



# Training Agenda



## About

This training course will focus on scheduling and publishing to six social channels: Facebook, Instagram, Twitter, LinkedIn, Google My Business, and YouTube. It will also cover engagement and tracking features, social media analytics, and Zoho Social's integration with CRM, Desk, Canva, and Bitly. It will also look at content creation, setting up the admin panel, lead form generation, and finally, we will share some best practices for Zoho Social.

## Who it is for:

This training course is for standalone marketers and small, medium, and agency-level businesses.

## Overview

Zoho Social: An introduction to the app and its role in Zoho's suite of business apps. This section will give a brief overview of the social media accounts supported in Zoho Social and look at current marketing trends and post types for each social network:

- Facebook
- Twitter
- LinkedIn
- GMB
- Youtube
- Instagram



# Day One - 3 Hours

## Module 1 : Publishing and scheduling

- Publishing window, types of scheduling tool, Power Editor
- RSS integration
- Bulk scheduler

## Module 2 :Tracking and managing posts

- Posts module overview
- Drafts and evergreen posting
- Content approval workflow
- Collaborate on posts
- Publishing calendar

## Module 3 :Tracking and managing engagement

- Messages module overview
- Live stream and notifications
- Monitor tab overview
- Connections overview



## Module 4 :Reports: Social media analytics

- Brand health
- Post stats
- Reports module overview
- Scheduling reports
- Report categories and classifications
- CRM and Desk reports

## Module 5: Collaboration with your team and clients

- Collaborate module overview
- Drafts
- Team notifications

## Module 6 : Content curation

- Media library
- Advanced keyword and hashtag search
- RSS integration with manual scheduling
- Repost and retweet scheduling



## Module 7 : Integrations

- Zoho CRM integration
- Zoho Desk integration
- Bitly integration
- Canva integration

## Day Two - 2 Hours

## Module 8 : Lead forms integration

- Facebook Lead Ads
- LinkedIn Lead Ads
- Lead Ads analytics
- Field mapping and field management
- The Social-CRM-Lead Ads triangle setup

## Module 9 : Other topics

- Zoho Social mobile app overview
- Sharing using the zShare browser extension



## Module 10 : Best practices

- Media uploads
- Content management (hashtags, mentions, and captions)
- Social channel setup and best practices
- Ad account setup
- Bulk scheduler example

## Module 11 : Brands and portal management

- Brand setup and management
- Team member, role, and permission management
- Publishing settings and approvals
- Notifications
- Portal customization for agencies
- Audit log

