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BEGINNERS GUIDE TO



**mailchimp**

FOR EMAIL CAMPAIGNS



superhighways

harnessing technology for community benefit

# About Superhighways

Providing tech support to the sector for 20 years

- Training
- Support
- Consultancy
- Digital inclusion



E-news sign up <https://superhighways.org.uk/e-news>



# About you...



# Benefits of emailing using Mailchimp



**What  
else??**



# It's another way to connect



Hard copy

Vs.



Email



# Our training roadmap:

- ✓ set up your account
- ✓ set up your audience
- ✓ create an email campaign
- ✓ view campaign reports
- ✓ customise your sign up form
- ✓ top tips for better emails
- ✓ next steps



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**Set up your  
account**



# Get started with a free account

Find your people. Engage your customers. Build your brand. Do it all with Mailchimp's marketing tools. Already have an account? [Log in](#)

Email

~~info@superhighways.org.uk~~

Username

Password

 Show

- One lowercase character
- One uppercase character
- One number
- One special character
- 8 characters minimum







# Check your email

We've sent a message to [sorrelparsons@superhighways.org.uk](mailto:sorrelparsons@superhighways.org.uk) with a link to activate your account.

[> Didn't get an email?](#)



We're glad you're here,  
SuperhighwaysGuest.

Activate Account

(Just confirming you're you.)





# Confirm you're human

Since you've made it this far, we want to assume you're a real, live human. But we need to be super sure you aren't a robot.

**I'm Not A Robot**



**Mailchimp Recommends**

<p><b>Premium</b> <input type="radio"/></p> <p>Advanced features for pros who need more customization.</p> <p>You'll pay</p> <p><b>\$299</b></p> <p>a month</p> <p>with 500 contacts</p>	<p><b>Standard</b> <input type="radio"/></p> <p>Better insights for growing businesses that want more customers.</p> <p>You'll pay</p> <p><b>\$14<sup>99</sup></b></p> <p>a month</p> <p>with 500 contacts</p>	<p><b>Essentials</b> <input type="radio"/></p> <p>Must-have features for email senders who want added support.</p> <p>You'll pay</p> <p><b>\$9<sup>99</sup></b></p> <p>a month</p> <p>with 500 contacts</p>	<p><b>Free</b> <input checked="" type="radio"/></p> <p>Current plan</p> <p>All the basics for businesses that are just getting started.</p> <p>You pay</p> <p><b>\$0</b></p> <p>a month</p> <p>2,000 contact maximum</p>	<p><b>Free plan</b> Billed Monthly</p> <hr/> <p>Free plan at 2,000 Contacts <span style="float: right;">\$0.00</span></p> <hr/> <p><b>Complete</b></p>
--	--	---	--	--

> [Compare Plan Features](#)

<https://mailchimp.com/pricing/>

<https://mailchimp.com/help/about-legacy-pricing-plan/>



## ▼ Compare Plan Features

### Everything in Standard, plus

- ✓ Advanced segmentation
- ✓ Multivariate testing
- ✓ Unlimited seats and role-based access
- ✓ Phone support

### Everything in Essentials, plus

- ✓ Automation series
- ✓ Retargeting ads
- ✓ Custom-coded email templates
- ✓ Advanced audience insights

### Everything in Free, plus

- ✓ All email templates
- ✓ A/B testing
- ✓ Custom branding
- ✓ 24/7 award-winning support

### Free plan

- ✓ 7 marketing channels
- ✓ 1-click automations
- ✓ 5 email templates
- ✓ Marketing CRM

**What do these features / words mean?**

<https://mailchimp.com/marketing-glossary/>





# Welcome to Mailchimp

Alright, let's set this up! Tell us a bit about yourself.

First name

Last name

Continue





## Tell us about your business

Let us know a little bit more about what you do. This information will appear in your emails to help your recipients find your organization.

What's the name of your business?

Do you have a website?

Yes

No

Continue





# Add your address

But why? Believe it or not, we need a physical address to make sure your emails comply with [international anti-spam laws](#). Don't have an official business address? Learn about [physical address alternatives](#).

Address line 1 (Street address or post office box)

Siddeley House

Address line 2 (Optional)

City

London

State / Province / Region

Other

Zip / Postal code

KT3 3TW

Country

United Kingdom

Continue







# Do you have a list of email subscribers?

These are people who have signed up to receive marketing emails from your organization.

Yes

How many email subscribers?

500 or less

No

I'm not sure...

Continue

I'm not sure...

What are you unsure about?

Select an option...

Select an option...

I don't know if what I have is considered a list.

I don't know if I have permission to use the email addresses I have.

I only send transactional emails.

Something else.





# Connect social media

Share your campaigns with followers and create social posts.



Facebook



Twitter



Continue

You can also connect your social media at a later date – either in the default settings for your account for all audiences, or against individual audiences.





# Let's find your marketing path

 Typically takes less than 60 seconds

Whether you're brand new or an experienced marketer, we have the tools to get you going. Tell us a little about your business, and we'll recommend where to start.

**Ok, Let's Do It**

Not right now





# Account's ready, Freddie

Come on in! Let's set up your list and build the campaigns you dream about.

## Want to stay in the loop with Mailchimp?

- Subscribe to What's in Store (Optional)**  
A bi-weekly newsletter of e-commerce stories, tips, and experimentation.
- Subscribe to Mailchimp Presents (Optional)**  
A monthly newsletter highlighting Mailchimp's original short-form series, films, and podcasts made with entrepreneurs in mind.

[Let's Go!](#)



# This is what you'll see after...


You're almost there.



50% complete

- Finish account setup
- Start designing your first email

Add your contacts

 Import from a file

Use a pop-up form to collect subscribers

[I'll do this later](#)

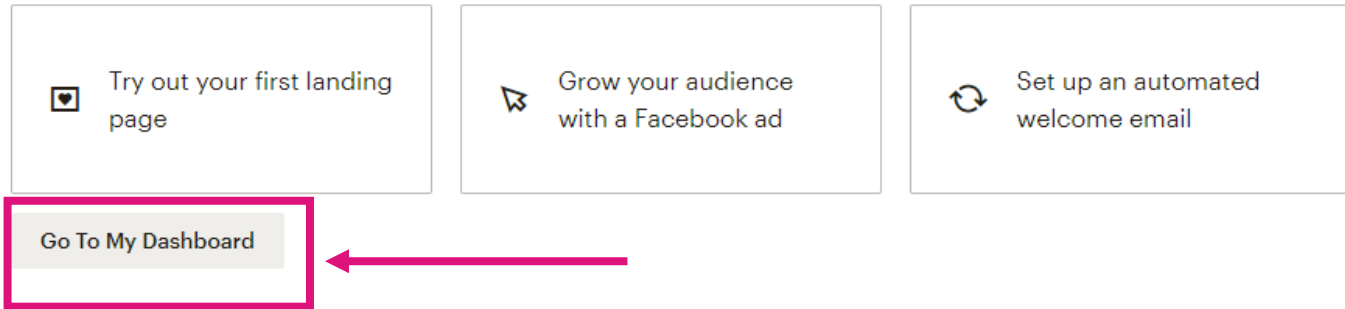
Send your first email



# And then this...

## Bonus: Take your message further

Reach people across channels for better results, or try putting your emails on autopilot.



- ✓ Finish account setup
- ✓ Start designing your first email
- ✓ Add your contacts
- ✓ Send your first email



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**Set up your audience**

# Audience



Sorrel Parsons

Actions ▾

Added via Admin Add on October 21st at 8:52 AM



Subscribed

## Write a Note

1000 characters remaining

Write an internal note here

Add Note

## Activity Feed

All Activity ▾

October 21st



Added Manually  
3:52 AM

## Tags

+

No tags for this contact

0%

Open rate

0%

Click rate

—  
Total revenue

—  
Average order value

[Connect your store](#) to get order data.

## Profile Information

Edit

Email Address	<a href="mailto:sorrelparsons@superhighways.org">sorrelparsons@superhighways.org</a>
First Name	Sorrel
Last Name	Parsons
Address	Superhighways Guest Siddele...
Phone Number	—
Birthday	—

## Other

Edit

Language	Not Detected
Location ⓘ	—
Favorite email client	—
Preferred email for...	html
Last Updated	Mon, Oct 21, 2019 8:52 am





# Audience

## Audience

Superhighways Guest

This audience has 1 contacts. 1 of them are subscribers.

View Contacts

Manage Audience ▾

Add a subscriber

Import contacts

Signup forms

Manage contacts

Settings

View audiences



# Building your audience



# Ways to categorise your audience



## Tags

audience  
fields:  
basic info

internally  
organise  
your  
contacts

## Groups

\*your  
audience  
chooses  
their own  
interests

## Segment

filter your  
contacts  
based core  
data

\*You can also create groups for internal purposes and choose not to show on your sign up form. However, 'Groups' is the ONLY way that individuals can choose their own interests



# Groups

How should we show group options on your signup form?

- As checkboxes (people can select more than one)
- As radio buttons (people can select only one)
- As a dropdown (people can select only one)
- Don't show these groups on my signup form

## Group category

Interests

**Group names**

- Donating ⊖
- Volunteering ⊖
- Events ⊖

Add Group

Save[Cancel](#)

# Audience

Current audience

MailchimpTraining 16072018 ▾

Your audience has 4 contacts. 4 of these are subscribers.

Stats ▾ Manage contacts ▾ Add contacts ▾ Signup forms Settings ▾ Conversations 🔍

## Settings

### Audience name and defaults

Change the name of your audience, and where to send subscribe and unsubscribe notifications.

### Publicity settings

Tell Mailchimp how "discoverable" you'd like campaigns to be.

### Audience fields and \*|MERGE|\* tags

Add fields to your audience database, and adjust the [merge tags](#) associated with them.

### Required email footer content

Enter contact info about this audience and a permission reminder in case someone reports you for spamming.

### Email beamer

Send a campaign by sending an email to a private Mailchimp address.

### Google Analytics on archive pages

Add Google Analytics tracking to campaign archives.

### Webhooks

Keep your audience synced with a local list on your server.

# Audience settings

This is where to change the name of any existing audiences you have – this is internal categorisation (you can change the name as it displays on your Sign up Form)

Don't forget to tell people where / how they signed up or ended up receiving information from you.



# Adding and importing contacts



- ✓ Do you have permission?
- ✓ Do you have data protection & data privacy policy?
- ✓ If not, review!



# Importing contacts



List Import Superhighways Guest

## Copy/pasted file

### Paste subscriber info

1	Email Address...	First Name...	Last Name...	Address...	Phone Number...	Birthday...
	Email Address...	First Name...	Last Name...	Address...	Phone Number...	Birthday...
	Email Address...	First Name...	Last Name...	Address...	Phone Number...	Birthday...
	Email Address...	First Name...	Last Name...	Address...	Phone Number...	Birthday...
	Email Address...	First Name...	Last Name...	Address...	Phone Number...	Birthday...

I understand that my billing plan may be automatically upgraded.

If your import causes your audience to exceed your plan contact limit, you'll need to **upgrade your billing plan** to accommodate the new contacts before you can send. **Undo your audience import before you send** to revert to your current 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 in your audience.*

<https://mailchimp.com/help/format-guidelines-for-your-import-file/>





## Import contacts

Now let's match the columns in your uploaded file to your Mailchimp audience.

[See an example of the import field match process.](#)

All columns are matched. Click "Continue To Organize" below to finish.

Show skipped columns

First Name merge field <a href="#">Edit</a> • <a href="#">Skip</a>	Last Name merge field <a href="#">Edit</a> • <a href="#">Skip</a>	Email Address merge field <a href="#">Edit</a> • <a href="#">Skip</a>
first name	Last Name	email
Kate	White	katewhite@superhighways.org.uk
Nine	Htet	ninehtet@superhighways.org.uk
Sorrel	Parsons	sorrelparsons@superhighways.org.uk
Colin	Cregan	colincregan@superhighways.org.uk

Always  
use  
separate  
fields!

Keyboard shortcuts:

Select name  Back  Next  Skip



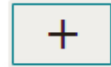




## Organize your imported contacts

### Tag all contacts

Add or create a tag +



Staff

Create a New Tag: 5 / 100

Staff

---

No tags yet

### Choose status of these contacts

Subscribed ▾

### Update existing contacts

Update existing contacts

If any imported contacts are already in your audience, we'll automatically update their information with the data from your import. This option may make the import process take longer.



## Choose status of these contacts

Subscribed ▾

### Subscribed

Subscribed contacts opted in to receive your email marketing campaigns.

### Unsubscribed

Unsubscribed contacts opted out of your email marketing campaigns.

### Non-Subscribed

Non-Subscribed contacts haven't opted in to receive your email marketing campaigns. You can also market to them through ads and social media.

- This person gave me permission to email them  
This person will not receive a confirmation email from Mailchimp. Since you're adding this recipient manually, they won't have an opt-in IP address or date in your records, so be extra sure you have permission first. [Learn more](#)

### Cleaned

Cleaned contacts are addresses that have bounced multiple times.

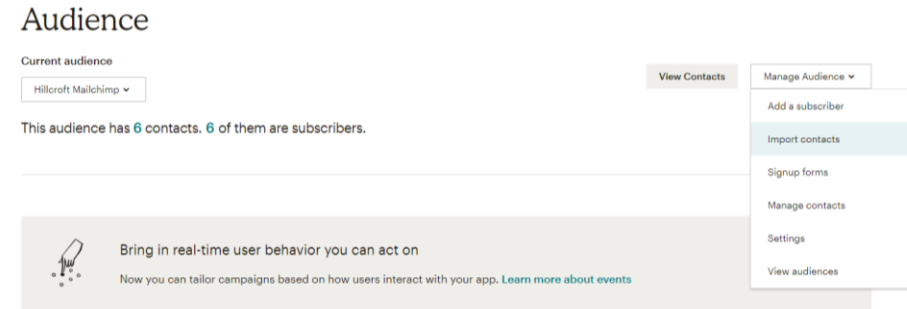
- If this person is already in my audience, update their profile

Subscribe

You can manually add or [re-subscribe](#) someone if they leave but take care.



# Import a list



- ✓ Create an Excel spreadsheet
- ✓ Add the following information in 3 columns with headers (first name, last name, email address):

Sorrel Parsons [sorrelparsons@superhighways.org.uk](mailto:sorrelparsons@superhighways.org.uk)

Superhighways Info [info@superhighways.org.uk](mailto:info@superhighways.org.uk)

Kate White [katewhite@superhighways.org.uk](mailto:katewhite@superhighways.org.uk)

- ✓ Save as 'Superhighways staff'
- ✓ Import into your audience – copy and paste your Excel data
- ✓ Give the people in this list a tag 'digital'
- ✓ Repeat this exercise with some of your own data if you have the time



# Archiving versus deleting

## Archived

- ✓ Removed from specific audience
- ✓ Don't count towards total numbers
- ✓ Retain personal data
- ✓ Easily re-enabled

## Deleted

- ✓ Removed from specific audience
- ✓ Anonymous data in reports

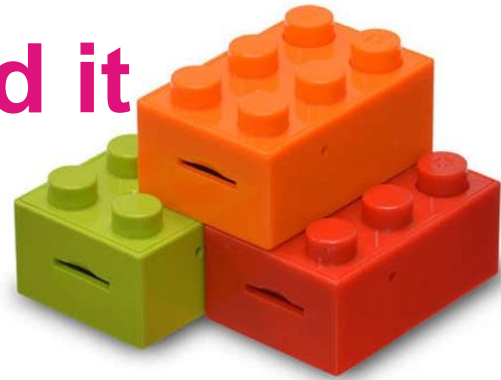


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**Sign up forms**

# Sign up form basics

**Build it**



**Design it**



# Consider...

- ✓ What do I need the individual to complete?
- ✓ What don't I need because Mailchimp does it automatically
- ✓ What do I genuinely need?

**Start building your form**

<u>Add a field</u>	Field settings
	Text
	Number
	Radio Buttons
	Check Boxes
	Drop Down
	Date
	Birthday
	Address
	Zip Code (US Only)
	Phone
	Website
	Image



# Where do I go to create a form?

## Audience

Superhighways Guest

This audience has 1 contacts. 1 of them are subscribers.

View Contacts

Manage Audience ▾

Add a subscriber

Import contacts

Signup forms

Manage contacts

Settings

View audiences

**You'll find sign up forms under  
'Manage Audience'.**





# There are lots of forms to choose from

Stats ▾ Manage contacts ▾ Add contacts ▾ **Signup forms** Settings ▾ 🔍



## 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



# Click and drag your options

Build it

Design it

Translate it

## Superhighways Guest

*click to add a message*

**Email Address**

**First Name**

**Last Name**

**Address**

Add a field

Field settings

Text

Number

Radio Buttons

Check Boxes

Drop Down

Date

Birthday

Address

Zip Code (US Only)

Phone

Website

Image



# Get more people signed up....

- ✓ Link to your sign-up form for your list
- ✓ Embed it on your website
- ✓ Use the link in an email signature for all staff
- ✓ Use the link in your social media
- ✓ Think about all your contact points





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**Start designing  
your email**

# Email campaign objectives



**Impacts on what you design & monitor**

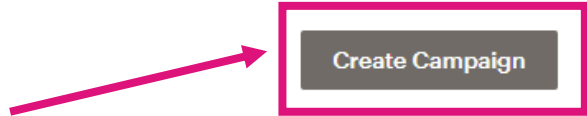


# Campaigns

Superhighways Guest

Your audience has 5 contacts. 3 of these are subscribers.

There are different types of campaign. Choose email



List View

Calendar View

Beta

View by Status

☰ All

→ Ongoing

✎ Draft

✓ Completed

View by Type

Sort by Last updated ▾

You can also search by [all audiences](#).

This Week (1)

📧 **untitled**  
Regular

Draft

Edited Mon, October 21st 9:12 AM by you





Regular

Automated

Plain-text



## Create an email

Keep your subscribers engaged by sharing your latest news, promoting a line of products, or announcing an event.

Campaign Name

100 characters

Begin

Cancel





Regular Automated Plain-text

## Create an Automation Email

Custom

Featured Tags Subscriber Activity E-Commerce Date Based API

### Email subscribers when they're tagged

Send an email to a subscriber when you tag them.

### Welcome new subscribers

Introduce yourself to people when they sign up for your audience.

### Say 'happy birthday'

Celebrate with an exclusive offer or cheerful message that sends based on the birthday field in your audience.

### Share blog updates

Help contacts keep up with your blog by sending new posts straight to their inboxes.

# How will you use automation?





# Top tips for your email campaign

- ✓ **To**  
All subscribed contacts in the audience Superhighways Guest. [3 recipients](#)  
Your 'To' field is personalized with \*|FNAME|\* .

Your whole audience or segment?

- ✓ **From**  
Sorrel • sorrelparsons@superhighways.org.uk

Someone they know and trust

- ✓ **Subject**  
Mailchimp 101: 5 top tips for small charities  
Preview Text: Must-have tips for people with limited time and budgets

Short & straight forward

- ✓ **Content**  
*Design the content for your email.*



## Share Your Campaign


### Campaign Link

[https://mailchi.mp/\[xxxxxx\]/\[xxxxxx\]](https://mailchi.mp/[xxxxxx]/[xxxxxx]) [Edit](#)

Want to brand your campaign link? Click edit to create a custom URL.

## Add A Social Post To Your Campaign

 **Facebook**  
Connect Facebook

 **Twitter**  
Add a social post to your campaign to let Twitter followers know about your promotion or update.



# Step 1 – pick a layout

[Layouts](#)

[Themes](#)

[Saved templates](#)

[Campaigns](#)

[Code your own](#)

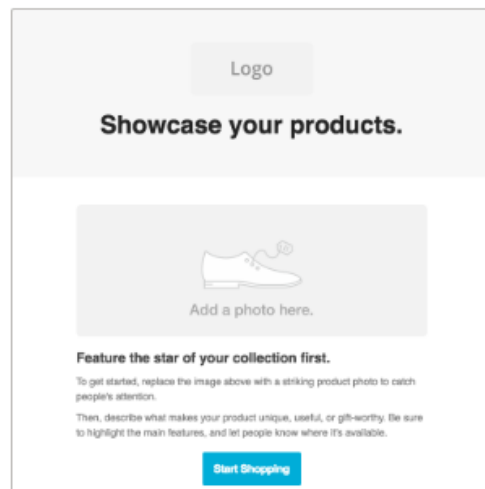


More ways to tell your story

Get access to a variety of layouts that can keep your emails looking professional and fresh.

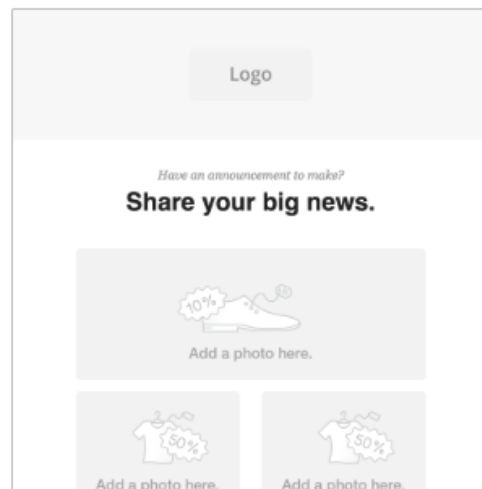
[Upgrade Now](#)

## Featured



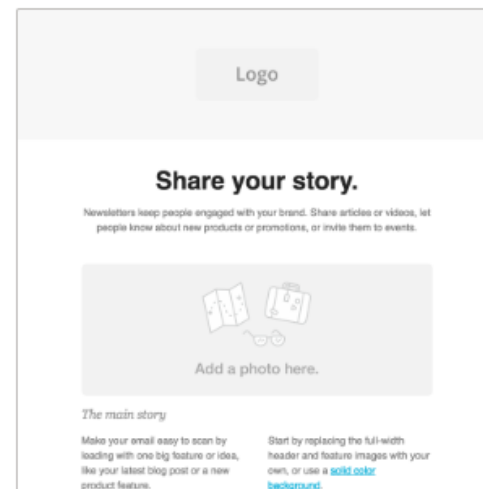
### Sell Products

Market a line of products or promote seasonal items.



### Make an Announcement

Share details about a sale, event, or other big news.



### Tell A Story


Send a newsletter to let people know what you've been up to.

You only get 5 layouts for your free account.



# Step 2 – add your content

[View this email in your browser](#)



## Mailchimp tips you can't live without.

- Natural language
- Break up your paragraphs of text
- [Link to your website](#)
- Alt-text for images
- Keep styling consistent e.g. fonts

[Twitter](#) [Facebook](#) [LinkedIn](#)


Copyright © *\*[CURRENT\_YEAR]\** *\*[LIST:COMPANY]\**. All rights reserved.  
*\*[IFNOT:ARCHIVE\_PAGE]\** *\*[LIST:DESCRIPTION]\**

Content Design Comments

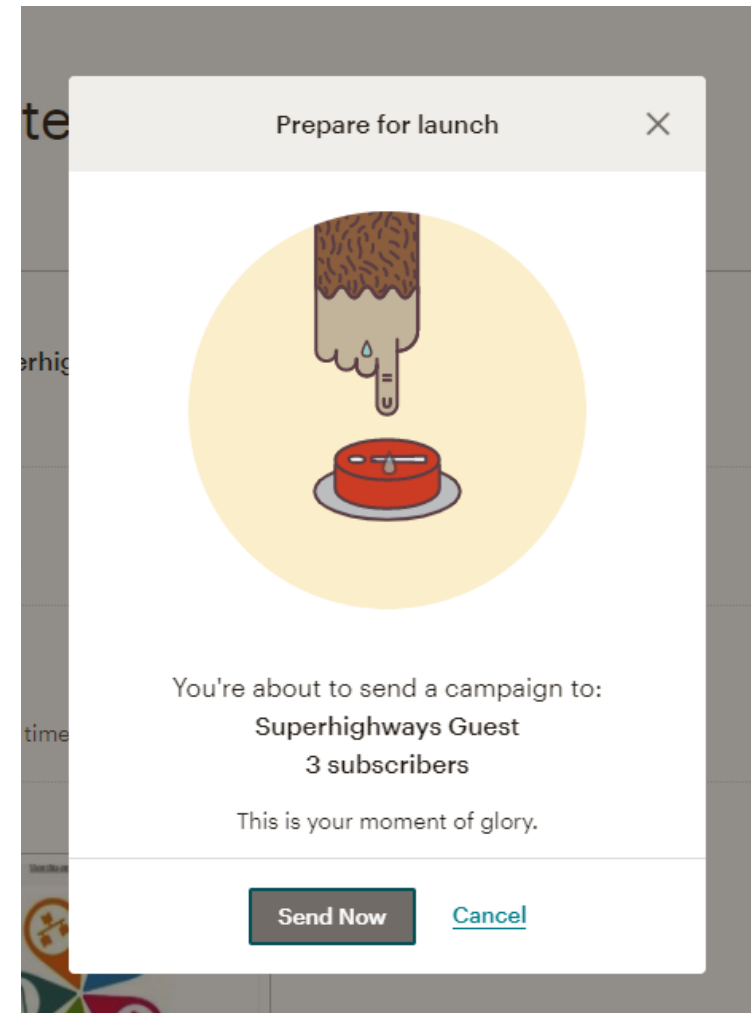
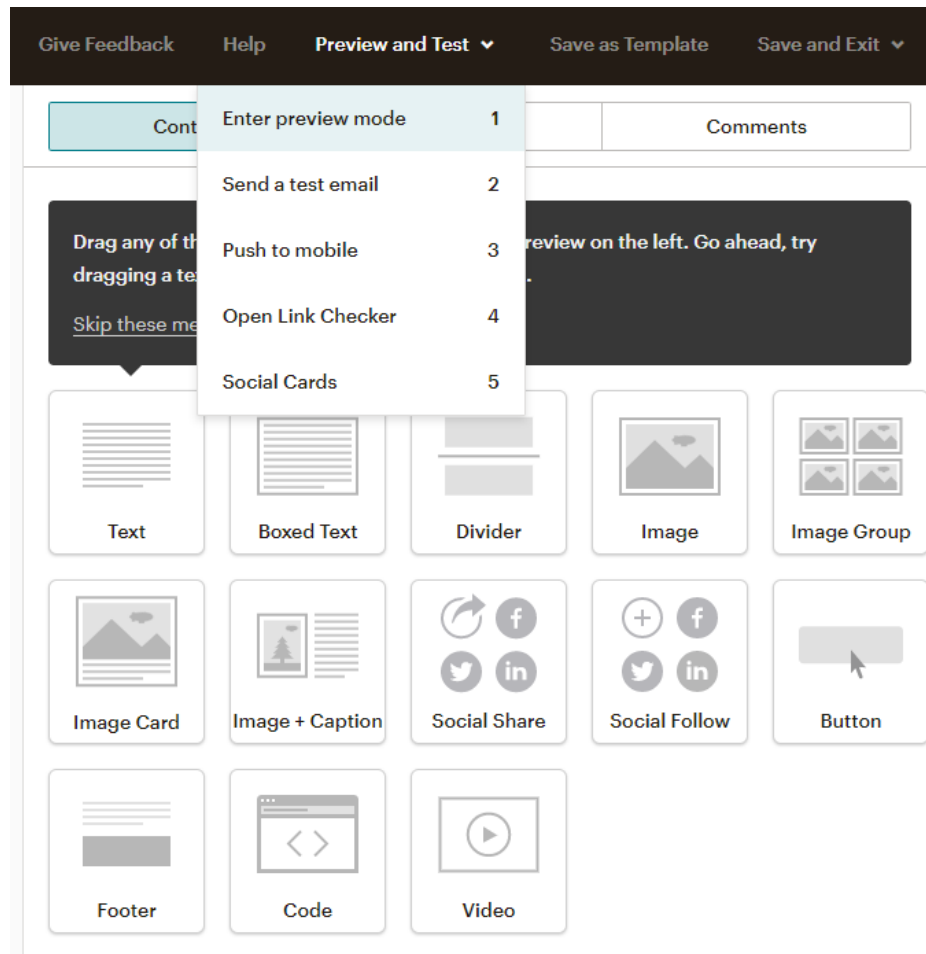
Drag any of the blocks below into the campaign preview on the left. Go ahead, try dragging a text block to the top of your campaign.

[Skip these messages](#)

- Text
- Boxed Text
- Divider
- Image
- Image Group
- Image Card
- Image + Caption
- Social Share
- Social Follow
- Button
- Footer
- Code
- Video



# Step 2 – Preview, test and send



# Get organised



Campaigns

Automate ▾

Templates

Audience

Reports

Content Studio

Content Studio

Search files



 My Files

 Products

 Giphy

 Instagram

 My Logo

Filter ▾

Folders ▾



- ✓ Upload your images and edit
- ✓ Create Giphy for added animation
- ✓ Set your default logo so you don't have to add it every time





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**Check out your  
reports**

# What does good look like for you?

## Tiny Films Feb 19 Promotion (Kingston)

Switch report ▾

Overview Activity ▾ Links Social E-commerce Conversations Analytics360

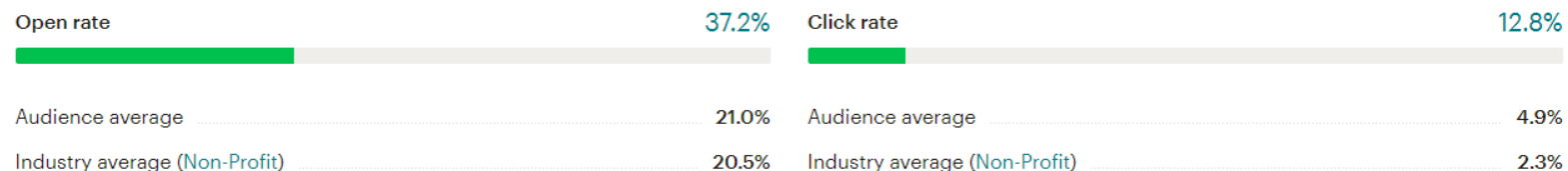
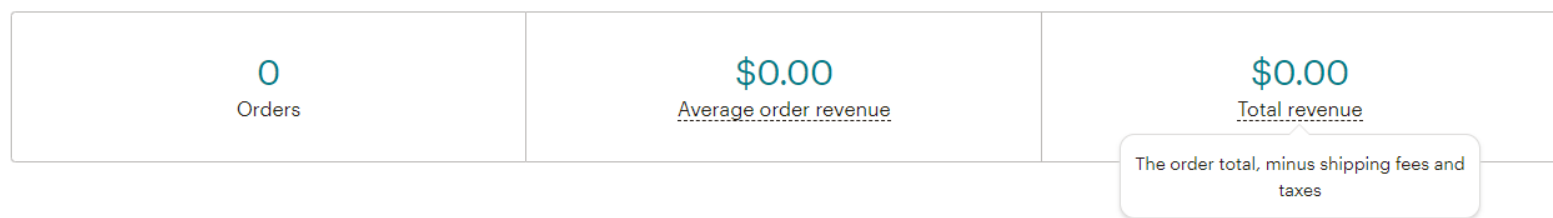
### 95 Recipients

Audience: Superhighways Mailing List (Unsaved segment)

Delivered: Tue, 29 Jan 2019 10:49 am

Subject: Creating short videos using smartphones - Kingston 14 Feb

[View email](#) · [Download](#) · [Print](#) · [Share](#)



<https://mailchimp.com/resources/email-marketing-benchmarks/>



# What does good look like for you?

## Top links clicked

<a href="https://www.eventbrite.co.uk/e/tiny-films-big-impact-kingston-tickets-52303135085">https://www.eventbrite.co.uk/e/tiny-films-big-impact-kingston-tickets-52303135085</a>	13
<a href="https://www.eventbrite.co.uk/o/superhighways-308927460">https://www.eventbrite.co.uk/o/superhighways-308927460</a>	4
<a href="https://superhighways.org.uk/">https://superhighways.org.uk/</a>	1
<a href="https://twitter.com/superhighwaysuk">https://twitter.com/superhighwaysuk</a>	0

Subscribers with most opens

← You can target specific people who are interested in your work. May be better with an email outside of Mailchimp?





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**Next steps**

# Nice work but what next?

Welcome To Mailchimp, Sorrel.

## Nice work so far



100% complete



### Bonus: Take your message further

Reach people across channels for better results, or try putting your emails on autopilot.



Try out your first landing page



Grow your audience with a Facebook ad



Set up an automated welcome email

[Go To My Dashboard](#)



Finish account setup



Start designing your first email



Add your contacts



Send your first email

## And a quick jargon busting test!



# Some useful links

Getting ready for GDPR <https://mailchimp.com/resources/getting-ready-for-the-gdpr/>

FAQs <https://mailchimp.com/help/gdpr-faq/>

EU / Swiss Privacy Shield <https://mailchimp.com/help/about-mailchimp-the-eu-swiss-privacy-shield-and-the-gdpr/>

ICO information on PECR and Electronic marketing <https://ico.org.uk/for-organisations/guide-to-pecr/electronic-and-telephone-marketing/electronic-mail-marketing/>

Plus <https://elink.io/p/mailchimp-training-resource>





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