superhighways
harnessing **technology** for **community** benefit

Beginner's Guide to Email Campaigns
With Mailchimp

CONTACT LISTS

Lists

As you will not have set up any lists yet – you will need to click on the "Create List" button in the top right hand corner
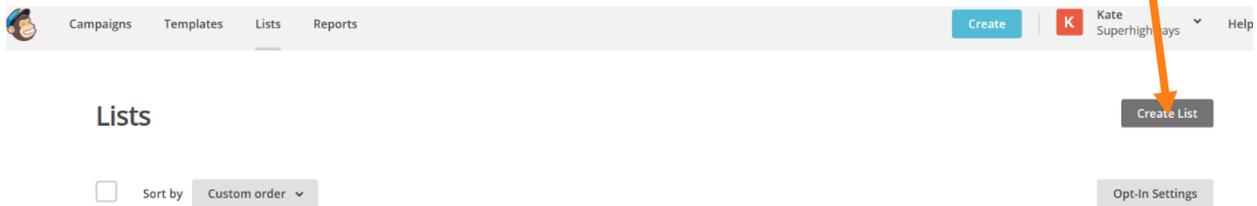
Options - New list or groups?

Do you want to create a new list, or do you just want to sub-divide an existing list with groups? Select **Create List**

Each time you set up a new list, you will be asked to provide some default information. This will pre-populate fields every time you set up an email campaign to send to this list. However, you can change and customise them for each campaign if you wish

Don't forget – to set the form settings and who gets notification messages. You can change who receives this information by clicking the edit button, as you can with the contact information above. The notifications are to do with new subscribers/unsubscribers.

Form Settings

☐ **Enable double opt-in**
Send contacts an opt-in confirmation email when they subscribe to your list.

☐ **Enable GDPR fields**
Customize your forms to include GDPR fields.

Notifications Sent to katewhite@superhighways.org.uk · Edit

☐ **Daily summary**
Summary of subscribe/unsubscribe activity

☐ **One-by-one**
Subscribe notifications as they happen

☐ **One-by-one**
Unsubscribe notifications as they happen

Save   Cancel

Once you have saved your list settings you will see your new list in the screen. You can add subscribers to your lists in a number of ways

Excellent! You have a brand new list.

Mailchimp Training
Switch list ⌄

Stats ⌄   Manage contacts ⌄   Add contacts ⌄   Signup forms   Settings ⌄   🔍

View contacts

You have no contacts
Import contacts or create a signup form to get started.

Three ways to add contacts
1. Clicking on import contacts
2. Clicking on your list name and then on the "import" menu
3. Clicking on the button to add subscribers one by

Importing Contacts to Your List Menu: Lists > Import
But before you start, check that you have permission to send emails to your list. The options are:

Where do you want to import contacts from?

- ● **CSV or tab-delimited text file**
  Import contacts from .csv or .txt files

- ○ **Copy/paste from file**
  Copy and paste contacts from .xls or .xlsx files

- ○ **Integrated service**
  Import contacts from services like Google Contacts, Salesforce, Zendesk, and more.
  Learn more

1. Importing contacts from a CSV or TXT file

This can be done by saving an Excel file as a .csv file format.
Click the "Browse" button to find your .csv file in your folders, then Click "Save".
And click the next button on the bottom right of the screen

Import from CSV file

Upload file

[   ] [Browse]

Acceptable file types: CSV or tab-delimited text files.

Duplicate addresses will be removed. We do not send confirmation emails to imported addresses and trust that you've gathered proper permission to send to every address on your list.

Mailchimp will then check that it is matching right columns in your spreadsheet to your Mailchimp list.

Import contacts

Now let's match the columns in your uploaded file to your MailChimp list.
See an example of the import field match process.

All columns are matched. Click "Next" below to finish.

☑ Show skipped columns

Column name		
First Name ⌄	**Last Name** text field Edit • Skip	**Email Address** email field Edit • Skip
Save > Skip		
First Name	Last Name	Email
Philippa	Leary	philippaleary@superhighways.org.uk
Kate	White	katewhite@superhighways.org.uk

Keyboard shortcuts:

↓ Select name   ← Back   → Next   × Skip

For each column, click "save" if you're happy with Mailchimp's matched columns.

Click on the drop down menu of column names if you want to give your column a different name. Choose from the list of New Column Names- to provide a new column title.

Click on "Skip" or use the X key to select skip if that column's contents is not important to import to your Mailchimp list.

Click on the "Next Step: Review>" button once you have matched all your columns. And click import on the next screen once you have reviewed the information.

2. Import Contacts by Copy/Paste from Excel

Simply select and copy the column contents in an excel spreadsheet and paste into the window provide by Mailchimp.   Mailchimp will ask to match up your column contents with the column names in your Mailchimp list.

Copy/pasted file

Paste subscriber info

```
1  First Name  Last Name   Email
2  Colin    Cregan   colincregan@superhighways.org.uk
3  Nine     Htet     ninehtet@superhighways.org.uk
4
```

☑ **I understand that my billing plan may be automatically upgraded.**
If your import causes your list to exceed your Forever Free Plan subscriber limit, you'll need to upgrade your billing plan to accommodate the new subscribers before you can send. Undo your list import before you send to revert to the Forever Free Plan.

Duplicate addresses will be removed. We do not send confirmation emails to imported addresses and trust that you've gathered proper permission to send to every address on your list.

Once you have matched them up (as per instructions in Point 1 above) click the "Import" button.

3. Import contacts by integrating with an online database tool

If you use any of the online database tools listed below, you can create a link up with Mailchimp to import your contacts.

To link any of these applications up you will either need your log in details for that application or an API key (Mailchimp gives guidance on how to get this).
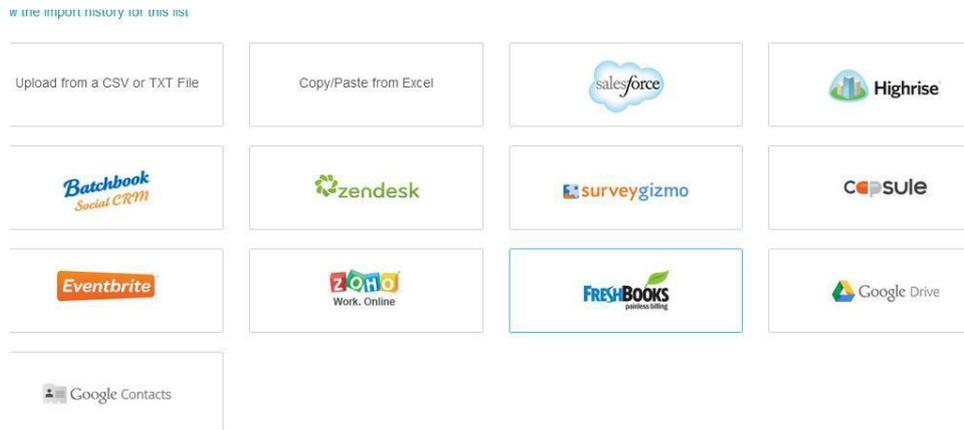
Once you have imported or added subscribers to your list, you will see a screen with a list of your subscribers whenever you go into that list.
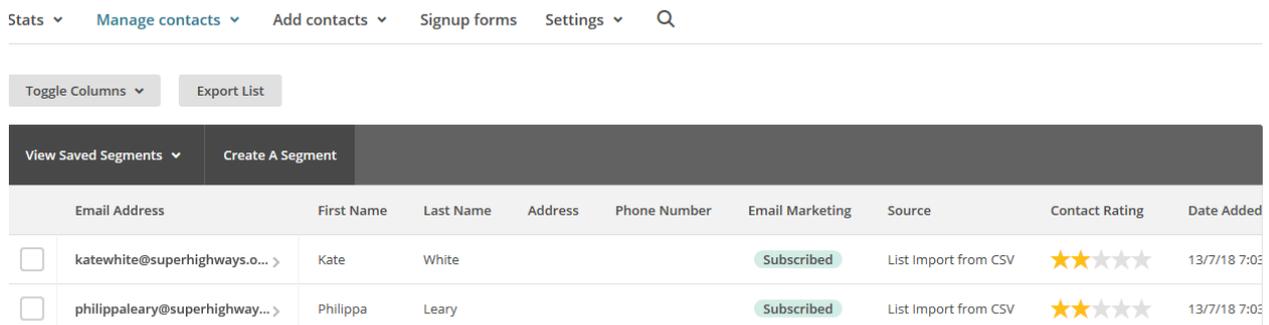
The "Manage Contacts" menu will allow you to take many actions including deleting and unsubscribing people from your list. Setting up groups and Segments
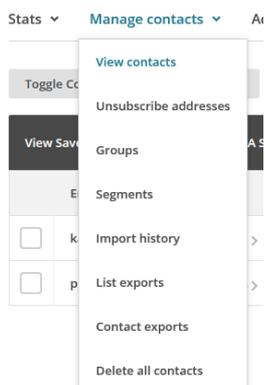
If you want to be able to collect new subscribers via online sign up forms, your next step will be to set these up by clicking on the "Signup Forms" menu.

Menu: Lists > Choose List > Manage Contacts > Groups

Use the Mange Contacts drop down to create a Group within your list. Groups are a useful way of categorising your subscribers by things like interests and preferences. Subscribers can select groups for themselves – Superhighways sign up form asks people which borough they work in as this is useful information for one of our projects. As the list owner you can also put your subscribers into categories for marketing purposes.

Click on "Create Groups" button on right hand side
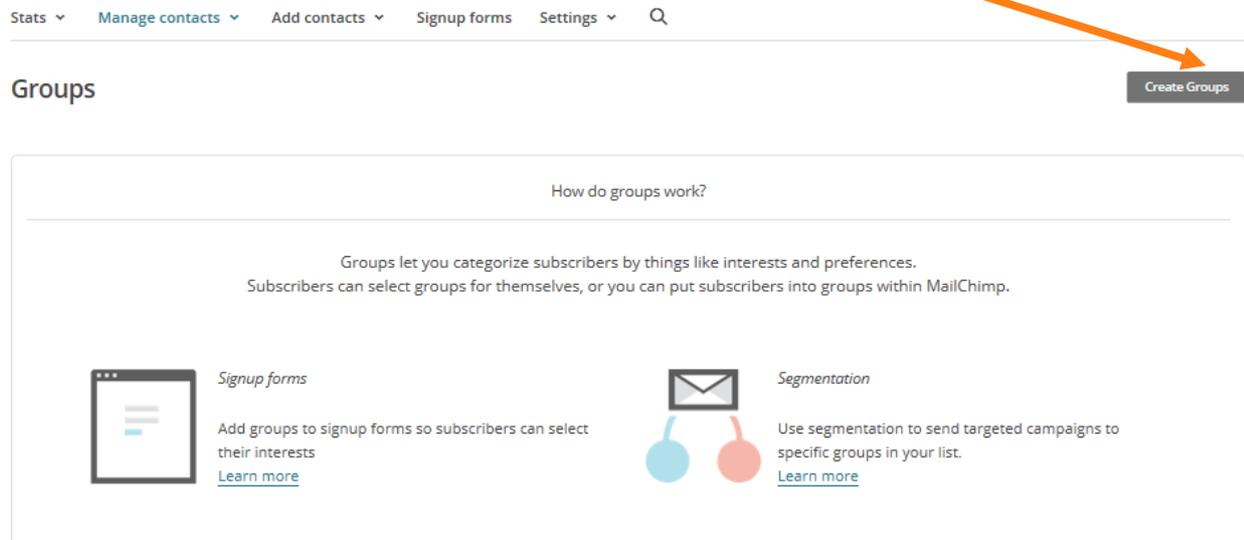
You can view your Groups anytime from the "Manage Subscribers > Groups" menu. You then have options to delete, import subscribers or send a campaign to each group.

Give your Groups a title (such as "interested in…" and then give group names such as *volunteering*, *events* or maybe certain services you offer. The Add Group button allows you to create a new category.
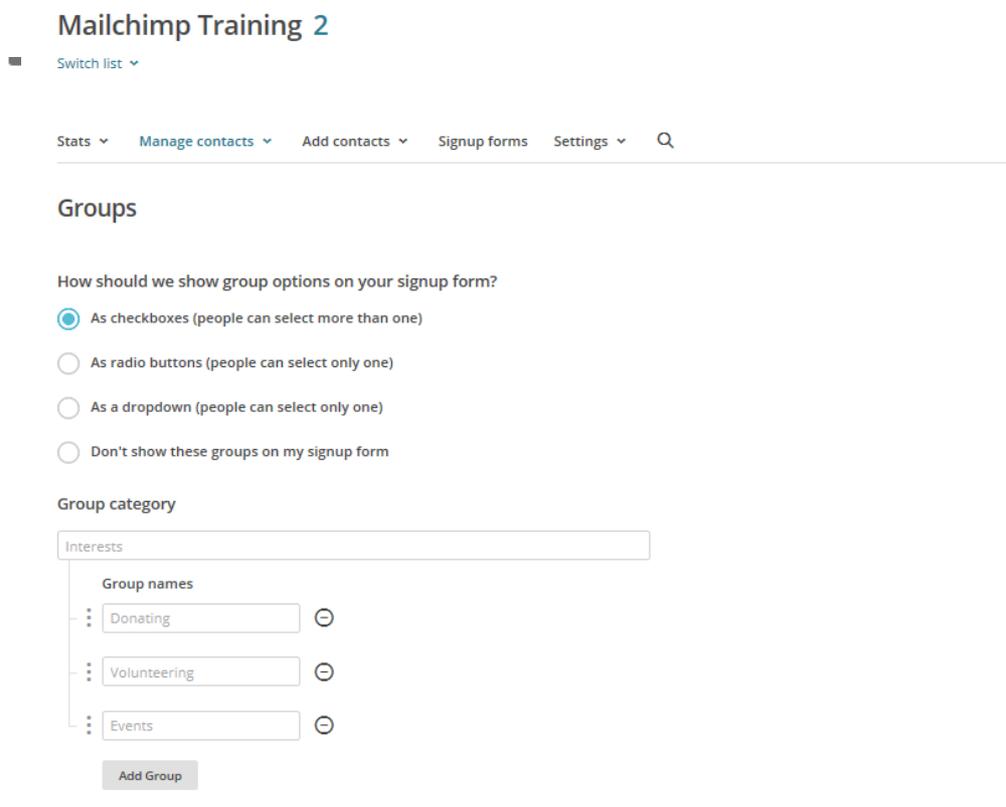
Group Management
You can retrospectively add your subscribers to a group

1. Open your list
2. From the Manage Contacts heading, select View Contacts
3. Click the checkbox next to the person you want to edit
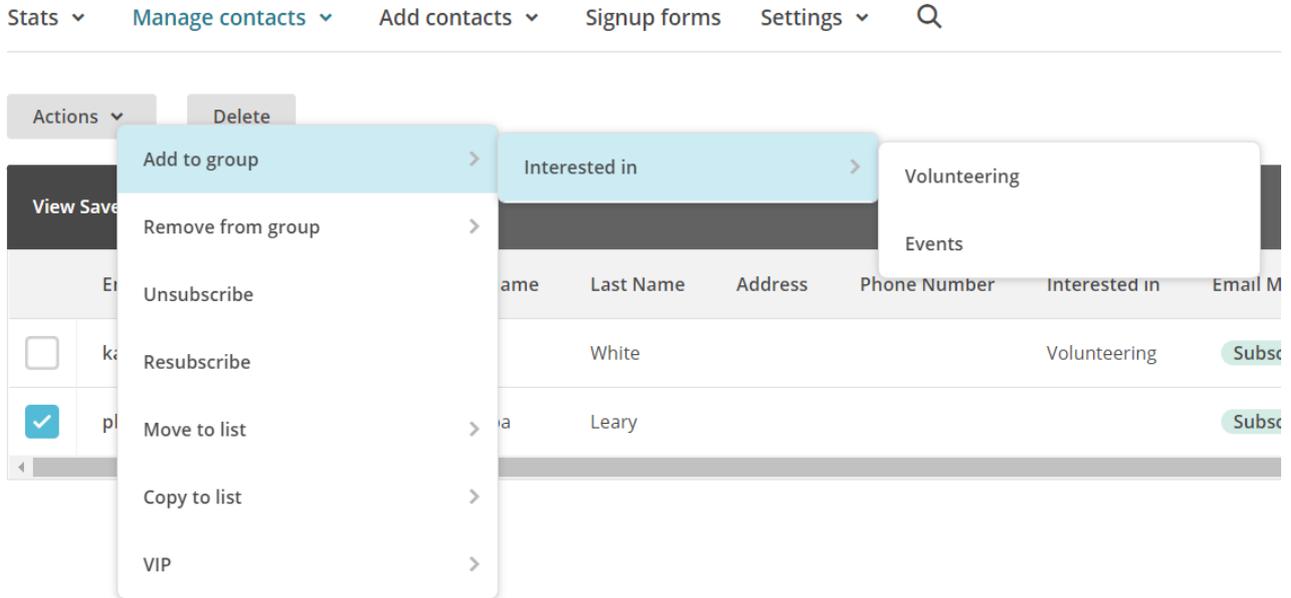
4. From the Action Drop down menu. Select Add to group > Interested in > Volunteering or events. Select which category they are interested in
5. Confirm you are sure this is the action you want to take.

Using Excel to add contacts to groups
You can also import contacts from an xls or csv file with groups already assigned.

For example, if your group is called Interested In, simply add another column to your spreadsheet list titled "interested in" and make sure the group words match exactly to those in Mailchimp.

When you upload your list, this will come up as another column that you will be asked to match to your list.
Audio

Sign Up Forms for your List

Form builder
Build, design, and translate signup forms and response emails

Select

Embedded forms
Generate HTML code to embed in your site or blog to collect signups.

Select

Subscriber pop-up
Design a pop-up signup form that can be embedded on any site.

Select

Form integrations
Create signup forms using one of our integrations.

Select

Facebook form
Add a signup form to your Facebook Page.
Learn more

Tablet form
Collect signups in store or at events with MailChimp Subscribe.
Learn more

The form "Form Builder" page allows you to start customising your sign up forms and response emails. Click the drop down menu underneath the forms and response heading. You will see the range of forms you can create and customise– make sure the sign up form is select for this exercise.
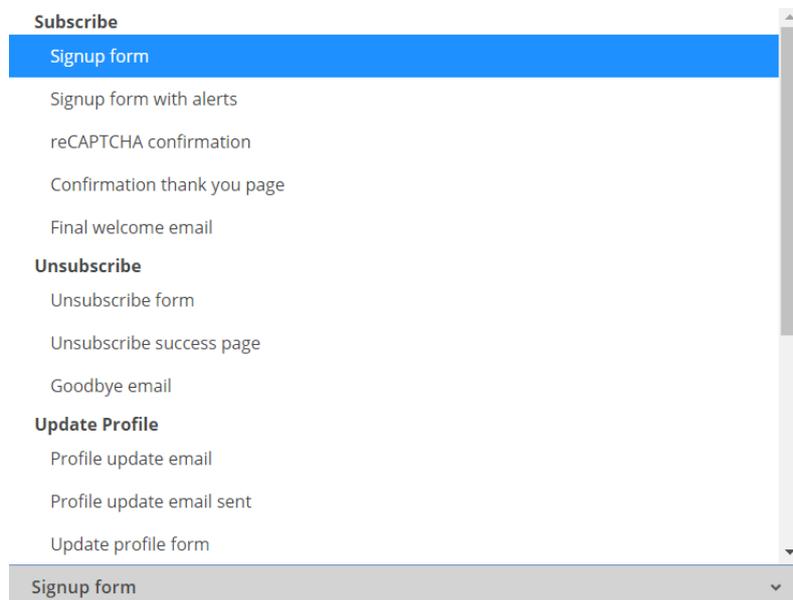
Subscribe
Signup form
Signup form with alerts
reCAPTCHA confirmation
Confirmation thank you page
Final welcome email
Unsubscribe
Unsubscribe form
Unsubscribe success page
Goodbye email
Update Profile
Profile update email
Profile update email sent
Update profile form

Signup form

Click to select field, then edit settings on the right

Customise Your Signup Form
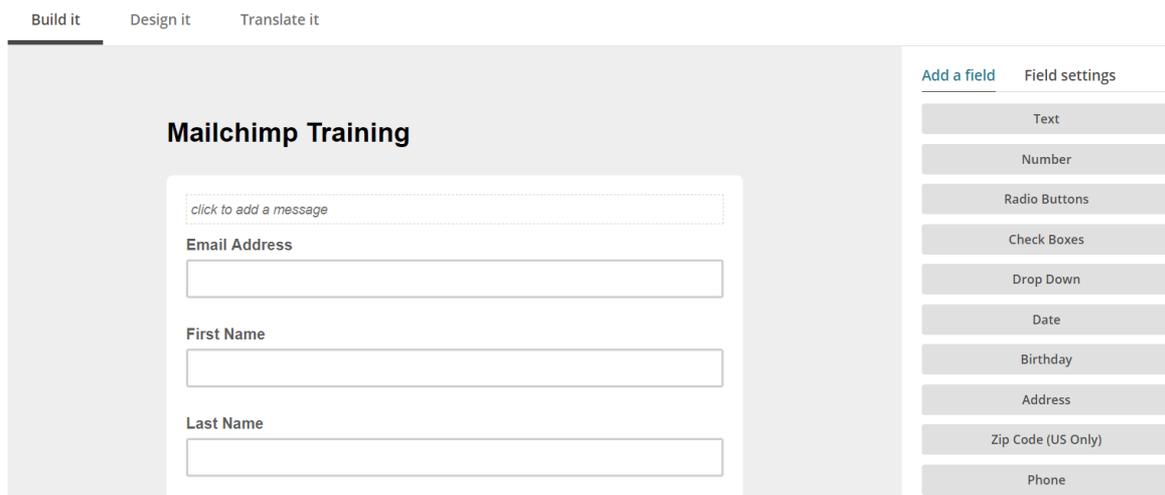
Build it

Edit your list name and any message you want to share about this list, what it means your subscribers will receive.

Mailchimp will already have chosen fields for your sign up form based on your columns in your list.

By clicking on a field it will bring up a new editing column on the right hand side where you can change the field name, set it as a required field and make it visible or hidden.

Tips

- Make sure the address field is based on UK address display.
- Remember to save.
- You can move the position of the fields in your sign up form either up or down once it has been added to the form
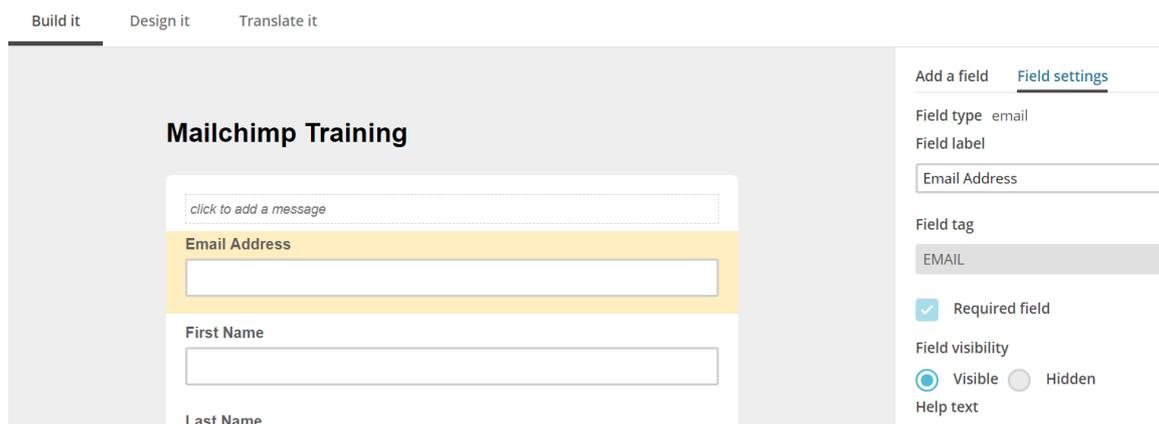
Adding New Fields

You can add new fields to your sign up form by clicking on "add a field" in the right -hand column and choosing a field type from the list. Edit your settings and select save field.

For example, you might want to collect subscribers' birth date so you can send them a special message or offer to celebrate their birthday. You can hide and unhide sections on the for

Design it

You have the options of changing the look and feel of the form.

Translate it

Choose a different language default for your list sign up form.

Share it

Mailchimp gives you various ways to share your sign up form:

1. URL address to use

2. share on your Facebook page
3. share on your twitter feed

4. download a QR code image to include on your hard copy publicity materials
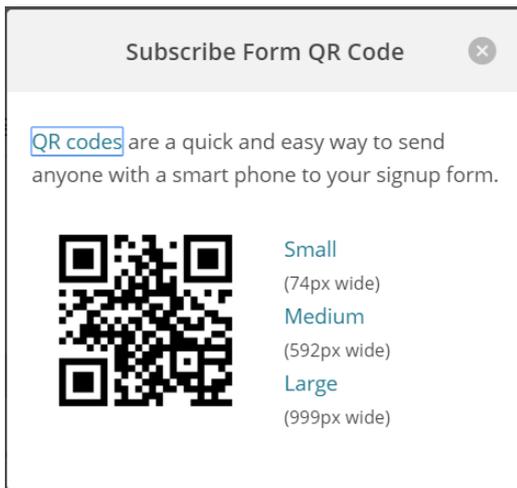
You can also embed a form into your website by going back to the "signup form" menu and choosing "Embedded forms"

Mailchimp gives you a choice of form styles you want to embed (Classic or Super slim most popular). You can customise Form Options and then Mailchimp gives you code to copy/paste onto your site.

Menu: Lists > Choose List > Manage Contacts >Segments

Segments allow you to view or send an email to specific people on your list based on more than an interest area or subscriber characteristic/activity.

Above your list of subscribers in your list you will see a "Segments" button. If you have no saved segments you can create a new one by click Create Segment"

Stats ⌄   Manage contacts ⌄   Add contacts ⌄   Signup forms

Settings ⌄   🔍

Segments

Create Segment ⌄

You have no saved segments
Create segments to target subscribers by location, engagement, activity, and more.
Learn more
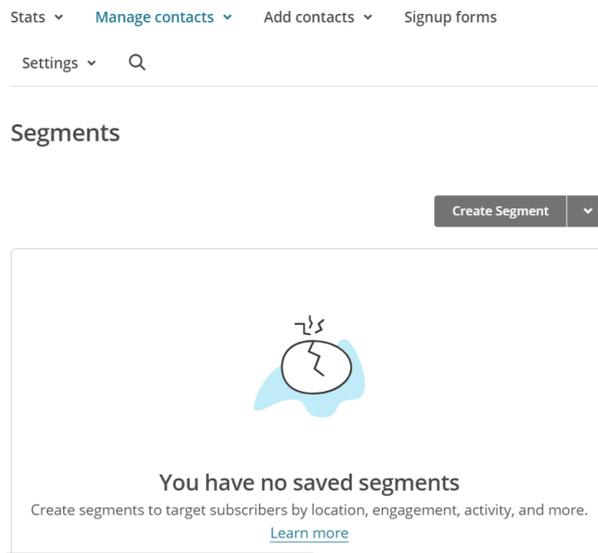
You can segment by any of the following criteria....

Subscriber Data
Automation Activity
Campaign Activity
Contact Rating
Conversations Activity
Date Added
Email Client
Email Marketing Status
Info Changed
Landing Page Activity
Language
Location
Signup Source
Groups
Interested in
Merge Fields
Address
Birthday
Email Address
First Name
Last Name

Email Address   ⌄
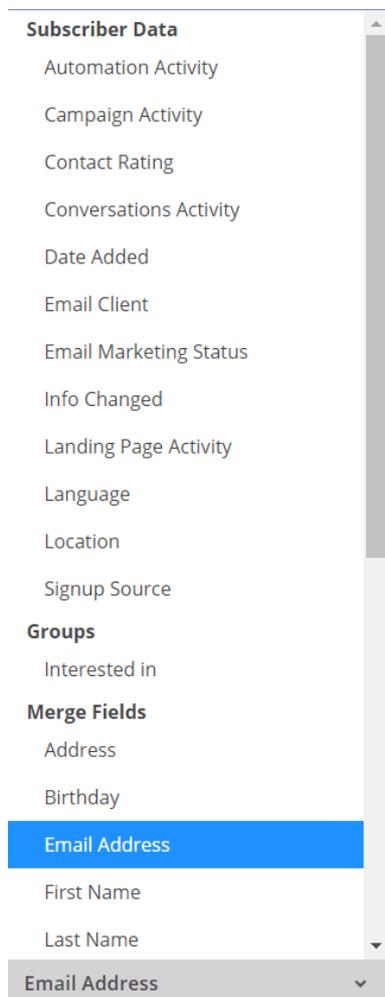
Date added – you may want to send a welcome email to people recently added

Member rating – you may want to send a re-engagement email to the 1* and 2* people on your list. Or reward those that are 5*

Subscriber activity – very useful for follow up emails. You could send to the people that opened but didn't click. Or the people that didn't open at all and maybe try another subject line to get their attention.

You can choose multiple criteria/conditions but beware...

Any = it will choose people who match any of the criteria
All – it will choose only those people who match all criteria