

This is How We Divvy An Implementation Worksheet for DivvyHQ Admins

Instructions

We want to get you thinking about the basic organizational structures, workflows and content fields that are available within Divvy. Completing this worksheet for your first calendar should provide a good framework for how you will set up other calendars, users, content and meta data structures.

Think about your calendar organization...

DivvyHQ's calendar architecture is built to mold to whichever structure makes sense for your organization. One approach is to map calendars to your existing org chart (i.e. markets, departments, silos, teams, product/service offerings, clients, etc.). Another approach is to set up calendars based on the different content channels or initiatives you manage (i.e. a blog calendar, a social calendar, a webinar calendar, etc.). If you're a Divvy Enterprise customer, you can do both with the additional "Parent Calendar" layer. For additional approaches, [check out this blog post](#).

The frequency of content for each channel often dictates how you organize/separate your calendars. For example, if you tweet every day, you may want a "Twitter Calendar". If the frequency isn't that high, you may just want to have a "Social Calendar" to manage all social channels.

Think about calendar names...

Should you establish a specific naming convention that ensures your calendar structure is clear and obvious for all users? Even if your calendar organization is simple today, it's probably going to grow. Establish a solid convention that will grow with you and minimize the need to change things in the future.

Think about your team members, their roles, and to which calendars they should be provided access...

Each DivvyHQ user role comes with a pretty complex set of permissions. In order to provide flexibility throughout the application, each user can be granted access to designated calendars and be given a specific role for each calendar based on the real-life role they play. Here are a few general rules of thumb that match DivvyHQ roles to real-world roles:

- **Global Admins & Parent Calendar Admins** = High-level managers who oversee multiple content teams, silos, and/or content initiatives.
- **Editors** = Power users who need full read/write/delete permissions on anything within a designated calendar.
- **Contributors** = Content producers who can read/write/delete anything they've created (own) and have read/write permissions on any content to which they are assigned.
- **Internal Reviewers** = Internal employees or trusted stakeholders who play a limited role in your production/approval workflow and with whom you're comfortable seeing all content that is associated with designated calendars. These users cannot create new content and have a read-only view of content items.
- **External Reviewers** = External contributors or stakeholders who play a limited role in your production/approval workflow and with whom you only want to see the content items to which they are assigned. These users cannot create new content items and have a read-only view of content items to which they are assigned.

Think about the content types you want to manage per calendar...

Once you've nailed down your calendar structure, you can customize the list of content types you wish to manage. We provide a default list, but you can also get very granular and add your own custom content types to build your list.

Think about the production workflow (tasks) for each calendar...

A custom workflow template can be established for each calendar, which automates the creation of production tasks and deadlines. If your production process is consistent, meaning the same people do mostly the same tasks each time, and you can guesstimate the amount of time each task takes, then creating a custom workflow will save you a lot of time vs. manually creating tasks each time. Note that assigning team members and typical durations is optional. We recommend at least defining the individual workflow steps/tasks.

Think about your content strategy for each calendar...

DivvyHQ has a variety of fields built in to help you execute on your content strategy. Consider the following questions:

- Which topics or categories do you need to cover with your content?
- For which target audiences are you focusing your content? Be careful here. Focusing on too many audiences can dramatically reduce your content's effectiveness.
- Are you mapping content to specific buying stages?
- In which publishing channels will you distribute the content associated with this calendar?
- Which promotional channels will be ideal for promoting this calendar's content?
- Are there specific keywords or tags on which you need to focus?

Think about any campaigns with which you may need to associate content...

If some of your marketing/promotional initiatives include campaigns that are supported by multiple pieces of content, list those out and load them into DivvyHQ to ensure proper planning, tracking and reporting down the road. We have a lot of new functionality coming for this area, so get started now by associating individual content items with specific campaigns when applicable.

That's enough thinking...Now it's time to Divvy.

Use the worksheet on the following 4 pages to nail down your plan for each calendar. Or you can simply use it as a framework for discussion and planning within your team. Completing the worksheet will translate directly to the set up of your DivvyHQ calendars within the Calendar Admin.

Good luck and Happy Divvying!

Parent Calendar Name: _____ (Enterprise Only)

Child Calendar Name: _____

Team Members/Roles:

Parent Calendar Admin: _____

Editors: _____

Contributors: _____

Internal Reviewers: _____

External Reviewers: _____

Content Types

- Blog Post
- Email
- News Release
- Photo/Image/Graphic
- Podcast
- Report/eBook/Whitepaper
- Status Update/Tweet
- Video
- Webinar/Presentation

Custom Content Types:

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Define Your Workflow (Tasks)

Task 1: _____

Assigned To: _____ Time Estimate: _____ Days _____ Hours

Task 2: _____

Assigned To: _____ Time Estimate: _____ Days _____ Hours

Task 3: _____

Assigned To: _____ Time Estimate: _____ Days _____ Hours

Task 4: _____

Assigned To: _____ Time Estimate: _____ Days _____ Hours

Task 5: _____

Assigned To: _____ Time Estimate: _____ Days _____ Hours

Define Your Content Strategy Fields

Topics/Categories – Required field? Yes / No - Disable this field? Yes / No

- | | |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
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Target Audiences – Required field? Yes / No - Disable this field? Yes / No

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- _____
- _____
- _____
- _____
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- _____
- _____
- _____
- _____

Keywords / Tags – Required field? Yes / No - Disable this field? Yes / No

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Buyer Stages – Required field? Yes / No - Disable this field? Yes / No

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- _____

Publishing Channels – Required field? Yes / No - Disable this field? Yes / No

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Promotional Channels – Required field? Yes / No - Disable this field? Yes / No

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Campaigns – Required field? Yes / No - Disable this field? Yes / No

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