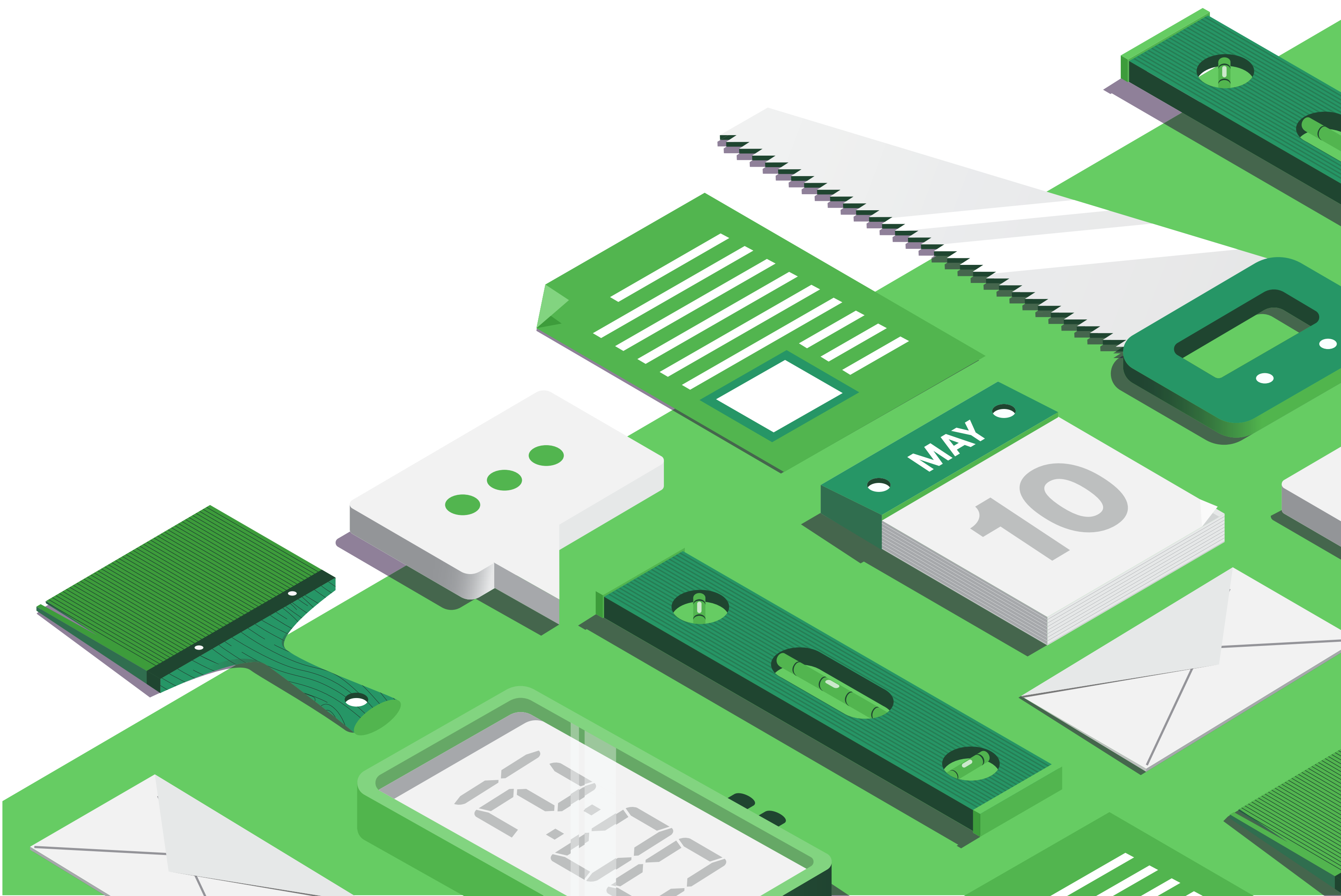
CoSchedule

THE NON-PROJECT MANAGER'S

Guide To Marketing Project Management



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CoSchedule on Marketing Project Management

CoSchedule is a family of agile marketing products that will help you stay focused, deliver projects on time, and make your team happy.

Put Your Knowledge Into Practice With These Templates

This book references templates and resources you can download. They're important for learning how to implement the processes outlined in the following pages. You can find them here:

https://coschedule.com/marketing-project-management-book

Get even more actionable advice on marketing project management, workflow development, strategy, and execution with regular updates from the CoSchedule Blog.

Visit and bookmark the CoSchedule Blog here.

Book Design: Danny Kvale

Also By CoSchedule

Agile Marketing: How to Get Started and Do Your Best Work

The worlds of business and marketing are changing. New technologies are empowering companies to respond to customer demands more quickly and with better data-driven insights than ever before. Those can adapt and execute with speed and precision will enjoy the benefits, while those trapped in an old-school business-as-usual mindset risk becoming irrelevant.

This means marketers must move with the flow of progress too. How can managers make sure their teams are able to keep pace with their competition while remaining flexible enough to adjust to an unpredictable future rather than simply guessing at what might come next?

The answer lies with agile marketing.

How to Create a Marketing Strategy That Will Skyrocket Your Results By 9,360%

Tasked with creating a marketing strategy but don't quite know where to start? It can be tough to know where to begin, and trust us, we've been there before too. That's why we created this comprehensive and easy-to-follow guide to developing and documenting marketing strategies that work. It's based on the same first-hand experience that has helped build CoSchedule into a leader in the marketing software-as-a-service industry.

Read and download the complete guide here.

The 10X Marketing Formula: Your Blueprint for Creating 'Competition-Free Content' That Stands Out and Gets Results

This book's title tips off the premise: WE'RE AFTER 10X MARKETING RESULTS. This means the return we expect, and are resolved to achieve, is ten times over what we put in. We aren't looking for 10 percent year-over-year growth; we're laser-focused on blowing the roof off last year's, last month's, and last week's numbers.

TO DO THIS REQUIRES A MINDSET SHIFT. You can't expect 10x results from copying everyone else. What worked for someone else isn't a guarantee to work for you. This means drafting a binder full of charts and best guesses and calling it a marketing plan is doomed to fail. It's too crowded and the world moves too fast for "copycat marketing."

This book is about finding those strategic shortcuts. It's about short-circuiting the path to jaw-dropping growth. YOU HAVE TO FIND YOUR OWN WAY – and the 10x-Marketing Formula is that path.

Buy the 10X Marketing Formula here or download chapter one (email signup required).

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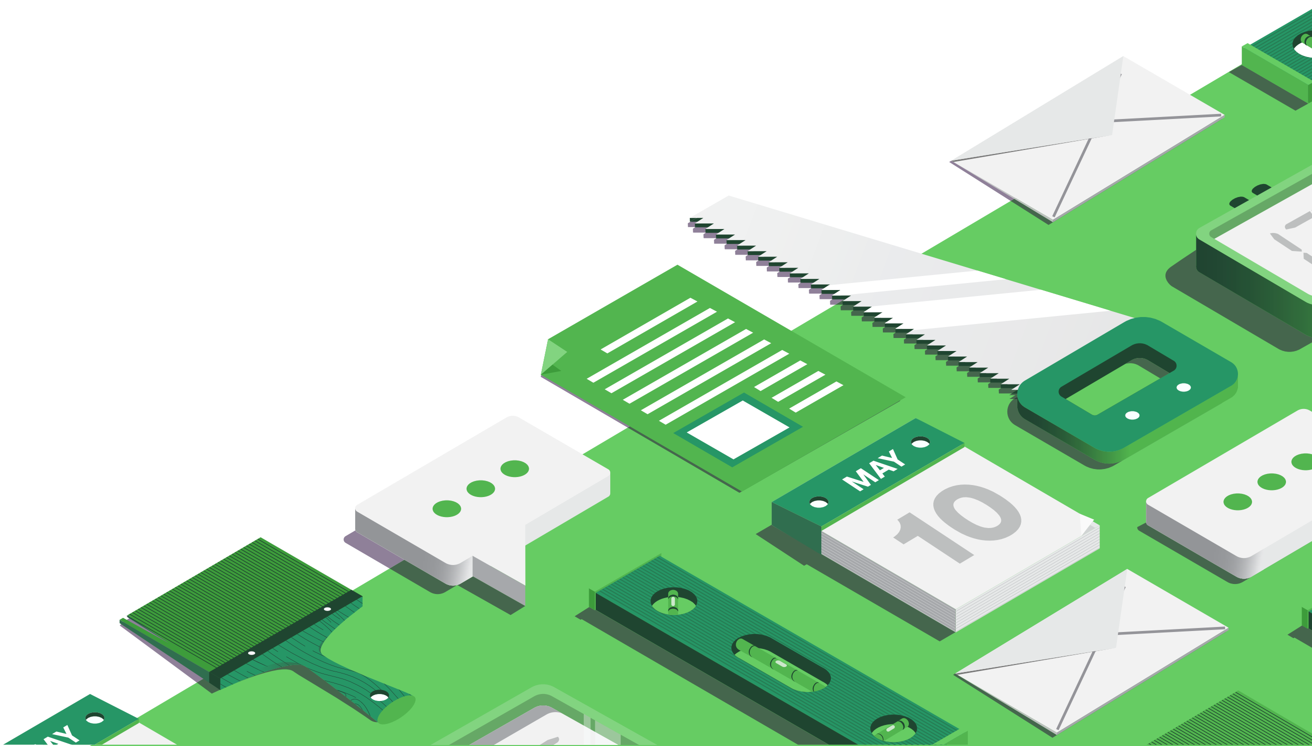
AN INTRODUCTION TO

Marketing Project Management Planning



An Introduction to Marketing Project Management Planning

NOTE: This chapter references downloadable templates to help you apply what you learn. They can be found here.

Project management can be intimidating at first. As marketers, we are often more comfortable executing work, rather than managing how it gets done. If that sounds like you, you'll need to develop new skills to keep our teams and processes organized.

There's a lot to learn, too. Planning project phases, allocating resources, and overseeing workflows is challenging. It's worth the effort, though, and developing strong organizational and leadership skills is invaluable.

Think about it like planning a trip. You need to know where you're going before you start driving, right? Otherwise, you're liable to get lost and waste time. The same applies to marketing campaigns, too. If your goal is the destination, then you need a guide on how to reach them.

That's where project management plans come in.

They're your roadmap toward success, helping teams visualize how to achieve success, from start to finish. Best of all, they don't have to be difficult to document. In this chapter, you'll learn several key components of planning marketing projects and campaigns, including:

- **How to map marketing timelines** from ideation to measurement.
- **What makes checklists so valuable** for keeping projects on track.
- **The best way to develop processes** that build consistency into your marketing operations.

By the time you're done, you'll be coordinating projects with the best of 'em.

What is a Project Management Plan (and Why Should Marketers Care)?

This chapter will work with the following definition:

Project management plans are simple workflow timelines. They map out what is necessary to complete a project, including tasks, deadlines, and resource requirements. When they're properly implemented, marketingt teams can plan their work, then work their plan.

Time spent planning yields significant benefits. Consider these statistics:

- According to one study from PriceWaterhouseCoopers, **only 2.5% of organizations complete 100% of their projects.**
- A report from The Standish Group, **90% of companies use some sort of project retrospective process to assess performance.**
- Aditi Consulting says **three in five projects companies execute are not relevant to their business strategy.**

These findings can teach us a few things:

1. **Failure to plan is planning to fail.** Without proper project management processes in places, things tend to not get done.
2. **Marketers need to prioritize the right projects.** Lots of companies spend more time looking busy than delivering value. Marketers aren't excluded from this trap, either.
3. **Reviewing results is key to long-term success.** When things go right, it's important to understand why they worked. This can help you build repeatable processes to duplicate positive results again and again.

First, Validate Whether the Project Is Worth Executing

It's easy to spend a lot of time looking busy. However, doing work that drives results is much more difficult. Unfortunately, marketers often spend too much time on non-essential tasks that distract from doing meaningful 10X work.

Answer these questions before moving forward:

1. **Is this project part of our overall marketing strategy?** If not, then what is its purpose?
2. **Will completing this work result in ___________?** What will this project help accomplish?
3. **Would our time be better spent on something else?** If the answers to questions one and two aren't clear, this third question is worth considering.

Once you have the green light to proceed, continue onward.

Create a Simple Creative or Project Brief

It's easier to visualize success when your team knows what it needs to produce. A simple project brief should include the following:

- **A Description of the Project**

  What does this project need to look like when its done?

- **The Objective Or Goal**

  Why is this project being completed?

- **A Rough Estimate Of How Long It Will Take**

  Do you have a rough estimate for how long this project will take?

This doesn't necessarily need to be complicated. What's important is that everyone working on the project understands what the team needs to achieve.

Next, Understand the Three Elements of Successful Project Planning

Project management plans form the bedrock of successful workflows. When everyone knows what needs to be done, completing work on time becomes easier.

There are three essential elements every project plan should include:

1. **Project Phases**

   What does this project look like when mapped out from start to finish?

2. **Tasks and Steps**

   Team members will need checklists to ensure no steps are missed.

3. **Available Resources**

   Who will complete each step? How much budget will they receive? Will they need other assets?

Planning Project Phases

How many phases will the project move through from ideation to execution? That's what you need to figure out first. For a marketing team, this may look like this:

- **Ideation**
  A campaign or project will need an idea. It may start with a brainstorming session.
- **Research**
  Next, the team will need to do research. This may include uncovering keywords, interviewing customers, or other steps relevant to the project.
- **Execution**
  Now, it's time to actually do the work.
- **Measurement**
  Did the project meet its goals?
- **Retro**
  What went well? What went wrong? How could the process be improved to ensure success next time?

This is a hypothetical example, of course. But, you get the idea. From start to finish, define every phase of the project.

How can you figure out your own project phases? Start with some simple questions:

1. **What Is The First Thing Your Team Needs To Do?**
   Identify the first thing that needs to be done, before any other work becomes possible.
2. **What Is The Most Logical Next Step?**
   In some cases, this will be obvious. For example, writing comes before design or development.
3. **How Can We Minimize Steps and Complete The Project?**
   If there are phases that don't add value, cut them out.

By the time you're done, you should have a clear overview of your project phases.
Recommended Reading: Why CoSchedule is the Best Project Management Software for Marketers.

Listing Tasks and Steps

Each phase will likely require multiple steps to complete. Using the example project phases above, you might have the following tasks under ideation:

1. Review brainstorm notes.
2. Read through audience persona.
3. Browse competitor's content.
4. Conduct keyword research.
5. Create an outline.

This includes all the steps for the first phase of the project. Duplicate the process to create checklists for the following phases, too. Eventually, you'll have every task for each phase mapped out.

Allocating Resources

Marketing departments often operate under constraints. This could mean limits on budgets, tools, or team members.

The goal: figure out the best way to complete the project with your available resources.
First, you need to determine who will complete each step, during each phase. In some cases, this may be obvious.

Writers write. Designers design. Coders code.

But, if you have multiple team members performing each role, you'll need to think through their assignments. Follow these steps:

1. **Assess who is available on your team.** Review your marketing calendar or upcoming projects to see who has availability.
2. **Assign the best fit to each task.** If someone has a particular talent or strength in a given area, give them the tasks they'll excel at.

Next, make sure everyone has the resources they need to succeed. This could include:

- **Budget**
  This is particularly important at agencies, where time literally equals money.

- **Tools**
  Do they have the right software to finish this project? Is it time to consider adding new tools?

- **Time**
  How much availability do team members have? How urgent is the project? When is your deadline?
  `

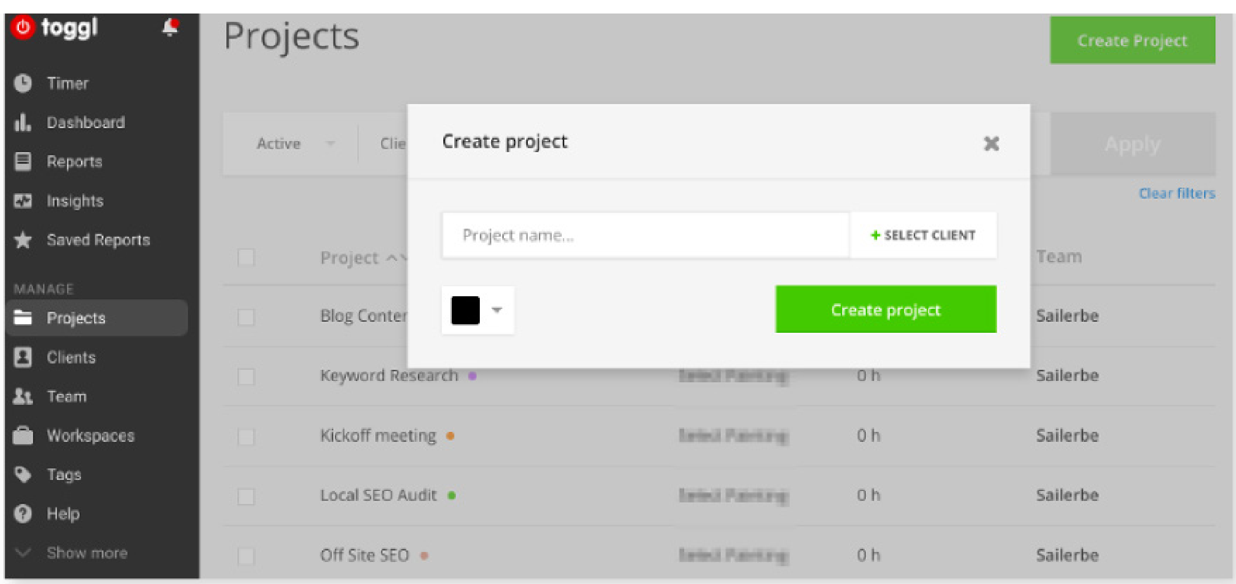
Identify the Scope of Your Project

This step entails creating timelines and setting deadlines. Without effective scope management, projects can expand out of control (this is commonly called **scope creep**). That leads to missed deadlines, busted budgets, and other un-fun problems.

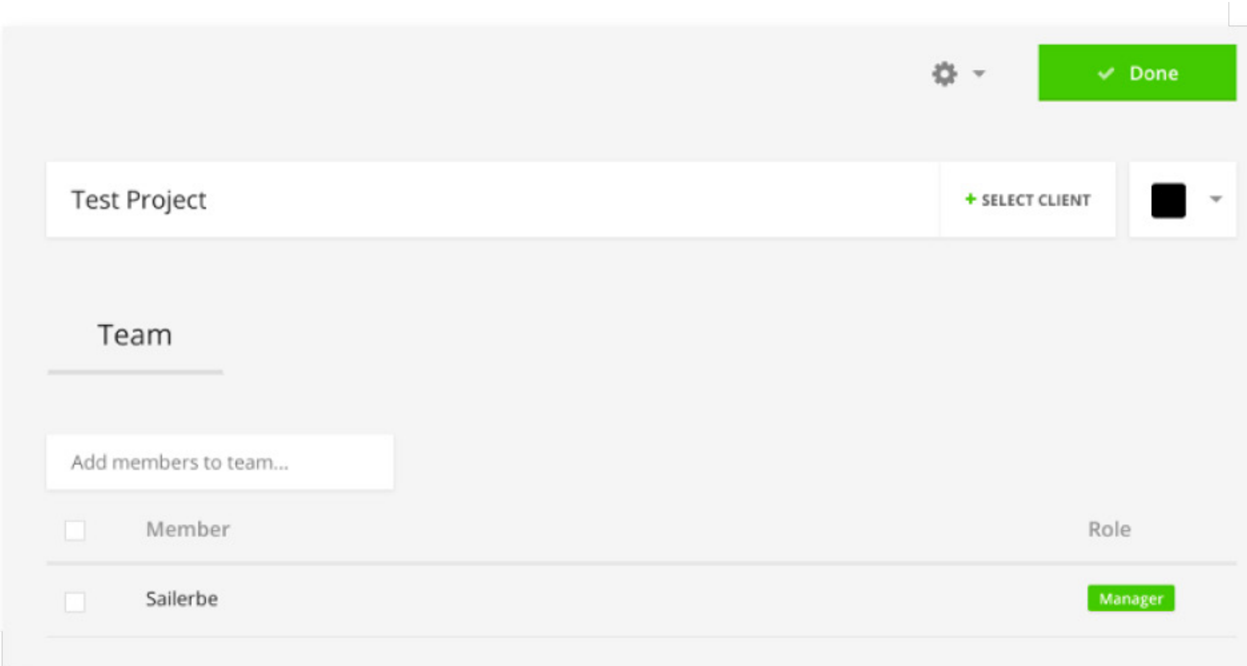
Estimate How Long Each Task Will Take

The best way to accurately estimate time is to track how long work takes. You can do this using a time-tracking tool like Toggl. Their basic plans are free, and it's easy to use. Have each team member follow this process.

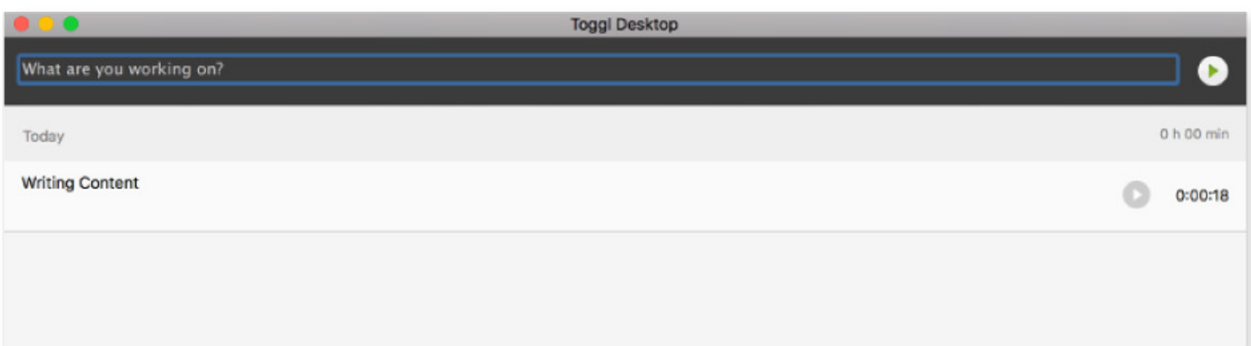
1. Create a Toggl account. Then, create a new Project:



2. Add all your team members:



3. Have each team member time their work using the Toggl web, desktop, or mobile apps:



Over time, this will help team members estimate time more accurately. Start with rough estimates for now, then lean on your data to better assess how long work will take.

List Necessary Tasks for Every Step and Team Member

Go through every phase in your project and list every single step.

Ideation

- Conduct brainstorming meeting.
- Sort through potential ideas.
- Refine concept.

Research

- Review brainstorm notes.
- Read through audience persona.
- Browse competitor's content.
- Conduct keyword research.

Execution

- Create an outline.
- Write first draft.
- Review and edit.
- Revise draft.
- Hand off for graphic design.
- Review design.
- Optimize for search engines.
- Schedule publish date.

Measurement

- *Gather data using Google Analytics and other reporting tools.*
- *Analyze data to extract meaningful insights.*
- *Prepare report and share findings.*

Retro

- Review what went well.
- Review what went wrong.
- Plan action steps to improve next time.

Do This With CoSchedule: CoSchedule users can create reusable project checklists with Task Templates. See how they work.

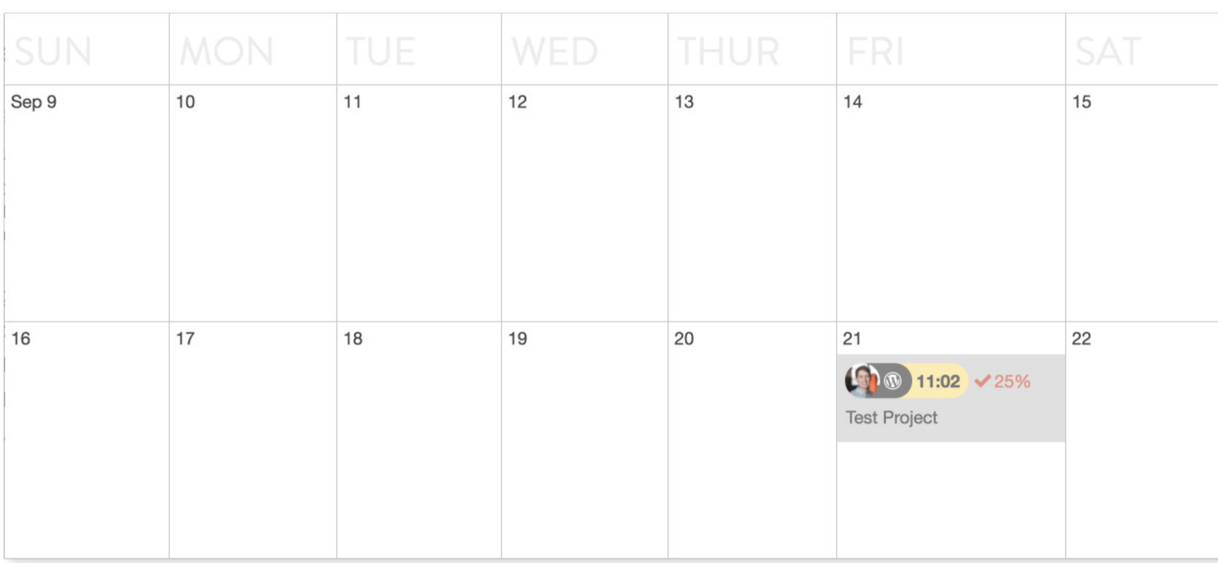
Set Deadlines According to the Time Required

Once you know how long each step will take, it's time to set deadlines. Go back to the earlier example demonstrating how to plan a piece of content. Here are those steps one more time (with time estimates added):

- **Review brainstorm notes (30 minutes).**
- **Read through audience persona (30 minutes).**
- **Browse competitor's content (2 hours).**
- **Conduct keyword research (2 hours).**
- **Create an outline (1 hour).**
- **Write first draft (3 hours).**
- **Review and edit (1 hour).**
- **Revise draft (1 hour).**
- **Design (4 hours).**
- **SEO (1 hour).**

This adds up to sixteen hours of total work. Using a marketing calendar, mark off an appropriate deadline. For the sake of example, let's say this project needs to be done in two weeks.

That's a reasonable amount of time, considering the team will have other projects, too. This means that starting from Sept. 10, the deadline would be Sept. 21 to leave enough time for everyone to finish their work:



Turn Your Tasks and Deadlines Into Checklists

You can build these checklists any way you like. **What matters most is that use checklists at all.** Science has proven they're extremely effective for ensuring even the most complex projects are completed correctly.

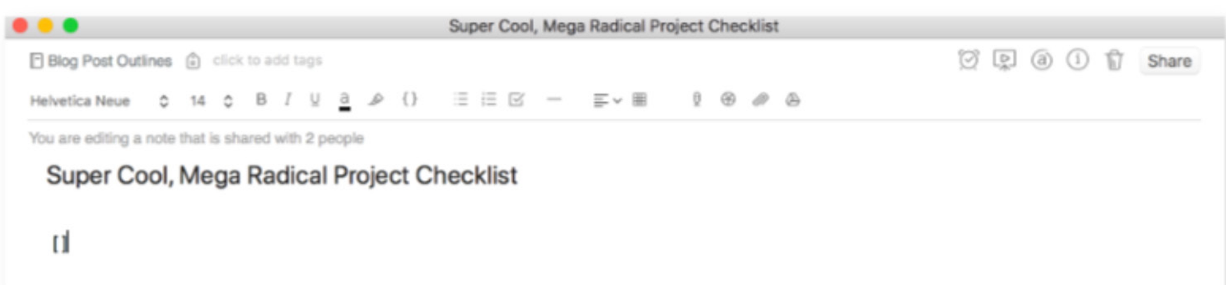
In fact, the famous surgeon and author [Atul Gawande]() wrote an entire book on this subject. Titled The [Checklist Manifesto](), it shows how powerful they can be (and in the operating room, they can literally save lives). He was concerned that advances in medical technology hadn't made surgery safer.

And what helped most? The humble checklist.

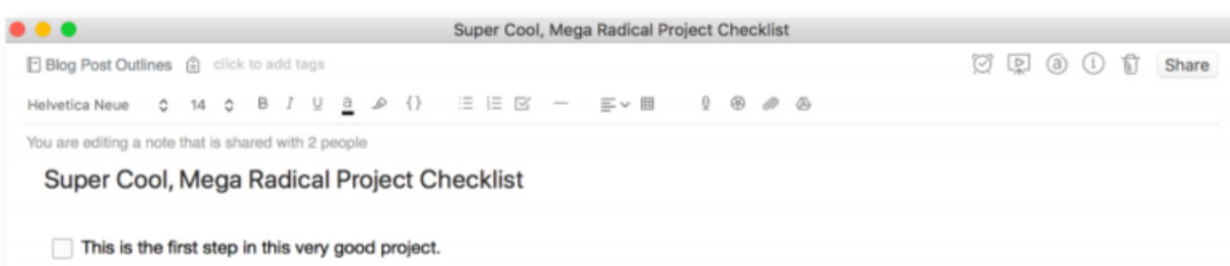
If your marketing projects are consistently going off the rails, they may be the magic bullet you need. After all, if they're good enough for surgery, they're good enough for marketing.

One possible checklist creation option is [Evernote](), which works well for teams thanks to its collaborative nature ([it also integrates with CoSchedule]()).

Simply create a shared note ([and consider creating a notebook for each project]()). Then, as you list each step, **use a pair of brackets [ ] before each step:**

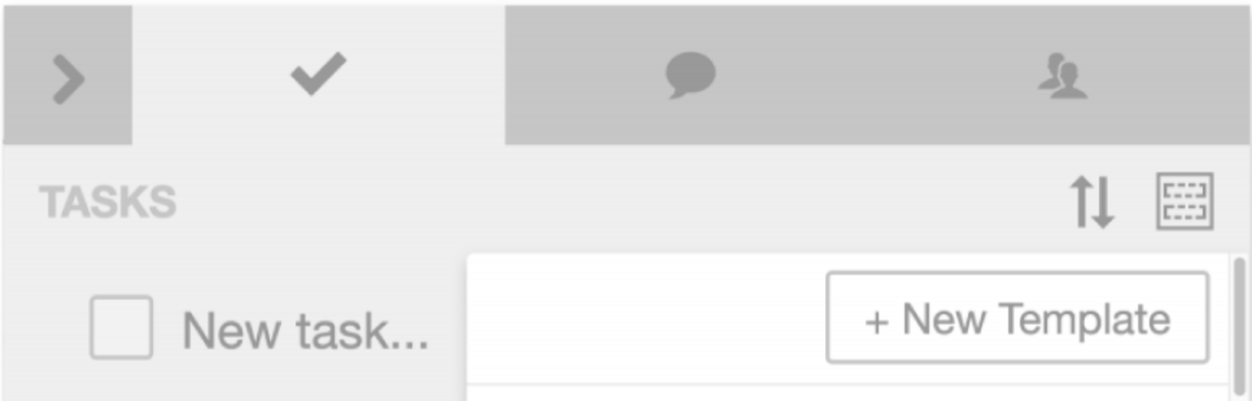


This will automatically **turn each set of brackets into a clickable button:**

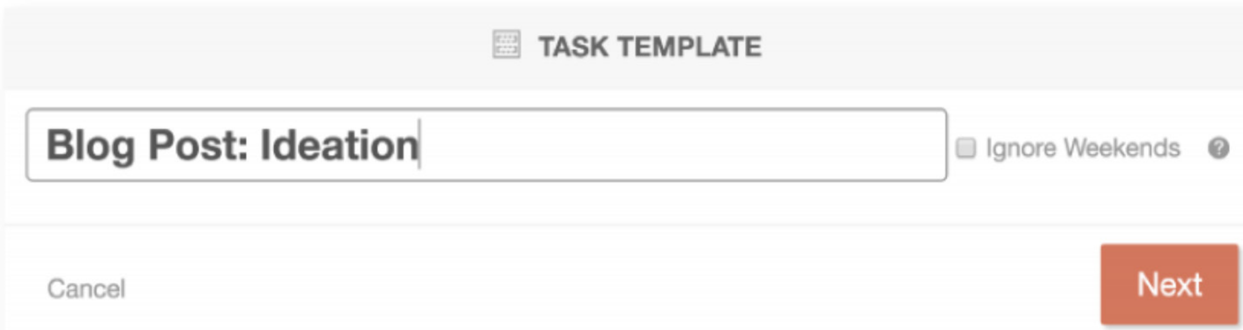


Continue until you've **built an entire checklist.**

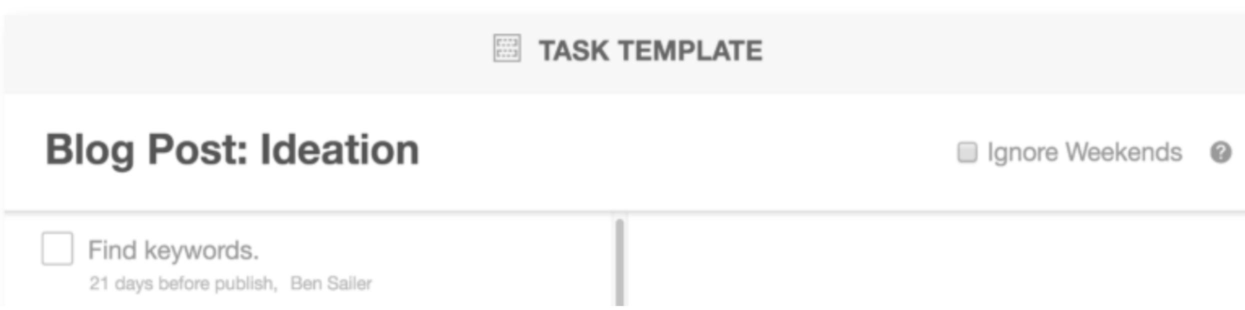
Alternately, **CoSchedule's Task Templates** make this easy as well. Create a project on your CoSchedule calendar. Then, under Tasks, click the Task Template Picker, then New Template:on yourCoSchedule calendar.



Next, give your checklist (Task Template) a name:

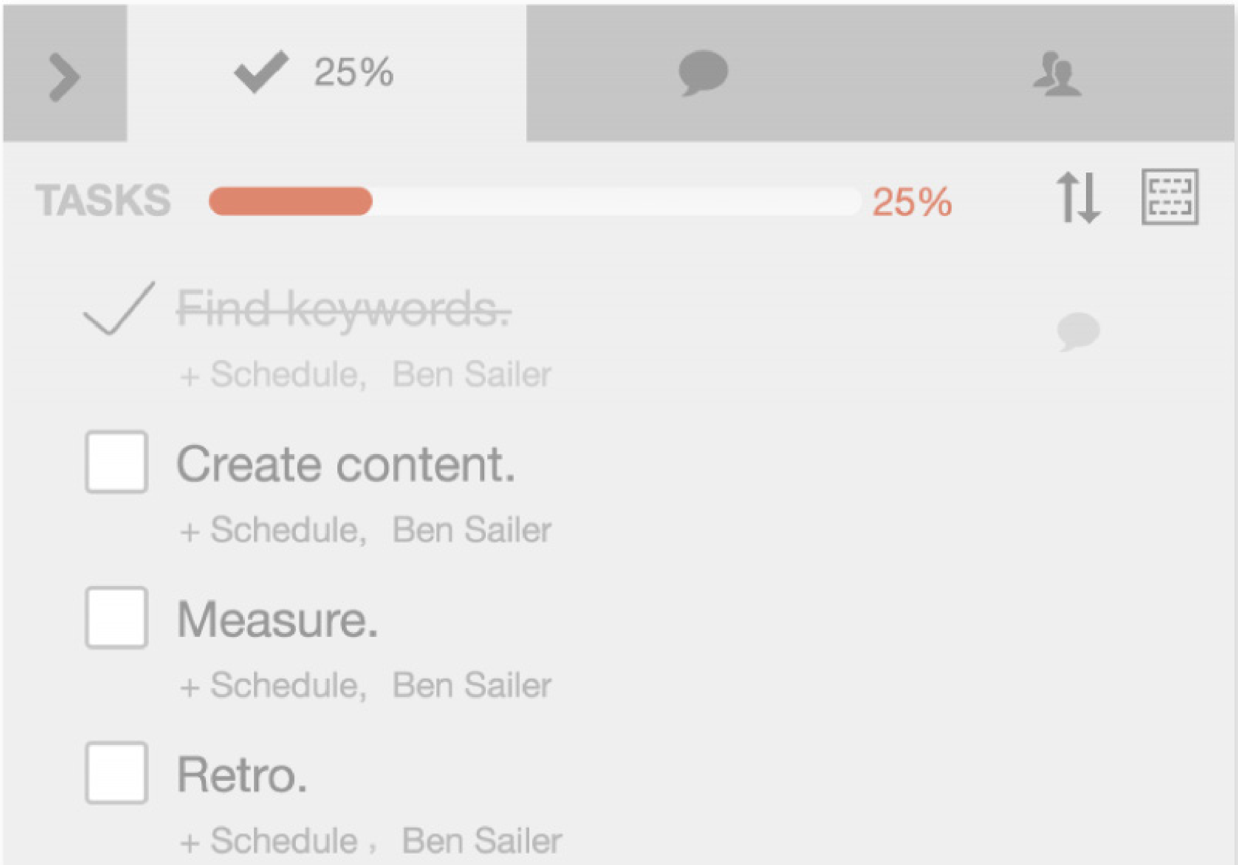


Now, add each step, assigning default team members and timelines:



When you're done, click **Close**. This will save the checklist so you can use it again in the future. Busy project managers, editors, and supervisors will also appreciate this: **clicking each step will indicate project progress status automatically.**

Look at this quick example Task Template. Since the first item of four is checked off, CoSchedule displays the project as 25% complete:

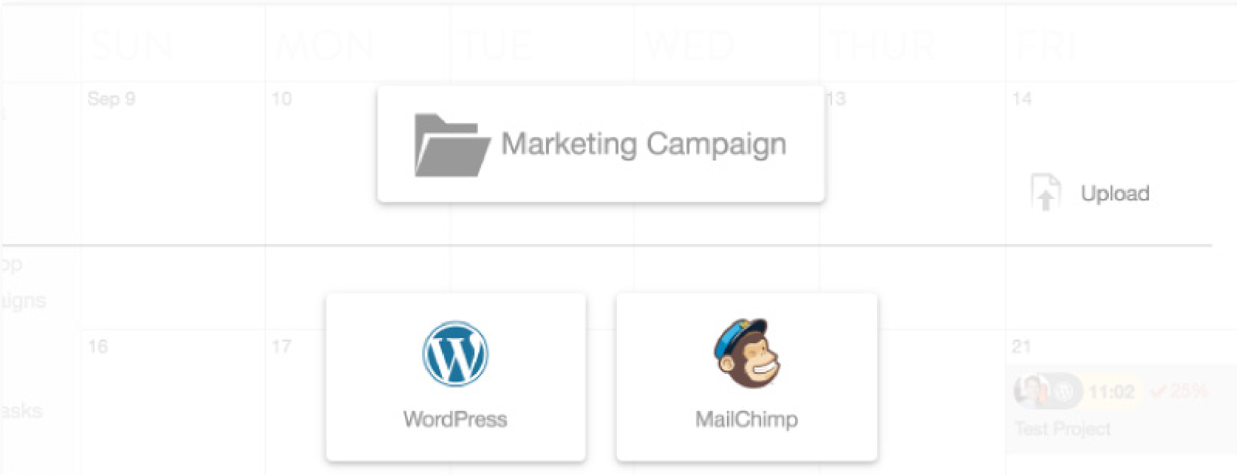


This figure also displays on the calendar. The benefit? **You can visualize project progress across your entire marketing calendar at a glance:**

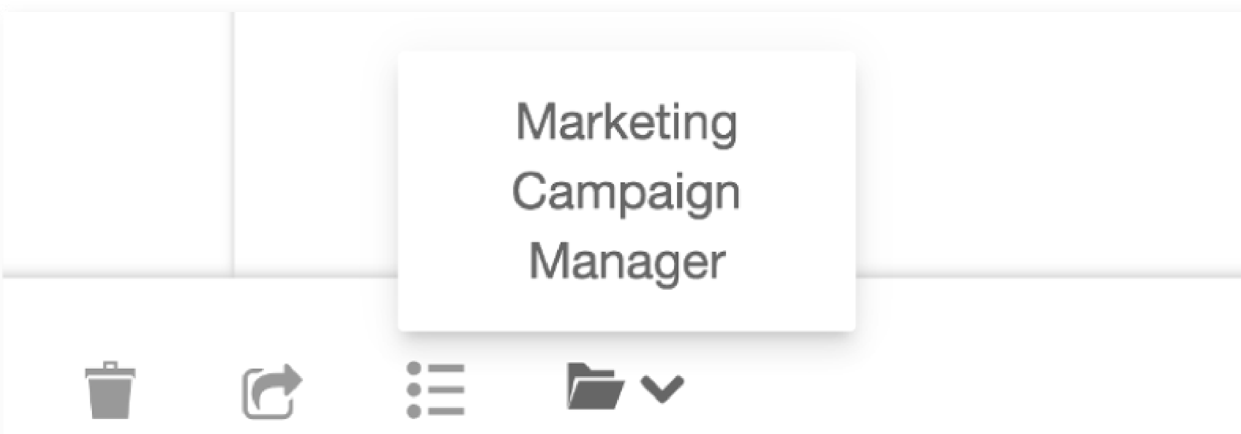
Put Together Timelines Mapping Out Each Phase

Next, place each phase onto one contiguous timeline.

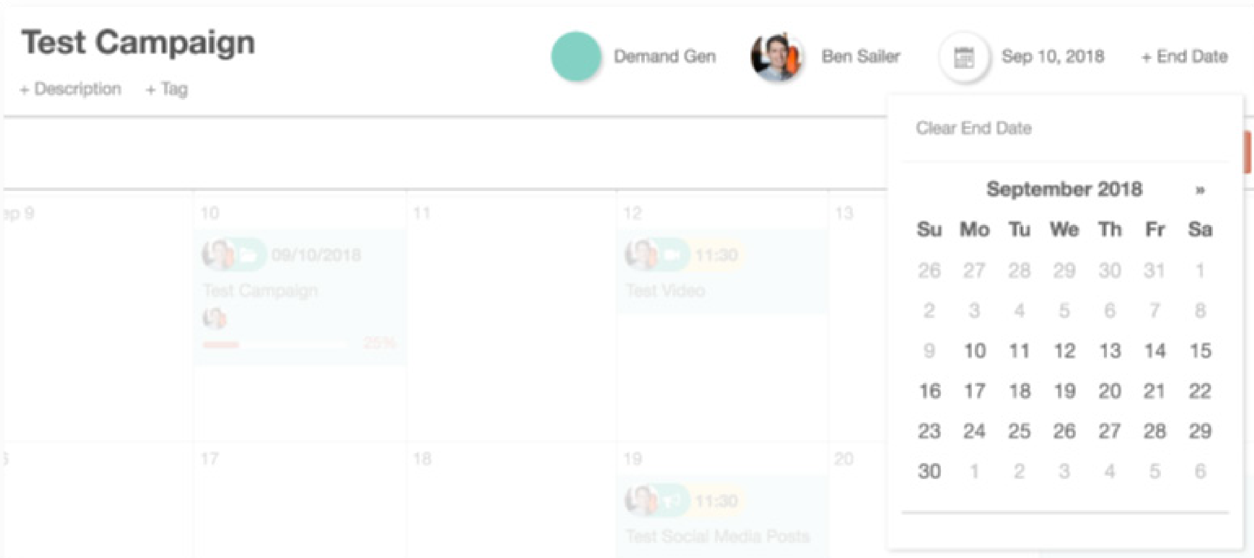
Create a [Marketing Campaign] in [CoSchedule] to visualize the entire project on the marketing calendar. When you select a day on your calendar, this will be the first available content type:



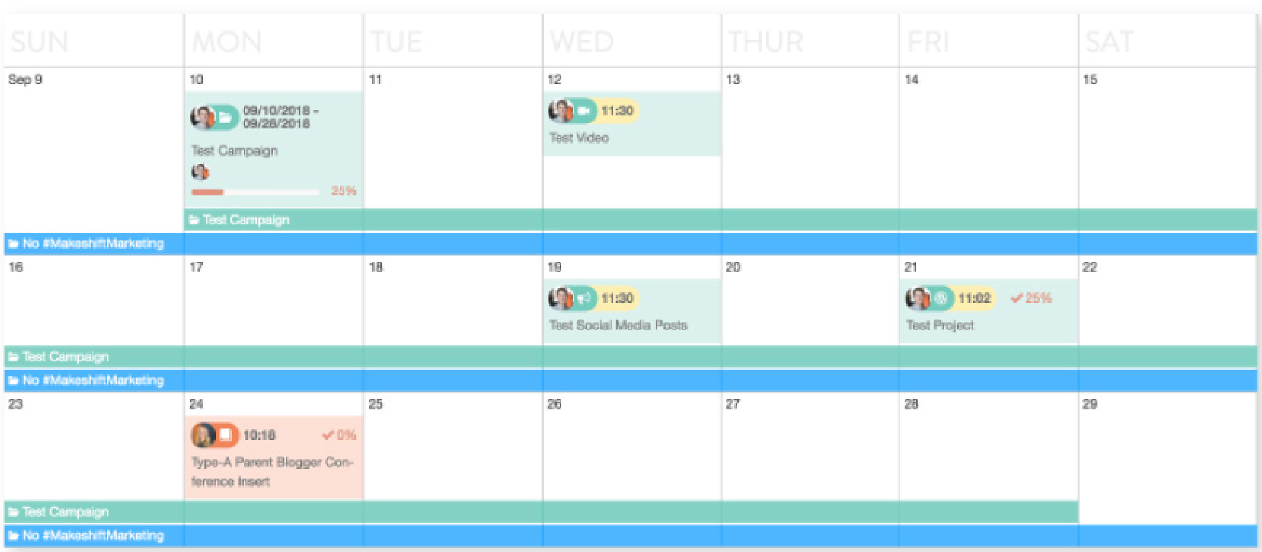
Then, add each project on the calendar to the campaign. To do this, click into the project, then click the Marketing Campaign Manager button at the bottom (it looks like a folder):



Next, click the pencil near the top to edit your campaign and **add an end date:**



When you're done, the campaign will be visible as a horizontal color bar across the calendar. Each campaign will have its own color bar (determined by your chosen [color label](#)):



This is an easy way to keep the entire process organized. You can see every project and campaign, along with their completion status, in one place. The benefits: **full transparency, tons of saved time, and less project management stress.**

Now, It's Time to Execute Your Plan

So far, you've set up everything you need to execute the project. Now, it's time to manage the process from start to finish.

Track Project Progress

As your team works through the project, **make sure they're hitting their deadlines.**
You can do this by scheduling regular check-in or scrum meetings (if you use agile processes).

Set up a recurring meeting (either daily or weekly) using Google Calendar. If you're a CoSchedule customer, you can also integrate your account with Google Calendar, so your meetings will appear alongside everything else.

In each meeting, ask the following questions:

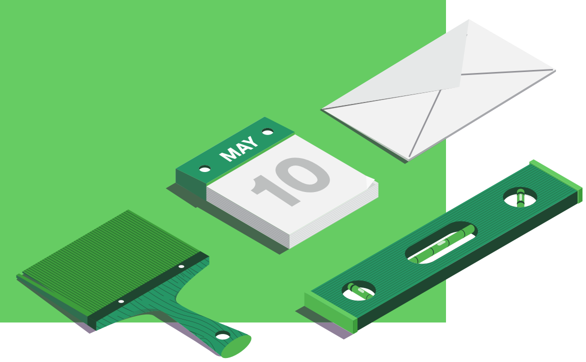
- **What is everyone working on today?**
  The team's answers should match your calendar.

- **How is each project progressing?**
  You should be able to see this on the calendar, too. But, direct communication is good, to ensure everyone is on the same page.

- **Are there any roadblocks?**
  If there are problems preventing the project from moving forward, raise those concerns now. Then, figure out how to solve them.`

Three Questions To Ask
In Every Morning Marketing Meeting

1. What is everyone working on today?
2. How is each project progressing?
3. Are there any roadblocks?



Maintain Team Communication and Collaboration

As the team continues its work, make sure everyone is communicating clearly. It helps to have the right tools for this (rather than relying on email. Here are some options:

- **Slack / HipChat**
  These are both popular chat apps, and odds are, your company uses one of them.

- **CoSchedule**
  Each projects features a [Discussion Thread](). These make it easy to keep notes, trade files, and organize communication.

- **Walking Across The Office**
  Sometimes, old-fashioned face-to-face conversations are best. Make sure to note anything important that you don't want to forget.

Gauge Team Productivity

If your plan is effective, everyone should be hitting their deadlines, and the project should be completed on time. But, it's important to make sure this is actually the case. Assume nothing!

10 INTERESTING

Office Productivity Statistics

1. **75% of American workers** don't believe they have access to the latest efficiency-boosting technology.

2. Employees who believe their workplace effectively uses mobile tech are more **creative, satisfied, and productive** at work.

3. Creative tasks that generate an **emotional response** encourage novel thinking and work dedication.

4. The top 10% of productive employees tend to work, on average, **52 mintues** before they take a break.

5. On average, employees spend **31 hours** per onth in meetings.

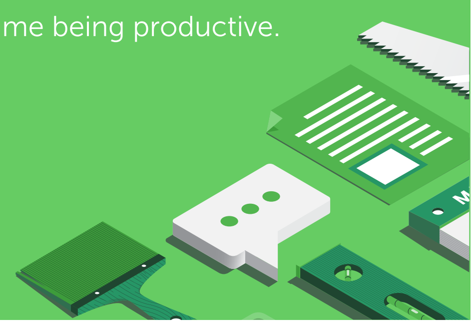
6. Employees receive **304 business emails**, on average, per week.

7. Unnecessary emails waste **$1,800** worth of productivity, per employee per year.

8. 73% of employees do **unrelated** work during meetings.

9. The average employee experiences **56 interruptions per day.**

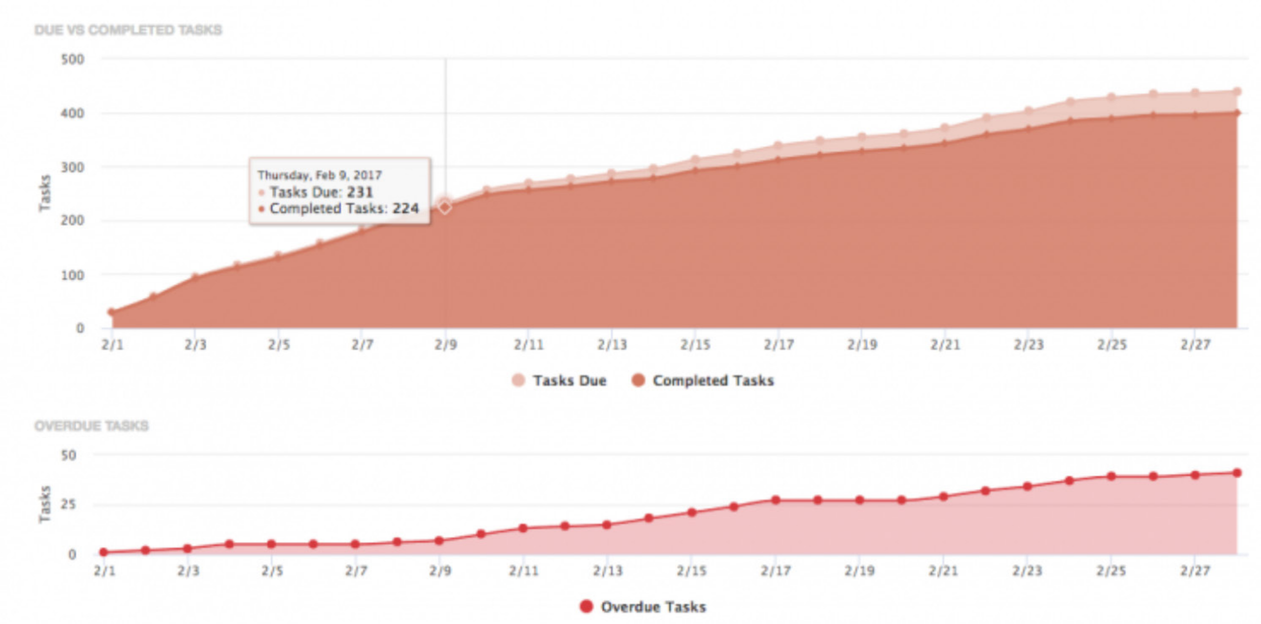
10. Employees spend **less than 60%** of their time being productive.



The consequences of poor project planning and workplace structure are clear. It literally costs **companies money**.

So, each day, make sure all project deadlines are being met. If they're not, and no one has volunteered to explain why, seek out the individual falling behind. Then, ask if there's an issue, or if they simply couldn't get the work done on time.
The key to keeping these conversations productive is to keep them limited. That means both in time elapsed, and in overall number. Don't take people's time unless there's a real reason to do so.

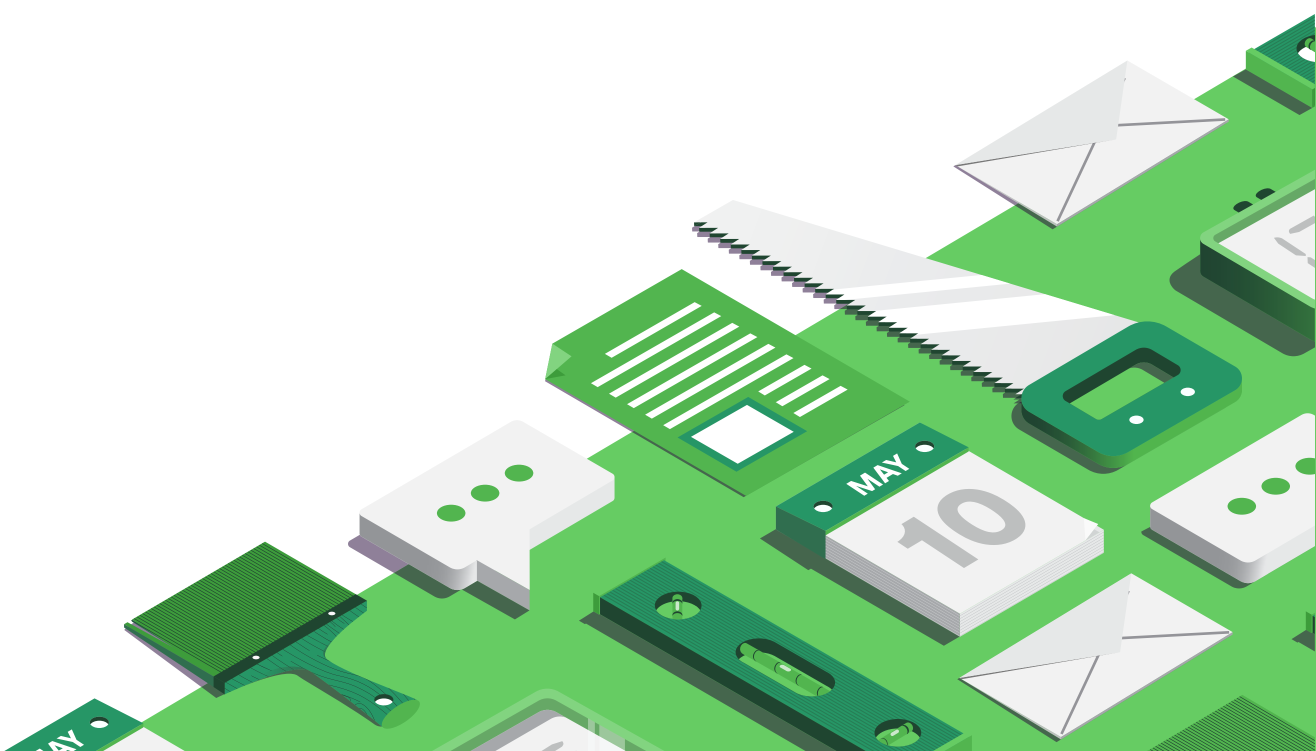
You can also do this with CoSchedule using [Team Performance Reports](). Each time an item on a Task Template is checked off, it tracks whether it was done on time, or not. The report then displays each team member's percentage of tasks completed on time:



Chapter 2

A COMPLETE 16-STEP

Marketing Project Management Process



A Complete 16-Step Marketing Project Management Process

NOTE: This chapter references downloadable templates to help you apply what you learn. They can be found here.

What if you could help your marketing team do more in less time?

It's a simple question that leaves a lot to dream about:

1. **You'd be awesome.** Like riding a unicorn over a rainbow kind of awesome.
2. **Your team and company would love you** because you'd finally get everyone organized, on the same page, and focused on super meaningful work.
3. **Your team and company would love you** because you'd finally get everyone organized, on the same page, and focused on super meaningful work.

Ah, the good life.

But, there are some challenges to overcome first.

For starters, project management can feel overwhelming. There are a lot of moving parts that need to be accounted for, especially when managing multiple projects and team members.
Fortunately, you're about to learn the secrets behind strategic marketing project management that will help you:

1. **Work even faster and collaborate better than ever** by managing your projects with an efficient process from the get-go.
2. **Focus 100% of your resources** on the right projects instead of "we've always done it that way" tasks that don't add measurable growth to your bottom line.
3. **Boost your productivity** while getting organized and taking control of your entire process.

You can be a successful marketing project manager.

What Is Marketing Project Management (For The Sake Of This Chapter)?

The traditional project management method is split into phases:

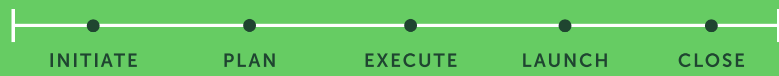
- **Initiate**
  What is the scope of what you'll create?
- **Plan**
  How will you create your content and with what resources?
- **Execute**
  Create your content.`
- **Monitor and Control**
  Identify and remove any roadblocks that are preventing you from executing.
- **Close**
  Get approval, publish, and review.

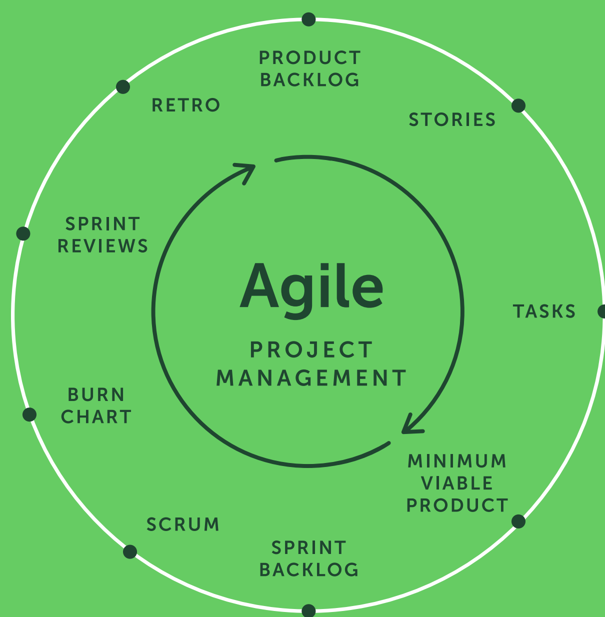
That is the approach traditional project managers learn about as they get started.
However, there's a way to layer in another proven project management method to help you move through the phases even faster. It's called agile project management.

This process is how developers typically approach creating software (like your beloved CoSchedule project management platform). Agile product management helps developers complete lots of work in short bursts of time by providing intense focus and removing obstacles that might cause them to miss deadlines.

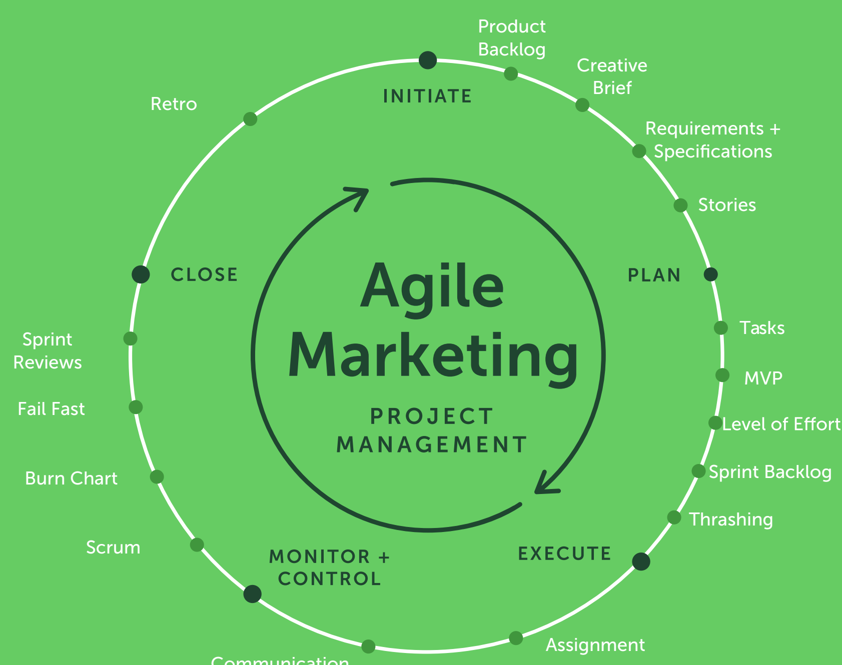
Traditional

PROJECT MANAGEMENT





Combine Traditional Project Management and Agile Product Management to a complete, 16-step marketing project management process.



So, for the sake of this chapter, you're going to combine traditional project management and agile product management together to create marketing projects more efficiently than ever before. Here's your definition:

> Marketing project management is the efficient process that helps you organize, create, and publish your content as fast as possible.

The beautiful thing is that you can use this process for planning any type of content—and you should.

Let's get into the details:

Initiate Your Marketing Project By Defining The Purpose

NOTE: This chapter references downloadable templates to help you apply what you learn. They can be found here.

What if you could help your marketing team do more in less time?

It's a simple question that leaves a lot to dream about:

Step 1:
Choose The Highest Priority Project From Your Marketing Project Backlog

Part of the agile project management process involves creating and maintaining a product backlog. For your purposes, that's a fancy definition for a prioritized list of marketing projects.

Project management starts by strategically choosing to complete the highest priority project on your list. Since that's the case, we wrote an entire post to help you create your own marketing project backlog:

What you're reading right now assumes that you've chosen one project and that it's your highest priority for 10x growth.

Step 2:
Explain The Project Background With A Creative Brief

You may already have detailed notes from your marketing project backlog to help you implement your biggest priority project. If not, there are a handful of things to get straight before you get too much deeper:

- **Who Will This Project Benefit The Most?**
  Pinpoint a subset within your audience.
- **What Do You Need To Create?**
  Define the end deliverable.
- **Why Will This Project Benefit The Audience You've Specified?**
  Write your value proposition that answers your audience's question, "What's in it for me?"
- **What Kind Of Resources Might You Need To Complete The Project?**
  Estimate the time and tools involved.
- **What Does Done Look Like?**
  Help your team know what you'll accept as a successful final product.

> **"Your creative brief shouldn't be TL;DR. The operative word is 'brief'."**
>
> —LEAH DEKREY, COSCHEDULE

The background will serve as the foundation for all of the remaining steps in your project management process.

As you write your creative brief to answer these questions, you'll immediately be able to spot areas of potential challenges that you can work to resolve now—**before your team starts executing the project.**

For example, if you need a developer's help to create a landing page or don't have a budget to complete the work, now is the time to solve the roadblock before slowing up your entire team as they take on the project.

Step 3:
Define Your Project's Requirements To Fulfill The Business' Needs

Requirements are the standards your content needs to meet before you publish. Every marketing project may need different requirements, yet some examples to help you brainstorm your project's requirements should include:

- **Automation**
  Is this a way to automate a part of this project to prevent manual work during execution or afterward? Anything to cut out unnecessary, tedious manual work a robot could do will immediately boost your productivity.
- **Elimination**
  Can this project eliminate something else you're doing as a new and improved replacement? Removing work from your future to-do list will help you find time to execute even more projects from your backlog a whole lot faster.
- **Maintenance**
  How can you make this project as successful as possible now with the least amount of daily, weekly, or monthly maintenance? Think 10x growth now that continues to provide long-term results without having to touch it.

All of those may sound similar.

But let that advice soak in a bit more as you look at your project idea and break down what you want it to do to benefit your team and business. If you can create requirements based on those three fundamentals, you will save you and your team time during and after project execution.
And when you don't have time to spare, that matters a lot.

Another way to look at this is by defining a set of requirements your content must meet before you publish.

For example, we've analyzed data to help us define standards of performance for our content. These standards literally help us predict how successful the content we execute will be based on four requirements:

- **Topic**
  Is the topic similar to your other top-performing content? Is the angle something your audience deeply cares about?

- **Keyword**
  Does the main keyword have high search volume and low competition? Is there an opportunity to include latent semantic indexing to help even more of your audience naturally find this content through search engines?

- **Research**
  How can you include deep research in this content to publish something the internet has never seen before? How can you use research to factually back up your claims?

- **Comprehensiveness**
  How can you tell the most complete story on your topic on the internet?

You could apply this standard of performance to your project, or you may find your most successful content has different traits that make it awesome. The point is to really define what the project will look like before you start working.

In project management terminology, a set of requirements is called a specification. So, if you follow this guide, you will have two specifications (time-saving specification and content specification) with multiple requirements under each.

If you think of more requirements, you can plan even more specifications for your projects. These two specifications are just a minimum viable starting point to produce successful content.

Step 4:
Write Your Stories To Focus The Project On An Audience-Valued Outcome

Stories are how you'll put yourself into your audience's shoes to focus on how the project will benefit their lives instead of just creating a deliverable.

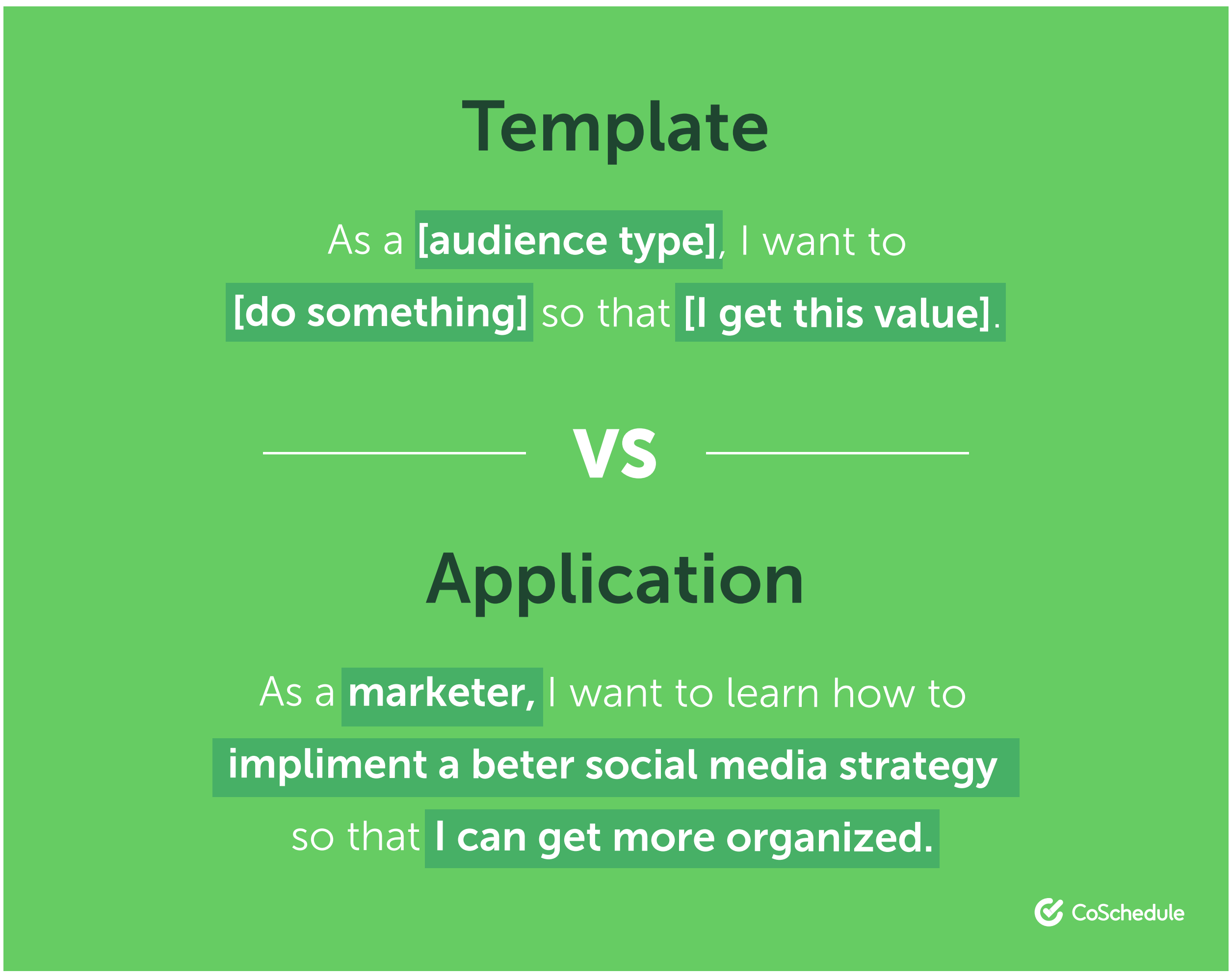
Unlike traditional storytelling, these stories help define requirements of satisfaction. It's like asking yourself, "How will my audience benefit from this project?"

Here's the template of how to think about stories:

As an {audience type}, I want to {do something} so that {I get this value}.

For example, let's say the project you want to take on is a new e-book about content strategy that you'll publish on the Amazon store to reach a new audience. One story for your project may look like this:

As a marketer, I want to learn how to implement a better content strategy so that I can get more organized.



One project will likely have multiple stories to help you and your team understand your audience's needs. To continue the e-book example, a second story could help you write a specific chapter in the book:

As a marketer, I want to learn which types of content our team should create so that we can maximize lead generation from every campaign.

Since the e-book project example also requires you and your team to create additional content, you could also use stories to define your audience's needs for a deliverable like the landing page where you'll promote the e-book:

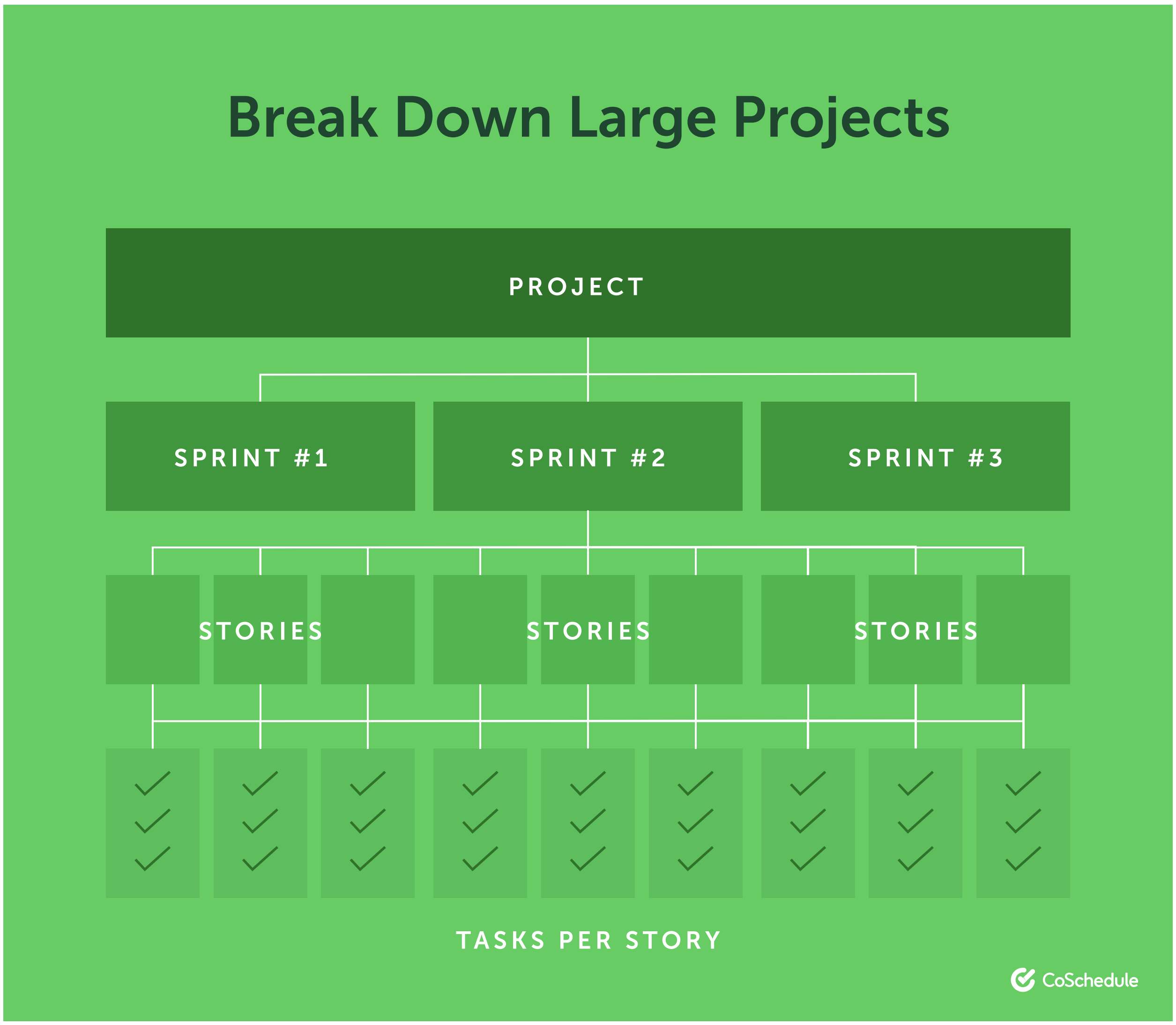
As a marketer, I want to be reassured that this ebook is worth my valuable time so that I can really reap the benefits it promises after I download the e-book.

Later, when you plan, you'll break down the stories into manageable tasks you can assign to individuals on your team.

Plan The Details Of Your Projects As Sprints

Step 5:

Break Your Stories Into Manageable Tasks Your Marketing Team Members Will Execute



Stories are something a team works on together, while you assign tasks to your team members. Tasks are important because they break down a large project—which may seem difficult to even know where to start—into manageable pieces. And tasks help you divvy up the work among your team to use your resources as efficiently as possible.

Let's look at an example story again for your ebook landing page:

> *As a marketer, I want to be reassured that this ebook is worth my valuable time so that I can really reap the benefits it promises after I download the ebook.*

To build a landing page that fulfills this story, you'll simply list the tasks you need to complete in chronological order:

1. Research landing page designs that convert.
2. Write the landing page outline based on the research.
3. Write the text.
4. Design the wireframe.
5. Design the landing page.
6. Develop the landing page.
7. Review the landing page.
8. Publish the landing page.
9. Promote the landing page.

You get the idea—the point is to break down a story into the step-by-step process you need to complete to check this story off your sprint backlog. Smaller tasks make it easier to estimate how much time it will take to complete the story (and subsequently, the project as a whole).

Step 6:
Thrash Your Project Into An MVP (Minimal Viable Project)

It's time to take a critical look into your stories. You want to find where you might have frivolous uses of resources that could be used better for creating a minimum viable project rather than an extremely polished deliverable.

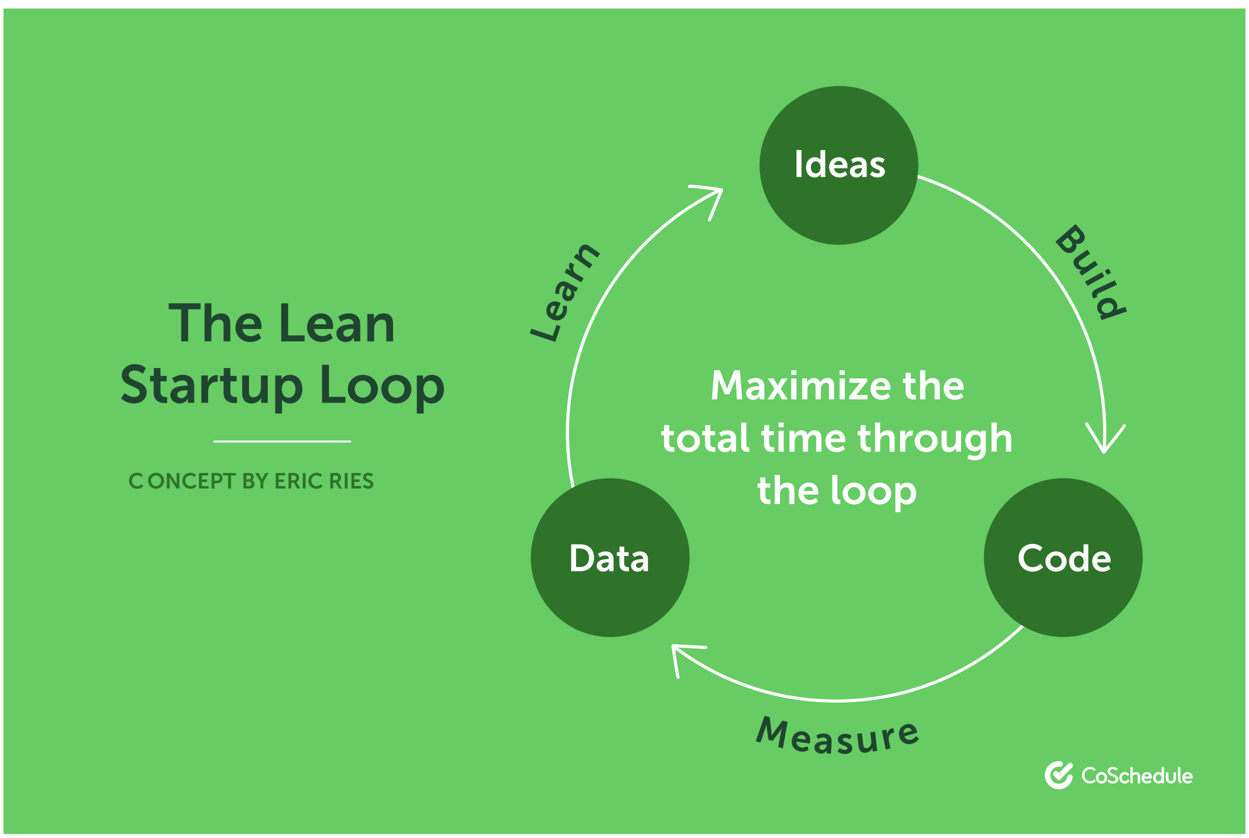
The real question here is this:

> *What stories or tasks could you cut to create a great project with the least amount of effort?*

You probably want your project to be the most perfect thing in your niche, so this question might seem counterintuitive at first.

However, the idea behind a minimum viable project is to eliminate risk by helping you:

1. Create and publish quickly
2. Measure your success
3. Learn to improve



You can steal the idea of an MVP by cutting excess stories and tasks that don't negatively impact your specifications. This will save your team valuable time during execution while helping you complete your project faster.

Step 7:
Estimate The Level Of Effort For Every Story

It's one thing to give your team a deadline to complete a project and another to know that the deadline is realistically achievable.

By understanding how much time each task takes to complete (and subsequently rolling that estimation into the story), you'll be able to further understand what stories or tasks you'd like to cut from your project to complete it quicker while also being able to set practical due dates.

To do this, you need to know two things first:

1. **Who Will Be Accountable For Completeing Each Task**

   These are the team members who'll work together to complete the stories.

2. **The Level Of Effort For Each Task**

   In other words, how much time will it take the person you'll assign the task to complete it?

For each task, write down who on your team you think is best suited to complete it the fastest. Then visit with each team member to ask how much time they'd estimate for every one of their tasks.

Step 8:
Plan The Scope Of Your Project As A Sprint Backlog

Scope helps you define how much work you'll complete in a certain amount of time. It's the big picture of the project.

Your marketing project may have many specifications and stories, so you may need to break the scope into phases, which agile marketers call sprints. Sprints often occur in two-week bursts in which you prioritize a specific number of stories to be completed.

Since you estimated the level of effort for each story—and understand how much time each individual needs to contribute—you can realistically plan your sprints and subsequently know your deadline when the project will be 100% complete.

Sprint	Level of Effort	Story #1	Story #2	Story #3
Sprint #1	1-10	Story #1	Story #2	Story #3
				CoSchedule

A great way to show your entire project scope to your team is with a project schedule—aka sprint backlog.

Step 9:
Demand That You Ship On Time

You know that your project will fulfill the specifications and stories. You also know your deadline is realistically achievable.

So make sure you publish on time by preventing project thrashing—otherwise known as scope creep and last-minute changes—before you begin executing.

Seth Godin has the best advice I've ever seen on this topic. Read Linch Pin to get the full scoop—and for your marketing project management, start here:

1. **Set the date when you'll publish.** This is when you'll launch your project no matter what.
2. **Involve others in your initiation and planning process and write everyone's ideas down.** This is important for your big wigs because, as Seth says, "This is their big chance."
3. **Show what you plan to do.** Give them the opportunity to thrash your plan before you start executing. Changes now are alright, but once your team starts executing, this thrashing will dramatically impact your deadline.
4. **Give them an opportunity for one final review.** Seth says, "Make sure everyone understands that this is the very last chance they have to make the project better."

5. **Revise the project blueprint** into a final, comprehensive outline.

6. **Show your plan to the big wigs** and ask, "If I deliver what you approved, on budget and on time, will you ship it?"

7. **Only start executing once you get your yes.** No maybes. Then deliver what you promised, thrash-free.

This simple process should prevent scope creep, last-minute modifications, and other nitpicking with small details because you've nailed the big picture.

Execute Your Marketing Project With A Clear Content Creation Process

Step 10:

Assign Tasks For Your Upcoming Sprint To Your Team

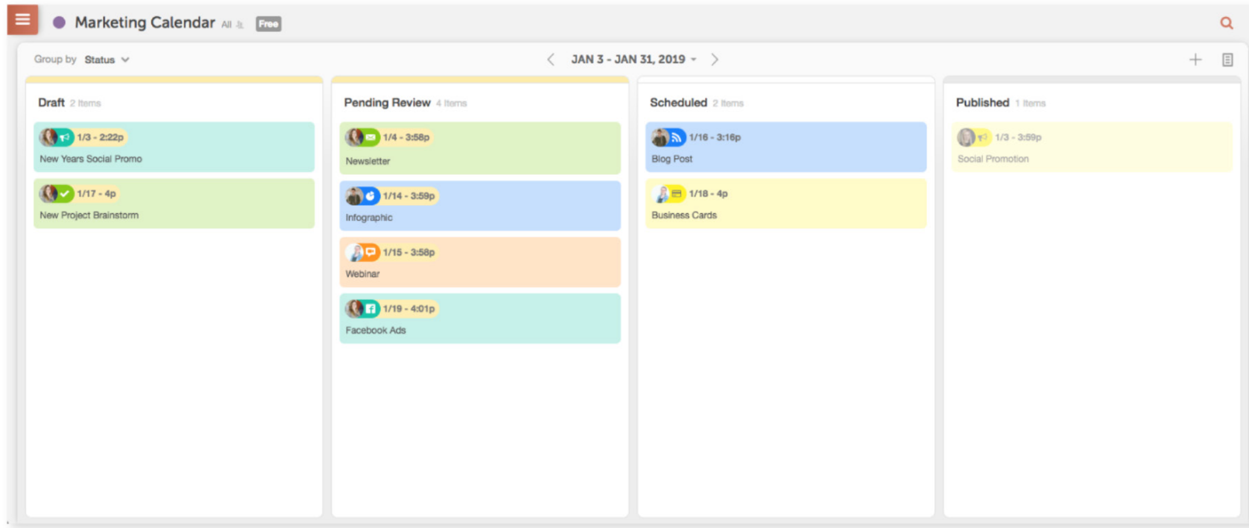
It's finally time for your team to start creating content for your project! You just need to **assign them the tasks to complete.**

The best way to begin is by choosing a marketing project management tool that will help you:

- **Manage your entire team** and easily assign them their specific tasks to complete.
- **Assign specific deadlines for tasks** to be completed on specific calendar dates.
- **Automatically notify your team** that you've assigned them a task to complete.
- **Automatically remind your team** as a due date for a task approaches.

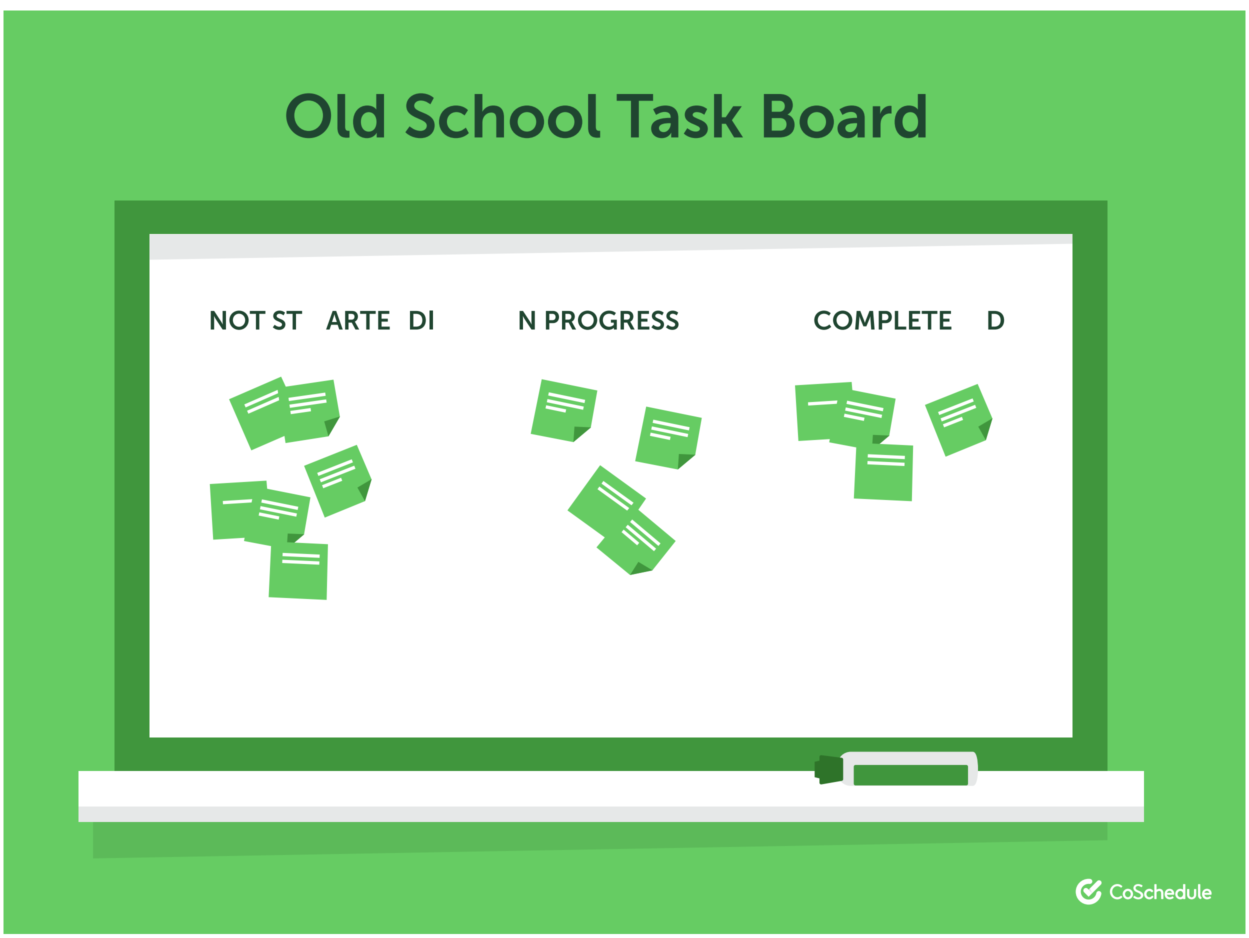
If you're planning a recurring project—like blog posts or social media campaigns—it's also helpful to find a tool that helps you create your ideal workflow and save it to reuse on similar projects.

Well, it just so happens that CoSchedule is a marketing project management tool designed to help you collaborate with all of those things. ;)



Agile product managers refer to this kind of functionality as a task board. Whether you use CoSchedule to efficiently manage your process or not, you're looking for a system to help you:

- See which tasks are completed, which should be in progress, and which are coming up.
- Understand which tasks are overdue that may cause you to miss your deadlines.



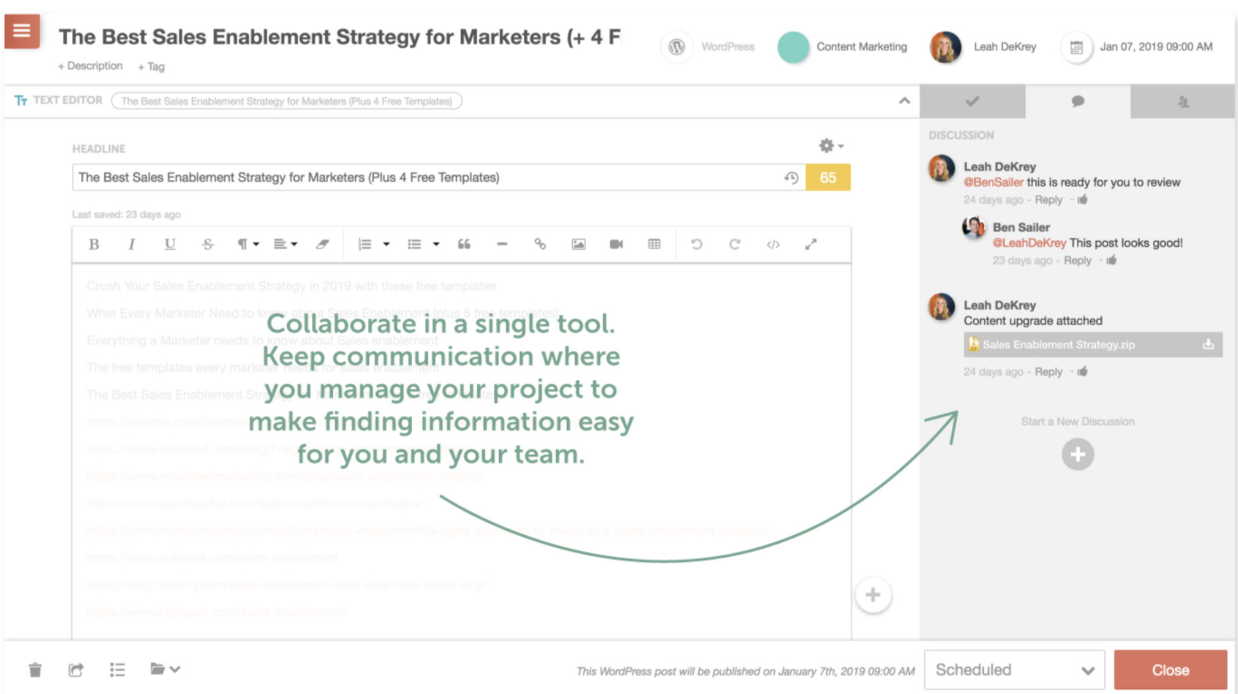
Step 11:
Communicate With A Tool That Keeps Collaboration In One Place

While emails serve nicely as notifications and reminders to help your team get into the system where you manage your projects, they're not so great for managing project communication.

That's where it's nice to **manage your team communication around the project in the collaboration tool where you manage everything else.** There are a few qualifications to make this work for your project:

1. **Avoid email to manage your project communication.** Email forwards and strings can miss some replies to sender only, which can cause team members to miss critical information on your projects.
2. **Agree as a team to communicate consistently with the same tools for your specific purpose.** This will help you maintain one version of the truth for all project communication to help the team collaborate more efficiently.
3. **Keep your comments, notes, and progress reports in the same tool where you manage your task board or workflow.** This is especially important if you manage multiple projects at once.

You can rock that advice with nearly any project management tool, but there's one designed to help marketers like you manage their projects better. It's *ah hem* CoSchedule.



Monitor And Control Your Project To Meet Your Deadlines

Step 12:

Hold Daily Scrum Meetings To Monitor Your Progress

Scrum is a daily meeting everyone working in a current sprint attends. These informal touch points are most effective with small teams who are collaborating on completing a story together.
You'll lead the touch point with a simple itinerary with everyone sharing:

- What they did yesterday to make progress on your sprint.
- What they're going to do today for your sprint.
- Any roadblocks that may prevent them from executing.

This **helps your team stay accountable** while giving them the chance to ask for help as needed.

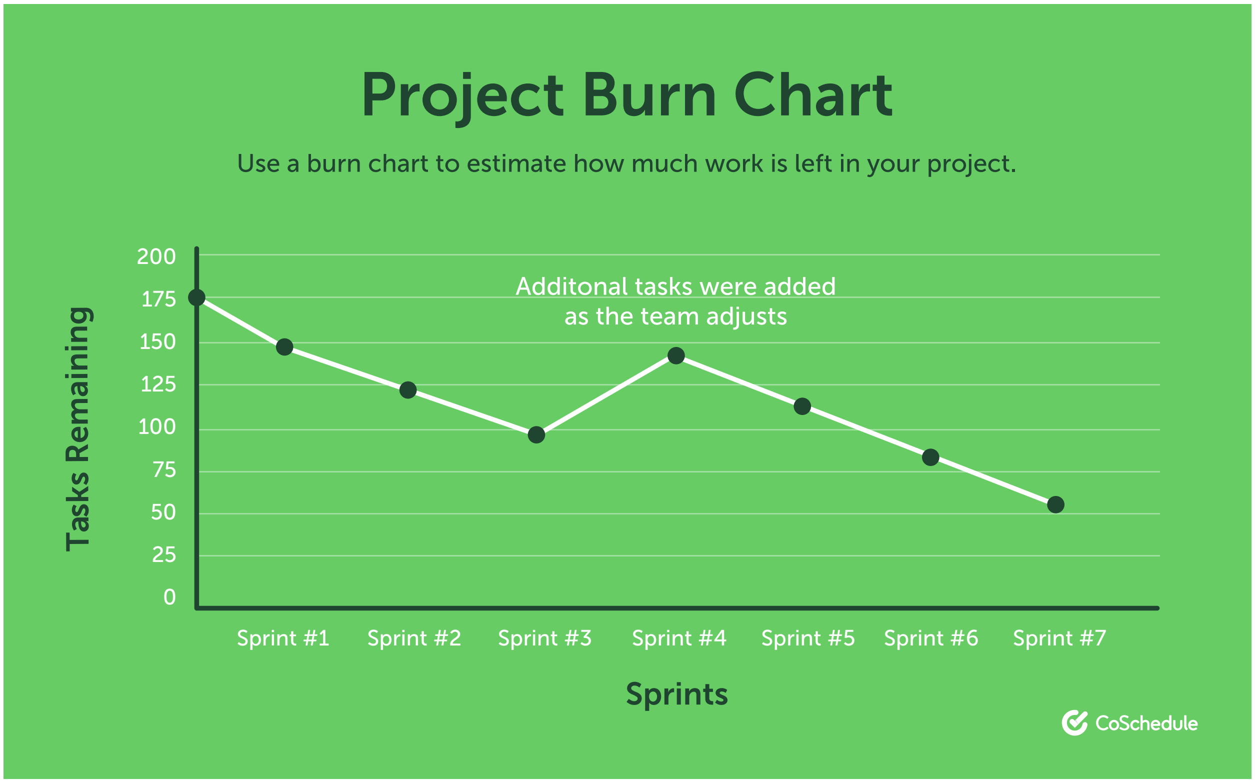
As the project manager, it's your job to proactively prevent those roadblocks from happening if you can. Otherwise, it's now your job to react and **remove the obstacles from your team's ability to execute.**

At each daily scrum, end the touch point by asking, "Who has roadblocks that are already or might prevent you from executing?" Sometimes, this is when someone will speak up, even after they've already shared their progress reports.

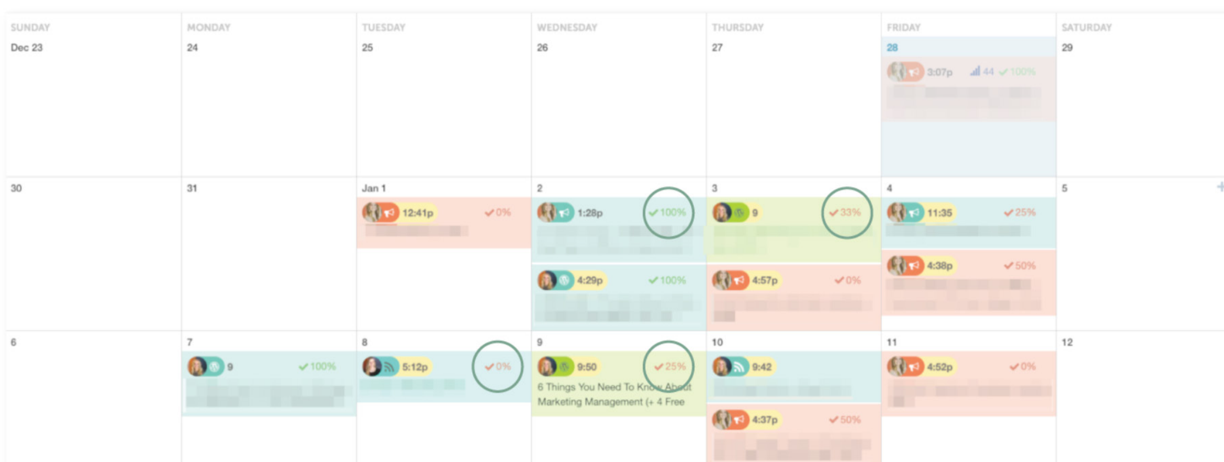
Step 13:

Manage Your Burn Chart To Estimate How Much Work Is Left In Your Project

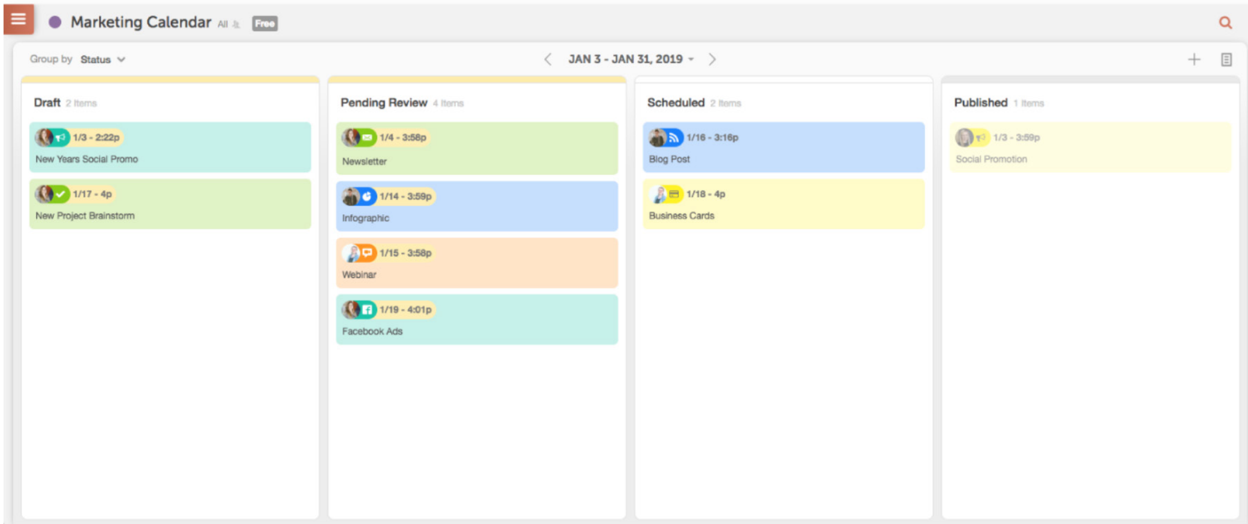
Your project burn chart is a graph that compares your completed work to how many sprints are remaining in the project's scope.



Another way to visualize this is to analyze your percentage of tasks completed. Your CoSchedule marketing calendar shows a handy **percentage completion rate for your project:**



This practice—combined with **reviewing which tasks should have been completed in the past but have not been checked off your task board**—will help you keep team members accountable for completing their work and will keep your project on track to hit your deadline.



Agile product management processes often suggest that you spell out the definition of done for your project to help the entire team understand when the project is complete.
The percentage completion rate is an excellent way to explain this to your team:

- A story is done when you complete 100% of your tasks.
- A sprint is done when you complete 100% of the tasks for the stories that make up the sprint.
- And a project is done when you complete 100% of the tasks for all of the stories within the sprints that make up the project.

Step 14:
Fail Fast To Get Back On Track ASAP

Even the best project managers hit snags that take their team's focus away from the tasks and stories that will fulfill their project's specifications.

Those are moments when you, as a project manager, need to **step in immediately to get your project back on track.** You can do that by identifying whom on your team needs a guiding hand, and asking them four simple questions:

1. What happened?
2. Why did this happen?
3. How can we make sure this doesn't happen again?
4. How can we get this project back on track?

These questions help your team member **identify the issue and the method to solve the problem now and in the future.** You just helped them self-correct!

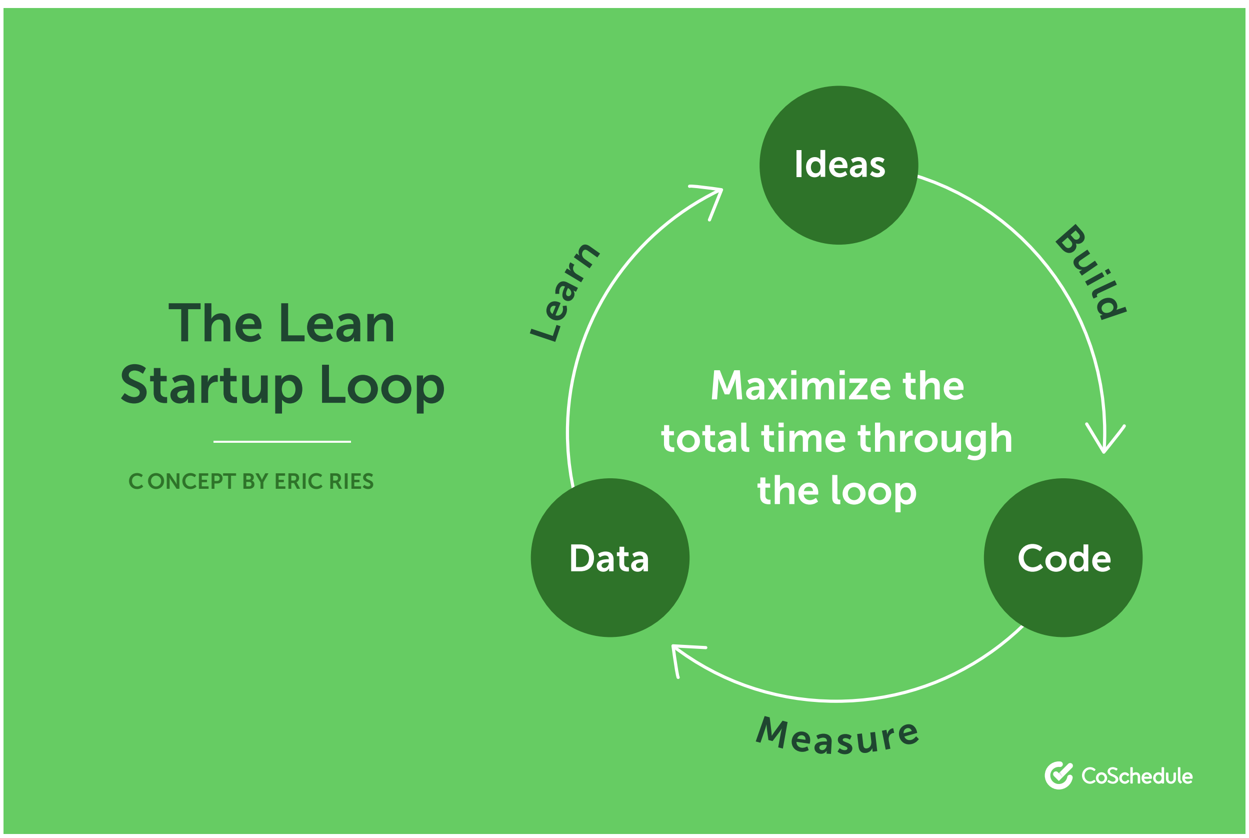
Step 15:
Host Sprint Reviews To Celebrate Your Accomplishments Toward Project Close-Out

While you took Seth Godin's advice on getting approval to s**hip your project on time no matter what**, your stakeholders probably want to see the progress you're making as the project continues.

That's exactly what sprint reviews are for.

Schedule a half hour touch point at the end of every sprint to review the stories you've completed. Gather feedback from those who need to know what's going on.

Just remember that you're employing Eric Ries' theory on the minimum viable project.
That means you should document what your big wigs are saying, but that will not impact your upcoming sprints or modify your deadlines because they've already signed off for approval.



Later, you can **plan the notes you take in this meeting as a post-project sprint** to button up the outstanding items after you publish if necessary. However, these modifications aren't in scope for your project now, so you should not change your direction.

Make this review fun for everyone—it's a celebration of accumulated hard work with 100% of your tasks done for an entire sprint!

Close Your Marketing Project And Move On To The Next

Step 16:

Host A Retro To Learn From Your Success

Your project is done when 100% of the tasks within the stories that make up your sprints are complete. Ship it now!

There's just one thing left to do... and that's to learn how to **improve your marketing project management process before you initiate your next project.**

Traditional project management often calls for a post implementation review. It's a meeting where you invite your team to ask them three simple questions:

1. What went **well?**
2. What went **wrong?**
3. What could we **improve** for the next project?

Agile product management follows a similar approach, calling their post-project touch point a retrospective. The goal is the same——but the questions you ask in the meeting vary slightly:

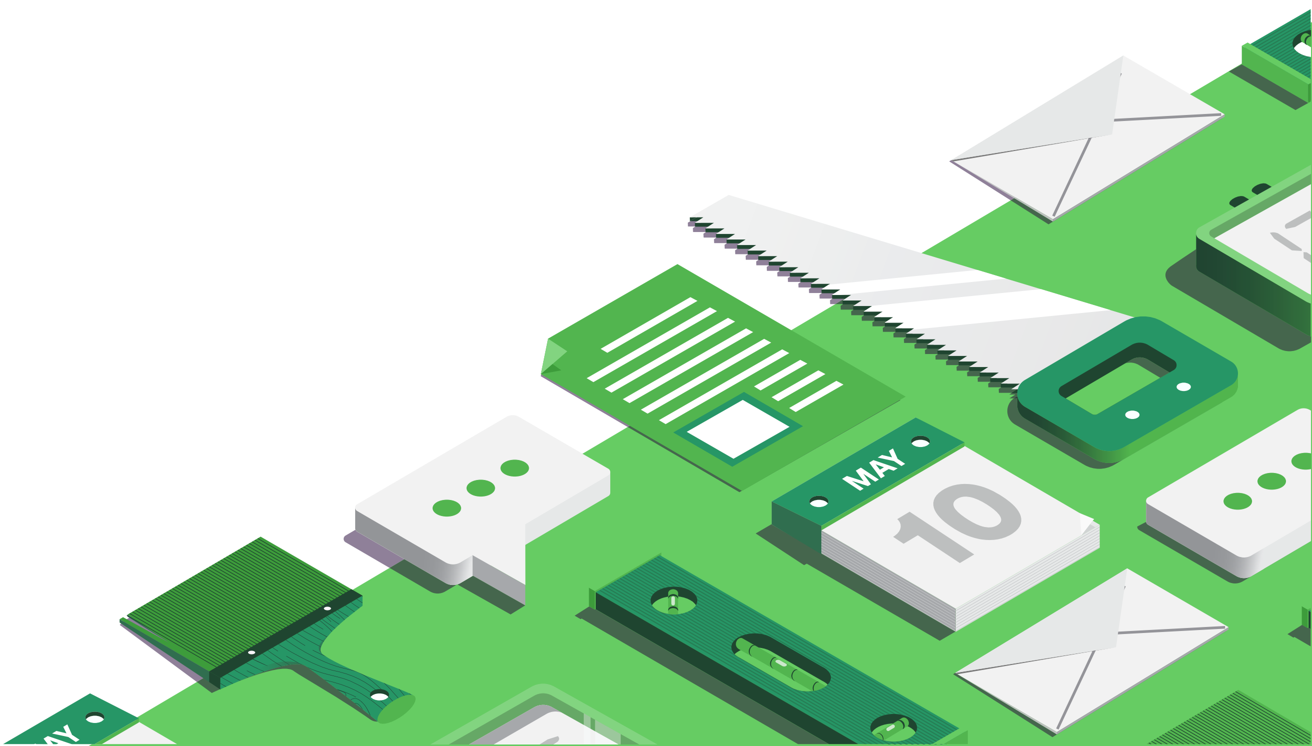
1. What should we **start** doing?
2. What should we **stop** doing?
3. What should we **continue** doing?

Combine those two sets of questions together for a 30-minute meeting, and you'll leave with dozens of lessons learned that will help you improve your marketing project management process next time.

Chapter 3

HOW TO ORGANIZE CAMPAIGNS

Using A Marketing Project Management Calendar



How to Organize Campaigns Using A Marketing Project Management Calendar

NOTE: This chapter references downloadable templates to help you apply what you learn. They can be found here.

"Efficiency is doing things right; effectiveness is doing the right things."

^ That famous quote is from Peter Drucker.

Pretty smart guy, right?
Well...

I say you can both be effective and efficient. And it all starts with 10x prioritization + 10x execution.

Let me explain.

Solid organization helps you produce content that produces results.

Publishing that content on time—every time—keeps your team producing even more results.

So getting organized, at its core, helps you produce effective work efficiently.

And a marketing project management calendar template will help you get organized.

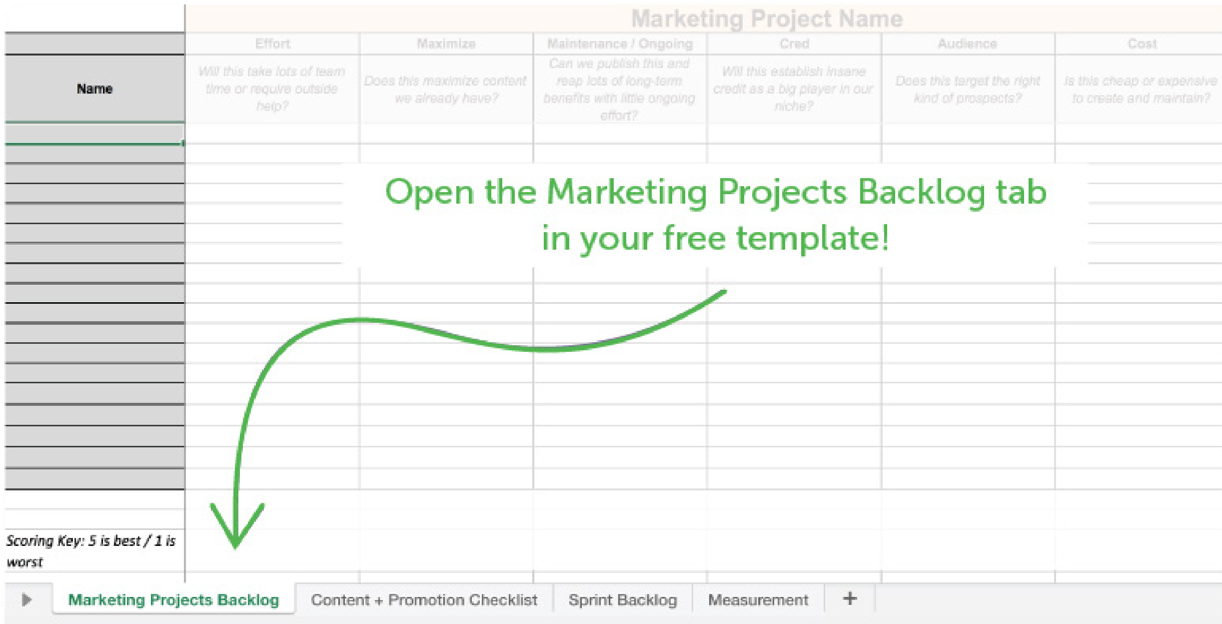
It's kinda like a marketing action plan template you can manage with Excel.

Get it and get organized now.

Prioritize Your Marketing Projects Backlog

You have a ton of projects you could do. Figuring out what you should do is a different story.
That's where prioritization comes into play. Because when you prioritize the projects that will have the greatest impact on your goals, you will naturally take on effective work.

In your marketing project management calendar template Excel spreadsheet, the first tab is labeled "Marketing Projects Backlog".



Literally write down every project you've ever thought about creating in column A.

Then involve the team to add more ideas to your list. Set up an hourlong meeting with a clearly defined agenda:

10 Minutes: Ice Breaker

You need your team to be thinking creatively. Outside the box. You need ideas that will dramatically grow your business, **ideas that will boost your results by 10x instead of just 10%.**

An ice breaker, as nerdy as you think it may be, helps your team expand from the norms of limitations.

^ That's exactly what you need.

So start with an ice breaker.

Begin by breaking a larger team into sub-teams of 2-3 people. Then ask:

What are all of the things you can do with a paperclip?

The obvious answers will come:

- **Holding papers together!**
- **Picking a lock!**
- **Hanging up clothes!**

Then the innovative ideas will follow. Your team will expand their minds with a simple exercise which will help them brainstorm actual project ideas.

30 Minutes: Individual Brainstorm

Individual brainstorm might sound like an oxymoron. I assure you, it's not. ;)

Give every member of your team a stack of Post-It Notes and a Sharpie. Then ask:

What projects will help us reach our goals as fast as possible?

Everyone in the room will write down their ideas, one per sticky note. (At this point, you write down all of your ideas from column A in your Marketing Projects Backlog on the Post-It Notes, too.)

Just like the ice breaker, the very obvious ideas will come first. After 10 minutes, though, you will see the writing slow.

^ That's a good thing.

This is when the innovative thoughts will come out. As this happens, reassure everyone:

There are no bad ideas. We need all of your thoughts right now. Write everything down.

> **"Oftentimes, the ideas that sound the strangest (or more difficult) result in some of the best projects.**
>
> —NATHAN ELLERING, COSCHEDULE

Do not rush this exercise.

20 Minutes: Optimization

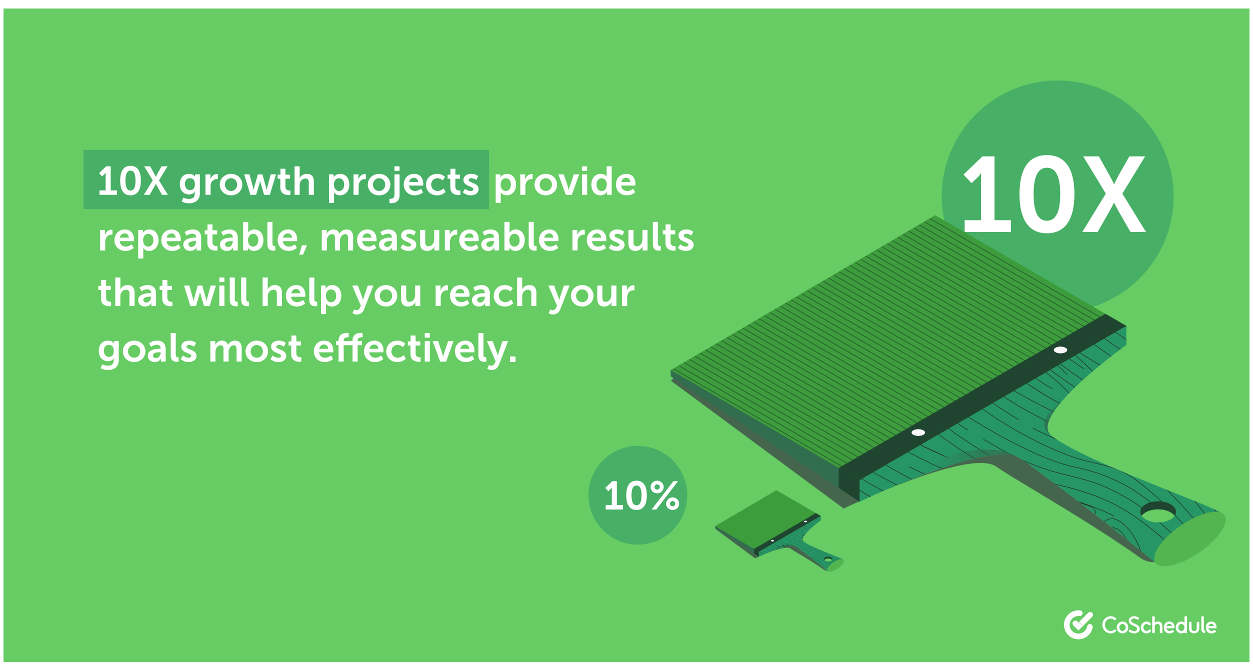
You'll notice in your Marketing Projects Backlog template, column C is labeled 10x.
At this point, you and your team will quickly run through every idea to answer one simple question:

Is this idea a 10x growth opportunity or a 10% improvement?
Your team will need to know the definition of 10x and 10%:

- **10x growth** projects provide repeatable, measurable results that will help you reach your goals most effectively. These often provide great value for a large number of people within your audience.

- **10% improvements** provide a little benefit to a few members of your audience. These are often slight improvements that don't generate huge return.

An example of a 10x idea may be launching a free tool to help you attract more of the right audience to your business. [The headline analyzer](#) from CoSchedule is an example of a 10x project.



A 10% improvement example could be increasing your word count within blog posts. Word count is often not the issue with content performance, but rather, comprehensiveness of the topic covered.

As you and your team score your ideas for 10x growth, it's important for everyone to have their voices heard.

It takes some grace to make that happen, or else the loudest person in the room will always win. This is due to the psychological principle of conformity:

To overcome that snag:

1. Gather all of the Post-It Notes.
2. Ask everyone to open up an instant message tool like Slack, HipChat, or Lync.
3. Read one idea aloud at a time.
4. Ask the team to message you 10x or 10% for their vote.
5. The most votes wins (for example, an idea with 3 10x votes and 2 10% vote is a 10x idea).

From here, write the idea in column A in your Marketing Projects Backlog. You can also write a Description in column B to help you remember notes or ideas on the project.

You can add the 10x or 10% information in column C. Now, this column is not as black and white as 10x or 10%. You need to enter a number here, from 1-5, with 5 being the absolute best for 10x growth and 1 being 10% without question.

This pointing system is somewhat subjective at this point.

If you have five people participating in your brainstorm meeting, you can give each person a point for their vote. For example, an idea with 3 10x votes and 2 10% votes gets a point of 3.

You get the idea.

Why Involve Your Team In Marketing Project Prioritization?

You might be tempted to skip past everything I just wrote about team brainstorming.

That would be foolish.

This is a matter of culture. Steve Jobs said:

> "Great things in buisness are never done by one person. They are done by a team of people."
>
> —STEVE JOBS

There is no better way to get buy-in from people who love what they do than helping them set the course for the work they'll do.

In their book, *Sprint: How To Solve Big Problems And Test New Ideas In Just Five Days*, authors Jake Knapp, John Zeratsky, and Braden Kowitz suggest:

By asking people for their input early in the process, you help them feel invested in the outcome. Later, when you begin executing your successful solutions, the experts you brought in will probably be among your biggest supporters.

This process sets the foundation of an inclusive culture. Everyone will feel involved and know what's coming. Plus. It's an extremely effective way to prioritize the projects that will most effectively help you reach your goals.

So What Are Those Other Columns In The Marketing Project Backlog Tab In This Excel Sheet?

These columns are all customizable for you. ;)

These are qualities that define a successful marketing project for your business.

I've provided several example qualities we actual use for prioritizing marketing projects at CoSchedule in your template spreadsheet. These may make sense for you, or you may want to add or remove some. Any way you do this is completely fine.

The qualities currently are:

- **10x**
  Is this project a 10x growth opportunity or 10% improvement?
- **Effort**
  Will this project take lots of team time or require outside help?
- **Maximize**
  Does this project maximize content we already have?
- **Maintenance / Ongoing**
  Can we publish this project and reap lots of long-term benefits with little ongoing effort?
- **Cred**
  Will this establish insane credit as a big player in our niche?
- **Audience**
  Does this project target the right kind of prospects?

- **Cost**
  Is this project cheap or expensive to create and maintain?

- **Partnership Opportunities**
  Does this project give us an opportunity to connect with influencers?

- **Expectation**
  Does our audience simply expect a company like us to do a project like this?

The main idea here is to point your ideas for the qualities with 5 being the best score and 1 being the lowest. Column L automatically counts your points for a project. So, if you do this right, the idea with the most points will be your highest priority project!

So after you point everything, you can sort your data by column L (the Score column) by selecting row 4-21 and columns A-L > Data > Sort > Custom Sort > Column L > Largest To Smallest.

	Marketing Project Name										
	Description	10X	Effort	Maximize	Maintenance / Ongoing	Cred	Audience	Cost	Partnership Opportunities	Expectation	Score
Name	*Why it just might work / What we'll do*	*Is this a 10X growth project or just a 10% improvement?*	*Will this take lots of team time or require outside help?*	*Does this maximize content we already have?*	*Can we publish this and reap lots of long-term benefits with little ongoing effort?*	*Will this establish insane credit as a big player in our niche?*	*Does this target the right kind of prospects?*	*Is this cheap or expensive to create and maintain?*	*Does this give us an opportunity to connect with influencers?*	*Does our audienc simply expect a company like us to do this?*	*This is the sum. Sort this data and work on the highest-numbered projects first!*
Video Series											0
Facebook Ads											0
Adwords											0
Course											0
Autoresponder Emails											0
											0
											0
											0
											0
											0
											0
											0
											0
											0
											0
											0
											0
											0

Now your projects are prioritized from the most points to the least.

For one final check, I like to double check for the 10x ideas one more time (column C). Are these ideas at the top of your list? If not... you might just want to reprioritize them there, despite the other qualities that brought down the projects' scores.

Why?

10x is more important than anything else.

Plan Your Marketing Project/Campaign's Content + Promotion Checklist

Sprints help you break down a single large project into manageable pieces.

Since marketing campaigns often involve many different pieces of content, you can think of sprints as phases of content development. It's a plan to help your team work through a project together efficiently.

To plan sprints for a project, you'll first need a Content + Promotion Checklist for each project. Here's how to do it:

The Team Decides What You'll Create For The Project

If you followed my advice on gathering team feedback on high-level ideas for your Marketing Project Backlog, this advice will come as no surprise...

Set up 15-30 minutes for an informal sync with your team before you kick off a project. The purpose of this meeting is to ask one simple question:

What would a project like this look like for our company?

This touch point can be way more informal with multiple people suggesting ideas out loud throughout the room. I've found that other team members can often build upon others' ideas this way, enabling more collaboration (which is good).

If the team starts to get off track (or just talks too long about one concept), call 'em out on it, and ask the question again:

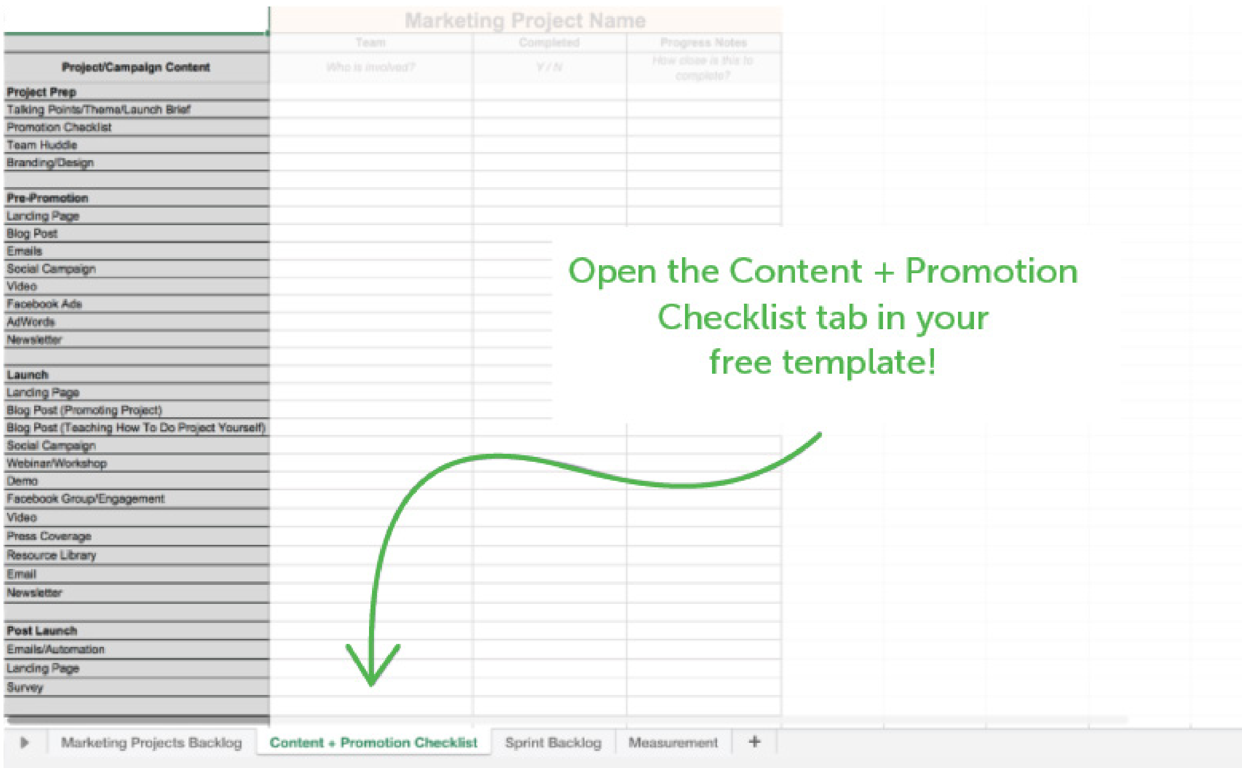
What would a project like this look like for our company? When I do this, I often direct the question at least once at every member of the team. This way, even our quietest folks participate.

As your team answers the question, do not jump in. Withhold your opinions as the project manager. Right now, you're not the expert. You're pulling the expertise from your team.

Your job is to open Evernote or OneNote and write down all of the amazing content ideas your team is suggesting should be a part of this campaign or project.

Map The 10x Content Ideas In Your Content + Promotion Checklist

Afterward, open the second tab in your marketing project management calendar template labeled "Content + Promotion Checklist".



Often, campaigns have phases for pre-launch, launch, and post-launch. This tab reflects that idea and provides examples of the kinds of content that may work best for each of those phases of marketing campaign planning.

For example, if your marketing project is an event, you will have content to promote the event, content for the event itself, and follow-up content for after the event.

Now you can take all of the ideas from your team sync and map them in column A, labeled Project/Campaign Content.

It's up to you, as the project manager, to decide which ideas to take on and which to leave out at this point. The 10x versus 10% exercise is still helpful in this scenario.

- What suggestions are definitely great for growth? **These are 10x.**
- Which suggestions are merely slight improvements? **These are 10%.**

After you write down the ideas you will take on in column A, fill in the names of the team members who will be involved in creating each piece of content. Think about your strategists, writers, designers, coders, and promoters here—everyone who will need to do some task with that content to make it a successful component of your campaign.

Later, you will use the names here to help you map out a realistically achievable marketing plan timeline in the Sprint Backlog tab in your Excel template.

Use Your Content + Promotion Checklist During The Project For Sprint Reviews

As for the remaining columns in the Content + Promotion Checklist tab: You'll reference this sheet throughout your project. Essentially, this tab will become a sprint review framework for your team.

Sprint reviews help you understand which content within a campaign is 100% complete.
For your team, an easy way to host a sprint review is with a weekly close-out meeting you'll hold on Fridays. In this meeting, you can literally open the Content + Promotion Checklist, go through the list, and ask for progress updates.

It's simple.

For each piece on the checklist, you'll ask, **"Wher are we with this?"**

If it's complete, you check it off in column C. If not (but it is supposed to be complete), you ask:

Ask Yourself This:

- What went wrong?
- Why did this happen?
- How can we make sure something like this doesn't happen again?
- How can we get this project back on track?

By asking these questions, you allow the team members involved in that project to come to a resolution themselves. They take the ownership in missed deadlines and how to prevent that sort of thing in the future.

You can add those notes in column D in your Content + Promotion Checklist.

But… you may be asking yourself, “How do I plan those deadlines so I can do these sprint reviews?”

Well…

Plan Your Marketing Project Sprint Backlog

Your Sprint Backlog is a marketing timeline template, in a way. It helps you understand when you will complete certain phases of your content development.

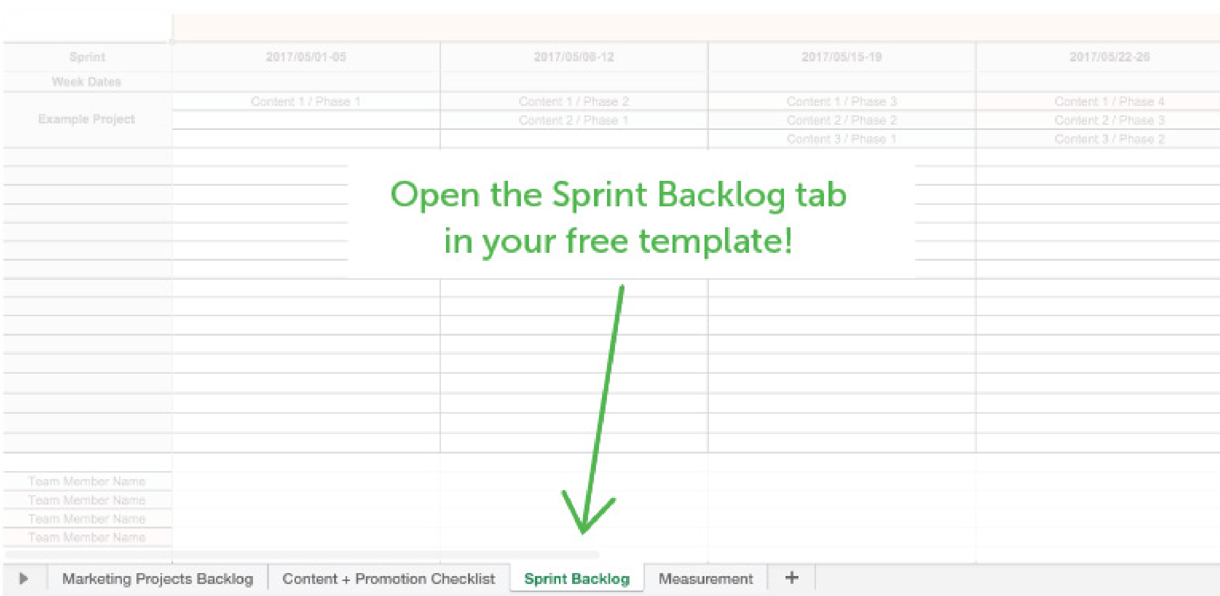
Consider your Sprint Backlog an exercise to help you, as the project manager, outline the content production for each of the ideas in your Content + Promotion Checklist for all of your projects.

Let’s explore the details:

Plan Each Piece Of Content In High-Level Phases

You can break every piece of content you’re planning to create throughout a project into phases of execution.

You may be tempted at this point to start thinking about tasks. Hold off on this for now.



At this point, you are planning the bird's-eye view of a single piece of content, which may align something like this:

1. **Write**
2. **Design**
3. **Code/Prep for publish**
4. **Promote**

This framework helps you understand when a logical handoff may take place from one team member to the next.
^ For example, as you write a piece, could someone else be coding the landing page template? Or maybe as you design, could someone write the promotion pieces?

Map Multiple Pieces Of Content + Their Phases On Your Sprint Backlog

Now you can also use multiple rows to plan many pieces of content as sprints within your project.

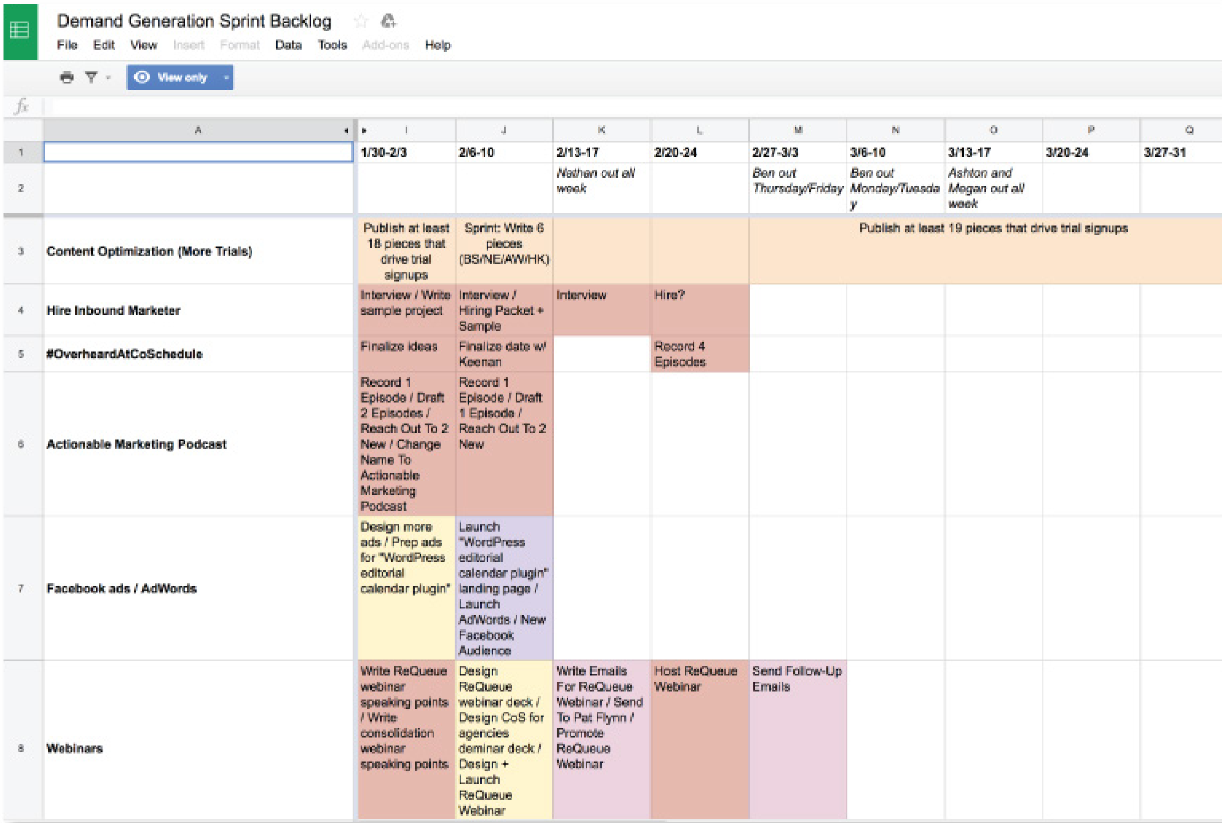
This gives you the opportunity to understand which phases may be completed by different team members at the same time so you ship projects faster.

For an example of what this looks like, check out your marketing project calendar template, and open the Sprint Backlog tab.

Rows 4-6 show three pieces of content you'll create for a project. You'll note the phases are color-coded by the team member's name who is most responsible for completing that phase.

The columns represent weeks of production—your production timeline/project management calendar. It's not a perfect science. But this view gives you the opportunity to understand the holistic opportunity you have per each team member to complete different phases of content production quickly.

Your template provided in this blog post is an improved version of what we really use at CoSchedule to manage high-level project sprints.



	A	I	J	K	L	M	N	O	P	Q
1		1/30-2/3	2/6-10	2/13-17	2/20-24	2/27-3/3	3/6-10	3/13-17	3/20-24	3/27-31
2				*Nathan out all week*		*Ben out Thursday/Friday*	*Ben out Monday/Tuesday*	*Ashton and Megan out all week*		
3	**Content Optimization (More Trials)**	Publish at least 18 pieces that drive trial signups	Sprint: Write 6 pieces (BS/NE/AW/HK)			Publish at least 19 pieces that drive trial signups				
4	**Hire Inbound Marketer**	Interview / Write sample project	Interview / Hiring Packet + Sample	Interview	Hire?					
5	**#OverheardAtCoSchedule**	Finalize ideas	Finalize date w/ Keenan		Record 4 Episodes					
6	**Actionable Marketing Podcast**	Record 1 Episode / Draft 2 Episodes / Reach Out To 2 New / Change Name To Actionable Marketing Podcast	Record 1 Episode / Draft 1 Episode / Reach Out To 2 New							
7	**Facebook ads / AdWords**	Design more ads / Prep ads for "WordPress editorial calendar plugin"	Launch "WordPress editorial calendar plugin" landing page / Launch AdWords / New Facebook Audience							
8	**Webinars**	Write ReQueue webinar speaking points / Write consolidation webinar speaking points	Design ReQueue webinar deck / Design CoS for agencies deminar deck / Design + Launch ReQueue Webinar	Write Emails For ReQueue Webinar / Send To Pat Flynn / Promote ReQueue Webinar	Host ReQueue Webinar	Send Follow-Up Emails				

A sprint backlog like this is also helpful for understand the effort needed by each team member as you work through multiple projects.

For example, you may have several projects in progress at any time. Use multiple rows in your sprint backlog to manage those projects and the content development involved in each.

After you have a solid idea of what a plan will look like, your next step is to break down the content (your sprints) into tasks complete with deadlines and map out your publishing schedule on a [marketing execution calendar.](marketing execution calendar)

Execute Your Marketing Projects

You've prioritized the most effective projects. You've planned how you will complete them efficiently.

Now it's time to turn your ideas into real content.

Based on your Sprint Backlog, map each piece of content within a project to a specific deadline when the piece will publish. From there, huddle with your team and commit to solid communication throughout the project lifecycle.

Here's how to do it:

Set Your Project's Specific Content Publish Dates On Your Marketing Execution Calendar

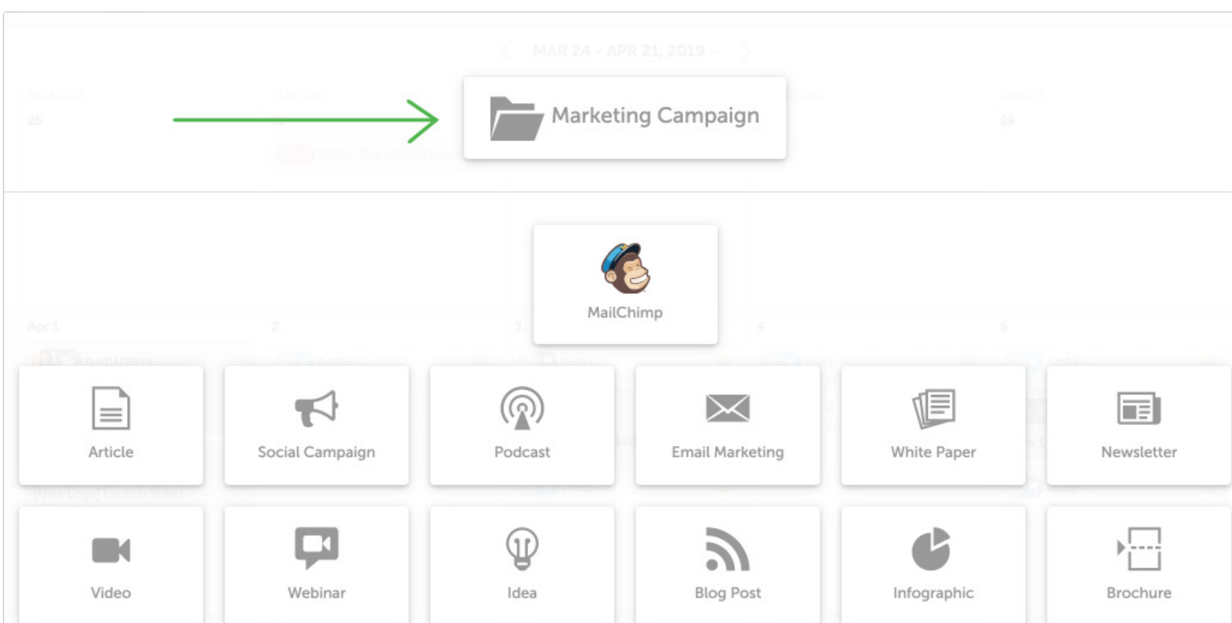
Your project (as a campaign) likely has multiple pieces publishing over time. Rarely is it so that you'll create multiple pieces and publish them on the exact day at the exact same time.

That's why your Content + Promotion Checklist has four parts to it: Project Prep, Pre-Promotion, Launch, and Post-Launch.

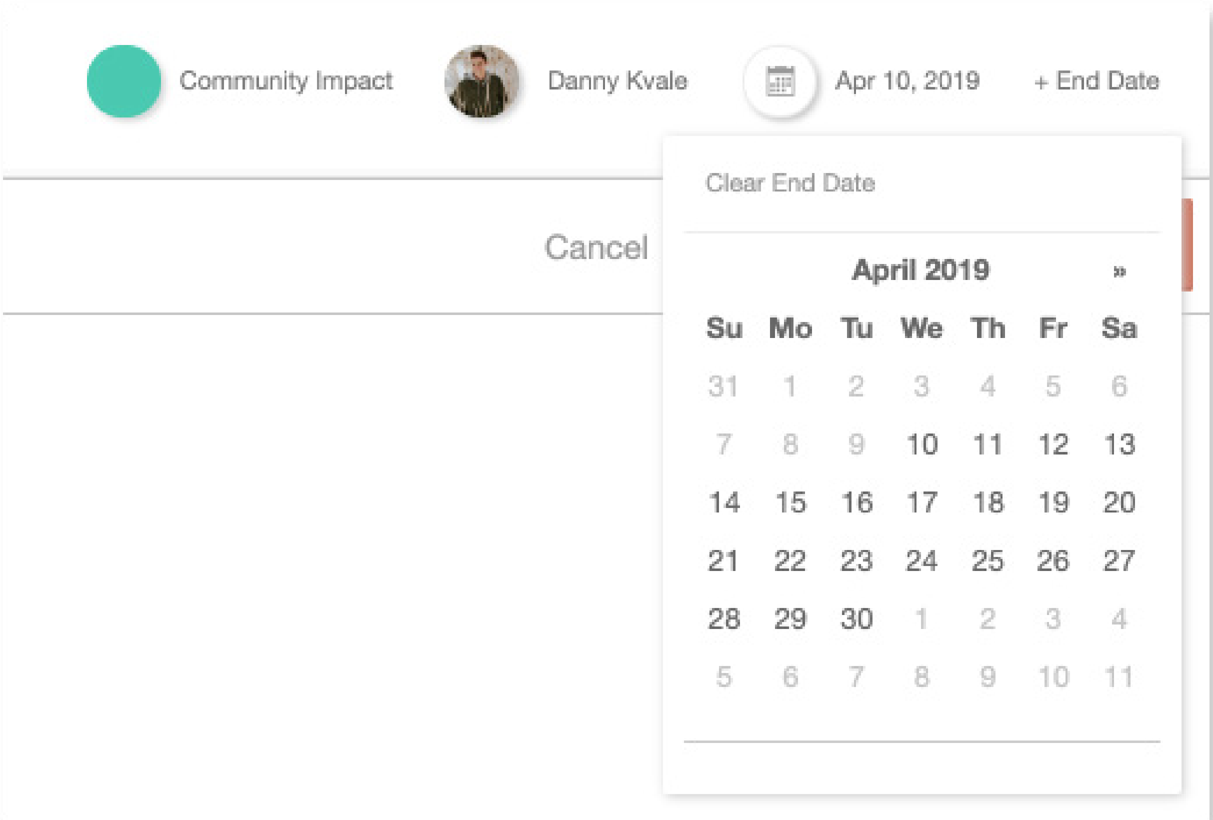
So.

On your marketing calendar, map those specific dates when you'll publish each piece within a project.

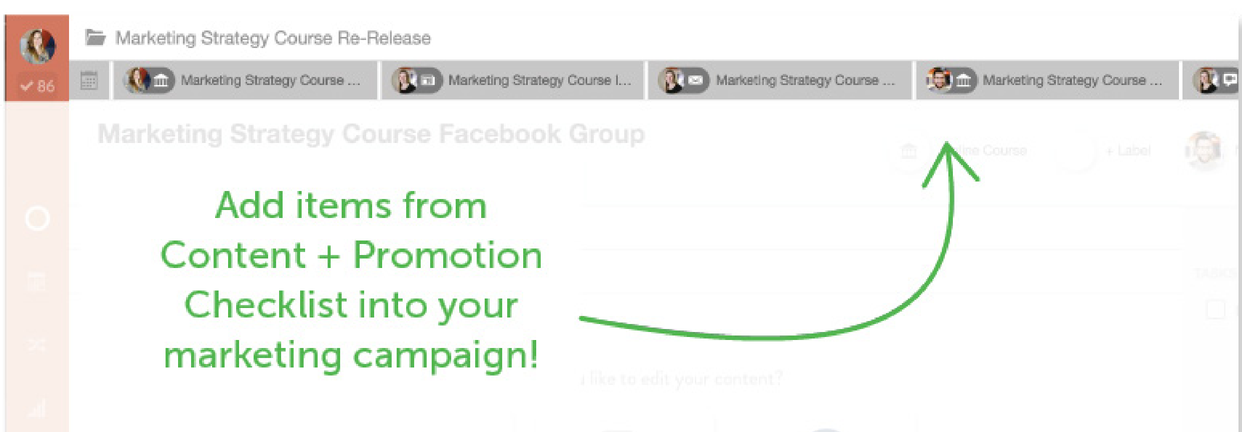
The all-new Marketing Projects feature in CoSchedule helps you create a project that spans multiple days. Simply add a new marketing project to your calendar on the day your project starts.



Then pick the end date of the campaign, who the owner is (likely you, as the marketing project manager), and color-code the project.



Afterward, add all of the pieces from your Content + Promotion Checklist as items within your marketing project's calendar.



These are the deadlines when you'll ship all of those things!

Tip: Add the Project Prep items within one piece of content on the calendar on the start date of the project. It makes it easy for the team to find all of that information from the get-go to help streamline your communication. ;)

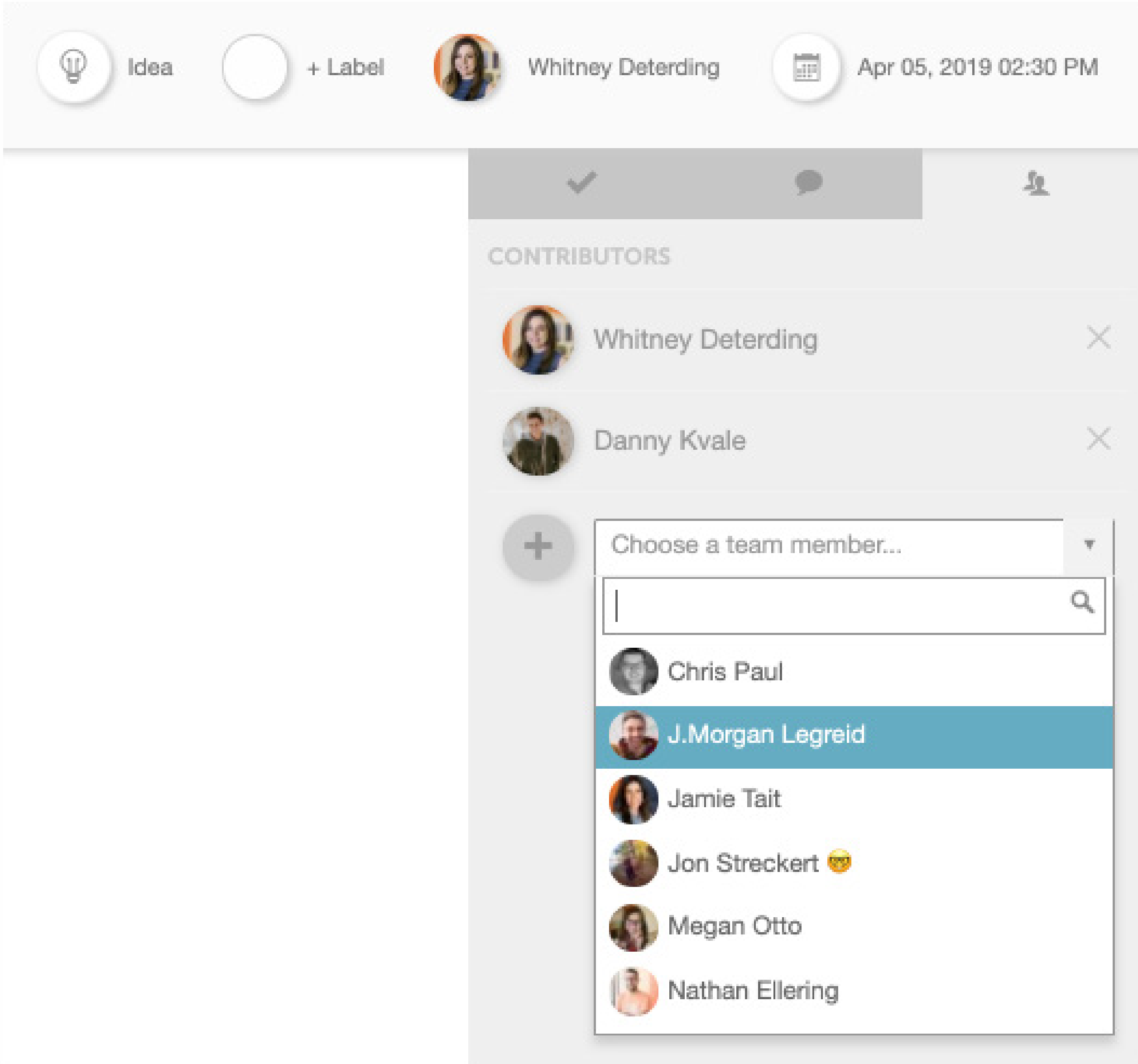
Delegate The Tasks For Each Piece Of Content

At this point, you, as the marketing project manager, tell your team these are the dates you'll ship the content.

Now they can help you break down each piece into the tasks they'll need to do to complete the work. I suggest setting your ship dates before breaking each piece of content into tasks for a few reasons:

1. It helps your team focus on the tasks that will 10x the project instead of only ***10-percenting*** the project. Tight deadlines provide intense focus to ship what truly makes the biggest impact.
2. Along with that, your team will cut the tasks that don't necessarily make huge improvements. You shoot for shipping here, not perfection.
3. If your timeline seems drastically off to a specific team member, this is the chance for them to voice their opinion. After the deadlines are officially set in this meeting, you + your team commit to making them happen.

An easy exercise here is to add the people responsible for completing certain pieces as contributors to the specific content within CoSchedule.

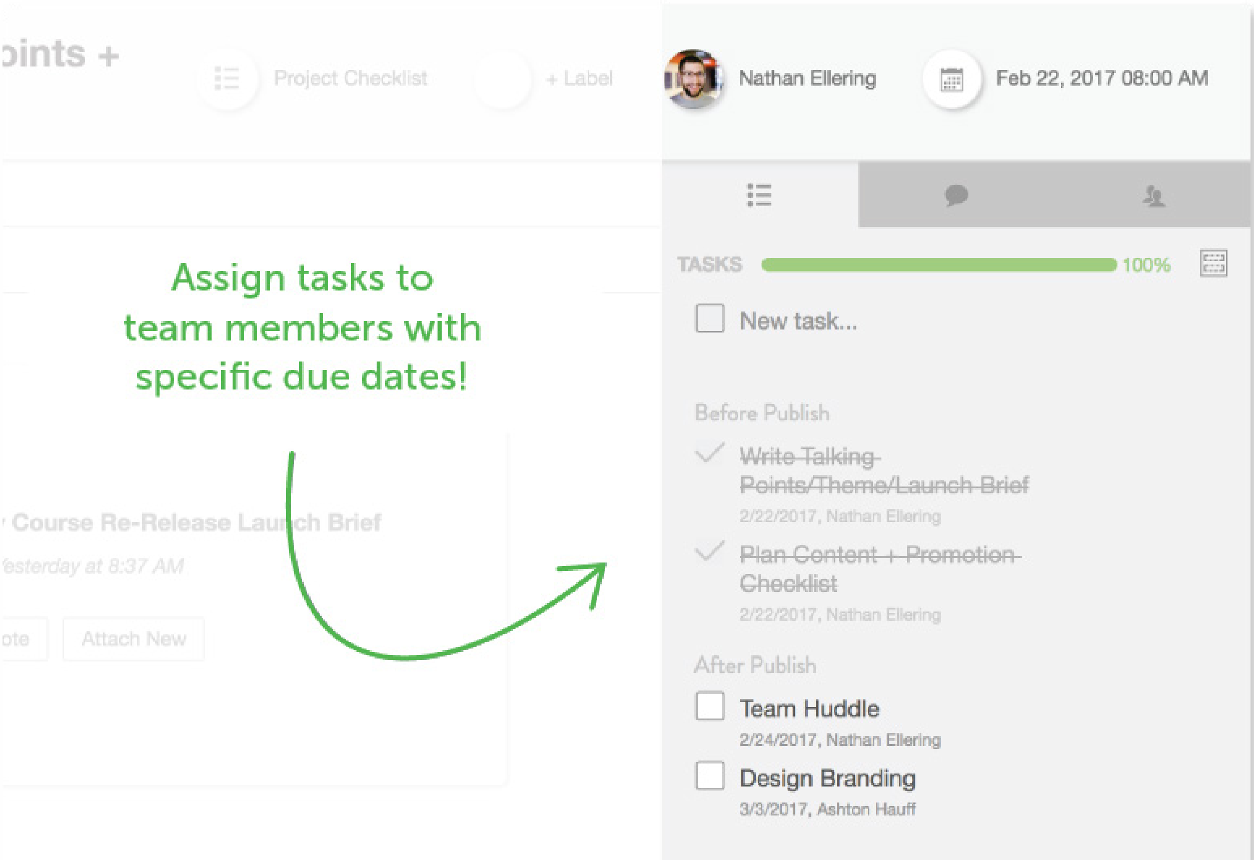


From here, they can lay out the tasks they need to complete for the project in chronological order. The key here is for your team members to think of a couple things:

1. Who will complete the task?

2. When should the task be complete so the content will be complete by the publish date (taking into account all of the tasks that need to be completed)?

Afterward, you can review those tasks just to make sure everything will get done on time. But empowering the team to own the content within the project and how they will execute gives them ownership in the outcome. This eliminates micromanagement + teaches your team how to collaborate and complete their work together efficiently.



Part of solid project management involves notifying your team members that tasks have been assigned and reminding them before the due dates, just in case they missed something.

^ CoSchedule automates this for you to eliminate some manual busywork from your to-do list.

So when your team assigns tasks to each other, they get emailed. And the day before a task is due, if it's not already complete, they'll receive a reminder email so the work gets done.

Execute + Communicate Efficiently

You've planned your work. Now it's time to work your plan.

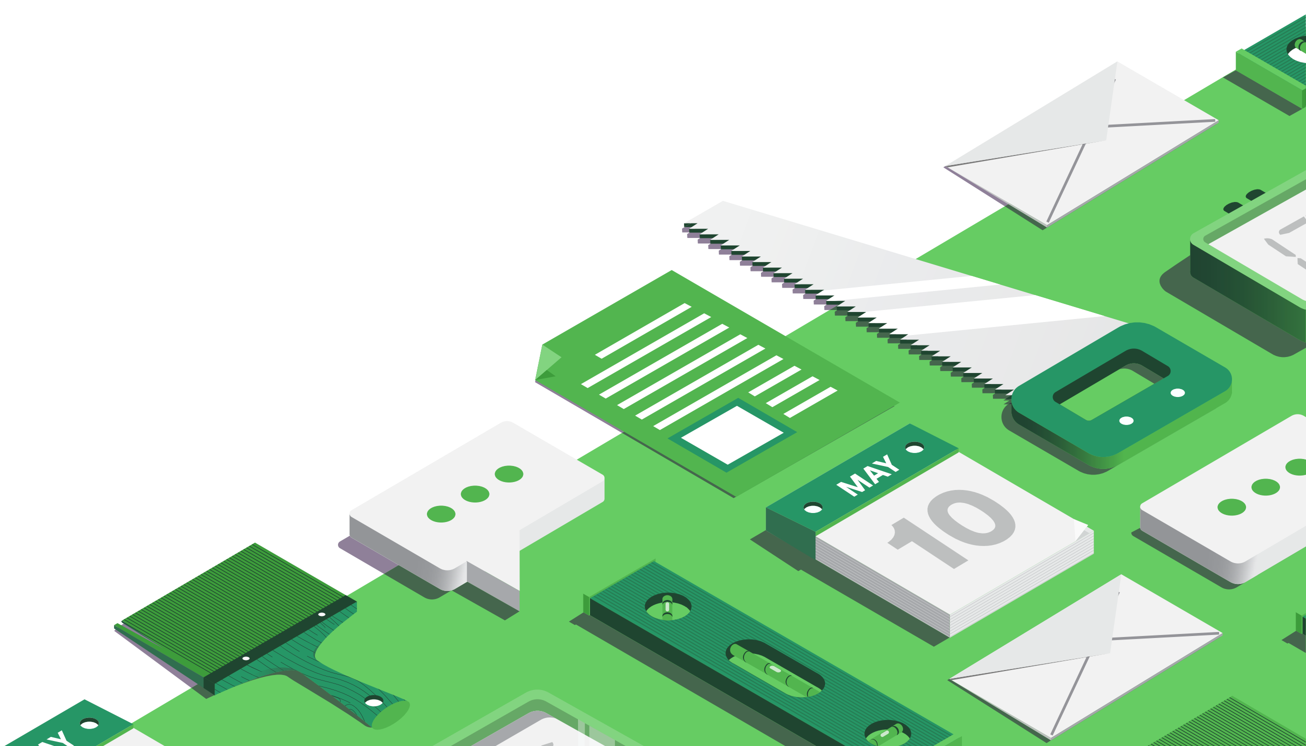
The only thing left to do is follow through, nail your deadlines, and communicate efficiently throughout the process.

CoSchedule helps with this, too, to help you track how far along a project is with a nifty (and nerdy) burn chart. Plus, you'll have one place to see everything + communicate.

If I were you, I'd try CoSchedule and the new Marketing Projects feature now! ;)
It's the #1 marketing calendar for everything you need organized. It's designed for marketers, not something that's built so broadly that you could use it for anything.
Good luck as you get started with your marketing project management calendar template and CoSchedule!

Chapter 4

Marketing Project Management Training



19 Marketing Project Management Training Resources for Marketers to Consider

NOTE: This chapter references downloadable templates to help you apply what you learn. They can be found here.

Like it or not...

Project management is a skill a lot of marketers need.

From campaign planning, to budgeting and tracking, marketing managers need to have acute project management skills to get their projects off the ground.

Problem is, many marketing managers are so bogged down wrangling tasks and chasing down status updates that they have little or no time to do *real* work that moves the ball forward.

Having a clear project management process is an important element for both your sanity AND your marketing ROI...

Why you ask?

For starters...

A clear project management process ensures everyone knows what they're doing and when.

(So you're not stuck herding cats all day.)

AND

Having an organized process means your marketing campaigns are more likely to be successful.

In fact, 86% of employees and managers cite ineffective communication as the main contributor to project failures.

Better project management = better communication.

Thing is...

Many marketing managers don't have any formal project management training.

Fear not trusty marketers. This chapter breaks down (almost) every type of project management style and the best training opportunities to help you make sure your PM skills are up to snuff.

Traditional Project Management Training

Training in traditional project management techniques covers skills such as managing tasks and time-lines, but also how to navigate deviations arise.

Courses cover skills like resourcing, strategic thinking, problem-solving, influencing, communication, and decision making.

University of California Irvine:

Introduction to Project Management Principles

This hands-on course aims to give you the skills to ensure your projects are completed on time and on budget.

This course covers the basics of project management such as the ability to manage product scope, create a project plan, build a budget, define and allocate resources, and manage risks.

Course cost: $49 USD/month

LinkedIn Learning:

Project Management Foundations

In this course, participants will learn the fundamentals of project management. This includes defining the problem, establishing project goals and objectives, and building a project plan.

You'll also gain best practice tips for reporting on project performance and keeping a project on track.

Course cost: $29.99 USD/month

Rochester Institue of Technology:

Project Management Life Cycle

This course teaches you about the project life cycle from initiation to closing. It addresses methods, tools and techniques for the initiation, planning, execution and closing of projects. You'll learn:

- The roles and responsibilities of a project manager
- Project initiation and planning
- Project execution
- Project closing Project management tools and techniques

Course cost: Free
Certification cost: $150 USDW

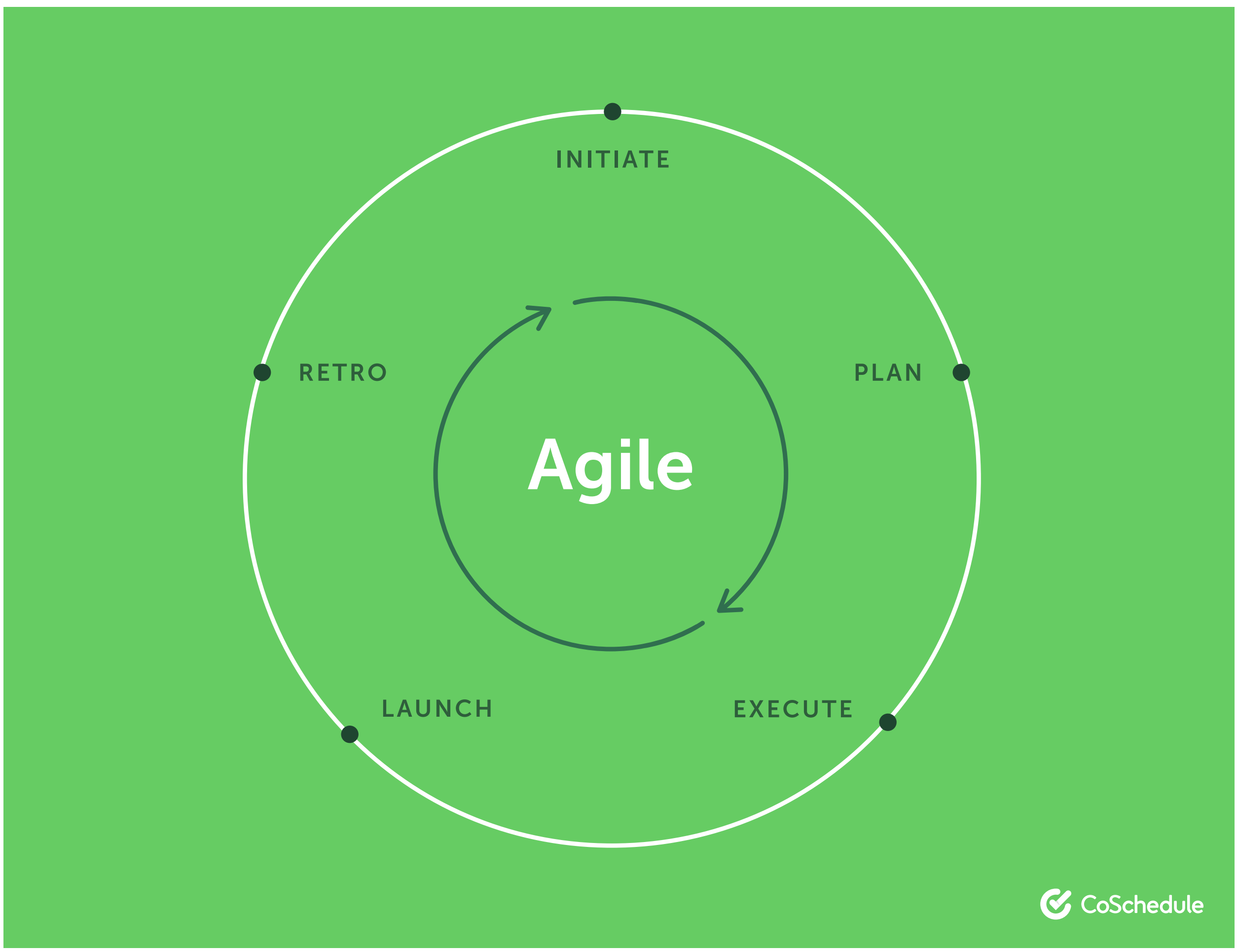
Agile Project Management

In traditional project management, phases happen in sequence. One thing can't be done until the previous is completed.

This has a snowball effect for mistakes because you can't build a great house on a faulty foundation. Likewise, if something in phase one encounters roadblocks, your timeline will easily be shattered.

Agile project management is in stark contrast to traditional project management. It's built on the concepts of expected change, incremental development, and frequent releases.

Rather than have the project plan set in stone, Agile expects that change will happen and is, therefore, better able to respond and adapt to changes. This makes Agile great for marketing teams as you are always responding to change – most of which is outside of your control.



Agile Project Management Training

Training in Agile project management courses give you the skills to lead a team according the the principles in the Agile Manifesto.

In addition to those skills, your team will become more productive, collaborate better, and have more time to spend producing great work, rather than managing tools and processes.

PMI:

Adopting an Agile Approach to Project Management

This course provides guidance on how to take steps towards adopting an Agile project management approach. It discusses how project leaders can develop an agile way of thinking, and successfully transition their team to Agile.

The course also provides guidelines for obtaining buy-in from stakeholders and change management to increase the likelihood of a successful transition.

Course cost: $130 USD

Lynda:

Become an Agile Project Manager

This course teaches how to you can deliver projects with higher levels of performance and quality using Agile methods.

The learning path helps you build knowledge around leading and motivating agile teams, how to develop user stories and set project goals.

Course cost: $29.99/month USD

University of Maryland:
Professional Certificate in Agile Project Management

Learn Scrum techniques and how to translate other Agile frameworks for your team's future project. This course is a full professional certification and covers all areas of Agile Project Management.

You'll learn how Agile techniques address faults in traditional project management techniques, the pros and cons of Agile, and how to best apply Agile to maximize value to the organization. Engineers, marketers, designers, and writers can all benefit from learning Agile principles in this course.

Online cost: $625 USD

AgileSherpas:
Agile Training for Marketers

AgileSherpas is a company that helps marketing teams implement Agile methodologies. They offer both in-person training and online courses. If you're keen to start getting your marketing team to go agile but are concerned with the change management process and/or how it will actually be implemented, AgileSherpas might be the best path.

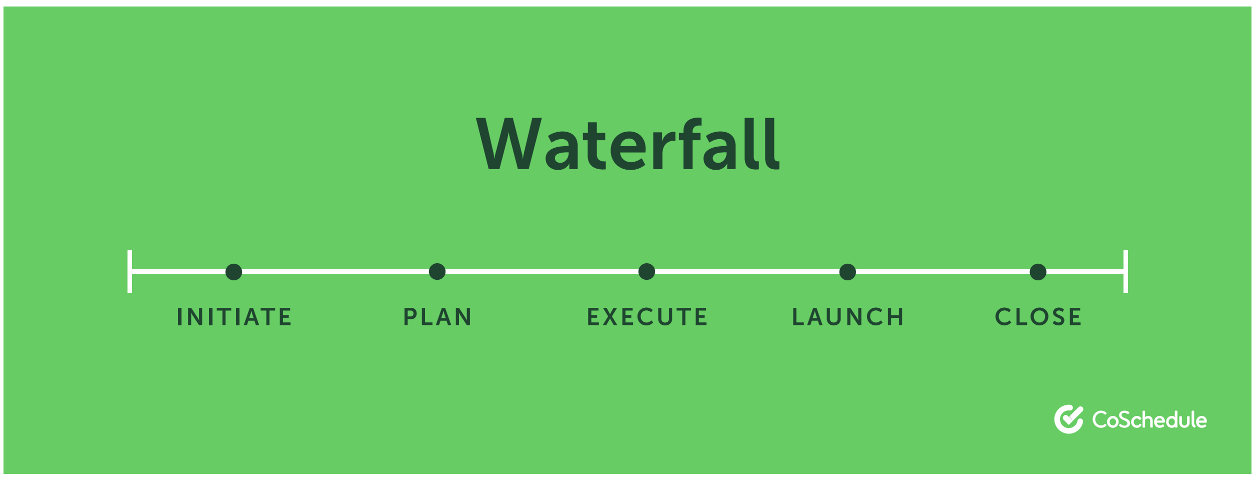
Online course cost: $99 USD

Waterfall Project Management

Waterfall is a project management approach that is very similar to traditional project management. Projects are completed in set stages and move from step-to-step until the project is completed.

You typically create a big plan on the front-end and then execute it. All while crossing your fingers that no changes pop-up.

No phase can begin until the prior phase is complete, and the completion of each phase is final — meaning the Waterfall approach does not allow you to return to a previous phase.



Waterfall Project Management Training

Waterfall project management training aims to teach participants how to outline all of the project's steps from the beginning.

If you spend more time planning on the front-end, then the execution phase will be fast and smooth, flowing like... well... a waterfall.

Lynda:

Learning Gantt Charts

Gantt charts are an important part of the Waterfall approach. They help project team leaders track what parts of the project are happening and when.

This course from Lynda aims to explain how Gantt charts work to plan resources, monitor progress, access risk, and predict project spend.

Course cost: $29.99 USD/month

Simplilearn:
Project Management Expert

This platform has a range of courses for Waterfall project management training. Most of these courses are for those seeking a PMP certification, but they also have intro courses for those looking to gain a high-level understanding of project management essentials.

Course cost: $99 USD

Learning Tree:
Project Time and Cost Management

This course from Learning Tree aims to give individuals the skills to overcome two of the biggest problems with managing a project: time and cost overrun.

You'll gain the skills to know how to define work and calculate a realistic timeline. Establishing a budget, allocating resources, and quantifying risk are also covered by this course.

Course cost: Unknown

Kanban Project Management

Kanban is a specific method that helps you organize, plan, and visualize, by categorizing tasks according to status on a visual board.

Kanban helps teams see where bottlenecks form and allows project managers to know what phase every part of the project is in. This improves productivity and allows team members to complete their tasks more efficiently.

Kanban allows teams to “stop starting and start finishing”. With that in mind, Kanban is one of the simplest and most effective tools to manage projects.

Kanban Project Management Training

Kanban training teaches participants how to implement and organize project tasks using the Kanban board.

Udemy:

Kanban Fundamentals – How to Become Insanely Productive

Udemy’s Kanban course teaches essential lean principles and helps participants understand how a Kanban board helps teams prioritize more effectively.

Topics include how to set up a board, optimizing the flow, lean principles, and much more.

Course cost: $19.00 USD

Pluralsight:

Kanban Fundamentals

In this course, you’ll learn the basic principles and concepts of Kanban, as well as how to apply them across your team.

Course cost: $35 USD/month

Global Knowledge:
Complete Kanban Training

Get a jump on your Kanban journey with this course from Global Knowledge. It helps you to understand how Kanban can benefit organizations and how it differs from other project management methods.

After this course, you will have the skills to apply Kanban methods within your own team.

Course cost: $1,395 USD

Lean Project Management

The goal of Lean project management revolves around maximizing value while minimizing waste. In essence, it aims to create more value for customers with the least amount of resources.

Although the process was originally for manufacturing, industries from healthcare to finance are realizing its benefits.

Lean is a popular project management process as many organizations are looking to do more with less – especially for marketing teams who are always dealing with tight budgets and time constraints.

The Lean principles focus on creating value and maximizing it through continuous improvement and waste elimination. Lean is really considered more of a theme, than a strict methodology that spells out specific tactics to accomplish a project.

The theme addresses three hurdles that create waste; Muda, Muram and Muri. Once these are overcome, your team will accomplish more with less.

- **Muda**
  is about removing anything that's not adding value to the customer. In the world of marketing, this could be eliminating multiple rounds of blog revisions.
- **Mura**
  is about eliminating variations – it's about creating a standard way of working to eliminate the overhead that deviations create. For marketers, this could mean standardizing creative briefs or workflows.
- **Mura**
  is about removing workload – according to Lean, the optimal capacity 60-70%; any more than that actually slows productivity. Marketing teams can apply this by limiting work-in-progress through a Kanban board.

Lean Project Management Training

Lean project management training teaches you how to prioritize, standardize and work at an optimal level to ensure that your output creates the maximum value for customers.
Rather than just checking off a laundry list of project, lean training will help you choose the right things to be working on.

Udemy:

Lean Project Management Training

This course teaches you how to run projects that deliver real customer value rather than just completing a laundry list of to-dos.

Following this course, you'll have the knowledge to apply the principles of Lean thinking to your projects and increase the likelihood that your projects are maximizing business value.

Course cost: $119.99 USD

Simplilearn: Lean Management Certification Training

Lean Management Certification Training

This Lean training will help you optimize processes, increase quality and deliver better value to your customers.

You'll learn to create utilize fewer resources, reduce unwanted activities and implement small changes for big payouts.

Course cost: $199 USD

Stacksocial:

Project Management Lean Process Certified

By focusing on prioritizing tasks, this course helps project managers learn to boost productivity and meet goals. This course also offers a certification to prove that you've mastered Lean project management fundamentals.

Course cost: $199 USD

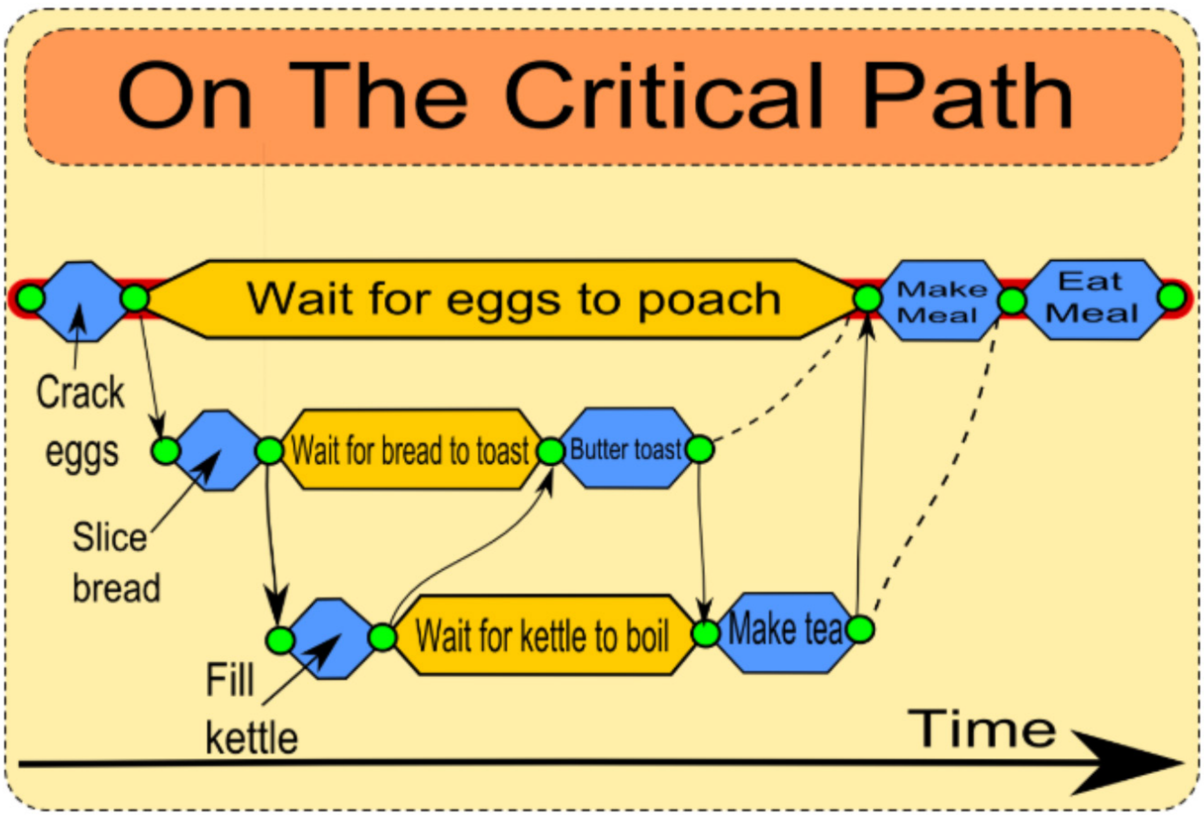
Critical Chain/Path Project Management

While Waterfall and Agile focus on process and tasks, Critical Chain/Path aims to solve resource issues. It is best suited for teams who have flexible skill sets and can move within the project fluidly.

Each project begins by setting out a chain of items that are fundamental to the project (the critical chain/path). Then, milestones and completion dates are estimated based on the critical path/chain.

After the critical path has been determined you can figure out what the least amount of time is necessary to complete a task. In other words, the critical path is the longest amount of time it will take to complete the project's tasks.

Here's an example of what the critical path for making breakfast would look like.



Source: [Tim Tyler]

Critical Path/Chain is all about what the earliest date tasks can start, the latest they can finish, and dependencies that are present.

Critical Path/Chain Project Management Training

Critical Path/Chain is very helpful when you have to plan large projects, map complex resources, and know who is available for what part of the project and when. However, it isn't great for small-scale projects that require a fast turnaround.

Courses in Critical Path/Chain will help you understand how to use the process to plan your resources better and increase ROI on your project.

Lynda:

What is the Critical Path?

This short course from Lynda discusses how the Critical Path works in relation to your project.
In this video lesson, you will learn more about what the critical path represents and why it's important to the success of your project.

Course cost: $29.99 USD/month

Study.com:

Critical Path Method in Project Planning

This course is a perfect starting introduction to the Critical Path method and how to use this project management tool to create better plans and schedule in all your projects.

You will learn about how to implement the organize projects according to fundamentals of the Critical Path method.

Course cost: $39.99 USD/month

ASCE:

Principles of Critical Path Scheduling

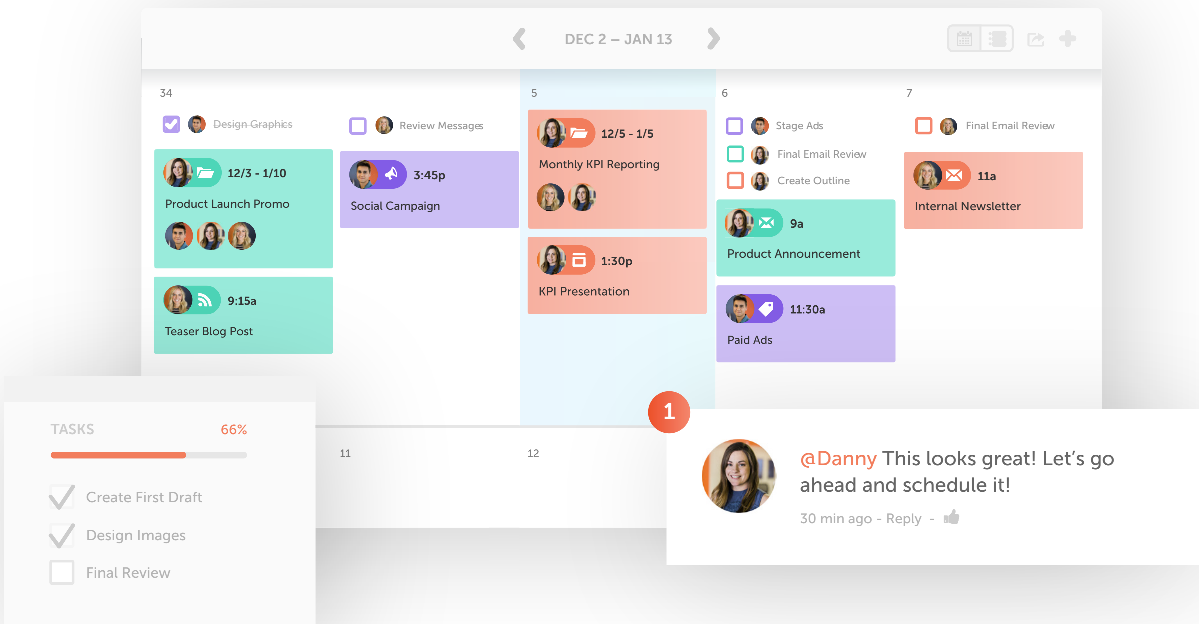
This course from ASCE takes a deep-dive into all things Critical Path.
It teaches the fundamentals of the Critical Path Method (CPM). Although this course is tailored to construction projects, project managers of all industries will likely find value in learning how to implement a Critical Path for their specific project.

Course cost: $745 USD

PM Tools + PM Training = Better ROI

Now that you know how to get the right project management training, take a test drive of CoSchedule. It's the best tool to get (and keep) your marketing projects organized.

See how your team can get organized with CoSchedule!



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