Beginner's Guide to MailChimp

Before you start

To send emails out using MailChimp you need to put together a list of names and email addresses. You can create as many lists as you want, but you might find it easier to have one master list that you can filter by, for example, gender, location, status (customer/supplier/lead) etc.

The easiest way to build your list is to use Excel to create a spreadsheet. As a minimum, you need columns for first name, last name and email address, and then add in any extra "filtering" columns such as Male/Female, source (networking/website), status and so on.

TIP: Make sure you do separate the first names from the last names. If you ever want to personalise your email you want to be able to say "Hi Joe!" rather than the rather formal "Hi Joe Bloggs!"

Once you have put together a contacts database you can start importing them into MailChimp.

Registering on MailChimp

MailChimp is free to use up to 2,000 contacts and 12,000 emails per month – which is more than enough for most people. To set up an account:

1. Go to www.mailchimp.com and click the big red **Sign Up Free** button.

2. Type in your preferred username, email and password and then look out for an email to activate your account.

3. Once you've activated your account, log in and fill in all the details re: name, address etc. You're done!

Creating a new MailChimp list

Once you've set up your MailChimp account you need to create your first list.

Choose **Lists** from the menu along the top, then click the Create List button on the left.

Give your list a sensible name (e.g. the name of your business or organisation), fill in the other details, and make sure you include a good reminder of why people are on your list (e.g. We have worked together or met at a networking event).

Click **Save** to finish setting up your list.

Adding contacts to your list

Once your list is set up you can add people to it. There are four ways to add contacts:

- Upload a CSV file
- Copy/paste from Excel
- Import from another programme (SalesForce, Google Docs etc)
- Add each contact manually

To add lots of contacts at once using the one of first three methods above, look for the grey cog symbol to the right of your list name and then select **Import**. You'll see a screen like this:
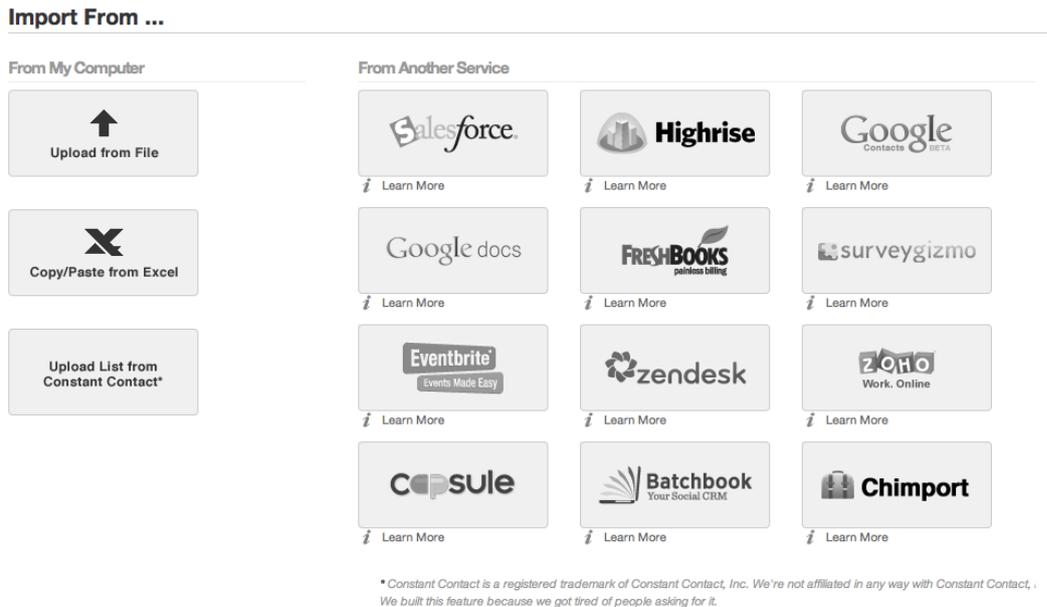
Simply select the import option you'd like and follow the steps.

Once your list is imported, you need to tell MailChimp what information is in each column – first name, last name, email address etc. This is called "mapping". Above each column you'll see a drop down menu – simply choose the right option for each field and click OK. If the field isn't listed, you can add your own labels (e.g. Gender). Once you've mapped every column, click **All Done** to complete the import.

Hopefully MailChimp will import all the emails on your list but sometimes it's not able to. One reason is that it doesn't like "generic" email addresses such as info@, sales@ etc. (The reasoning is that these are often department addresses rather than going to

individuals, so emails sent to them could be seen as spam – though obviously a lot of business owners use info@ as their main email address!) If it is not able to add any contacts it will email you to tell you about the ones it missed out and you can then add them manually. It will also tell you about any email addresses that were invalid – for example, because of a typo in the address.

To add contacts manually, one at a time, click the grey cog on the right of your list name and choose Add. You'll then be able to add a name, email address and any other information and save each contact.

You can add more contacts to your list whenever you want. Just follow the steps above to import a database or add them manually. MailChimp will automatically check if the address is already on the list, so you won't end up adding people several times!

Creating a Newsletter

Once your list is set up and you have some contacts in it, you're ready to send your first email newsletter – called a "campaign".

From your **Dashboard** or **Campaign** tab, click the **Create Campaign** button. Choose the type of campaign you'd like to create. (Start with **Regular Ol' Campaign** – the others are more advanced options used for testing different titles etc).

In the first step of the campaign builder, select the list you want to send to. Once you've selected the list, click **Send to Entire List** or choose to send to a segment. If you have some filters on your list this is where you can specify who your email goes to. For example, you may have a special offer you only want to send to females – so choose **Send to Segment** and then use the drop down menus to select Gender>Female. You can use as many filters as you like for each campaign so if you wanted to (and you had enough filters set up) you could send an email to all the women on your list who are aged over 50 and live in London!

Campaign Info

Name Your Campaign
Newsletter 20th November 2012

Message Subject
News from The Proof Fairy

From Name
Alison Neale

Reply-To Email
alison@theprooffairy.com

☑ Personalize The "To:" Field *i* info

Specify *|MERGETAGS|* For Recipient Name
|FNAME|

Once you've chosen who to send your campaign to, you need to fill in some information including the name of your campaign (this is for your reference), a subject line (this is what the recipients will see), who your newsletter will appear to be from and the email address to send replies to. You'll also find options for tracking, authentication, analytics tracking, and social sharing. Click the **Design** tab at the top of the page when you're finished.

TIP: Connect your MailChimp account with your Twitter and Facebook accounts on this page – in future you can have a link to your newsletter sent out to followers automatically.

Designing your newsletter

Select a template for your email by clicking **Basic Templates** or **Designer Templates**. (Once you've created your first newsletter you can save the layout and use it again – it will appear in **My Templates**.) There's also a new Drag and Drop option that you might want to play with!

Once you choose your template, you'll remain in the Design step of the campaign-builder process. You can add content and images here, and also change the overall look of your newsletter. Click **show style editor** to set your design and style options. You can change the colours of every element of the newsletter.

The grey area at the top of your newsletter is for a banner or logo. Try to find a suitable image that is 600px wide.

To change the text or images in your newsletter template, click anywhere inside the dotted red borders to bring up the Content editor box. If you have chosen a template with lots of different areas (columns, images etc), you need to click on each section to edit the text or image.

TIP: If at all possible, type directly into the content editor. If you have already written your email in Word or an email, copy it into Notepad first, and then paste it into MailChimp. This is because Word can add its own coding that might mess up the look of your newsletter.

Add your content to every section – you can upload images and format the text, much as you would in Word or another word processing programmes. Make sure you click the Save Now button on each section.

TIP: Look out for the tiny "teaser" area at the top of the email – lots of people miss that and send it out with the generic "Use this area to offer a short teaser of your email's content" text which looks unprofessional!

To check what your email looks like click the **Preview and Test** button (on the right, near the top). You can either open your email in a pop-up or send it to yourself.

When you're done, click the **PlainText** tab at the top of the page. This version is sent to people whose email programmes don't allow HTML emails. Check it looks okay, then click **Confirm** (at the top) to move on to the final step.

Sending your newsletter

Step 5 of the Campaign Builder is a Pre-delivery checklist. If you've missed out anything important – such as a subject line - you'll be alerted here. If anything needs fixing click **Resolve** to go back and fix it.

If you want to, you can preview your newsletter one last time with the **Preview & Test** pull-down menu. If everything looks good, schedule or send your campaign.

Avoiding Spam Filters

It's pointless writing and sending a newsletter if it goes straight to everyone's spam folder! There are some things you should try to avoid doing to give your newsletter the best chance of successful delivery.

Don't:

- Using spammy phrases like "Click here!" or "Once in a lifetime opportunity!"
- Using lots of exclamation marks!!!!!!
- USING ALL CAPS, WHICH IS LIKE SHOUTING VIA EMAIL (especially in the subject line)
- Using lots of coloured fonts, especially bright red or green
- Creating an email that's nothing but one big image, with little or no text (since spam filters can't read images, they assume you're a spammer that's trying to trick them).
- Using the word "Test" in the subject line

If you need any more help using MailChimp you know where I am ... give me a call on 01367 888229 or email me at alison@theprooffairy.com