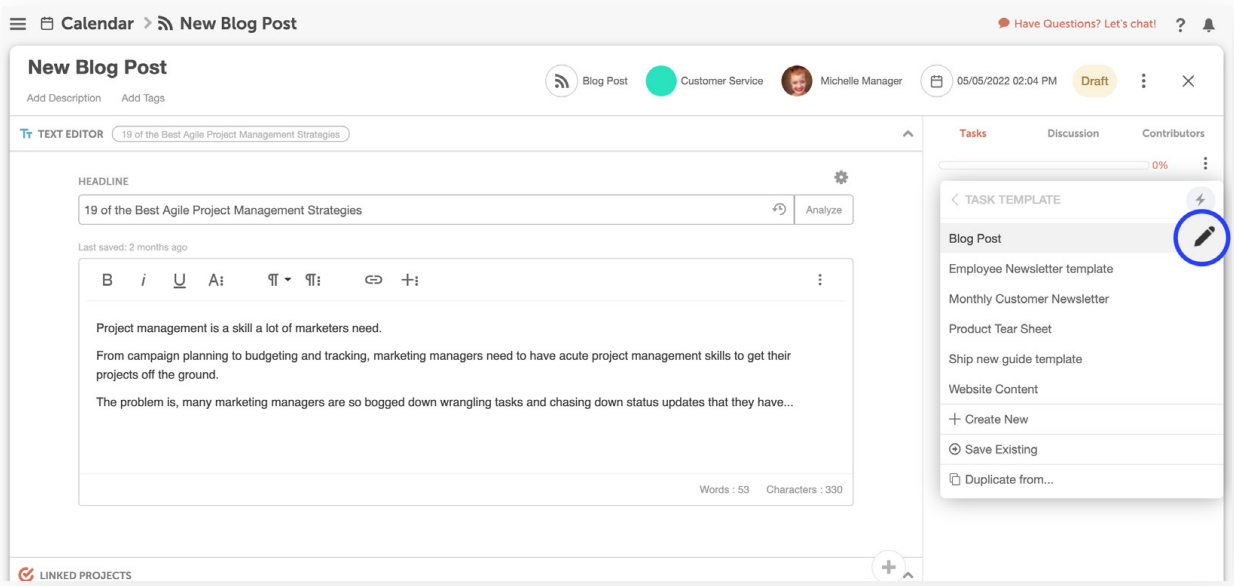
Task approvals eliminate the need to manually notify people when a task is ready for their approval. This saves time and removes bottlenecks from forming in the content creation process.

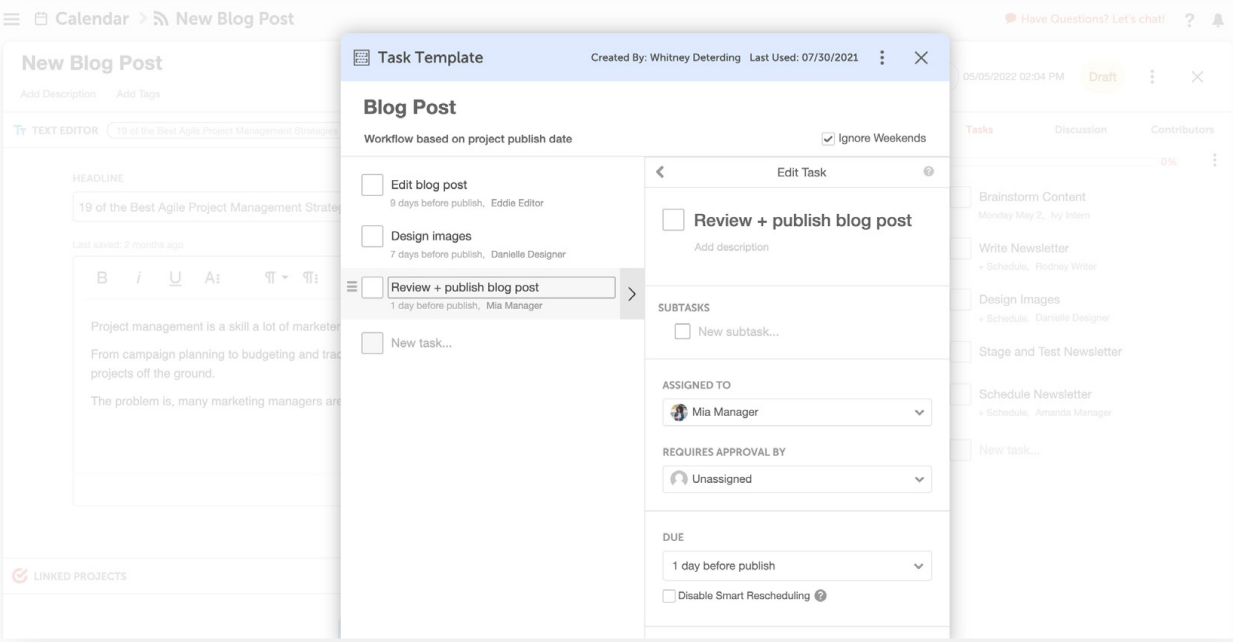
Task approvals are only available with Professional and Enterprise Work Organizer plans. Not sure if you have one of these plans? Click on the arrow button over on a task, if you see "approvals", you're good to go.



Task approvals can be included on any or all tasks within a project's workflow. Here's how:

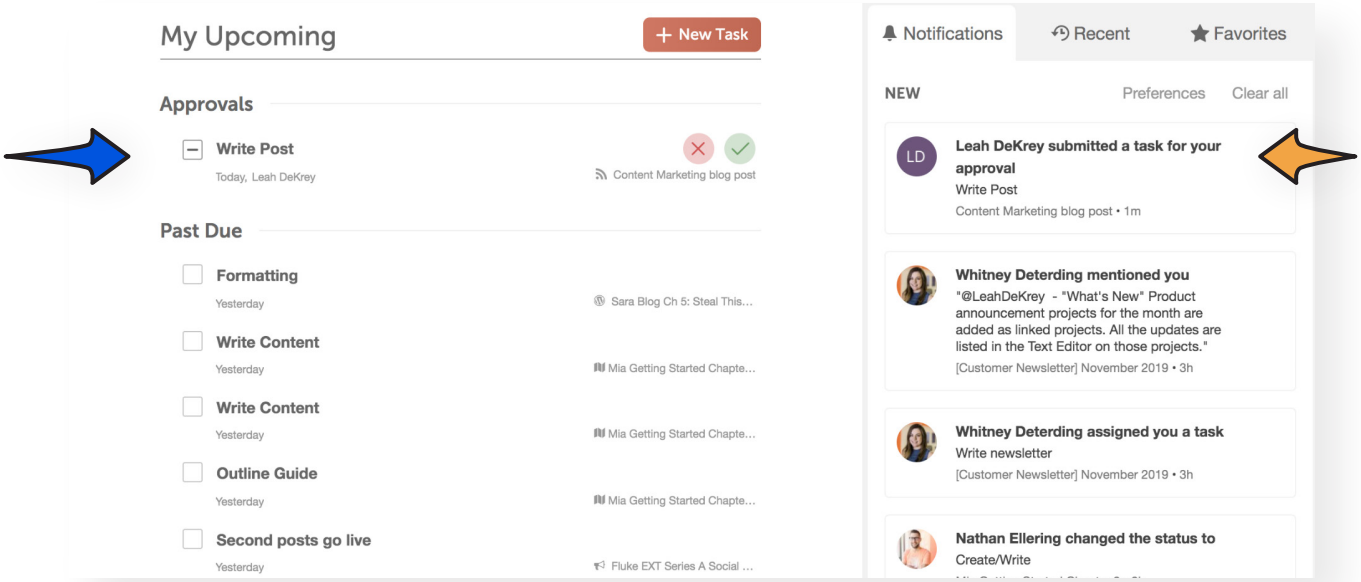
1. Click into a project on your calendar.
2. Click the templates icon in the task bar.
3. Edit the relevant task template by clicking the pencil that appears when you hover.
4. Click the arrow next to the task you want to add an approval to.
5. Add the approver's name from the drop-down list.

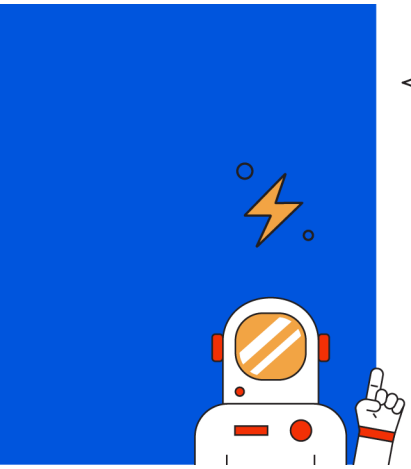




Once a team member marks a task completed, the individual responsible for approving their work will get a notification on their home dashboard.

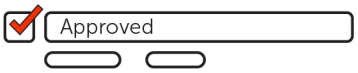
It will appear as a task on their to-do list, as well as a notification under the 'Notifications' tab.





TIP

If you don't have the task approval feature in your CoSchedule plan, you can always add an approval task directly in the task list.



Task Rules - Automate Your Workflows

Task rules add a layer of automation to your workflow to lessen the time it takes you to monitor project progress and update timelines.

Task rules are only available with Professional and Enterprise Work Organizer plans. If you have task approvals in the previous section, you also have access to task rules.

Here are a couple simple task rules you can add to your task templates to save time.

Use a Task Rule to Speed Up Project Completion

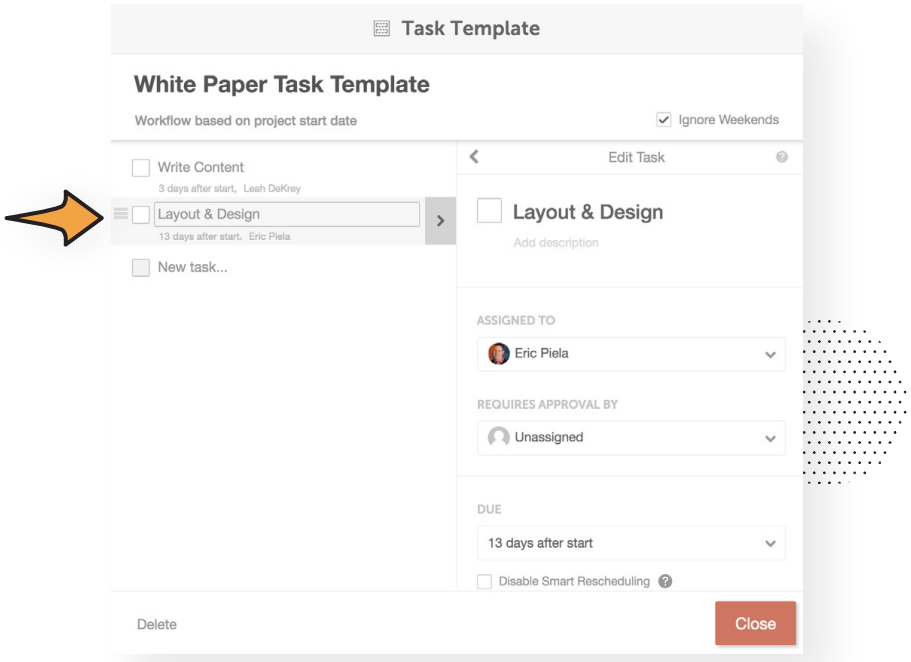
This task rule helps your team get more done in less time.

Say you allocated 10 days in your task template for a writer to produce content for a white paper, however it only took them 5 days to complete the task.

This creates a 5 day lag in the production process because the next task isn't scheduled to begin for another 5 days.

A task rule can be applied to your task template to overrule pre-set due dates if tasks are completed ahead of time. Here's how:

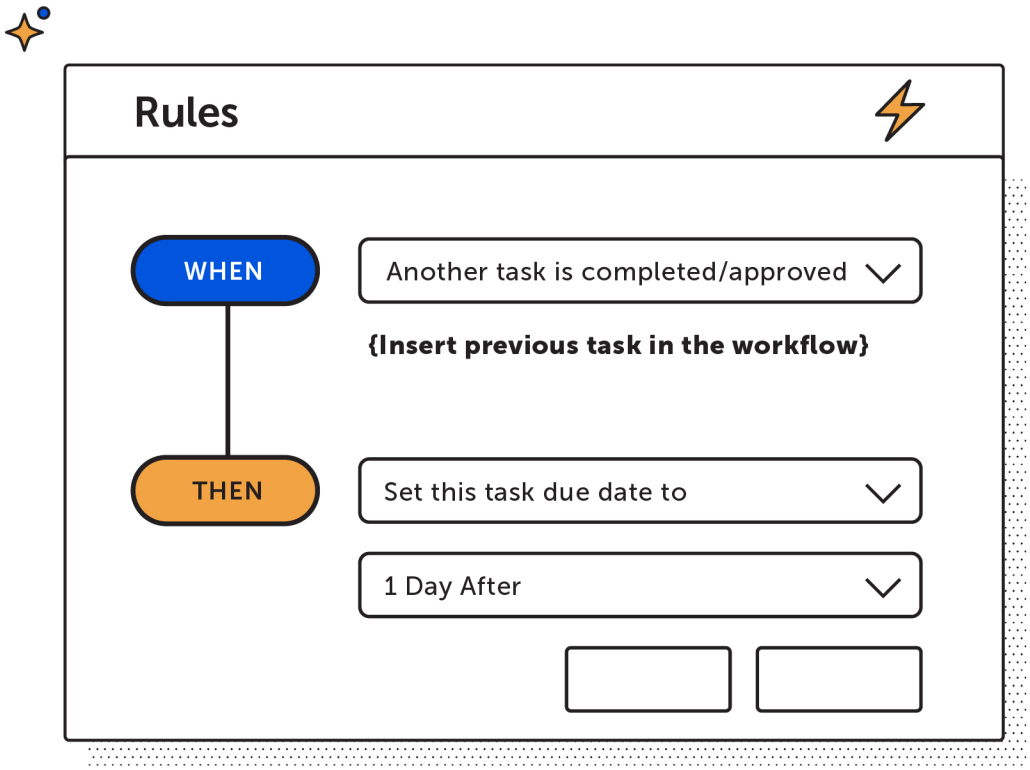
Edit your task template by clicking on the pencil that appears when you hover over one of your task templates. Next, click the arrow that appears next to the task.



Scroll to the bottom and you'll find an area called 'Rules'. Click the button to add a rule to the task.

Here is the setting to use when implementing this use case:

Add the following task rule to the second task in the workflow.



This means if the previous task is completed early, the next task will automatically be assigned the next day to shorten the time it takes your team to complete projects.

Use a Task Rule to Streamline Project Handoffs Between Teams

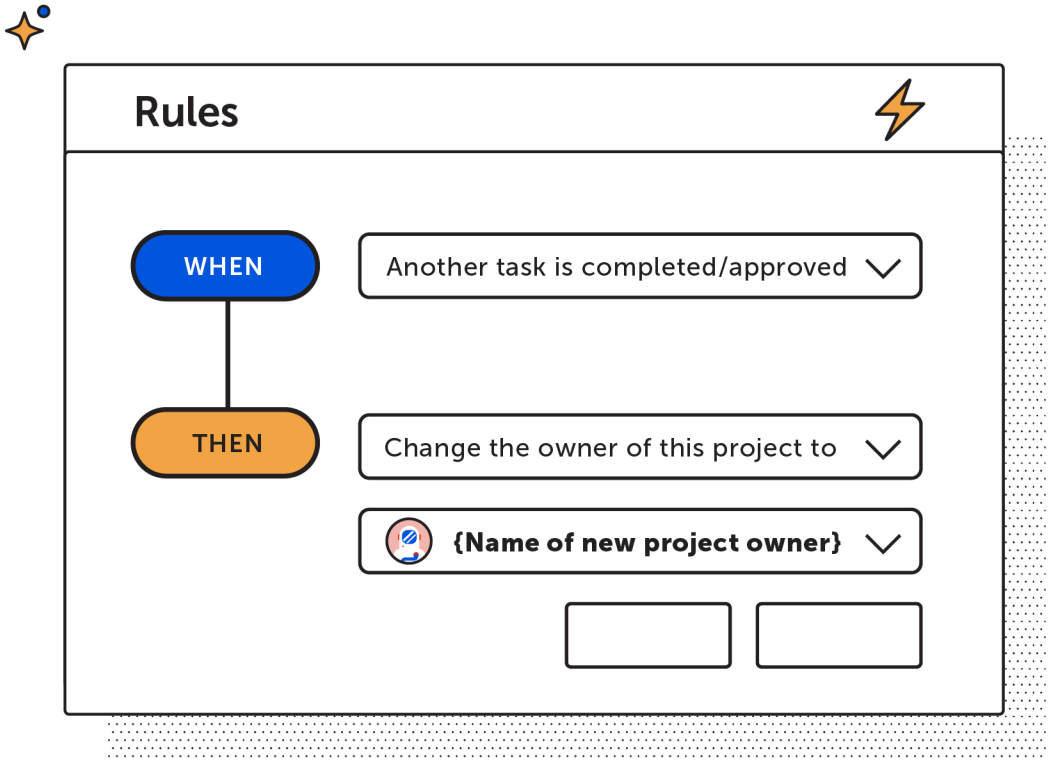
This task rule saves you time by eliminating the need to manually email and track projects as they change hands.

If your workflows are complex and involve multiple teams, you can use a task rule to automatically update the project owner as the project moves between departments for approval.

This automates the "passing of the baton" so you don't have to manually email people to notify them when a project moves forward in the workflow.

Here is the setting to use when implementing this use case:

Add the following task rule to the last task before the project moves to a different department.



Use a Task Rule to Automatically Reschedule Overdue Tasks

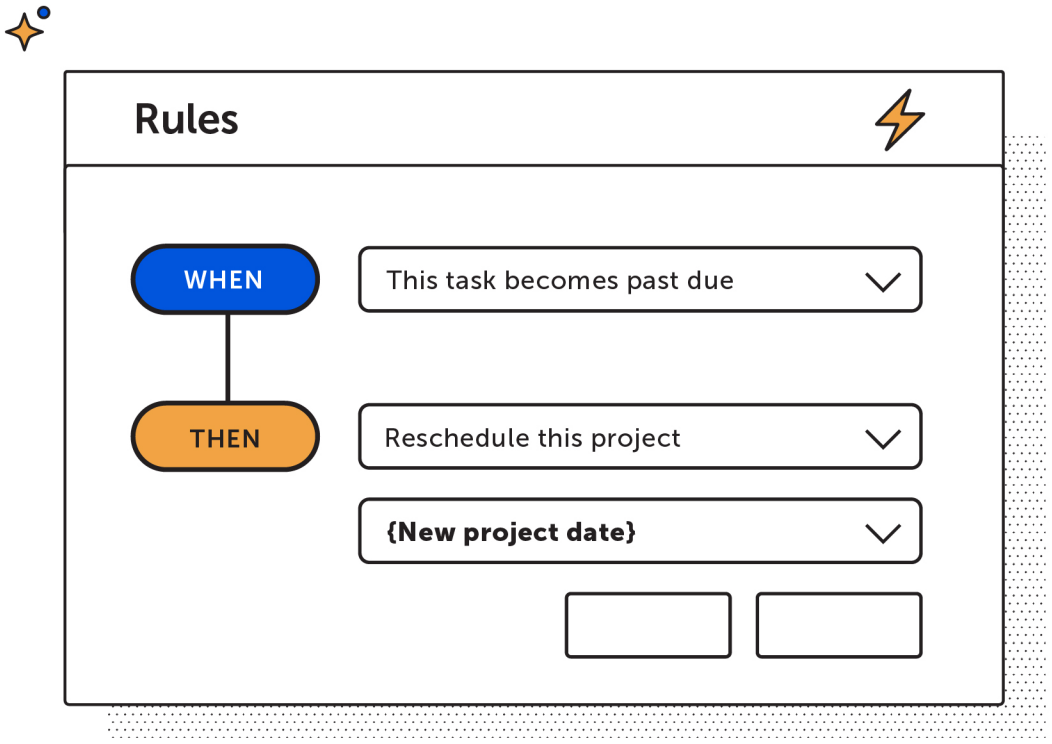
Many things come up that impact project timelines. A coworker is out sick. You are waiting on feedback from a client. Or stakeholders are taking longer than you anticipated to approve tasks.

Regardless of the reason, it shouldn't take hours of your time to reschedule overdue tasks.

Add a task rule that automatically reschedules the project to reflect overdue tasks; giving you a more accurate picture of project timelines.

Here is the setting to use when implementing this use case:

Add the following task rule when a task becomes overdue.



Head over to your calendar to execute everything you learned in this lesson.

BUILD YOUR WORKFLOWS

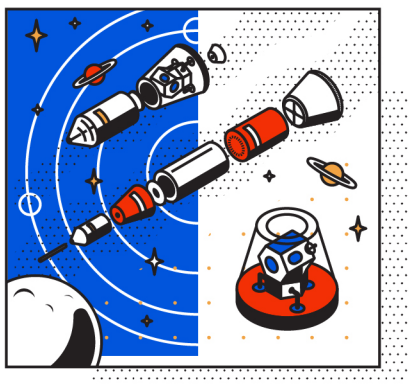


OR

Ready to learn more?

Check out the next lesson for details about how to maximize efficiency with integrations.

HEAD TO LESSON 4

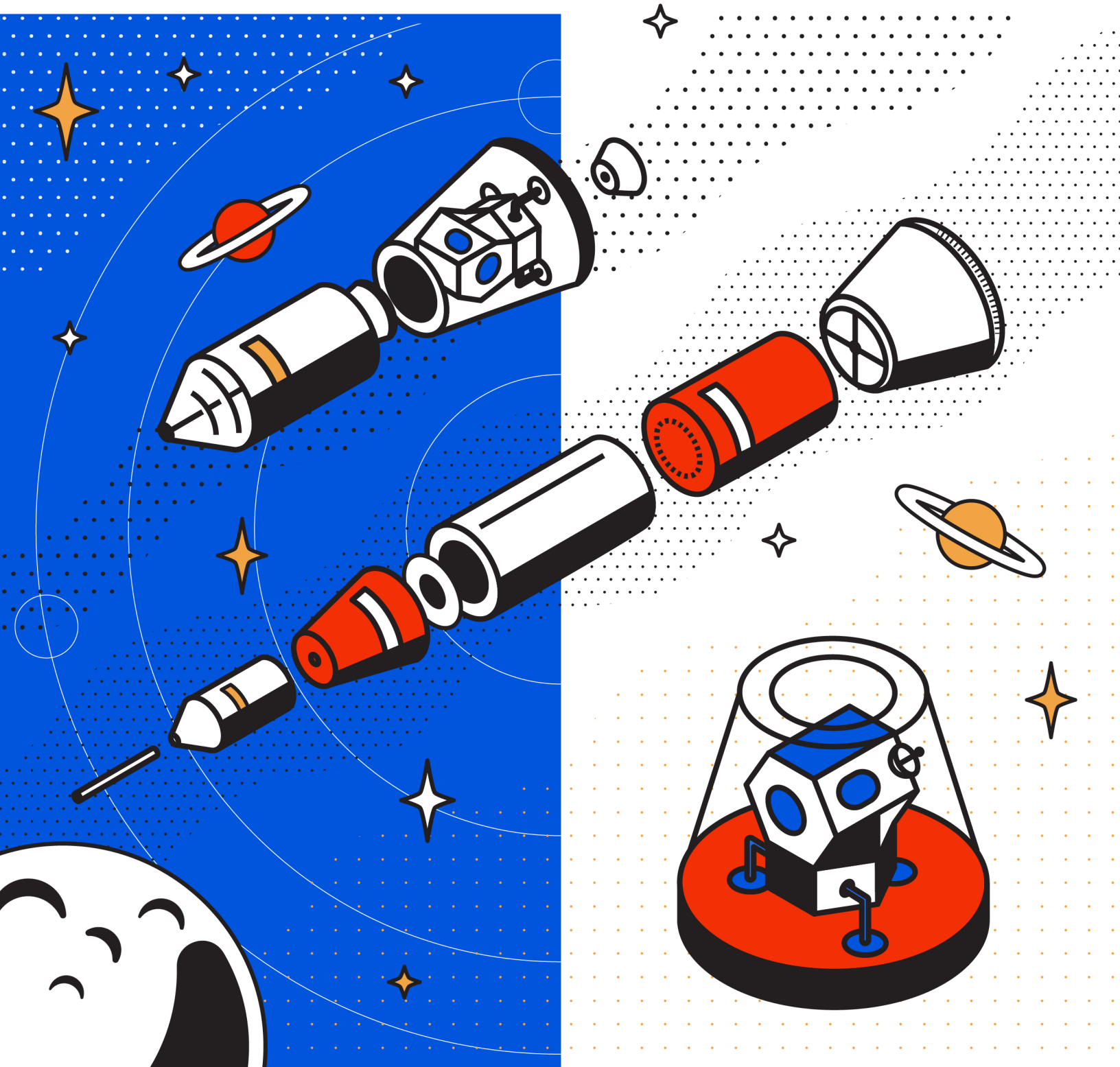


CoSchedule

Maximize Value and Efficiency

with CoSchedule Integrations

4



In this lesson:

Integration Checklist

Introduction

Integrating a WordPress Account

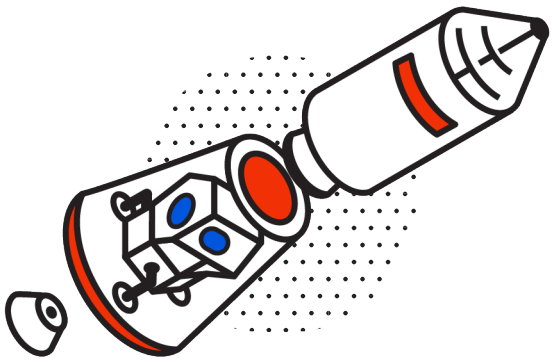
Adding a Google Drive Integration

Calendar Sync

Connecting an Email Marketing Account

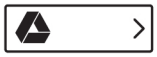
Adding Social Profiles to CoSchedule

Social Sync



Integration Checklist

Before we get started, use this checklist as you start to set up integrations in your CoSchedule account. It follows the content in this lesson to help you set-up everything from social profiles to Google Drive and everything in between.

STEP	COMPLETED	ACTION ITEM	INSTRUCTIONS	
	☑	*Complete all steps on your CoSchedule Calendar.*		
1	☐	**Add a WordPress account.**	Toggle down your name in the left-hand corner; click integrations; find WordPress on the list; and follow the prompts.	
2	☐	**Connect a Google Drive.**	Toggle down your name in the left-hand corner; click integrations; find Google Drive on the list; and follow the prompts.	
3	☐	**Sync your email marketing.**	Toggle down your name in the left-hand corner; click integrations; find MailChimp, Constant Contact or Campaign Monitor on the list; and follow the prompts.	
4	☐	**Add your social profiles.**	Toggle down your name in the left-hand corner; click social profiles; follow the prompts.	

Introduction

Adding integrations to your CoSchedule account helps maximize the value you receive from your entire marketing tool stack.

Integrations make CoSchedule the single source of truth for all marketing activities. It means you can continue using the best tools to create and deliver your messaging, while gaining visibility into how everything interconnects and works together.

What is this guide? This lesson covers how to set up integrations to get more value out of CoSchedule.

Who's this guide for? New CoSchedule power users that will be implementing CoSchedule for their marketing team.

What you'll learn:

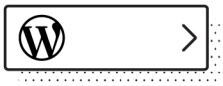
- How to set up WordPress.
- How to add Google Drive.
- What calendar sync is.
- How to integrate your email marketing.
- How to add social profiles.
- What value social sync provides.

Integrating a WordPress Account

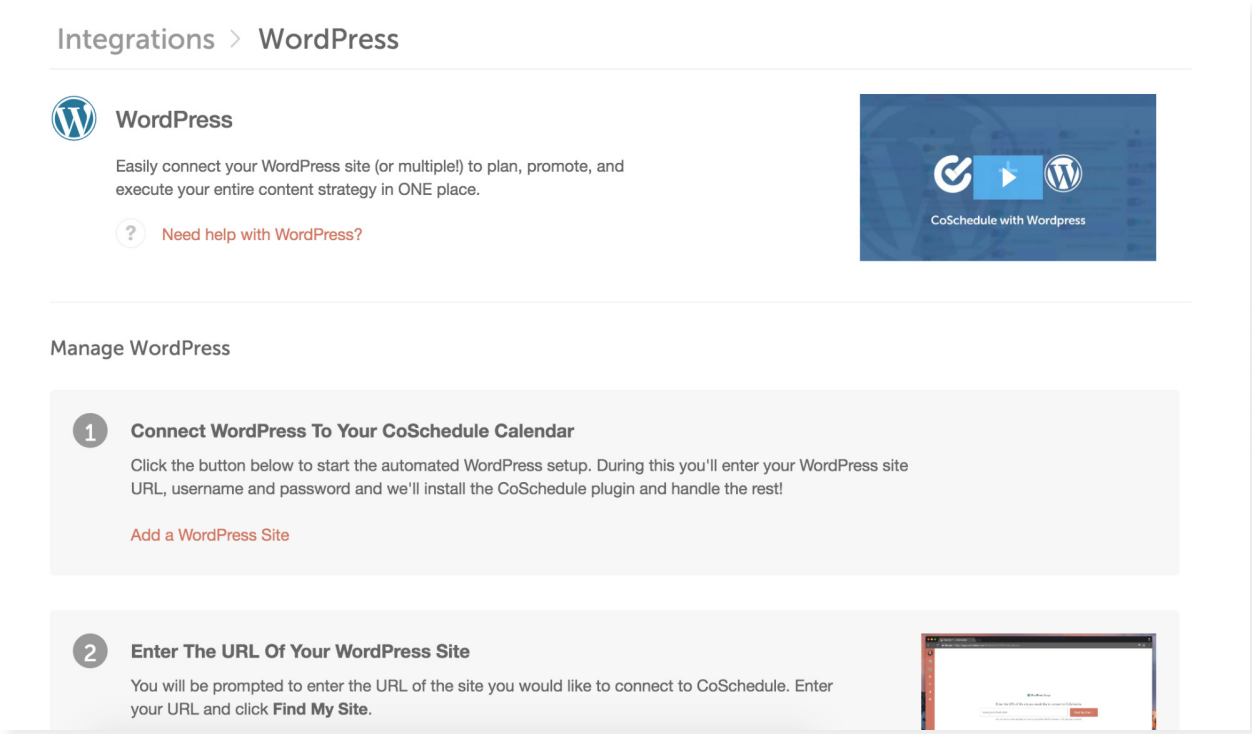
CoSchedule's WordPress integration helps you stay on top of marketing activities that are happening outside of CoSchedule.

Whenever someone creates a new post in WordPress, it will automatically appear on your CoSchedule calendar so you can see when all blog posts are going live.

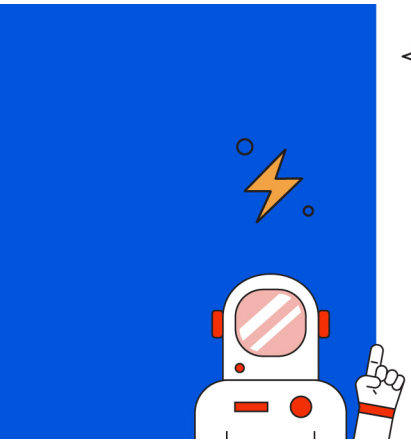
To connect a WordPress account:

1	☐	**Toggle down your name.** 
2	☐	**Navigate to 'Integrations' in the drop down menu.** 
3	☐	**Click the blue button, 'Add More Integrations'.** 
4	☐	**Scroll down to find WordPress from the list of options.** 

Follow the prompts until you reach this screen:



Next, follow the step-by-step directions listed to finish your WordPress set-up.



TIP

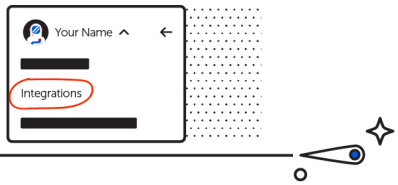
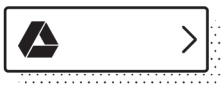
You might need approval from your IT department before getting this integration set up. Here's a help doc section that can provide your IT department more info if necessary.

Adding a Google Drive Integration

The next integration we recommend adding is Google Drive. This allows you to attach Google files to any CoSchedule project so everything is in one place.

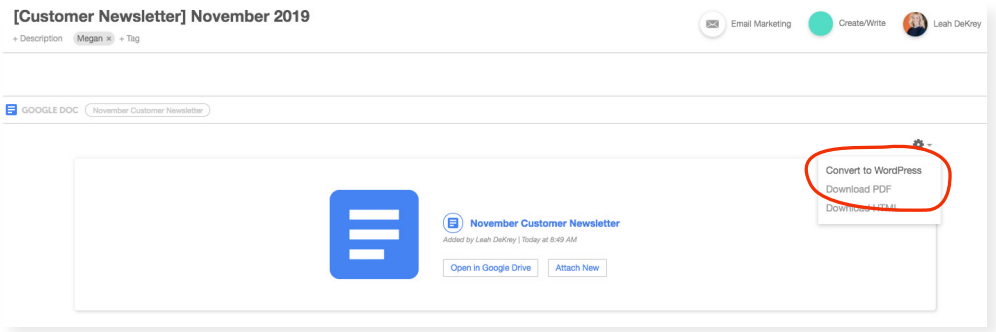
Attaching Google Drive files to projects makes it easy for people to see all the work that has been done without needing a meeting to get them up to speed.

To connect Google Drive:

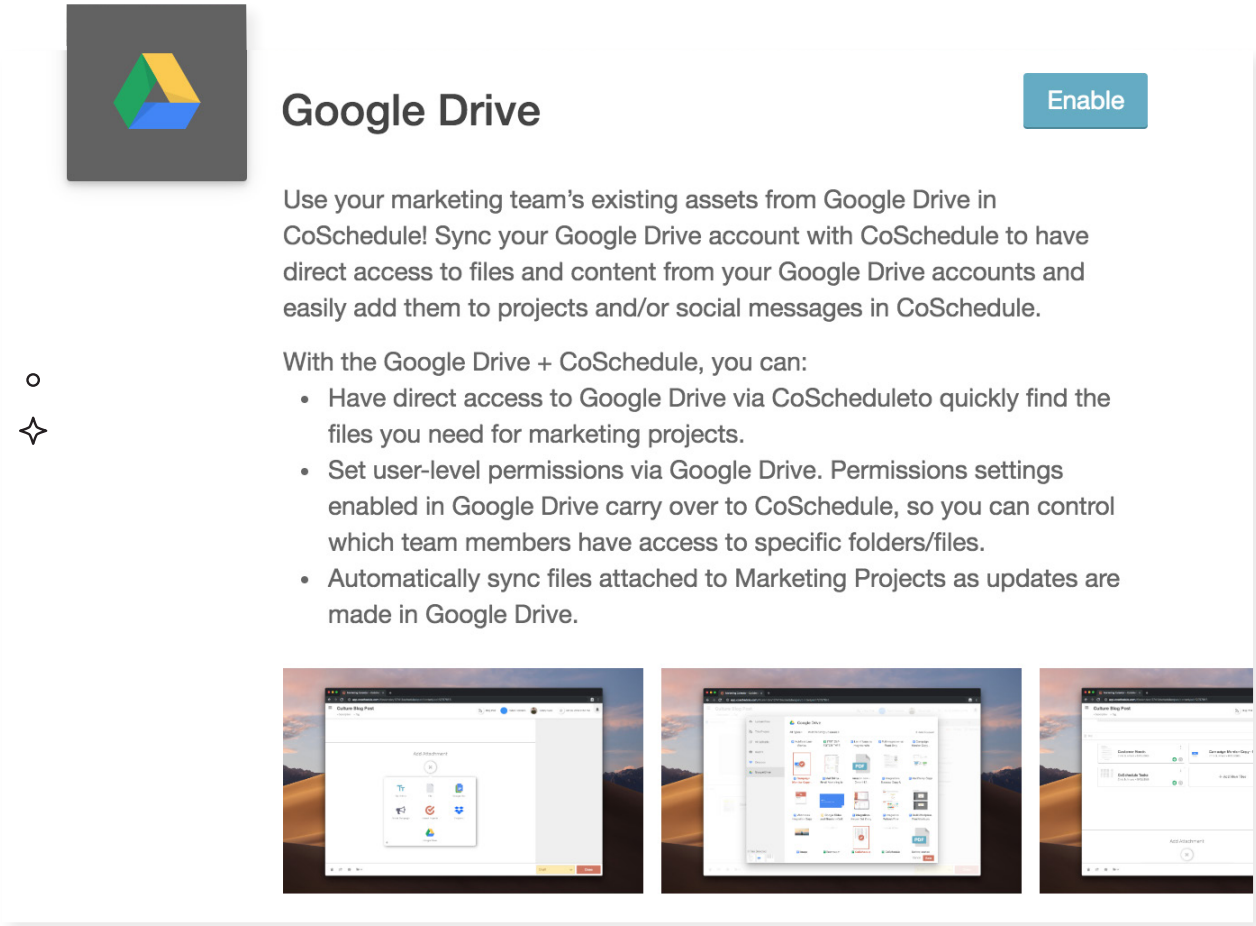
1	☐	**Toggle down your name.**	
2	☐	**Navigate to 'Integrations' in the drop down menu.**	
3	☐	**Click the blue button, 'Add More Integrations'.**	
4	☐	**Scroll down to find Google Drive from the list of options.**	



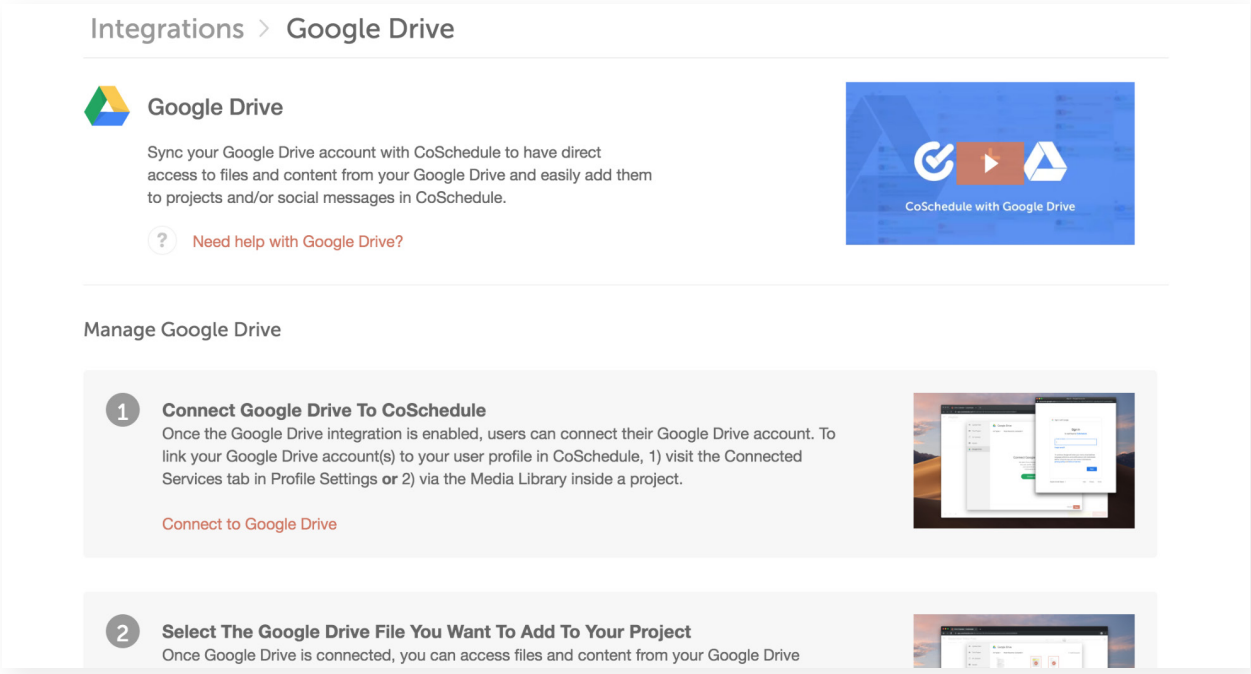
Your writers can produce all their content in a Google Doc, attach it to a project, and convert it into a WordPress post with the click of a button.



Follow the prompts to set up the integration.



When you reach this screen, follow the step-by-step directions listed to finish your Google Drive set-up.

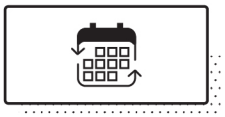


Calendar Sync

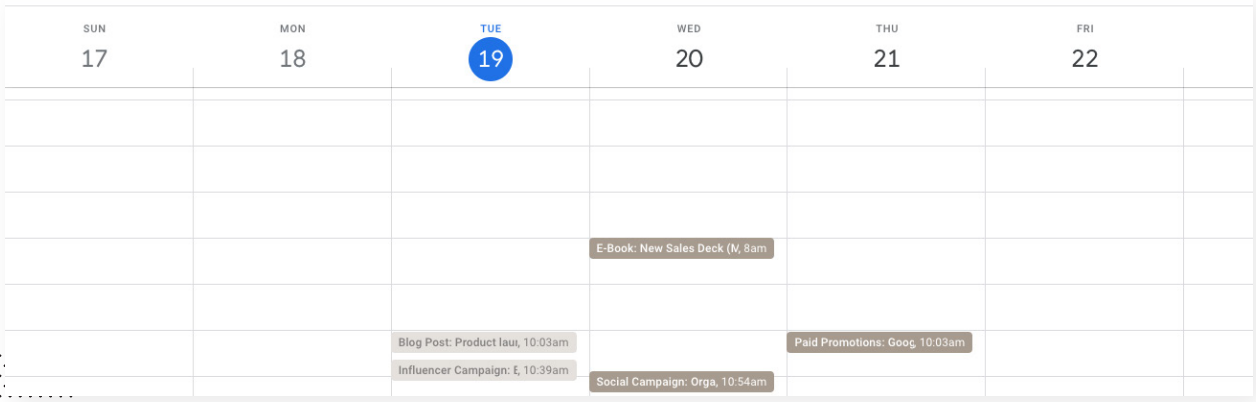
Keep important projects top-of-mind and stakeholders in-the-know.

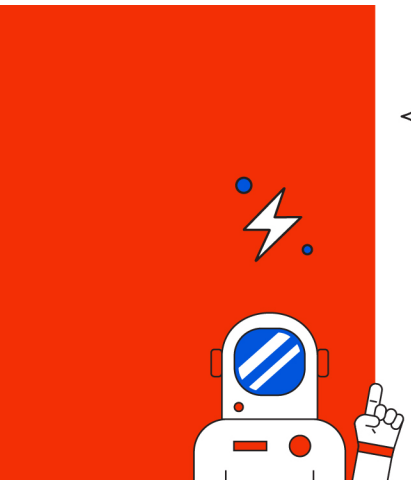
With calendar sync you can add read-only projects and/or social messages from CoSchedule to a Google Calendar, Outlook Calendar, Apple Calendar, or other calendar app. This makes all your CoSchedule activities available to stakeholders so they can stay updated on what your team is working on.

To set up calendar sync:

1	☐	**Toggle down your name.** 
2	☐	**Navigate to 'Integrations' in the drop down menu.** 
3	☐	**Click the blue button, 'Add More Integrations'.** 
4	☐	**Scroll down to find calendar sync from the list of options.** 
5	☐	**Follow the steps to connect CoSchedule's calendar sync to your preferred calendar.** 

Here's what calendar sync looks like on a Google Calendar once you've set it up.





TIP

You cannot create or control projects from your external calendar; that must be done in CoSchedule. However, you can see when your projects will publish.

Connecting an Email Marketing Account

Visibility when it comes to email marketing is vital. You don't want to send too many emails to the same list or you risk increasing your unsubscribes.

Integrating your email marketing platform with CoSchedule makes it simple to see all the emails that are going out so you can manage your email strategy at a glance and keep everyone on the same page.

There are a few email marketing platforms that CoSchedule integrates with, including:

- MailChimp
- Campaign Monitor
- Constant Contact

Campaign Monitor and Constant Contact allow CoSchedule to pull in all of your scheduled email campaigns, which then appear on your calendar as projects. If you want to make changes to an email, you'll have to do so directly in the email platform.

If you're using MailChimp to send your email marketing, CoSchedule's integration allows you to view all email marketing campaigns on your calendar and make real-time changes to your emails without jumping into MailChimp.

To set up an email marketing integration:

1	☐	**Toggle down your name.** 
2	☐	**Navigate to 'Integrations' in the drop down menu.** 
3	☐	**Click the blue button, 'Add More Integrations'.** 
4	☐	**Scroll down to find your email client from the list of options.** 

Adding Social Profiles to CoSchedule

Social media is an important element for your marketing, so why not do it all in one tool?

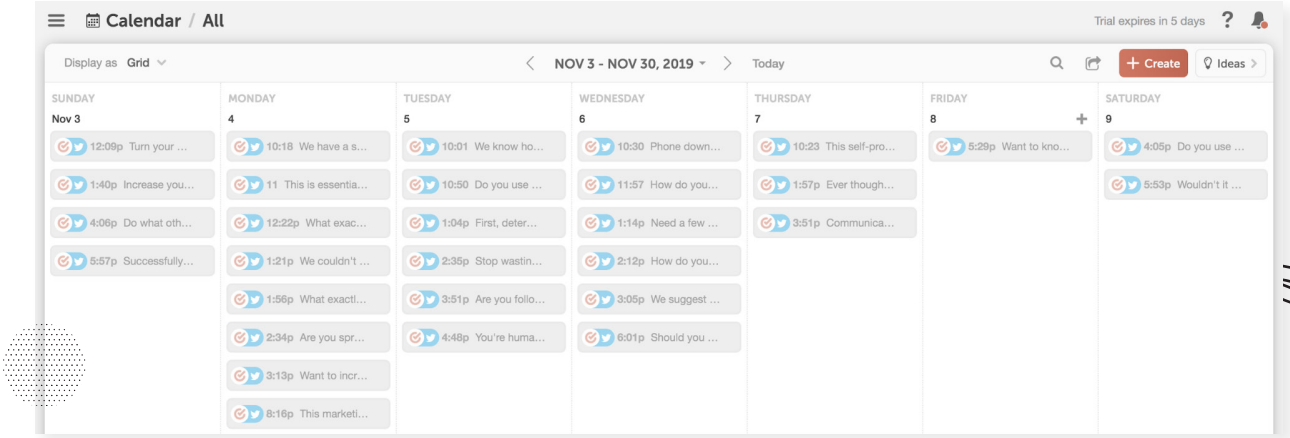
Connecting social profiles to CoSchedule brings your social team into the same platform as the rest of your marketing team, so you can easily plan, schedule, monitor, and report on ALL your marketing activities... including social.

Here's how to connect a social profile to your CoSchedule calendar:

1	☐	**Toggle down your name.** 
2	☐	**Find the list item called 'Social Profiles'.** 
3	☐	**Click the blue 'Connect a Social Profile' button in the corner.** 
4	☐	**Choose the social profile you want to connect and follow the prompts.**

Social Sync

Once you've added a new social profile to your calendar, CoSchedule will bring in historic social messages and analytics for that profile.

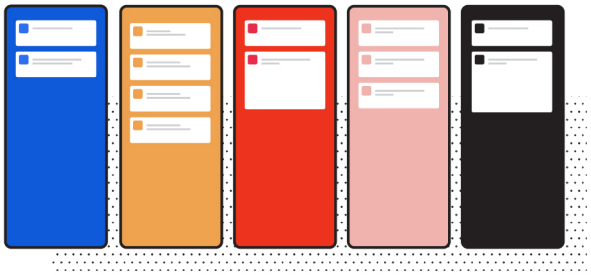


If you want to continue using a different social media scheduling tool, adding social profiles to your CoSchedule account means that CoSchedule will continuously sync new messages onto your calendar that were posted natively or via other scheduling tools so your social reports are always accurate.

This means that you get all the benefits of CoSchedule's amazing visibility and reporting features – even if you decide to schedule messages outside of CoSchedule.

Head over to your calendar to start adding integrations.

ADD YOUR INTEGRATIONS



OR



Ready to learn more?

Check out the next lesson for details about how to get CoSchedule ready for your team.

HEAD TO LESSON 5

CoSchedule

5

Get CoSchedule Ready For Your Team



In this lesson:

Launching CoSchedule Checklist

Introduction

User Roles in CoSchedule

- Owner
- Manager
- Admin
- User
- Guest
- Where to Set User Roles for Your Team

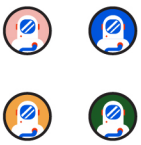
Read-only Views in CoSchedule

- How to Create a Read-only View
- When to Use a Read-only View



Launching CoSchedule Checklist

Before you invite your team to use CoSchedule, there are a couple things you should set up to make the transition go smoothly. Use this checklist as you walk through the lessons in this chapter to help get CoSchedule set up for your team.

STEP	COMPLETED	ACTION ITEM	INSTRUCTIONS	
	☑	*Complete all steps on your CoSchedule Calendar.*		
1	☐	**Set user roles.**	Use the example provided to set user roles for each of your team members.	
2	☐	**Create a read-only link.**	Use the read-only option to create shareable links for stakeholders.	
3	☐	**Invite a team member to CoSchedule.**	Enter a team member's email address and assign them user role.	
4	☐	**Customize someone's app permissions.**	Use the best practice guidelines to create a customized app experience for a team member.	

Introduction

What is this guide? This lesson covers what you should know & do before inviting your team to use CoSchedule.

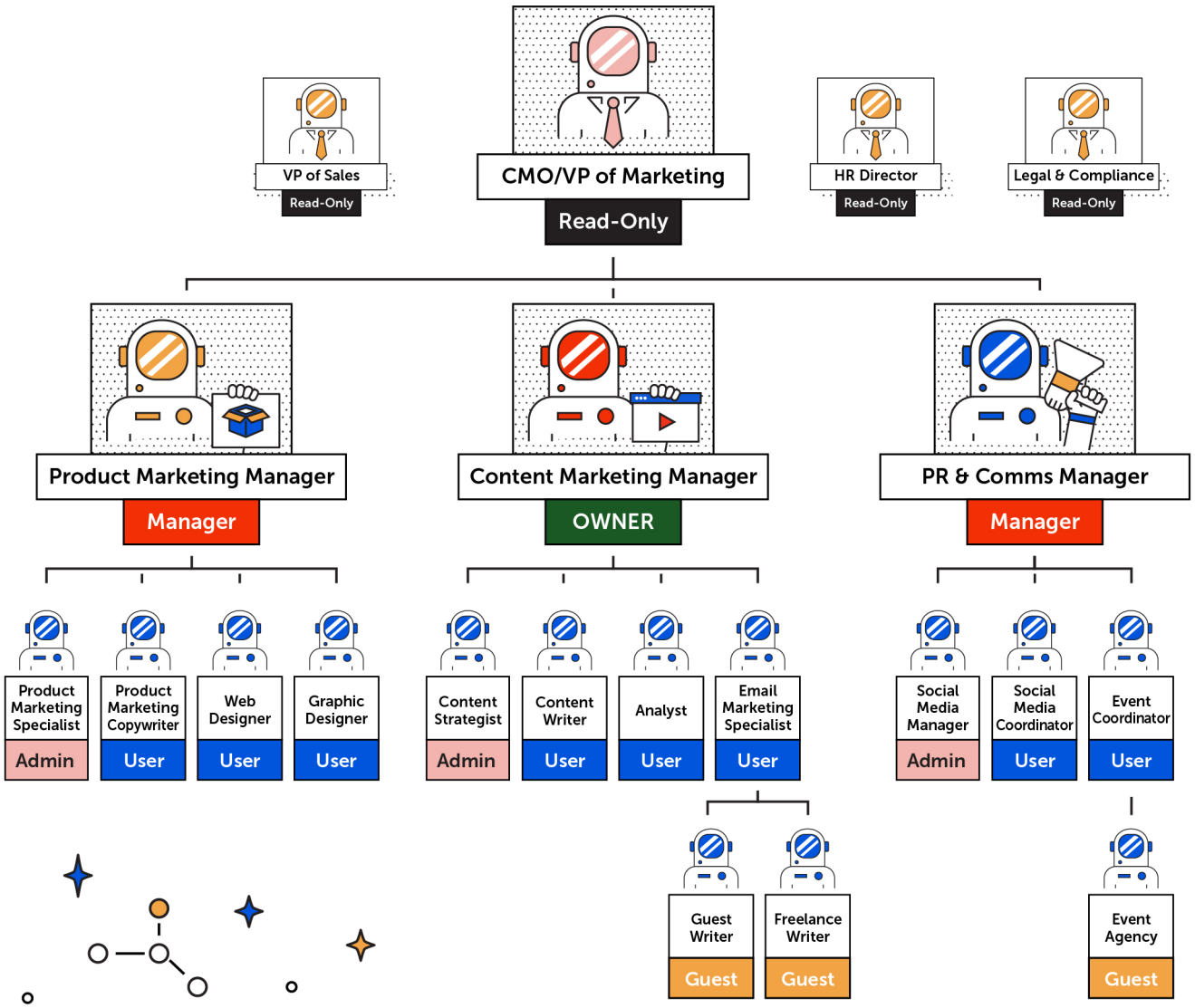
Who's this guide for? New CoSchedule champions that will be implementing CoSchedule for their marketing team.

What you'll learn:

- Inviting team members to CoSchedule.
- Types of user roles and use cases for each.
- How (and when) to use read-only views.
- Setting team permissions for each member.

User Roles in CoSchedule

User roles allow you to limit what certain users see in CoSchedule. 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. There are five user roles in CoSchedule: Owner, Manager, Admin, User, and Guest.

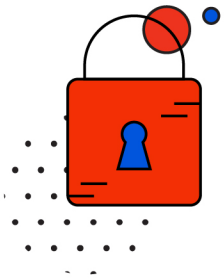


Owner

An owner in CoSchedule is the individual with the highest access rights. It is likely the person who started the CoSchedule plan and initiated the purchase. There is only one owner per account.

This individual can:

- Can change subscription plan, update billing information, and delete calendars.
- Can view, edit, publish, and delete projects and social messages.
- Can create and assign tasks to all team members.
- Change calendar settings.
- Can administer social profiles, including the ability to delete profiles from your company.
- Can add and edit templates. *Templates vary based on what's available to you in your plan.*



Who Should Have Owner Access Rights?



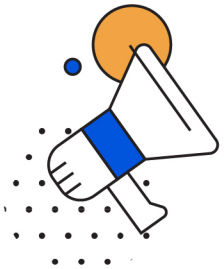
This individual will likely be the CoSchedule champion who is implementing the tool for their team. (i.e. you!)

Manager

Managers have the same access rights as an owner. However, the owner can rescind rights from the manager as necessary. You may want to assign a team member these rights to assist you with managing the account in the event that you are unable to access the account due to travel, etc.

These individuals can:

- Can change the subscription plan and update billing information.
- Cannot assign other team members as Managers.
- Can view, edit, publish, and delete projects and social messages.
- Can create and assign tasks to all team members.
- Change calendar settings.
- Can administer social profiles, including the ability to delete profiles from your company.
- Can administer team members, including the ability to delete team members from your company.
- Can add and edit templates. *Templates vary based on what's available to you in your plan.*



Who Should Have Manager Access Rights?

- One or two individuals that are perhaps marketing strategy leads - These are individuals you trust to manage billing aspects of your CoSchedule account.
- These are likely your power users of CoSchedule.

Admin

Individuals with admin access can...

- Cannot assign other team members as Managers.
- Can view, edit, publish, and delete projects and social messages.
- Can create and assign tasks to all team members.
- Change calendar settings.
- Can administer social profiles, excluding the ability to delete profiles from your company. (Only owners and managers can permanently delete a social profile from the entire company.)
- Can administer team members, excluding the ability to delete team members from your company. (Only owners and managers can permanently delete a team member from the entire company.)
- Can add and edit templates. *Templates vary based on what's available to you in your plan.*



Who Should Have Admin Access Rights?

- The Social Media Manager (or similar) - They need access to the calendar settings to be able to pause all social media messages in the event of an emergency.
- Team leads who do not have Manager rights, such as Content Strategists and Product Marketing Leads.
- Team supervisors.

User

Individuals with user access can...

- Can view, edit, publish, and delete projects and social messages.
- Can create and assign tasks to all team members.



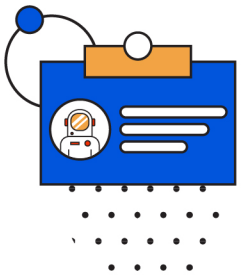
Who Should Have User Access Rights?

- Most of the people on your team will have user access rights.
- Writers, graphic designers, coordinators, etc. Basically the specialists or contributors on your team that execute marketing tasks.

Guest

Individuals with guest access can...

- Can view and edit projects only if assigned to them.
- Can complete tasks assigned to them.

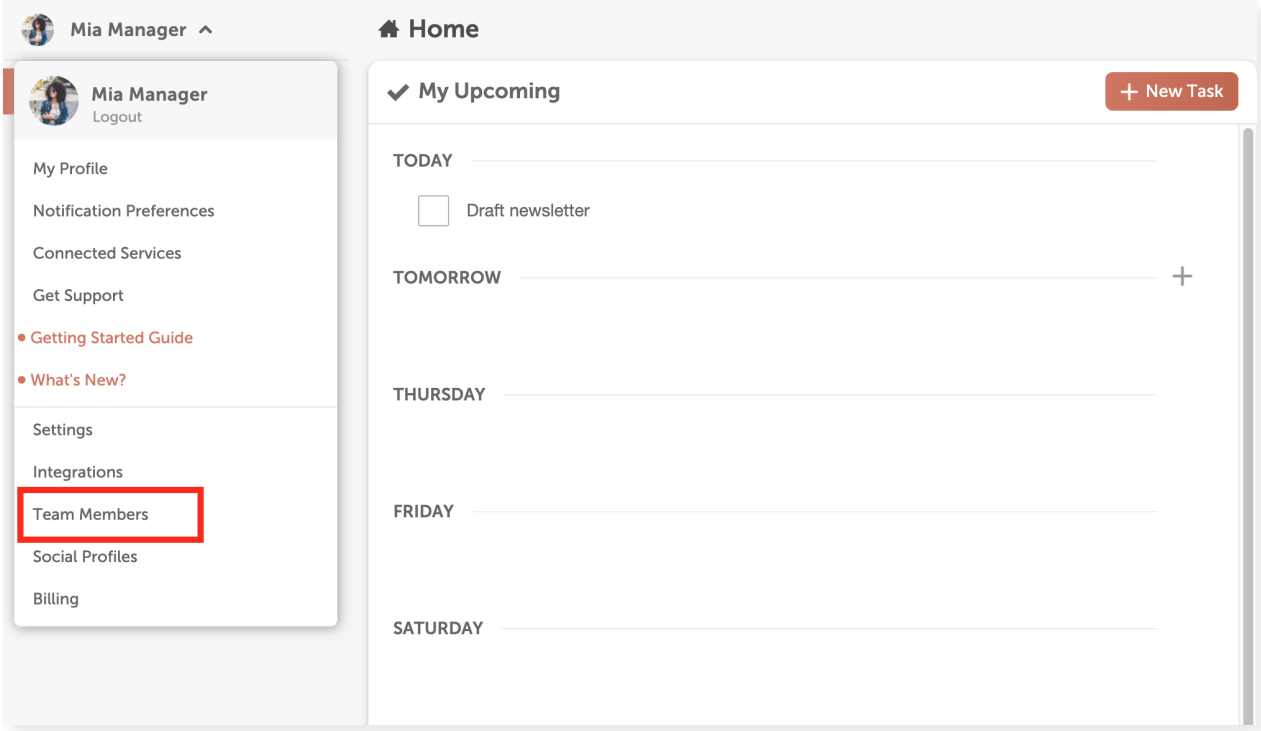


Who Should Have Guest Access Rights?

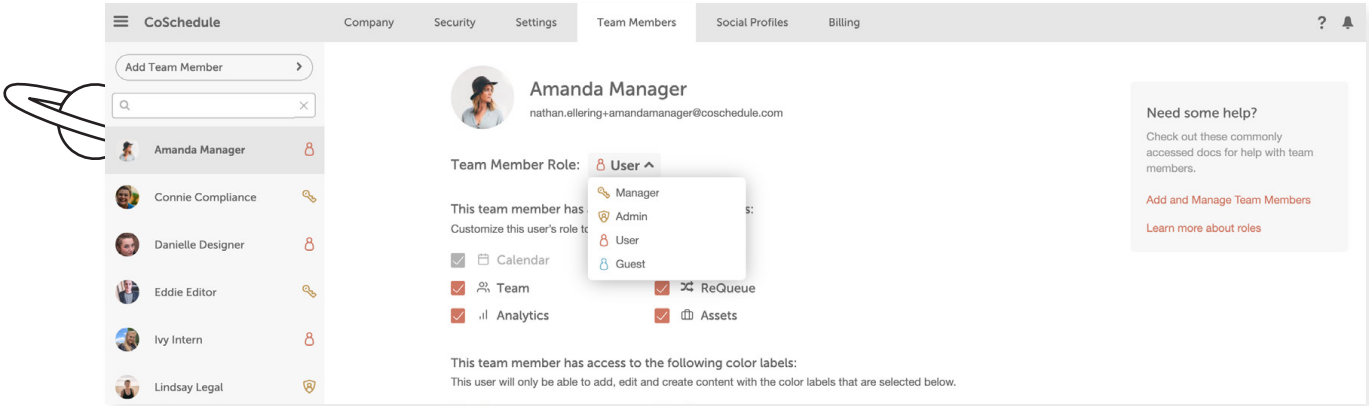
- External writers.
- Freelancers.
- Event Agencies.
- Vendor partners.

Where to Set User Roles for Your Team

When you're ready to start inviting your team members to CoSchedule, user roles can be set by toggling down your name in the left-hand corner and clicking the "Team Members" option.



Click the pencil next to the team member you want to edit and use the drop down list to choose the user role you want to apply to the individual.



Read-only Views in CoSchedule

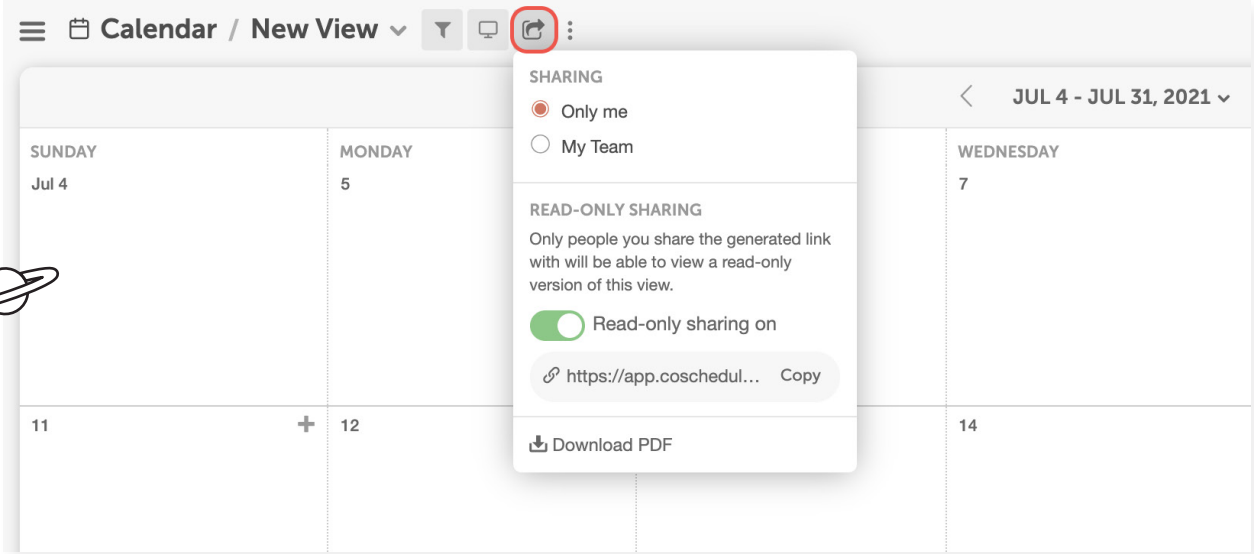
You likely have a few stakeholders that require regular updates on what your team is working on. CoSchedule makes it easy to keep everyone in-the-know and prove the value of your team with read-only views.

This means people can have access to see certain marketing projects or campaigns, but can't make changes, edit, or reschedule.

The best part about read-only views is that stakeholders can see what's going on, but you don't have to pay for an extra user in CoSchedule.

How to Create a Read-only View

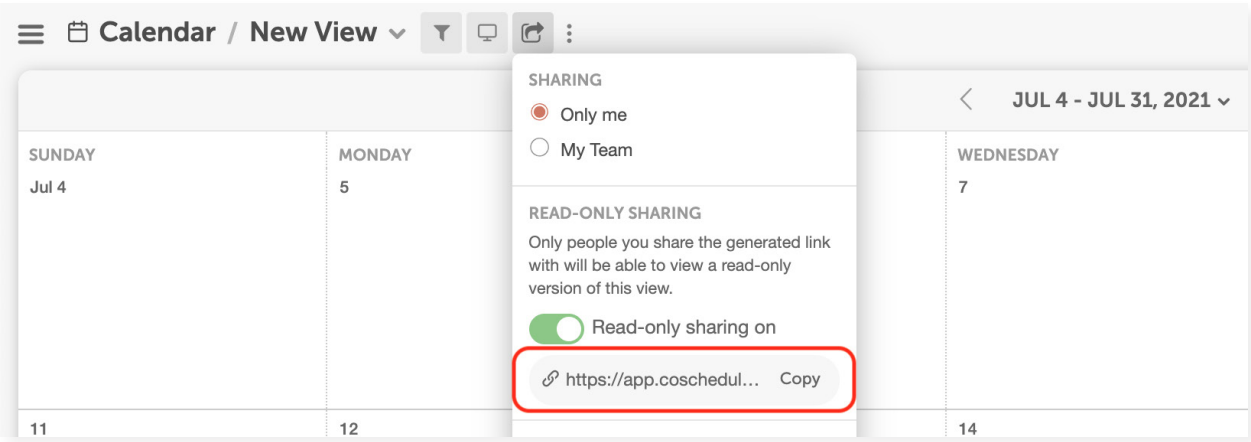
Read-only views are created by clicking the share icon in the top left section of your calendar.



There are two different versions of the read-only view that can be shared.

1. **A shareable link** that gets updated in real-time, so your stakeholders always have the most up-to-date details.
2. **A downloadable PDF** that is best for printing, but won't automatically update when changes are made.

To create a shareable read-only link, click the button next to the "Read-only sharing on" text. Next, click "Copy" to copy the link and send it to anyone who needs to stay updated about what your team is working on.



If you don't want someone to have access to that link any longer, simply break the link by toggling off the "Read-only sharing on" text.

To create a downloadable PDF, click the "Download PDF" text located under the shareable link.

When to Use a Read-only View

Here are a few awesome use cases to make the most of out read-only views.

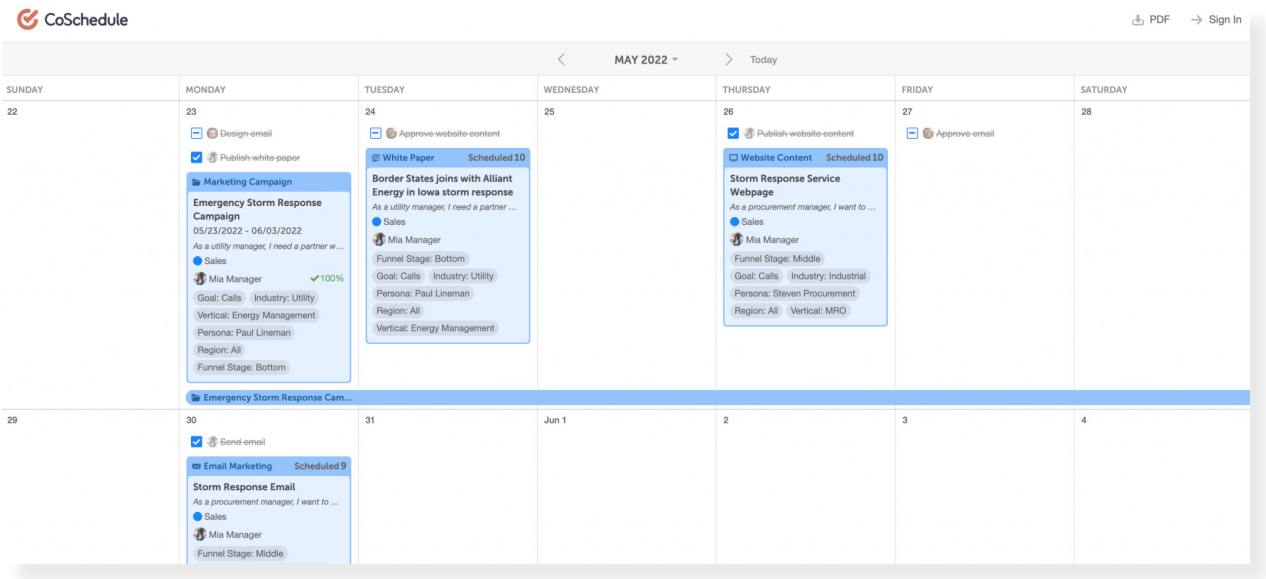
Keep the Sales Team Updated on Deliverables

If your team is responsible for producing materials on behalf of other departments, creating a read-only view is a great way to cut down on status updates and keep people in that department updated on projected timelines.

For instance, if your team regularly creates sales collateral for the sales department, choose to create a read-only link based on the "Sales" saved view.

This will ensure that the sales team only has access to view the projects that are relevant for them.

Here's an example of what the sales read-only link will look like to someone on the sales team:



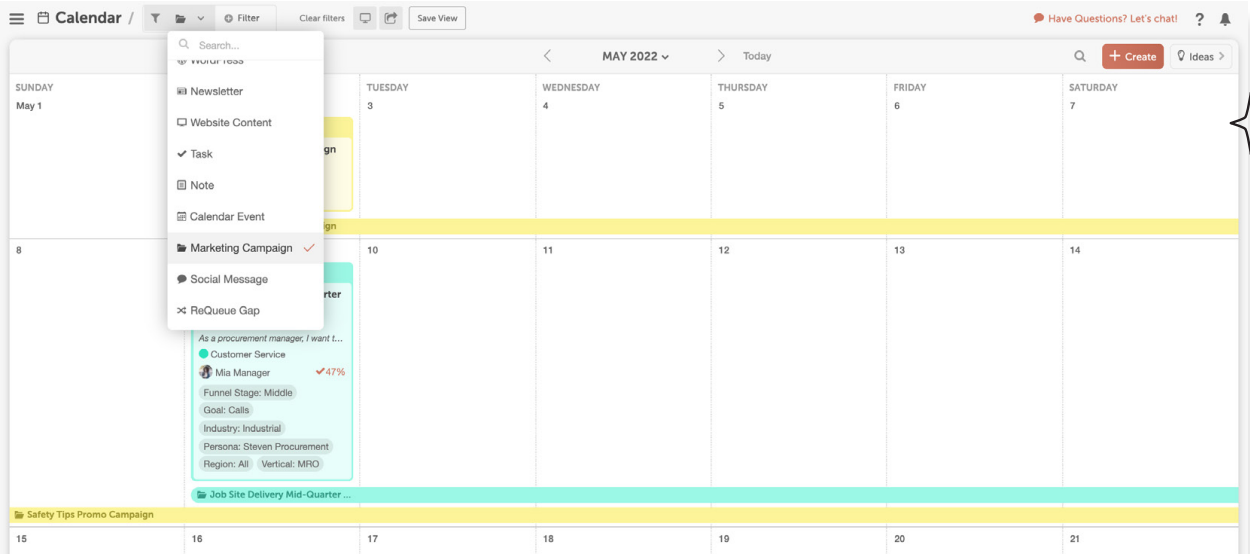
This cuts down on the time it takes you to manually provide updates. Individuals can self-serve and see exactly when their projects will be done and what progress has been made so far.

Show Your CMO/CEO All Scheduled/Planned Marketing Campaigns

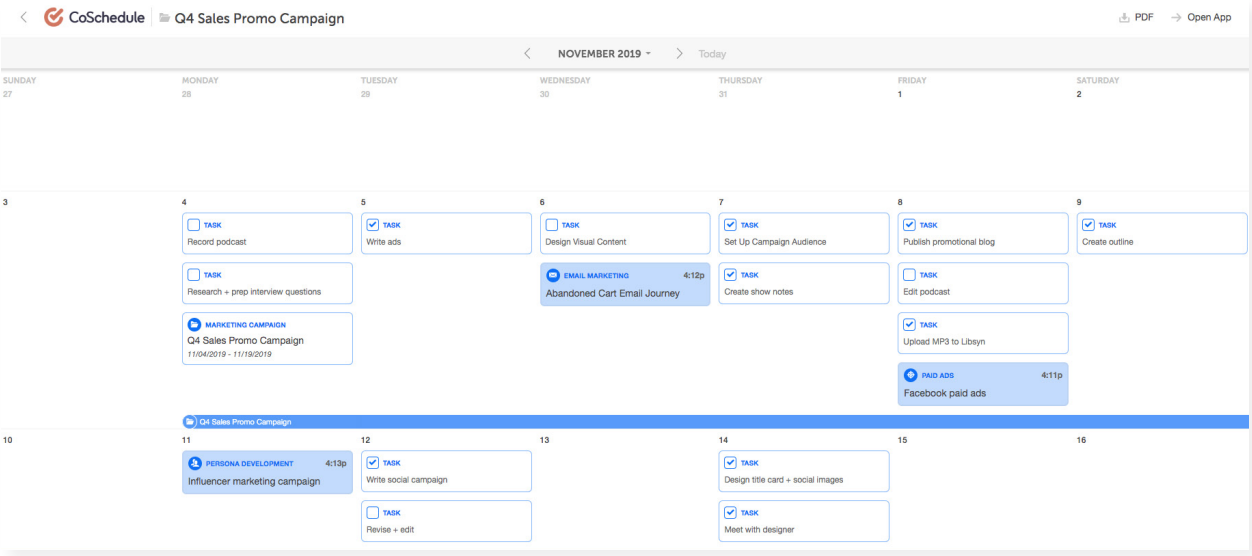
Say your CMO wants to stay updated on the progress of every marketing campaign your team launches.

Create a read-only link from a “Campaign Timelines” saved view. This allows the CMO to quickly see when each campaign will launch and all the individual projects which the campaign is comprised of.

To create a Campaign Timelines view, click the filter icon to filter by “Project Type,” then select “Marketing Campaign. Once you save this view, you can select the share icon to copy or download the read-only link.



For more details about the campaign, the read-only link allows the user to click into each campaign to see individual projects, tasks, and content.



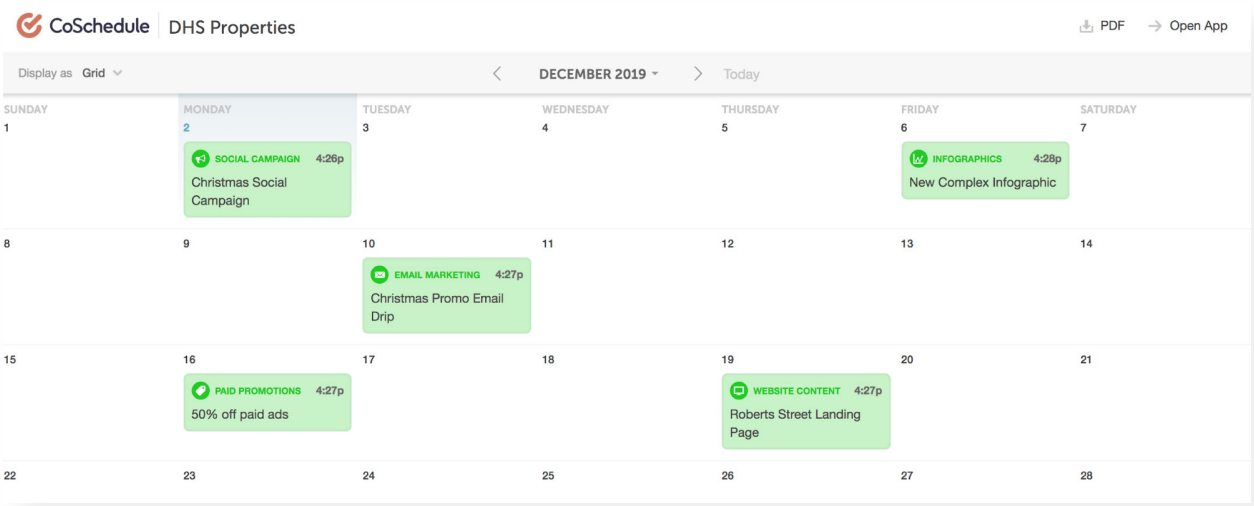
Share Planned Work on Behalf of Clients

Keep clients in-the-know by giving them a read-only link to quickly see all the things you're working on including marketing initiatives, social media, or email marketing.

Share a read-only link with a client based on the color label saved view you created in an earlier lesson. Missed that lesson?

No problem. You can re-read it here.

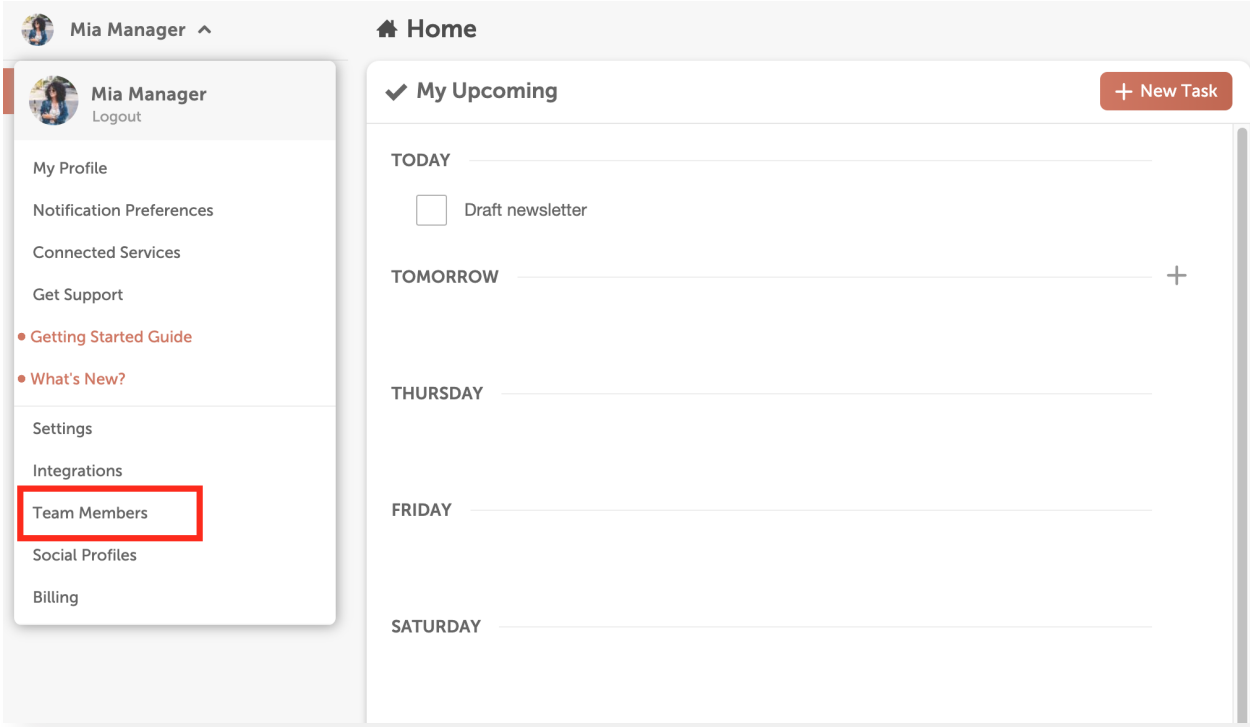
This allows your clients to quickly approve content, see timelines, and give feedback about deliverables.



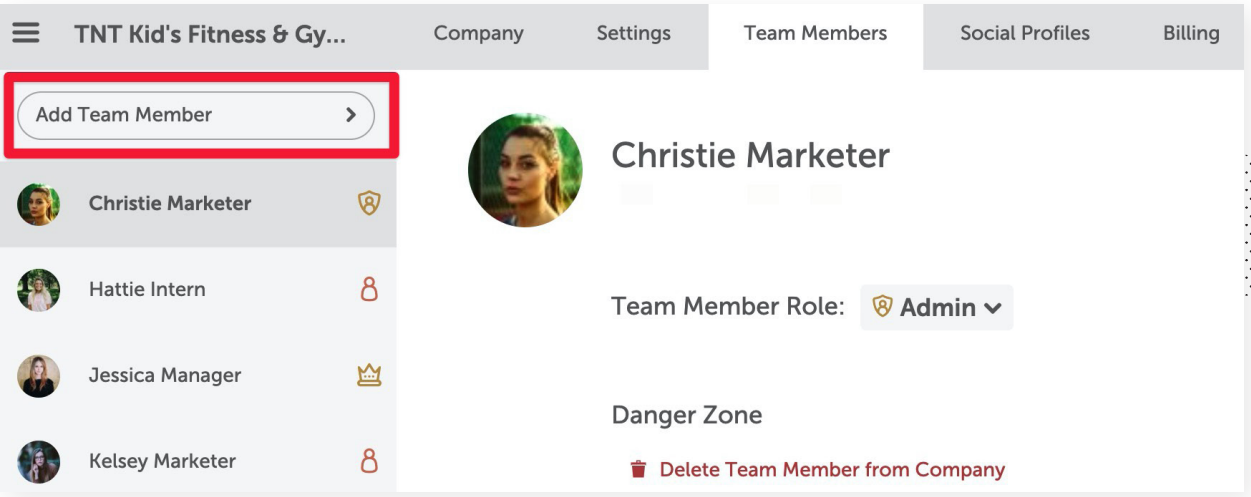
Inviting Your Team to Use CoSchedule

Now that you've got some of the basic things set-up in CoSchedule, it's time to start inviting your team members to use CoSchedule.

Inviting team members is easy – simply toggle down your name and chose the "Team Members" option from the drop-down menu.



From here, click the "Add Team Member" button to add a new team member to your calendar.



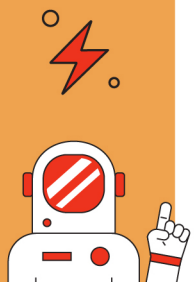
Enter the individual's email and choose their user role based on their needs.

Setting User Permissions

Once you've added your team members and they've accepted the invite, you can customize which parts of CoSchedule each person has access to.

There are a couple of reasons you'll want to do this:

1. It allows you to set boundaries based on roles and responsibilities.
2. It gives each team member a custom view of CoSchedule that only has the features they care about.



FYI

Keep in mind that only those designated as "Users" can have customized app permissions. "Admins" get access to everything and "Guest" users only have access to the calendar.

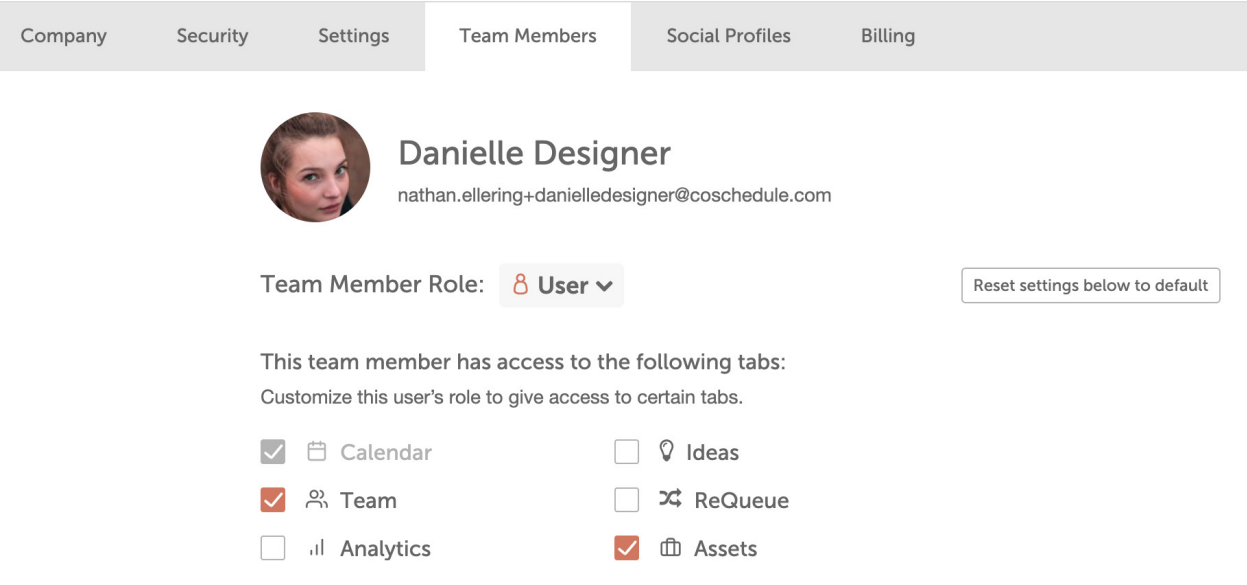


Here are some best practice suggestions for each member of your team:

Graphic Designers

Use Case: Graphic designers use CoSchedule to manage their daily workloads, submit their work and monitor projects for changes and approvals, but things like analytics and the Ideas Board aren't relevant for them.

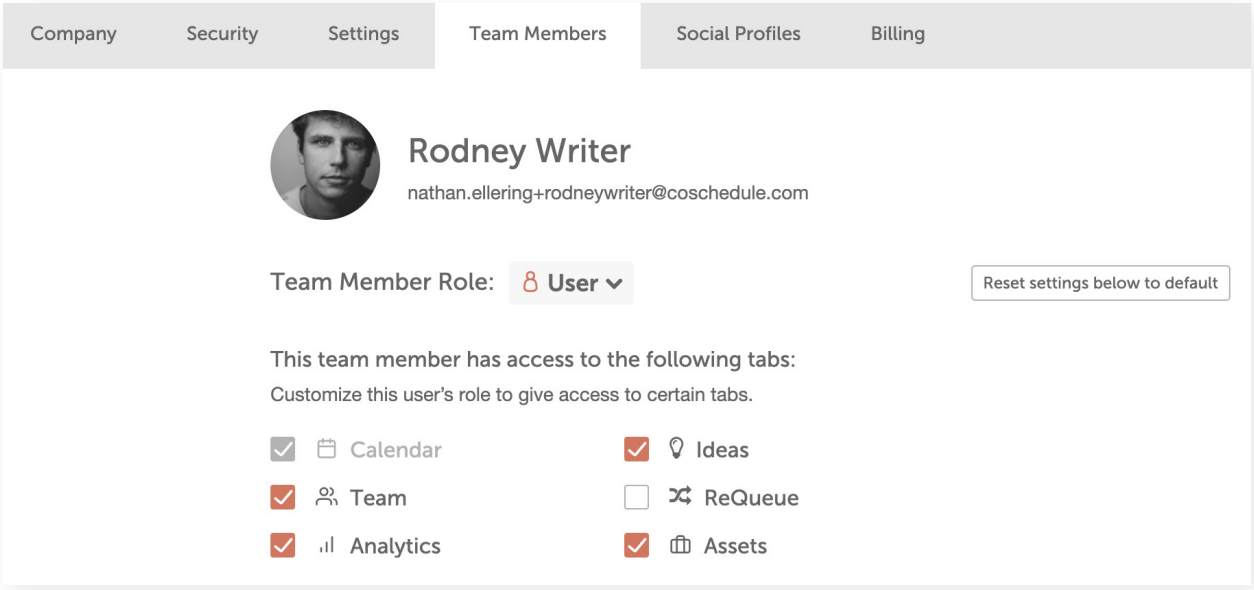
Best Practice: Give graphic designers access to **The Team Dashboard** so they can easily see what they need to work on and **The Asset Organizer** for a place to store all their projects.



Content Marketing Writers

Use Case: Content Marketers need to manage their daily workloads, monitor project progress and potentially see how their blog posts are performing on social media, but they probably shouldn't be responding to incoming social media messages, etc.

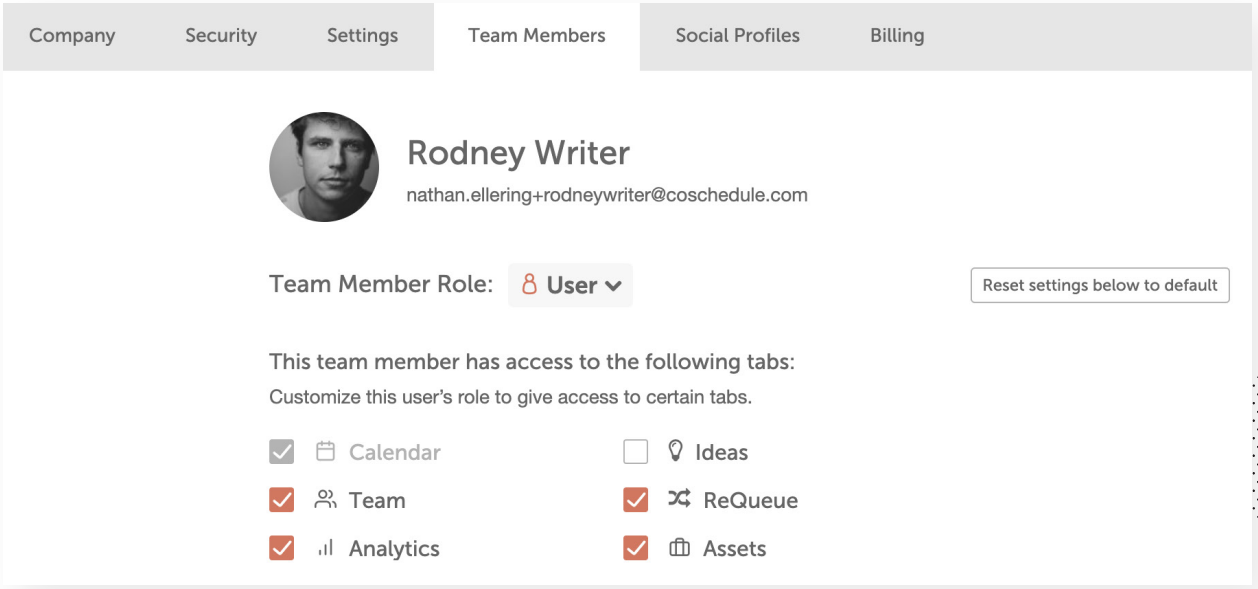
Best Practice: Give your Content Marketers access to the **Team Dashboard** so they can easily see what they need to work on; **Analytics** to see how their blogs are performing on social media; **The Ideas Board** to put content marketing and blog ideas in the backlog; and **The Asset Organizer** to pull graphics for their projects.



Social Media Coordinators

Use Case: When it comes to social media, it's important to restrict who has access to these features. You don't want someone to respond on behalf of your organization without proper permission. Some of your team is trained to respond using the brand voice and PR guidelines, and others are not.

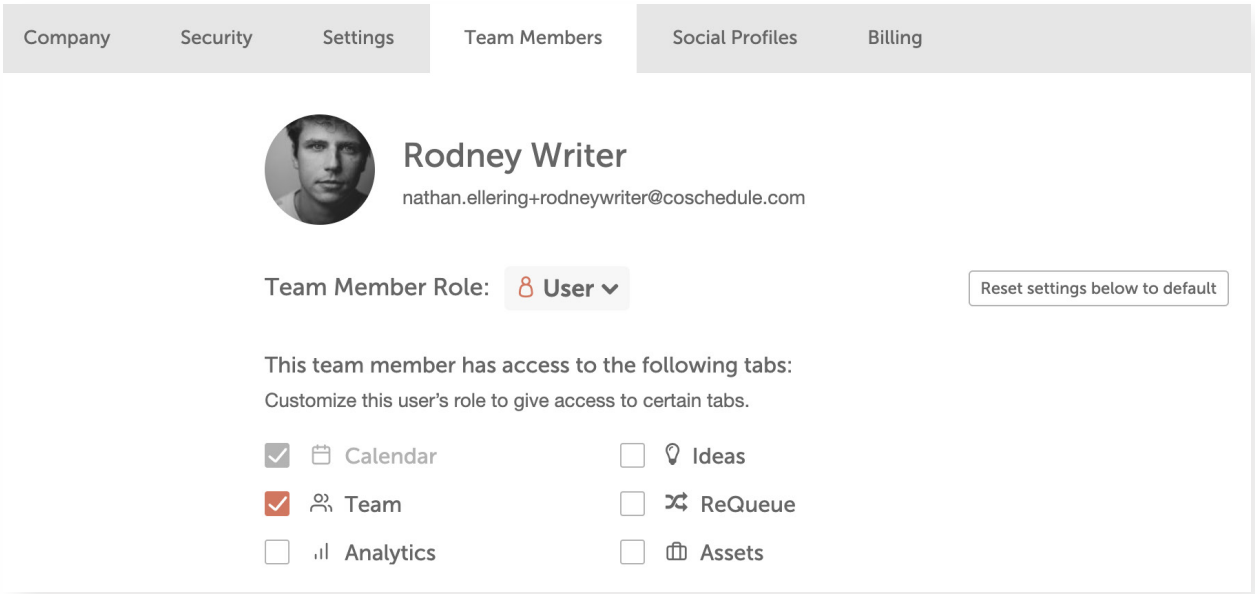
Best Practice: Social media is a powerful tool for marketing, but not everyone needs to access it. We recommend giving Social Media Coordinators access to **The Asset Organizer** so they can easily find documents; **The Team Dashboard** to Plan their daily work, and **ReQueue** to get better ROI on their social media efforts.



Copywriters

Use Case: Copywriters need to manage their daily workloads and quickly see what tasks they need to accomplish.

Best Practice: Give your Copywriters access to the **Team Dashboard** so they can easily see what they need to work on.



Analysts

Use Case: Marketing Analysts need to manage their daily workloads and quickly see what tasks they need to accomplish and need to see data in CoSchedule to pull reports when necessary.

Best Practice: Give your Analysts access to **The Team Dashboard** so they can easily see what they need to work on, as well as **Analytics.**

