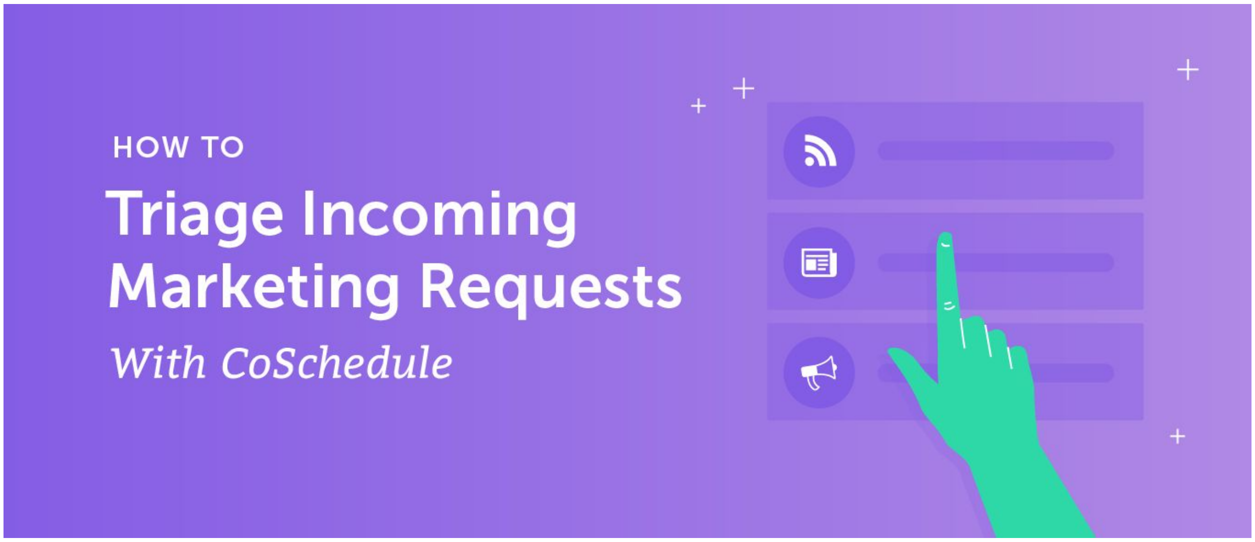


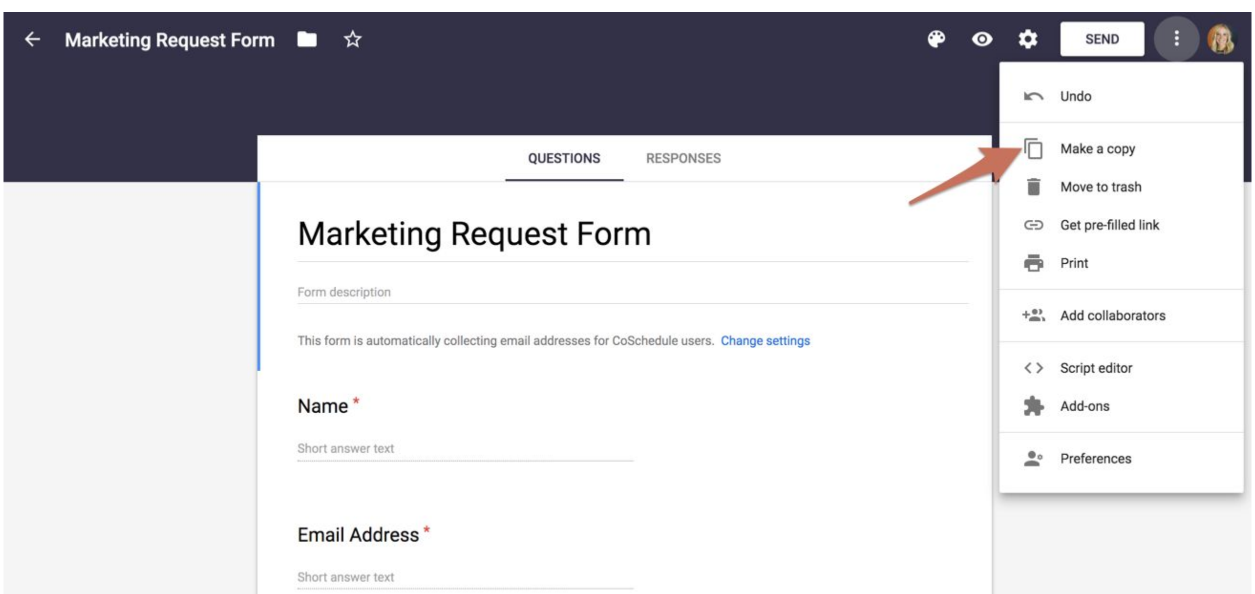
Step 1: Create a Marketing Request Form

The first thing you need to do is create a Google Form with all the details you need from the project requester.

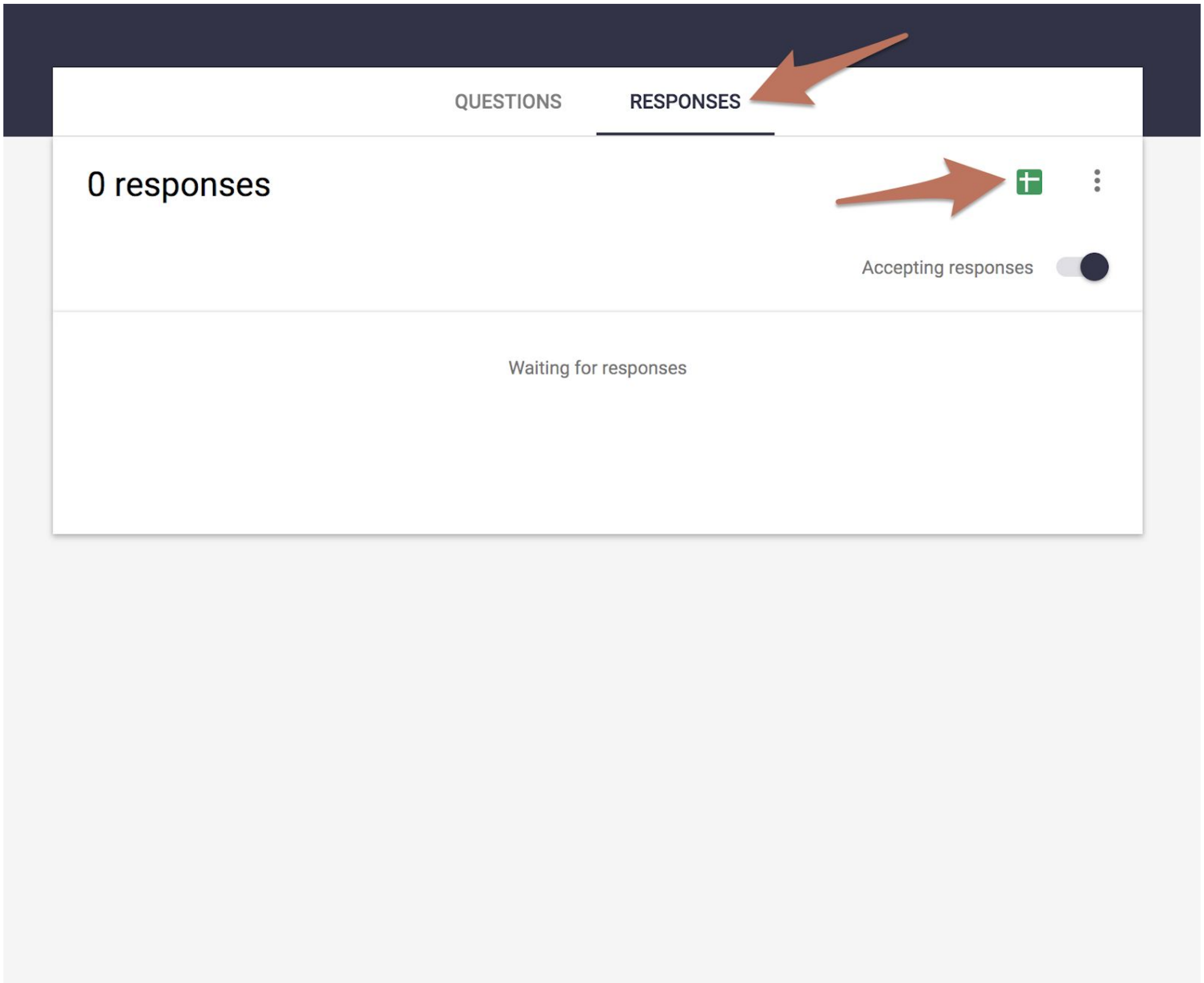
This is what people in other departments will use to request projects from your team moving forward.

Here's a Google Form template we've created for you.

To use it, simply create a copy and save it to your Google Drive.



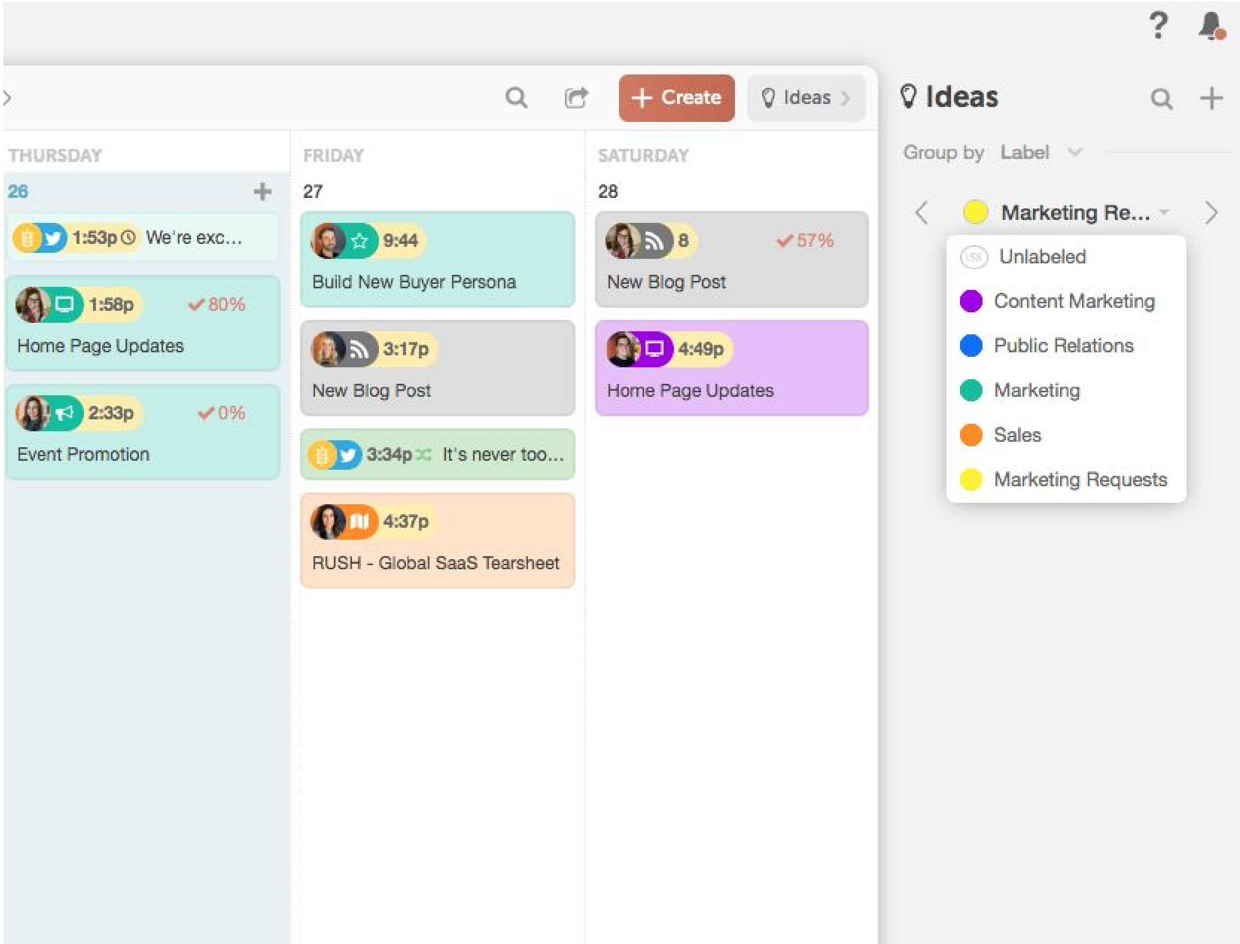
Next, you'll turn this form into a Google Sheet by clicking the responses tab and saving it as a new spreadsheet in your Google Drive.



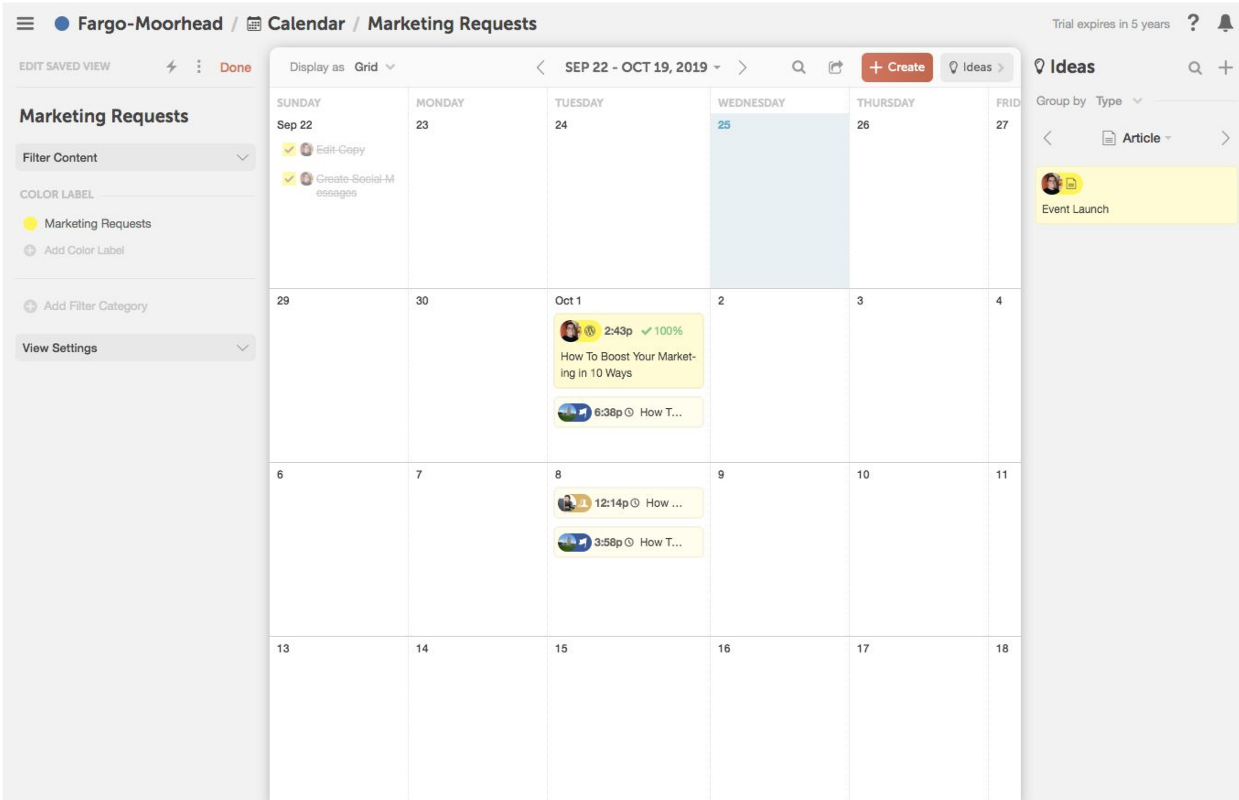
Step 3: Create a New Marketing Requests Color Label

Head over to your CoSchedule calendar and create a new color label called "Marketing Requests".

This allows you to quickly see when new requests arrive in your Ideas Bin. You can also filter your Ideas Bin by color label to easily see new incoming requests that need to be assigned and scheduled.



If you use color labels to label your request projects, you can also create a saved view to help filter all of your marketing requests on your calendar and Idea bin.



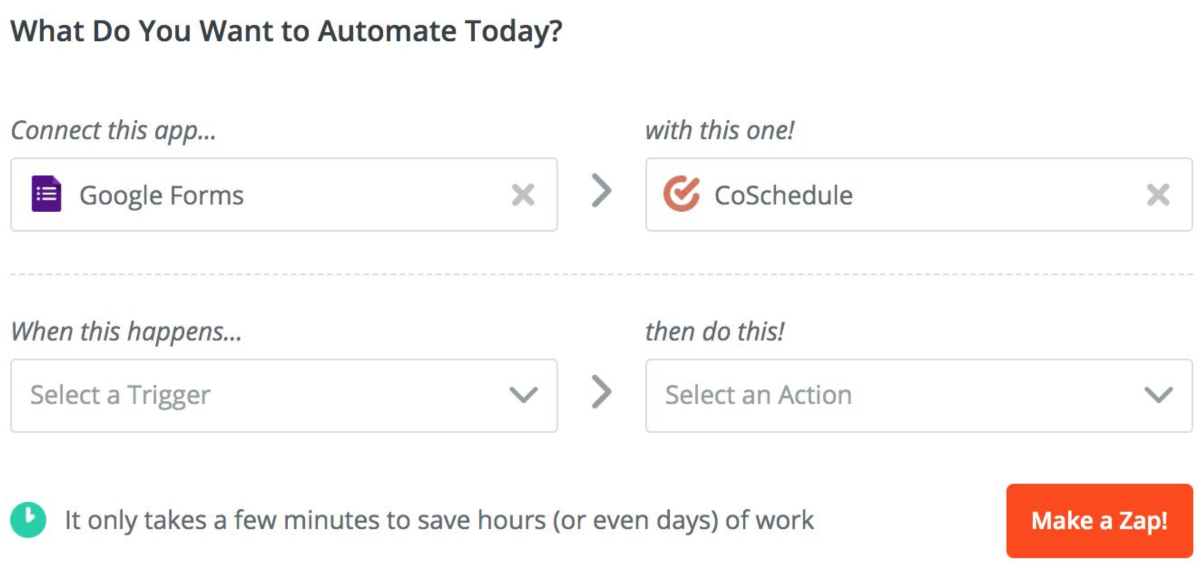
Step 3: Connect Zapier

When your Google Form is created and you've added a new color label, connect CoSchedule to the Google Form using Zapier.

Head over to the integration area of CoSchedule and make sure you've added Zapier as an integration. Don't have a Zapier account? Click here to create a free Zapier account.

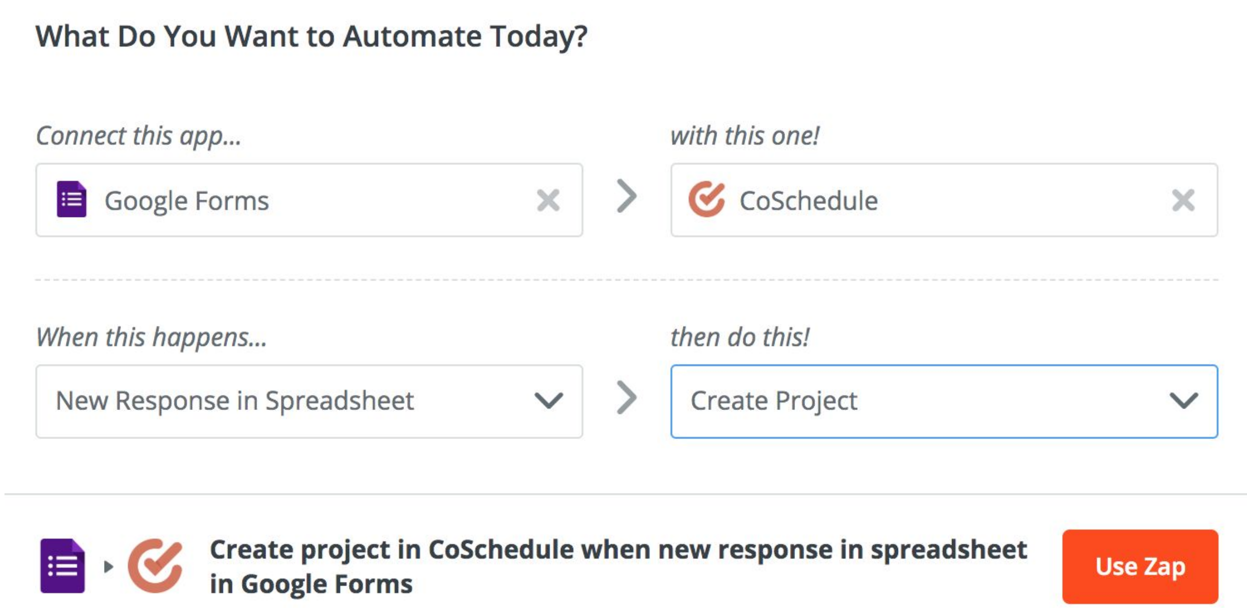
Once you've got the Zapier integration added to your CoSchedule calendar, you'll need to create a Zap in Zapier.

In Zapier, choose to connect Google Forms with CoSchedule.



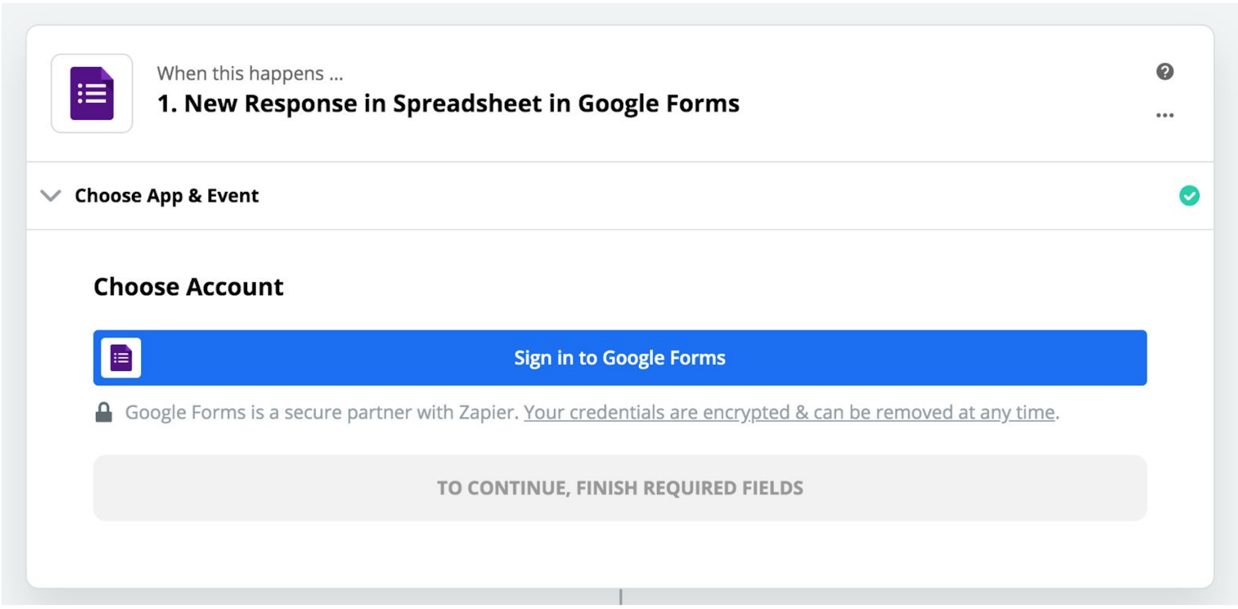
Then choose When this happens…
New Response in Spreadsheet

Then do this!
Create new Project

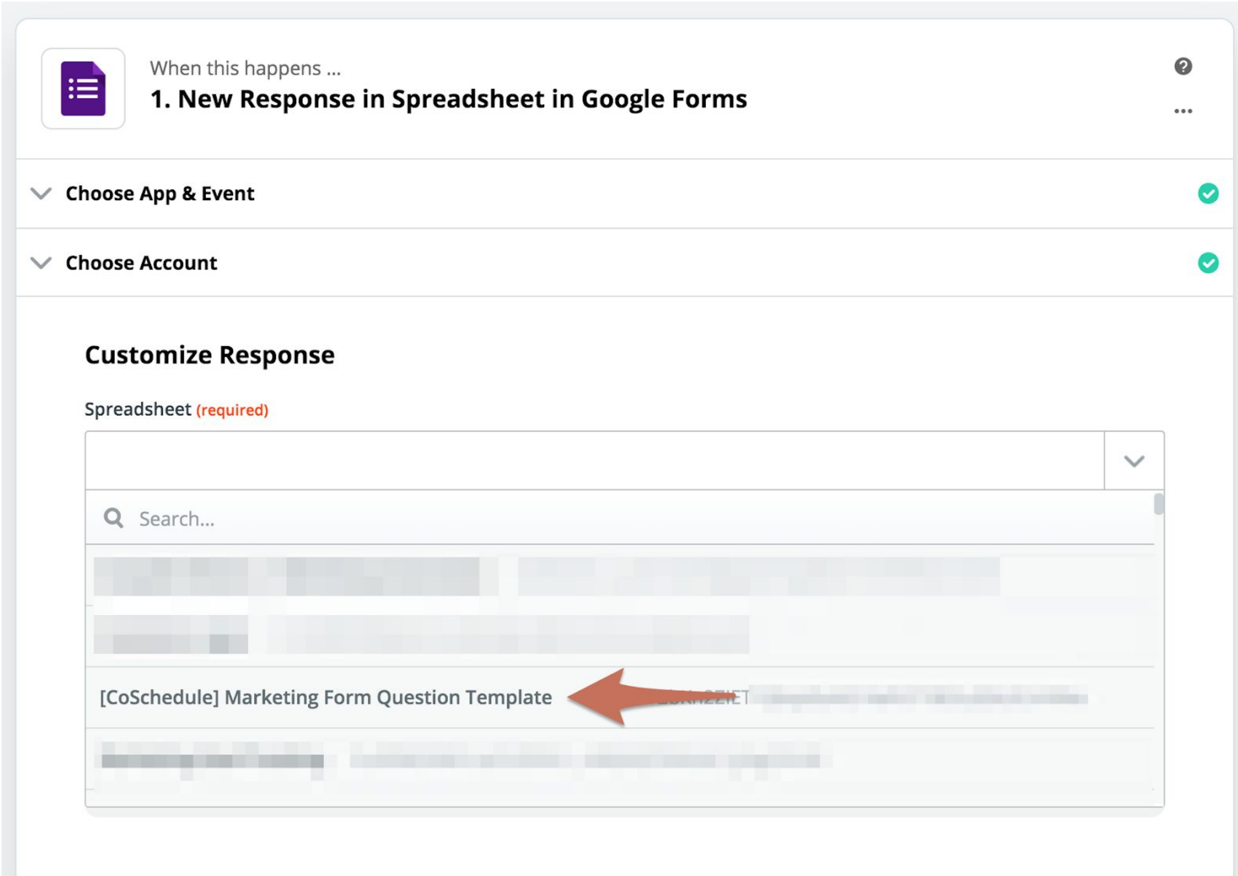


Once you've clicked "Use Zap", Zapier will walk your through the process of setting it up. We'll go through it below to help.

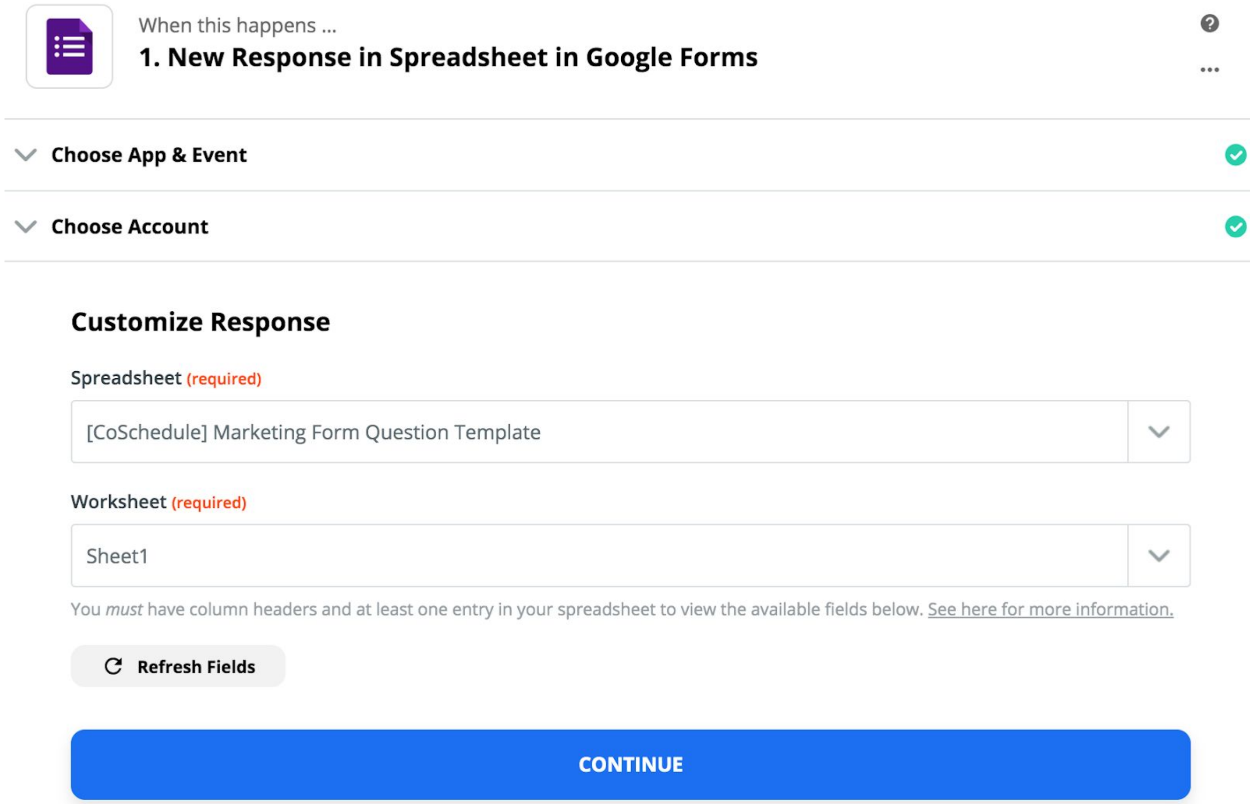
Sign in to your Google account using the blue button.



Using the dropdown menu called “Spreadsheet” find the sheet that you created in step one. It will be called [CoSchedule] Marketing Form Question Template… unless you changed the name.

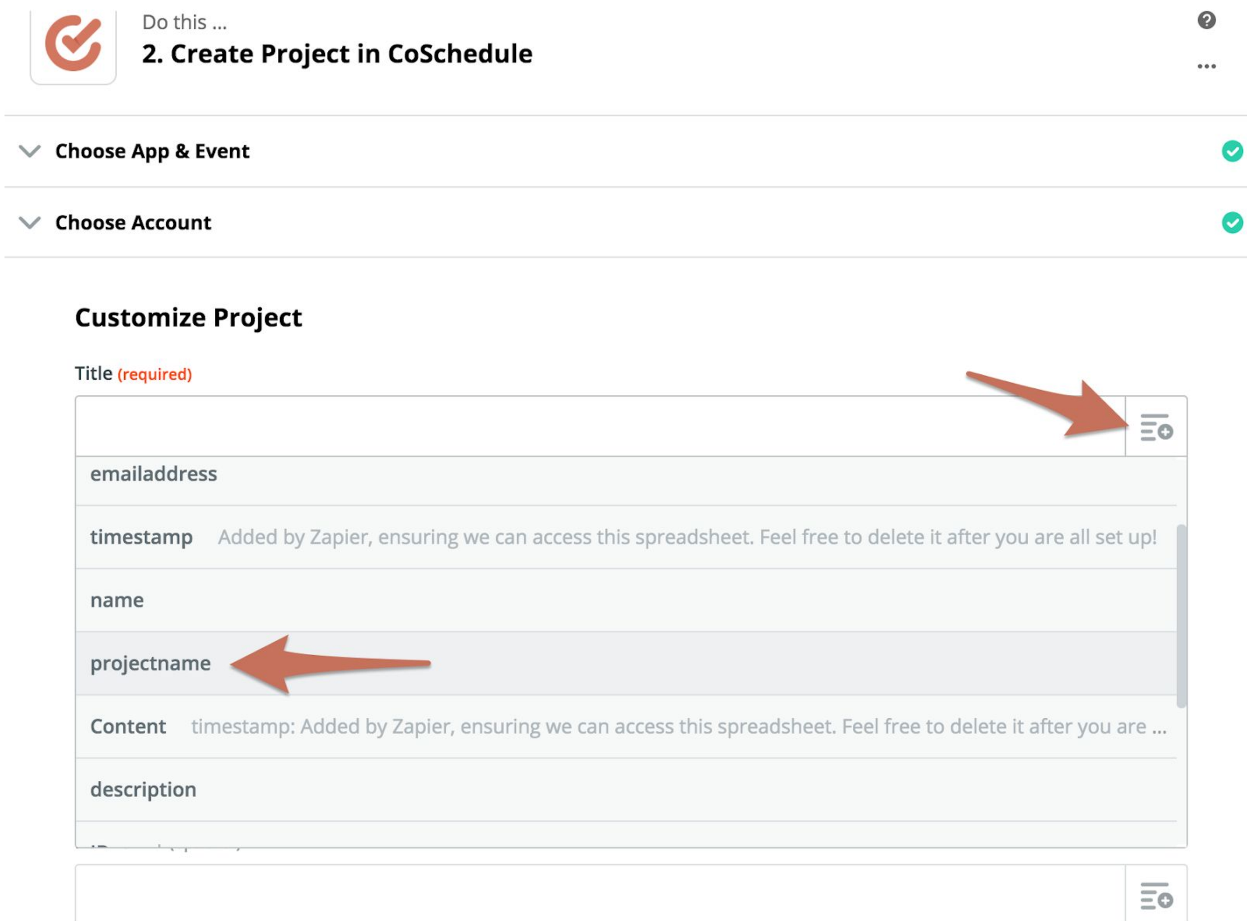


Then Choose Sheet1 in the drop down menu called “Worksheet”.

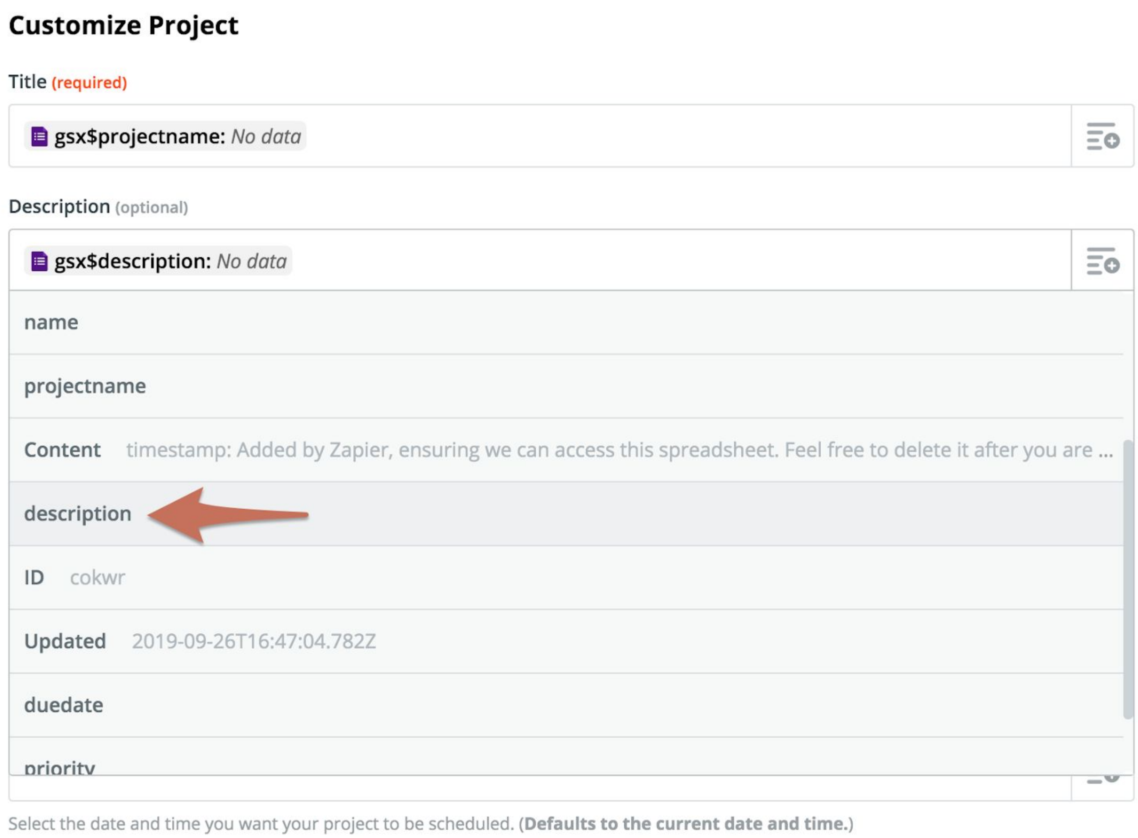


Next, you'll continue on to the CoSchedule part of the Zap set up. You might need to copy and paste the API key from your CoSchedule calendar. You'll find it in the integrations area on your CoSchedule calendar.

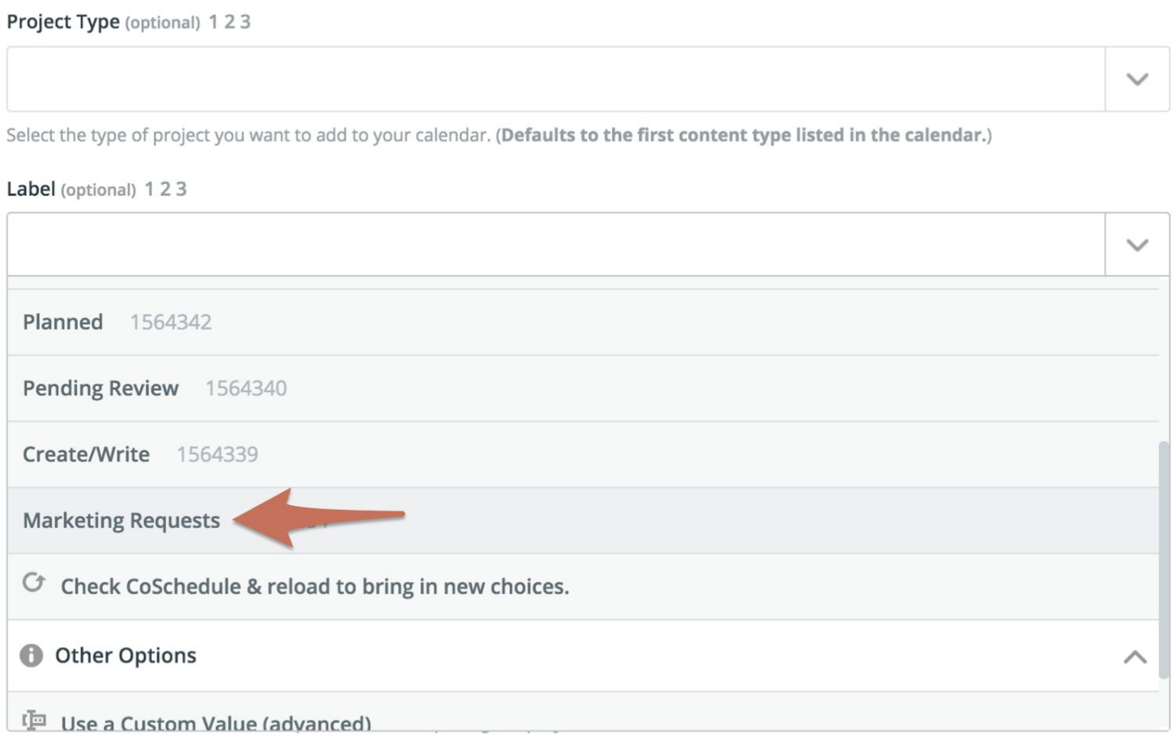
Under the title field, find the option that says projectname.



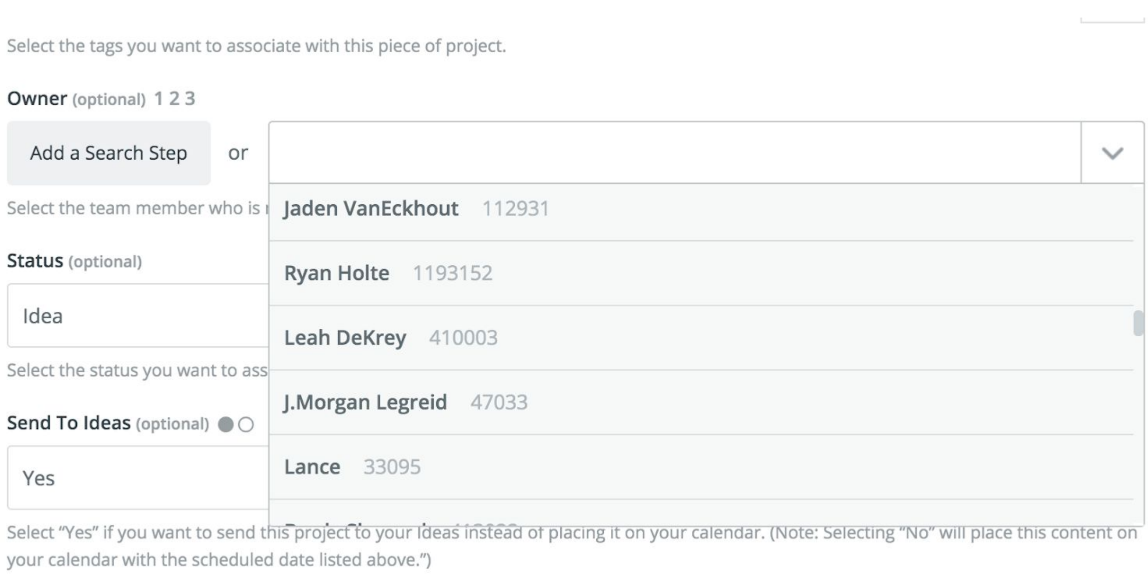
In the description field, choose the option that says “description” from the drop down menu.



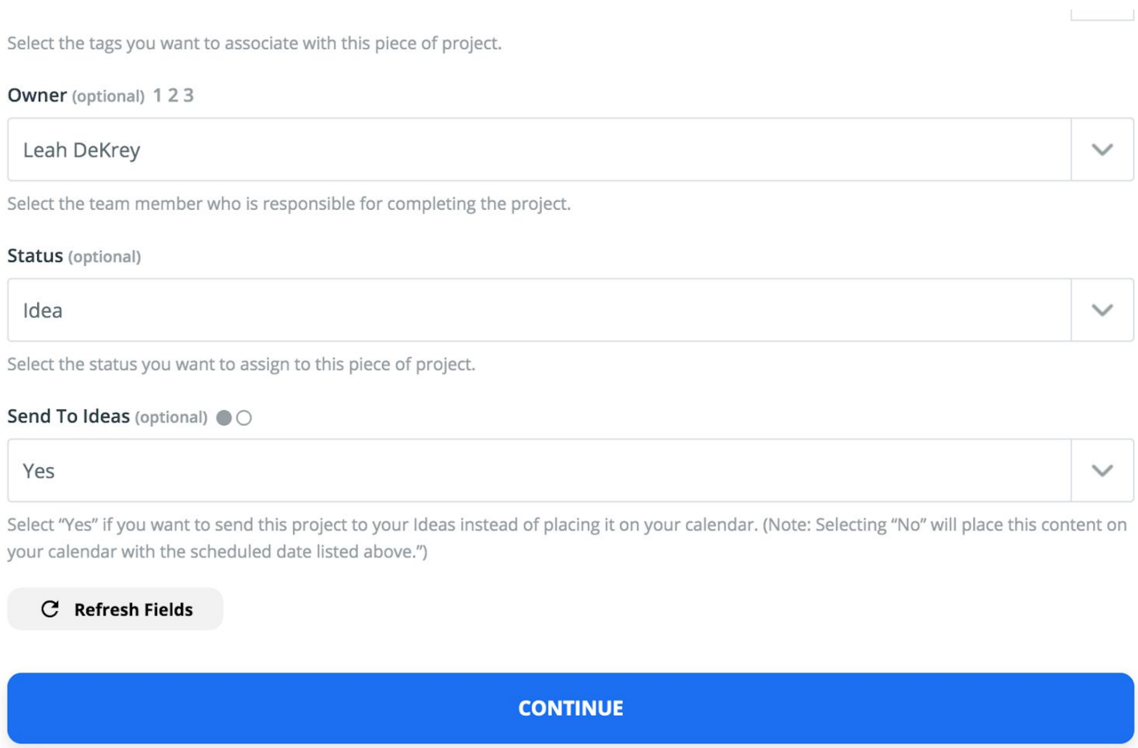
Under the field called Label, choose the “Marketing Requests” color label you just created.



Next, add yourself as the owner for all requests. This will give you a notification in your CoSchedule dashboard any time a new request is created. Find your name using the drop down menu to add yourself as the owner.



Finally, change the status to Idea, and say "Yes" to sending the request to your Ideas Board.



When finished, you'll click "Continue" and finalize your Zap. A test will be sent to your calendar to make sure everything is connected correctly.

Step 4: Send the Google Form to Your Organization

Now that you've successfully set up your Zap. You'll need to tell everyone at your organization that they need to use the Google form to request marketing collateral from now on.

Here's an example email you can steal to save time.

Hi everyone,

It's getting increasingly difficult to track incoming requests for marketing materials. In the interest of saving time and to avoid things getting lost in the shuffle, we will be implementing a new request form. Please fill this out whenever you require something from the marketing team. I recommend bookmarking the link for quick and easy access.

Once you submit a request using the form, I will send you a confirmation and expected timeline for delivery.

{INSERT THE LINK TO YOUR GOOGLE FORM}

Thanks for your cooperation.

{YOUR NAME}

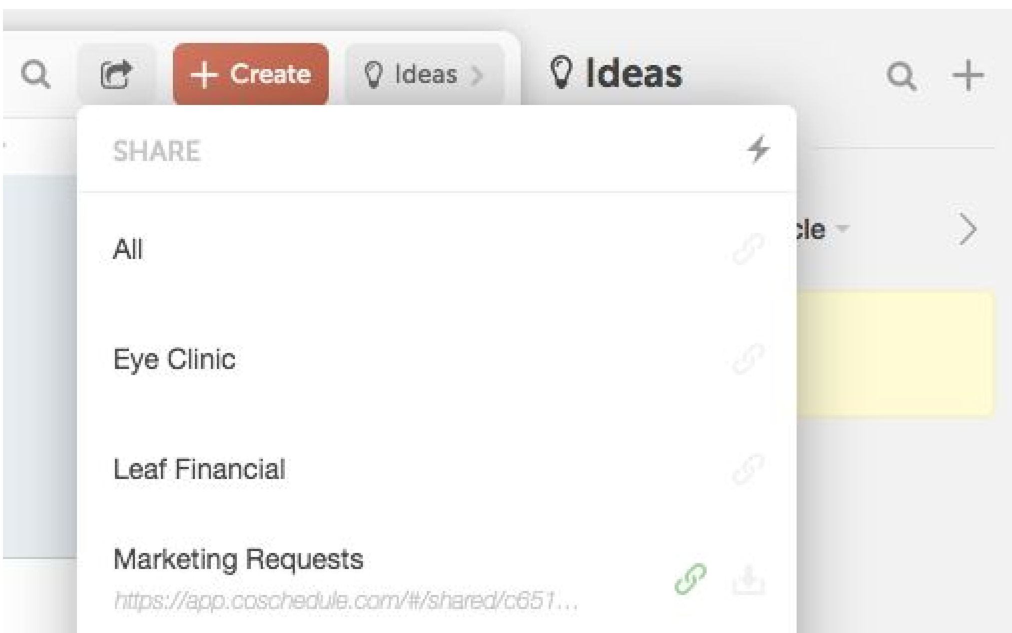
We also recommend bookmarking the link yourself for quick access when people inevitably forget to use it. You can simply respond by sending them the link again until they get the hang of the new process.

Step 5: Share The Progress With The Requester

In step 2, you created a saved view on your calendar. This creates a calendar that visualizes all the schedule marketing requests that your team is (or will be) woking on.

This means you can quickly create a read-only view to share progress with the individuals who have requested projects.

To create a read-only view, click share calendar and select your marketing request view.



This creates a link you can share with people who in your organization who don't have a user account with CoSchedule.

You can also choose to download the saved view as a PDF, rather than using a read-only link.