BEGINNERS GUIDE TO

O

mailchimp

FOR EMAIL CAMPAIGNS

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

About Superhighways

Providing tech support to the sector for 20 years

[Training](#)
Advice
Consultancy
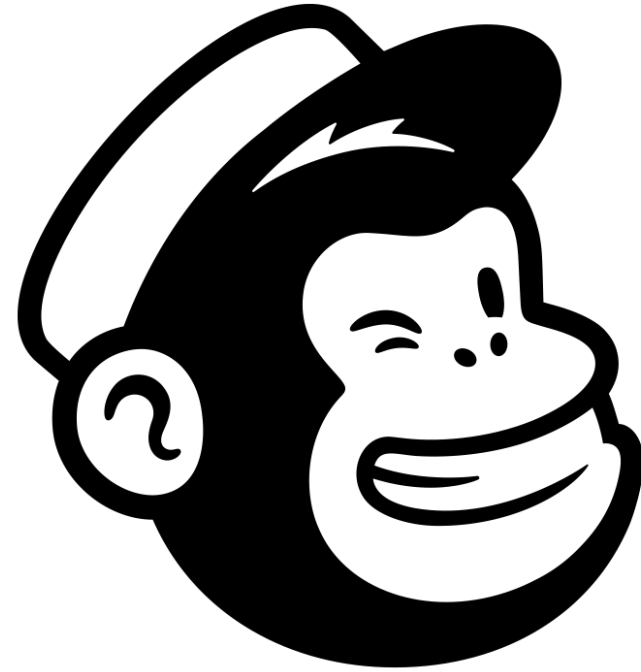Digital Inclusion
[Datawise London](#)

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

Today's goal

Learn how to set up an account, manage your subscribers and send an email campaign.

Our training roadmap:

- ✓ quick overview of how to set up your account
- ✓ building your audience
- ✓ demo creating an email campaign
- ✓ how to customise your sign up form
- ✓ top tips for better emails and subscriber management
- ✓ how to view campaign reports
- ✓ next steps

Over to you

1. Name
2. Organisation name

Then in chat...
Benefits of using an email platform

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@gmail.com

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** 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

$ USD ⌄

Mailchimp Recommends

Premium ○	Standard ○	Essentials ○	Free (Current plan) ○
Advanced features for pros who need more customization.	Better insights for growing businesses that want more customers.	Must-have features for email senders who want added support.	All the basics for businesses that are just getting started.
You'll pay	You'll pay	You'll pay	You pay
$299	$14 99	$9 99	$0
a month	a month	a month	a month
with 500 contacts	with 500 contacts	with 500 contacts	2,000 contact maximum

Free plan
Billed Monthly

Free plan at
2,000 Contacts $0.00

Complete

› Compare Plan Features

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

Select	Select	Select	Get Started

Calculate your cost

200,000+ contacts
Unlimited audiences

Everything in Standard, plus:

✔ Advanced Segmentation

✔ Multivariate Testing

✔ Comparative Reporting

✔ Unlimited Seats & Role-Based Access

✔ Phone Support

Calculate your cost

Up to 100,000 contacts
5 audiences included

Everything in Essentials, plus:

✔ Customer Journey Builder + Branching Points `New`

✔ Send Time Optimization

✔ Behavioral Targeting

✔ Custom Templates

✔ Dynamic Content `New`

Calculate your cost

Up to 50,000 contacts
3 audiences included

Everything in Free, plus:

✔ All Email Templates

✔ Multi-Step Journeys

✔ Custom Branding

✔ A/B Testing

✔ 24/7 Email & Chat Support

Up to 2,000 contacts
1 audience included

Everything you get with Free:

✔ Marketing CRM

✔ Creative Assistant `Beta`

✔ Website Builder `New`

✔ Mailchimp Domain

✔ Forms & Landing Pages

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

Sorrel

Last name

Parsons

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?

Superhighways Guest

Do you have a website?

(•) Yes

www.superhighways.org.uk

( ) 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...

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.

Continue

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, so don't worry if you don't have those details to hand straight away.

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.

| ♥ 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

Once you have set up your account you can verify your domain

Any quick questions?

Individual contacts

Sorrel Parsons

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

★★☆☆☆ Subscribed

Actions ▾

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%	0%
Open rate	Click rate
—	—
Total revenue	Average order value

Connect your store to get order data.

Profile Information   Edit

Email Address	sorrelparsons@superhighways.org
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 (all contacts in one list)

Audience

Superhighways Guest

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

View Contacts

Manage Audience ⌄
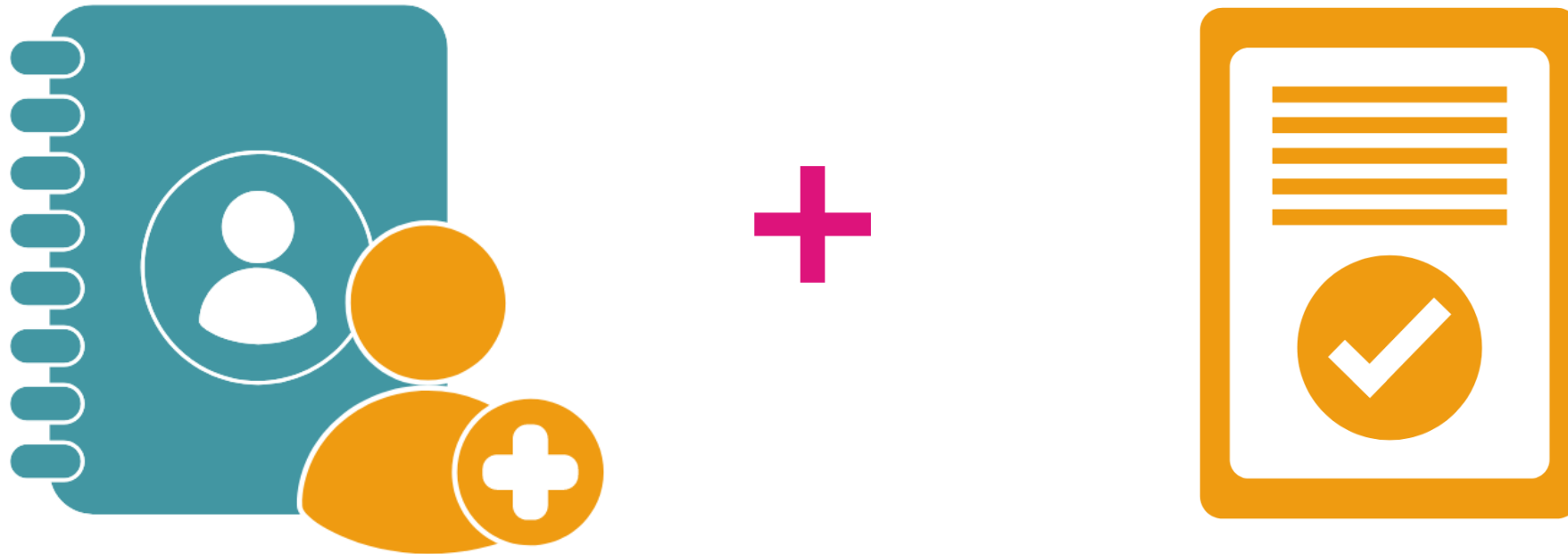
Add a subscriber

Import contacts

Signup forms

Manage contacts

Settings

View audiences

Building your audience well

Breakout room in pairs – 5 minutes

Ways to categorise your audience

Tags

Groups

Segment

audience fields: basic info

internally organise your contacts

your audience chooses their own interests

filter your contacts based core data

Ways to categorise your audience

Tags

Groups

Segment

audience fields: basic info

internally organise your contacts

*your audience chooses their own interests

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
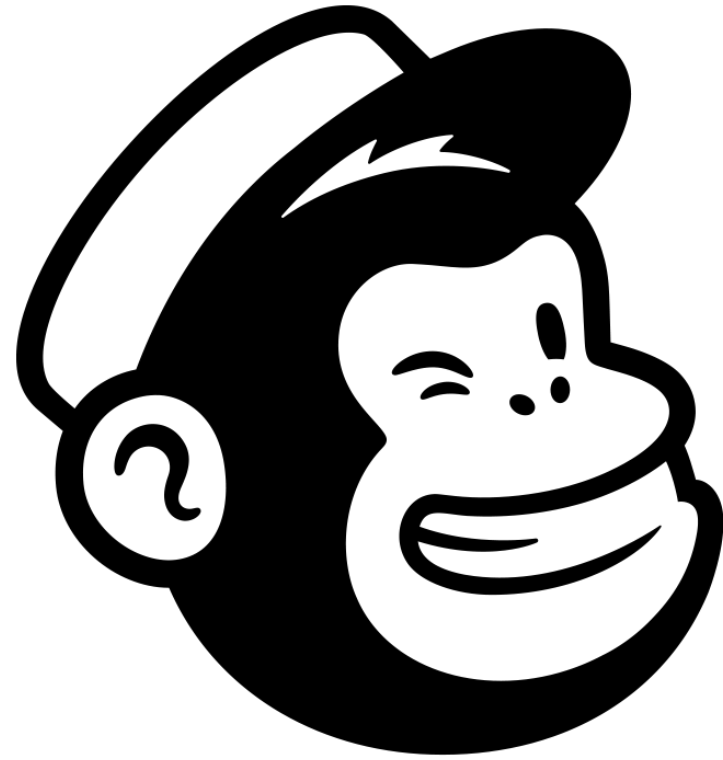
Adding and importing contacts

✓ Do you need / have permission?

✓ Do you have data protection & data privacy policy?

✓ If not, review!

Any quick questions?

DEMO

mailchimp

How would you like to import your contacts?

Not sure how to format your file? **Learn how**

⃝ Upload file
Upload a CSV or tab-delimited TXT file.

🔘 Copy and paste
Copy and paste contacts from a spreadsheet.

Continue to Upload

Importing contacts

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/

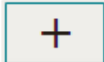# Organize your imported contacts

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.

Settings ⌄   Inbox   Surveys   🔍

Audience settings

Audience name and defaults

GDPR fields and settings

Publicity settings

Audience fields and *|MERGE|* tags

Required email footer content

Email Beamer

Google Analytics on archive/audience pages

Webhooks

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 enable GDPR fields for your forms

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

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

Finding cleaned contacts

Create a segment   ⊗

Contacts match   [all ⌄]   of the following conditions:

[Email Marketing Status   ⌄]   [is   ⌄]   [Cleaned   ⌄]

⊕ Add

[Preview Segment]   Cancel

To see your 'cleaned' contacts you will need to go to All Contacts' then 'New Segment'. You can then choose cleaned from the tick box list against the Email Marketing Status'

Any quick questions?

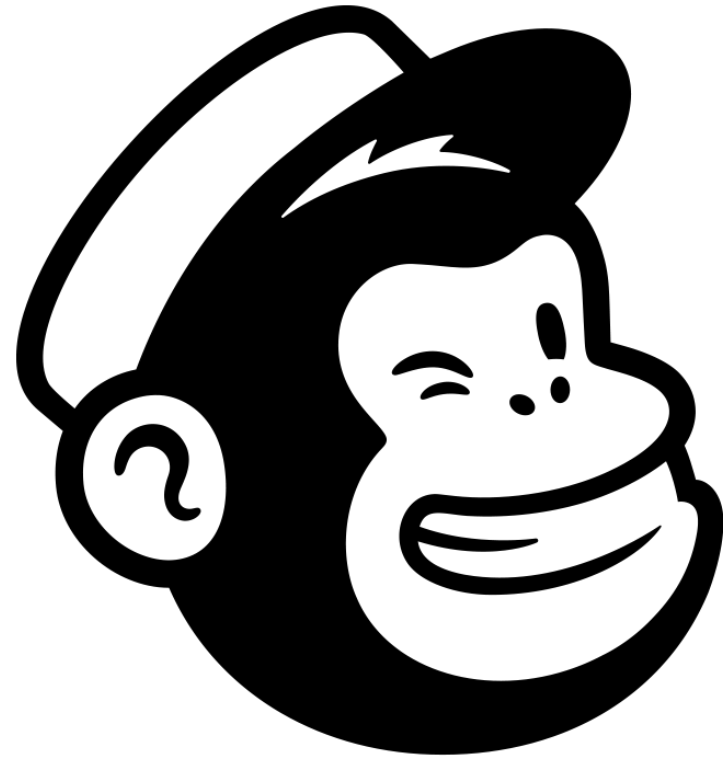# Email campaign objectives

Impacts on how you design & monitor results

DEMO

mailchimp

Step 1 – Create Campaign

Campaigns   Automate ⌄   Templates   Audience   Reports   Content Studio   **Create**   S Sorrel Superhighways

Campaigns

Create Campaign

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   🔍 Find a campaign by name or type   Sort by   Last updated ⌄

≡ **All**   You can also search by all audiences.

⇢ Ongoing

✎ Draft   This Week (1)

✓ Completed   ✉ untitled   Draft
                    Regular

View by Type   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

You'll usually choose a Regular email (but have a look at the others). The campaign name you use is only for internal purposes.

← ✕

Regular   **Automated**   Plain-text

Create an Automation Email

Custom

Featured   Tags   Subscriber Activity   E-Commerce   Date Based   API

Email subscribers when they're tagged	**Welcome new subscribers**	**Say 'happy birthday'**
Send an email to a subscriber when you tag them.	Introduce yourself to people when they sign up for your audience.	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.

Consider how you can use automation – welcoming new subscribers, saying goodbye as people leave your audience or sending a birthday card

Step 2 – who's it for?

To

✓ All subscribed contacts in the audience Superhighways Guest. 3 recipients

Your 'To' field is personalized with *|FNAME|* .

From

✓ Sorrel • sorrelparsons@superhighways.org.uk

Subject

✓ Mailchimp 101: 5 top tips for small charities

Preview Text: Must-have tips for people with limited time and budgets

Content

○ Design the content for your email.

To: your whole audience or segment?

From: Someone they know and trust

Subject: Short & simple language

Share Your Campaign

Campaign Link

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

f Facebook
Connect Facebook

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

Step 3 – Go to content & pick a layout

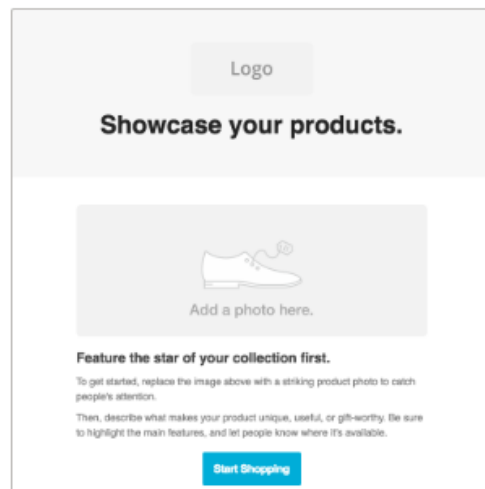Layouts   Themes   Saved templates   Campaigns   Code your own

More ways to tell your story
Get access to a variety of layouts that can keep your emails looking professional and fresh.
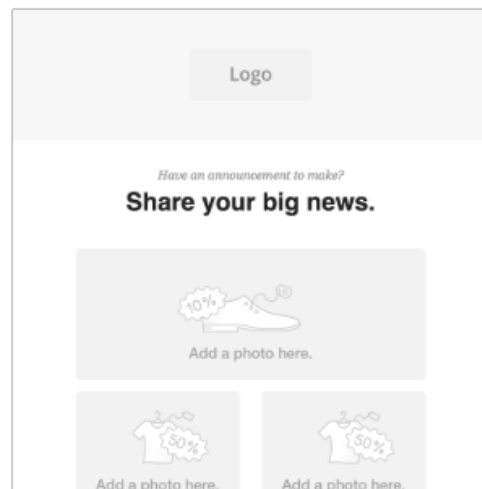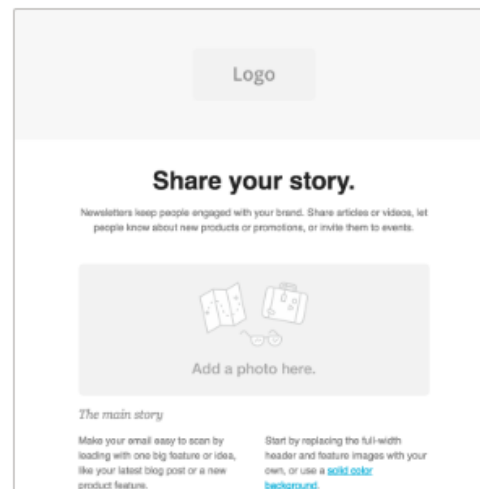
Upgrade Now

Featured

Logo

Showcase your products.

Add a photo here.

Feature the star of your collection first.

To get started, replace the image above with a striking product photo to catch people's attention.

Then, describe what makes your product unique, useful, or gift-worthy. Be sure to highlight the main features, and let people know where it's available.

Start Shopping

Sell Products

Market a line of products or promote seasonal items.

Logo

Have an announcement to make?

Share your big news.

Add a photo here.

Add a photo here.   Add a photo here.

Make an Announcement

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

Logo

Share your story.

Newsletters keep people engaged with your brand. Share articles or videos, let people know about new products or promotions, or invite them to events.

Add a photo here.

The main story

Make your email easy to scan by leading with one big feature or idea, like your latest blog post or a new product feature.

Start by replacing the full-width header and feature images with your own, or use a solid color background.

Tell A Story

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

Pick a layout: You only get 5 layouts for your free account. But don't worry about this. It's enough for what you need. You can use content blocks to break up text with images and more.

Step 4 – add your content

Click and drag content blocks from the right onto the left preview pane. The edit field will appear on the right

Step 5 – Preview, test and send
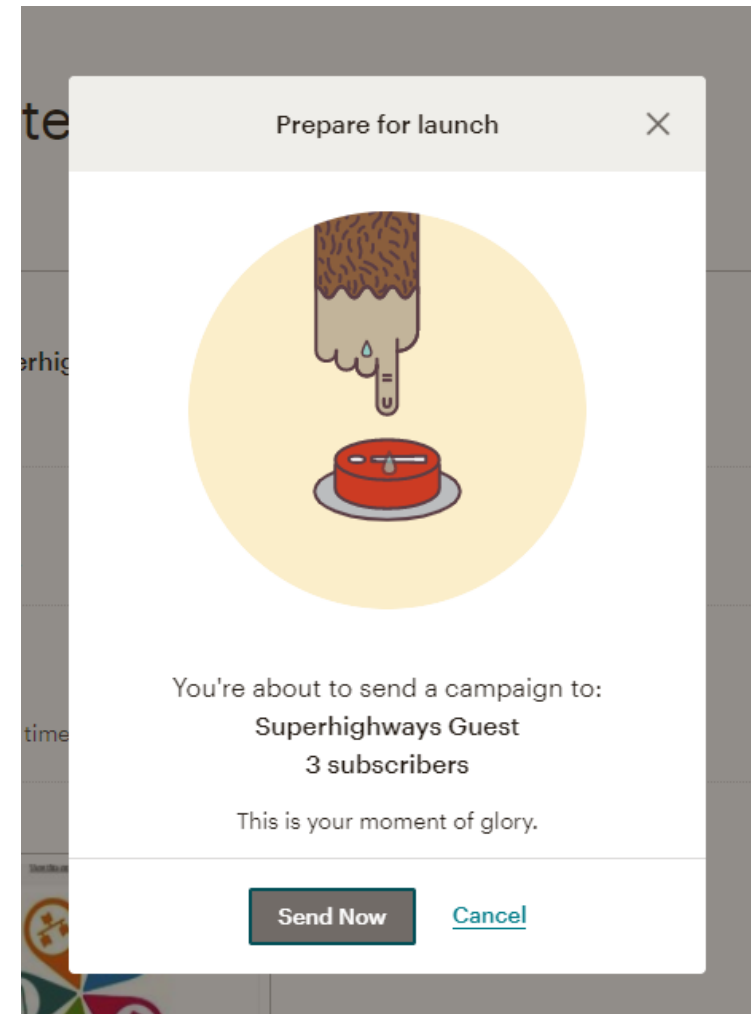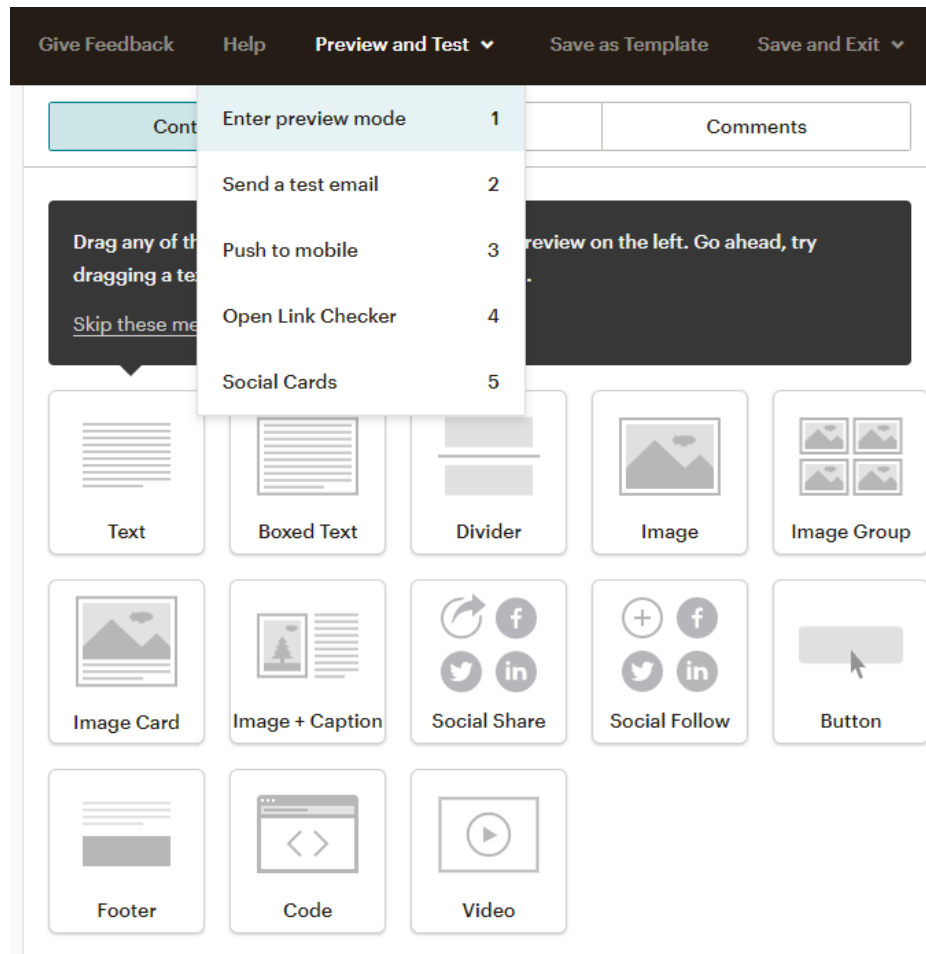
Get organised in Content Studio from your main Dashboard

Campaigns   Automate ⌄   Templates   Audience   Reports   **Content Studio**

Content Studio

Search files 🔍

My Files

Filter ⌄   Folders ⌄

Products

Giphy

Instagram

My Logo

✓Upload your images and edit

✓Create Giphy for added animation

✓Set your default logo so you don't have to add it every time

Any quick questions?

Sign up forms

Mailchimp sign up form basics

Build it

Design it

Translate it

Share

What should be on a form?

Newsletter

Subscribe

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

Add a field	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.

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

View Contacts

Manage Audience ⌄

Add a subscriber

Import contacts

Signup forms

Manage contacts

Settings

View audiences

DEMO

mailchimp

Notes for later on

RECAP

Click and drag your options

Build it   Design it   Translate it

Add a field   Field settings

Superhighways Guest

click to add a message

Email Address

First Name

Last Name

Address

Street Address

Address Line 2

City | State/Prov/Region | Postal/Zip

United Kingdom

Text

Number

Radio Buttons

Check Boxes

Drop Down

Date

Birthday

Address

Zip Code (US Only)

Phone

Website

Image

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

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

Don't forget you will need to go to Manage Contacts and Groups to enable custom options for your public sign up form. (If you are using them!)

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

Any quick questions?

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
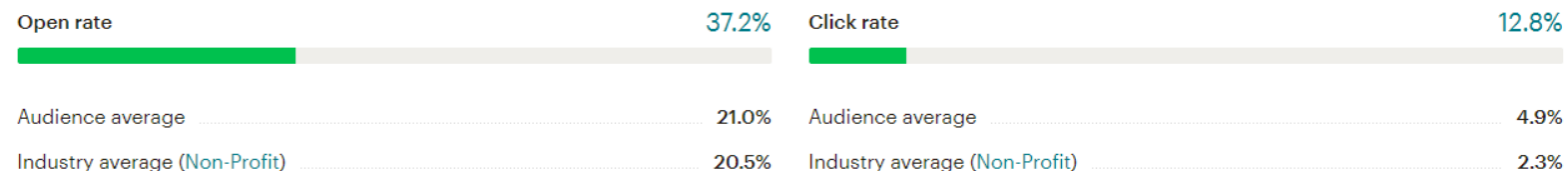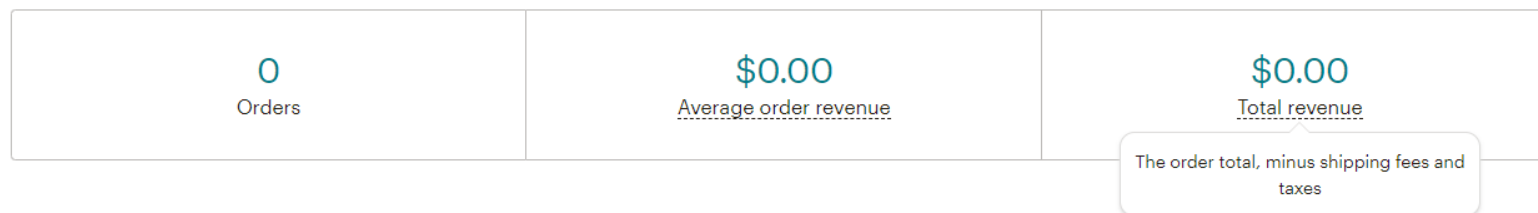
95 Recipients

Audience: Superhighways Mailing List (Unsaved segment)

Subject: Creating short videos using smartphones - Kingston 14 Feb

Delivered: Tue, 29 Jan 2019 10:49 am

View email · Download · Print · Share

0	$0.00	$0.00
Orders	Average order revenue	Total revenue

The order total, minus shipping fees and taxes

Open rate	37.2%	Click rate	12.8%
Audience average	21.0%	Audience average	4.9%
Industry average (Non-Profit)	20.5%	Industry average (Non-Profit)	2.3%

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

What does good look like for you?

Top links clicked

https://www.eventbrite.co.uk/e/tiny-films-big-impact-kingston-tickets-52303135085	13
https://www.eventbrite.co.uk/o/superhighways-308927460	4
https://superhighways.org.uk/	1
https://twitter.com/superhighwaysuk	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? Is it more important that people click e.g. to sign up, book an event...

Any final questions?

Some useful links

Get the most out of Mailchimp with step-by-step videos and tutorials.
[Mailchimp Help]

Mailchimp have some great ideas for organizing content and designing emails that inspire.
[Email Design Guide]

See how Mailchimp handles GDPR
[Mailchimp and GDPR]

Information Commissioner's advice on [Data Protection for small organisations]

What you're able to do with marketing
[ICO information on PECR and Electronic marketing]

Next steps

Look for an **Ask the Expert** session with Sorrel, Kate or Philippa to book a one-to-one surgery and ask questions about how to set up your account or start emailing.

info@superhighways.org.uk
Tel: 020 8255 8040

www.superhighways.org.uk