

Chapter 2:

Take Control of Your Process With Your Marketing Calendar





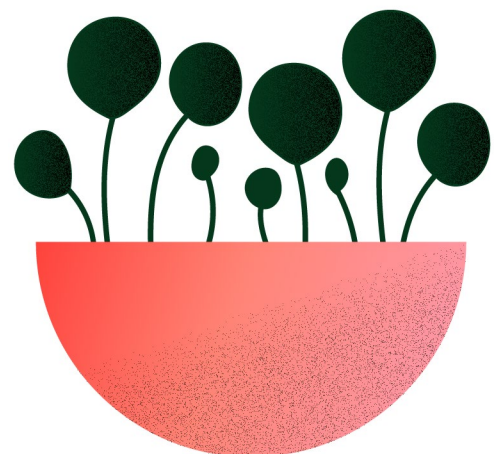
In This Lesson

Change The Status Of A Project

Choose Your Color Labels

Apply Color Labels To Your Marketing Calendar

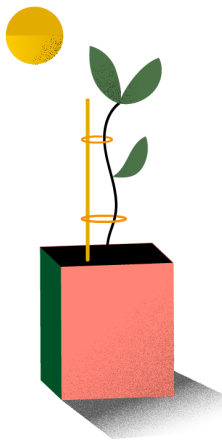
Bonus Step: Apply Additional Metadata To Your Projects



Core Concept: Get Your Process In Order

When you suffer from a lack of process, it can feel like your to-do list & projects are out-of-control.

It feels impossible to define your priorities or know when projects will be done. In this chapter, you'll learn how to use your CoSchedule Marketing Calendar to get a solid marketing process in place.



What is this guide?

This lesson will walk you through how to use CoSchedule Marketing Calendar to see all your projects & social messages on a single calendar.

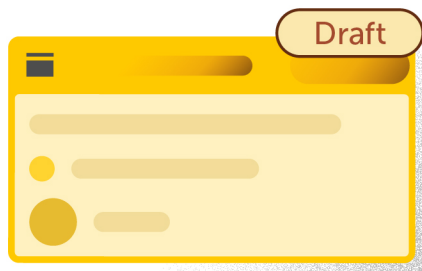
Who is this guide for?

Marketers who wear many hats and struggle to coordinate their marketing work as their task list grows.

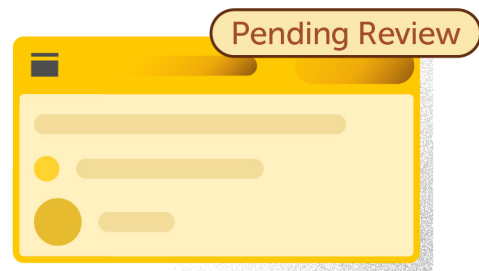
Change The Status of a Project

The Project Status shows what you are working on, and when it will be published. This helps you prioritize your work, and keep things from going live before you are ready.

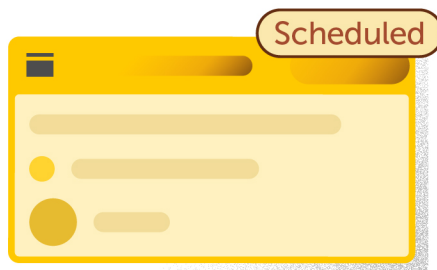
There are four statuses in your Marketing Calendar:



Draft - Project WILL NOT publish or go live. Best used when the project is still in progress.



Pending Review - Project WILL NOT publish or go live. Best used when a project needs to be approved by another individual.



Scheduled - Project WILL publish or go live at the time scheduled. Best used when a project is completed, but will go live at a future date/time.

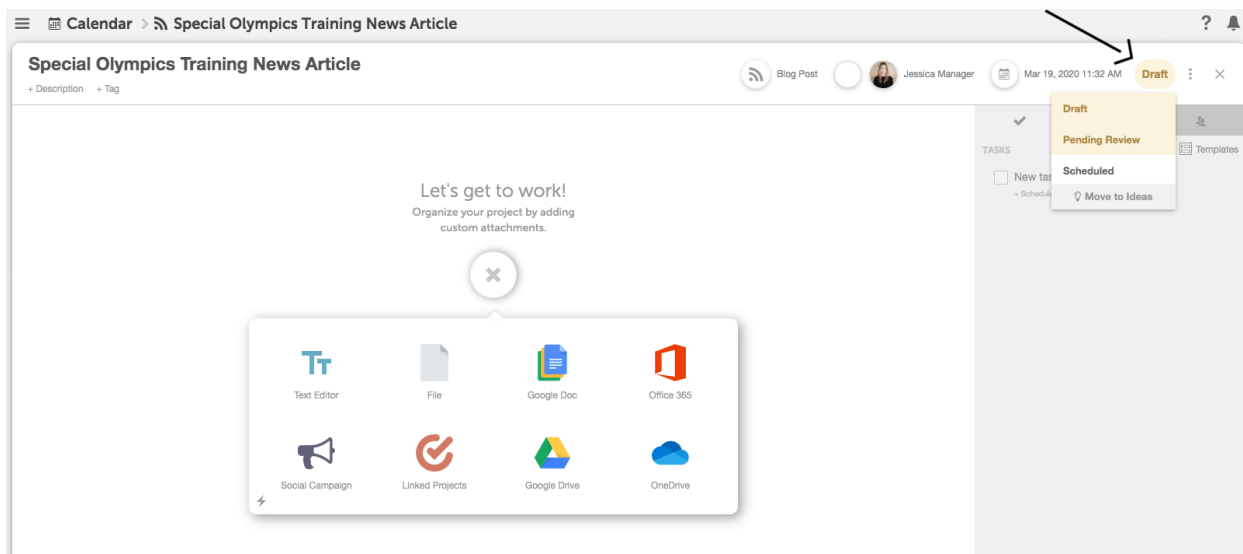


Published - Had been published, sent, or is live on your website/social media channels. Best used to mark which projects have been fully completed by your team.



To change the status of a project:

1. The Project Status shows what you are working on, and when it will be published. This helps you prioritize your work, and keep things from going live before you are ready.
2. There are four statuses in your Marketing Calendar:



Choose Your Color Labels

Color labels are the most powerful way to add visual organization to your calendar. Customize your labels to match what is most important to your company or add visual hierarchy to your calendar.

Here are a few of the most common ways people use them:

Color Only: Use this if you want a simple way to add visual hierarchy to your calendar.

- Purple
- Yellow
- Blue
- Green

Region: Use this if your team creates marketing materials for different business regions.

- West
- Midwest
- Southeast
- South

Product line: Use this if your team creates content to promote different product lines.

- Gardening
- Lawn Care
- Snow Removal
- Landscaping

Department/Team: Use this if you need to quickly see which department marketing projects serve.

- Sales
- Demand Generation
- PR
- Product Marketing

Client: Use this if you're an agency and need to divide your work by client.

- Country Table Foods
- Lynx Machinery
- Johnson Ag Products
- Red Tree Electric



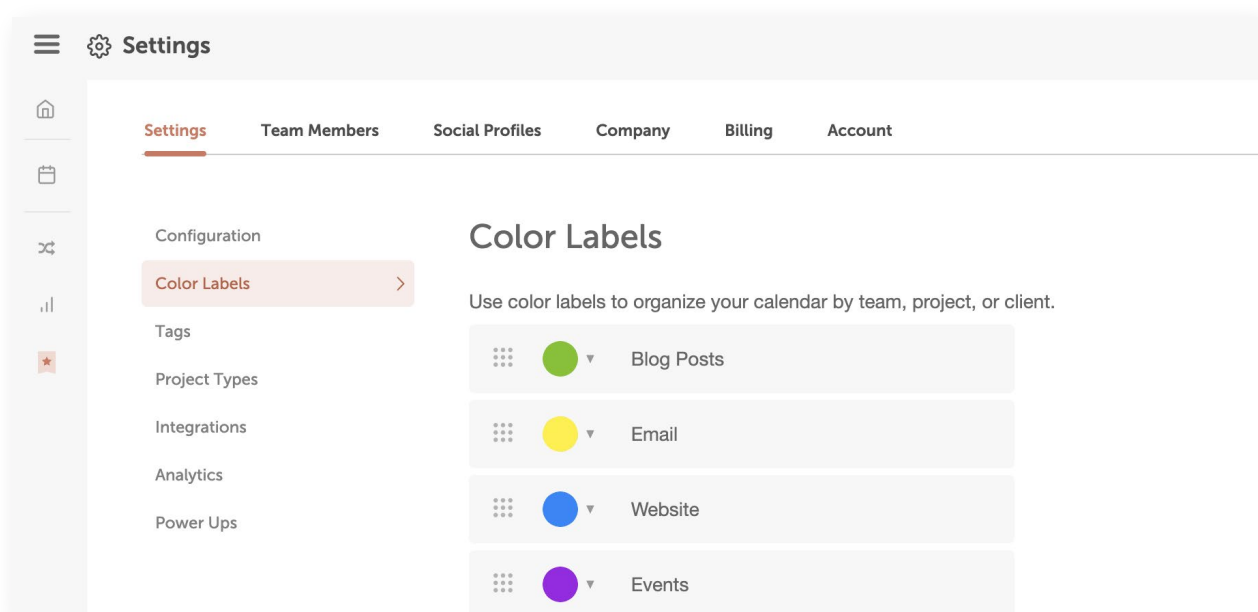
Onboarding Milestone: *Customize Your Calendar*



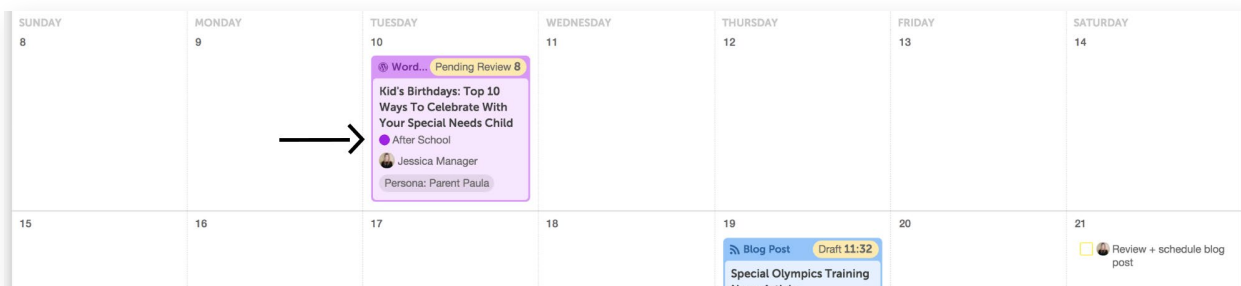
Apply Color Labels To Your Marketing Calendar

To set up color labels:

1. Click the Settings button in the left-side panel.
2. Select Color Labels from the menu list under Settings.



After you've set up color labels, you can apply them to your projects to visually distinguish between different projects on your calendar.

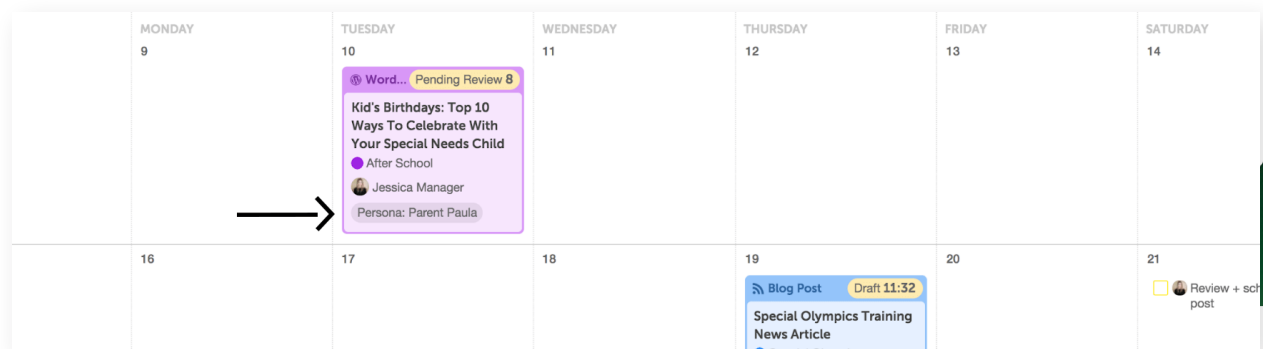


Bonus Step: Apply Additional Metadata To Your Projects

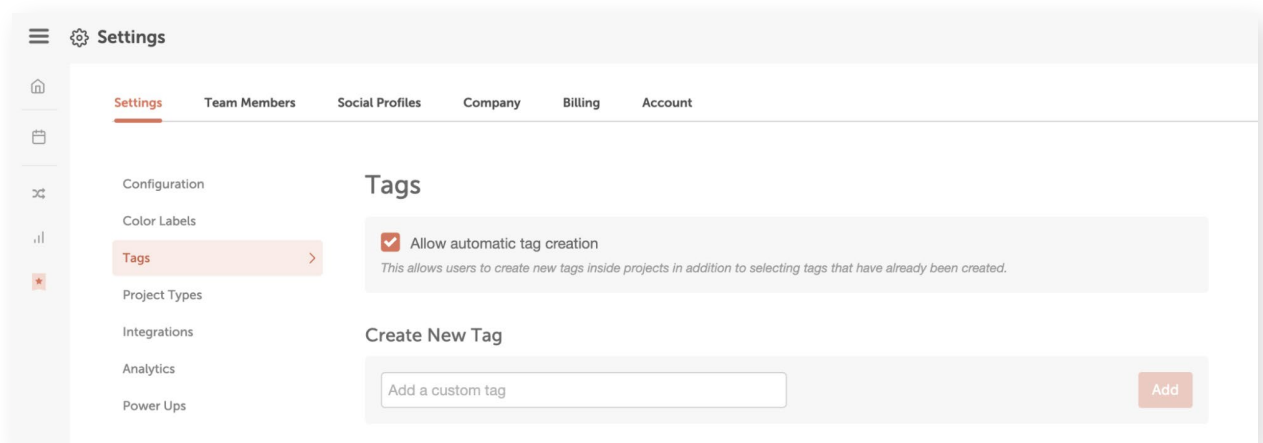
Aside from color labels, there are additional descriptors you can add to your projects for even better visibility.

Tags

Tags build an added layer of information on top of your color labels. Use tags to quickly see which projects contribute to various goals, target audiences, or initiatives at a glance.

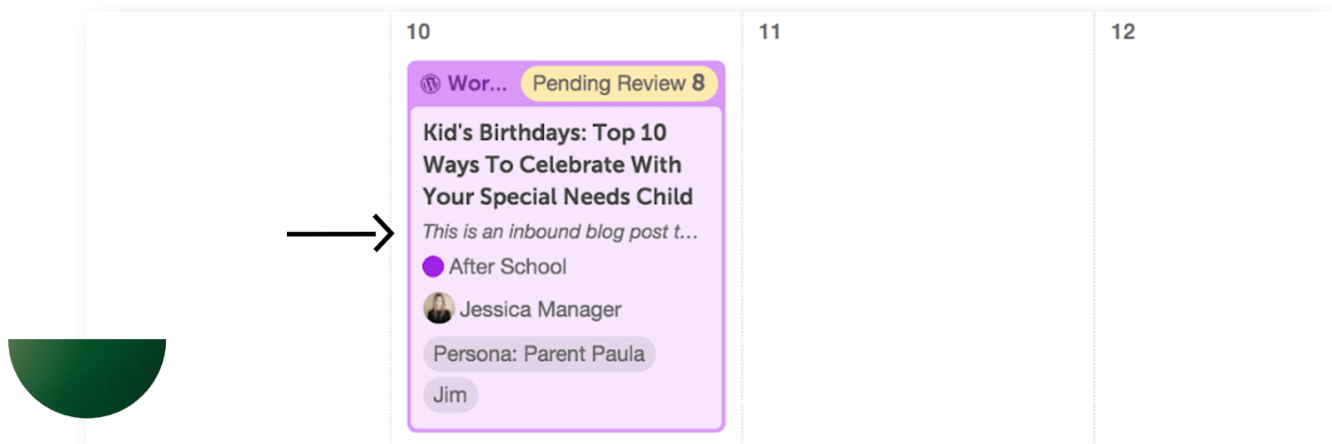


Tags are automatically added to your calendar when you add a new tag inside any project. You can manage your list of Tags by going to the "Tags" section in your Settings.



Descriptions

Use Project Descriptions to add more context or details to a specific project's Project Card. This helps you quickly know an important summary of your project.



Descriptions can be added by clicking "More Options" when creating a new project or below the project name within a project card.

**Start Implementing Your
New Marketing Process**

[GO TO MY CALENDAR](#)

