GETTING STARTED WITH MAILCHIMP

MailChimp

WELCOME TO MAILCHIMP.

This handy guide will help you get your first email campaign off the ground. We'll also offer tips on managing your list, viewing your reports and making sure your campaigns get into the right hands.

As for our system requirements, all you need is a modern browser. Internet Explorer 7 or higher works, but for a faster experience we recommend Firefox 3.5 or higher, Safari or Chrome.

What to expect:

In this guide, you'll learn how to:

1. Create your list
2. Import your list
3. Create your campaign
4. Avoid spam filters
5. Understand your MailChimp reports

If you have any questions that aren't answered here, feel free to contact our support staff at mailchimp.com/support or join one of our free daily online training webinars at mailchimp.com/webinar. Now let's get started.

CREATING A LIST

Since creating a list is the first thing you should do in your MailChimp account, we create one for you when you fill out your account information on your first login. You can use the list we created for you, or you can follow these two simple steps to create a new one.

**Step 1**: Choose **Lists**, then click the orange **Create New List** button on the left.

Step 2: Fill out the setup details, making sure you've written a Good Permission Reminder. Click **Save** to finish setting up your list.
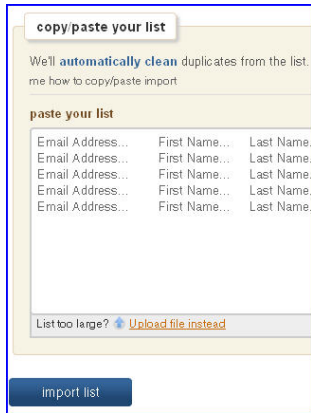
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IMPORTING YOUR LIST

Now that you've got your list all set up, it's time to import your subscribers into the list. There are four ways to do it:

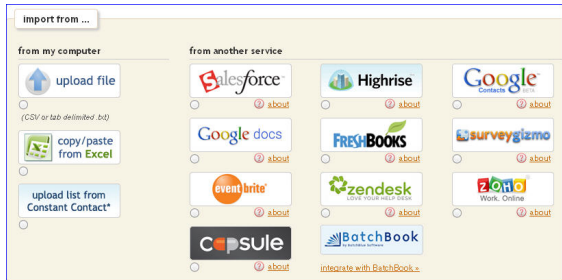## 1. Upload a CSV file
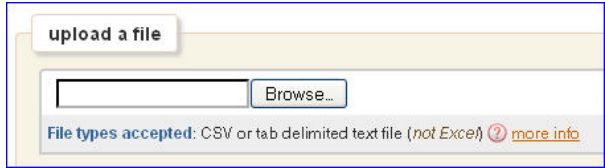
2. Copy/paste from Excel

3. Import directly from other apps like Google Docs, Salesforce, Highrise and more.

4. Start a list from scratch. Set up your list with the email address in one column, and any other data you want to include in separate columns. Like this:

Just select the import option you'd like and follow the easy steps.

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Now that your list is imported, we'll help you set the name and content type for each column—we call it **mapping**. Use the pull-down menu above each column to set the field name and type. Once you've mapped your fields, click the **All done** button to complete the import.

After the import, you'll get to review all the emails that were or were not added to your list. Just click the links to view more details. (Note that if you have a large list, we'll ask for your email address so we can send you the notifications and report when the list is imported.)

Frequently Asked Questions

How can I add groups to my signup form?

If you *have not* created any lists in MailChimp, go to **Lists** > **Create new list**. We'll ask you if you really want to create a new list or if you just need to add groups to an existing list. Click **Create list**. Fill in your information on the **Set up your new list** screen and save. You'll see a list creation success screen. Click to **Add groups to list**. We'll expand the screen below, and you can choose the list your groups will be added to, how you want us to display your group options in your signup form, the title of your groups field and the group names.

If you *have* a list created in MailChimp, go to **Lists** > **Groups** > **Create groups** from the drop-down menu. We'll expand the screen below, and you can choose the list your groups will be added to, how you want us to display your group options in your signup form, the title of your groups field and the group names.

How can I add new fields to my list?

You can add up to 30 (including email) fields in your list area. Just go to your **Lists** tab, and under **List database**, click the green plus sign (+) to add a field.

You can also add fields and customize them directly in the signup form designer. Go to **Lists** > **Forms** > **Build it**, and then choose your field type with the **Add a field** choices. You can then customize that field directly on the right side of the signup form and save, duplicate, or if you don't like the changes, delete the new field.

New to MailChimp?

Let us pay for your expert help with the EXPERT EXCHANGE PROGRAM
mailchimp.com/experts

CREATING A CAMPAIGN

You've got your list ready to go, so it's time to create your first campaign. In this section we'll explain how to select your list, select a template, edit your content and design your email.

From your Dashboard or **Campaign** tab, click the big, orange **Create Campaign** button.
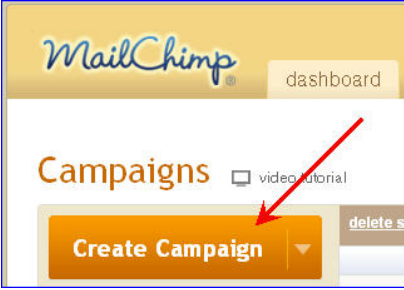
Choose the type of campaign you'd like to create. (Start with **Regular ol' campaign**).
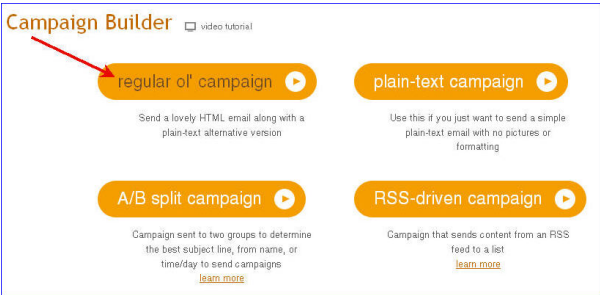
On Step 1 of the Campaign Builder, select the list you want to send to. Once you've selected the list, use the **Next** button to move forward, or just click **Send to entire list**.

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On Step 2 of the Campaign Builder, you'll have the options to name your campaign, set up a subject line, from name reply-to email and personalize your "To:" field with *|MERGETAGS|*. You'll also find your options for tracking, authentication, analytics tracking and social sharing. Again, use the **Next** and **Back** buttons to navigate through the steps (don't use your browser's back button).

Select a template for your email by clicking **Pre-designed** or **Start from scratch** (to get basic template layouts that you can fully customize) under the **Templates** heading. Click **Design Genius** if you want us to walk you through the styling process. Templates you've set up and saved will live under **My templates**. If you're providing your own code, use the **Paste/import HTML** or **import from URL** options. If you want to create an editable (or non-editable) template for your clients, choose **Code custom templates**.

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Once you choose your template, you'll remain on Step 3 of the Campaign Builder. You'll edit your styles and content in our **Content editor**. Click **Show style editor** to bring up the style options.
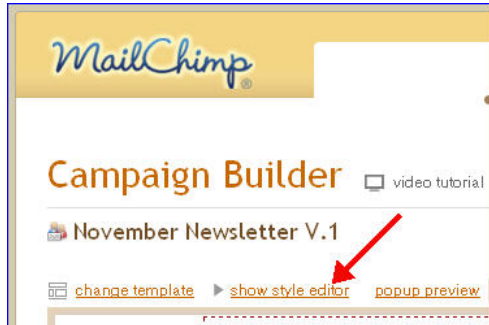
Here, the **Body** tab is selected and the **Title style** subheading has been clicked. This will allow you to set the line height, font size and more for this section:

Click anywhere inside the dotted red borders to bring up the **Content editor** box.

Edit or add content, then click **Save** to set the changes.
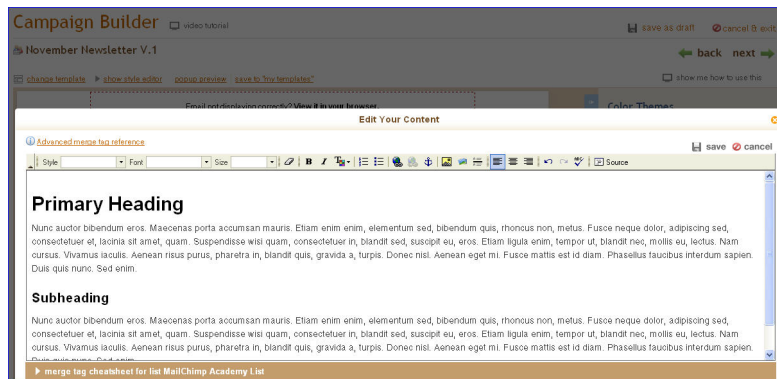
TIPS: ADDING CONTENT

- Type directly into the content editor—don't copy/paste from another word processor into MailChimp. Only copy/paste from a simple text editor like TextEdit or Notepad.
- If you copied your content from a website or web-based email program and need to clean up the campaign, you can generally use the eraser tool (**Remove formatting** tool) on the online editor toolbar to remove just the formatting and junk code brought over from the other program.
- If you copied your content from **MS Word**, the only way to fix it is to start a new campaign and add clean content. Word creates so much junk code that the tool can't even clean it up.

After saving, wait for your content to refresh, then click **Next**. Our plain-text generator will automagically create the plain-text version of the email from your HTML version. Look it over and click **Next** again to move to the last step of the Campaign Builder.

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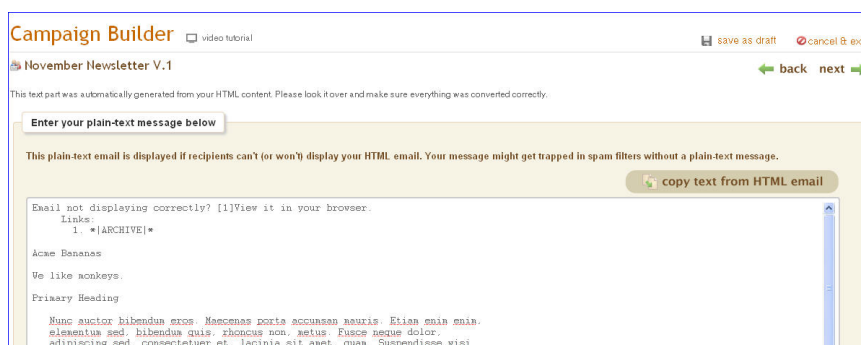
Step 5 of the Campaign Builder is a **Pre-delivery checklist**. If we see anything missing from your campaign, we'll alert you in red on this screen. Click **Resolve** to go back to any area that needs attention.

You can preview the campaign once more by clicking on the **Popup preview** button.

We recommend sending tests to several email addresses to see how the campaign looks in your recipients' inboxes. If everything looks good, schedule or send your campaign.
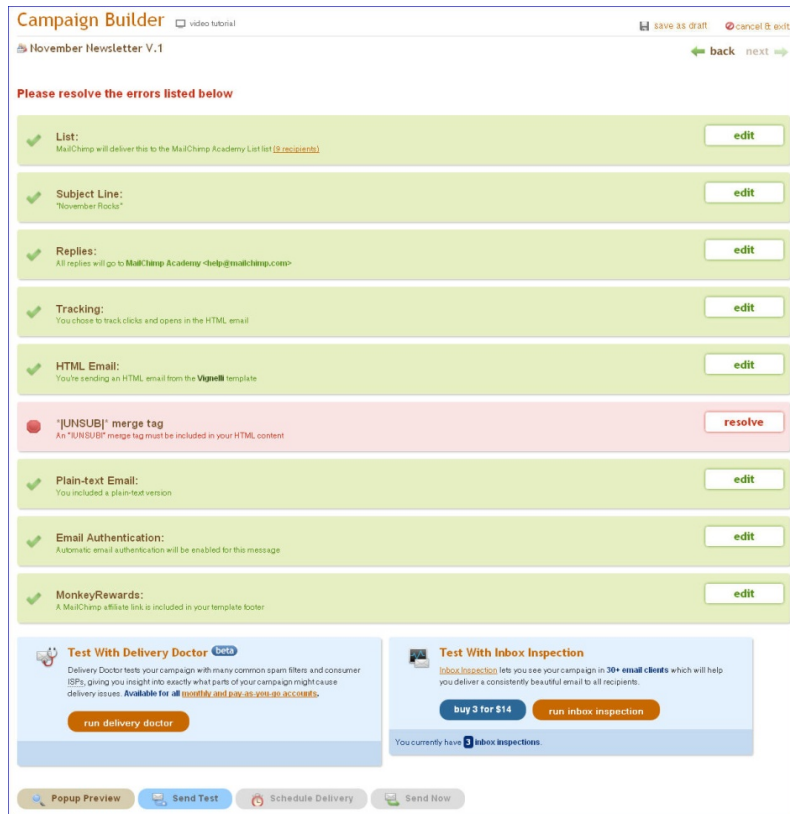
Note: If you use templates provided by MailChimp, we'll add your postal address for you. If you're providing your own code, make sure the address is included somewhere in the text of your campaign. It's required by law!

TIP: GET TO KNOW THE CAN-SPAM ACT

The FTC's CAN-SPAM act requires you to include your postal address in email marketing. There are lots more rules, too.

To learn more, visit ftc.gov.

AVOIDING SPAM FILTERS

There's no sense spending all that time designing, coding and writing your email newsletters, only to get them trapped in your recipients' junk folders. Make sure your newsletters go straight to your subscribers' inboxes by learning how spam filters think.Spam filters look at a long list of criteria to decide whether or not your email is junk. The list of spammy criteria is constantly growing and adapting, because spam filters learn more about what junk looks like every time someone clicks the **This is spam** button. Spam filters even sync up with each other to share what they've learned. There's no magic formula, but these tips will help you avoid common mistakes that often send email marketing to junk folders.

Avoid these common mistakes

- Using spammy phrases like "Click here!" or "Once in a lifetime opportunity!"
- Going crazy with exclamation points!!!!!!
- USING ALL CAPS, WHICH IS LIKE SCREAMING AT THE TOP OF YOUR LUNGS VIA EMAIL (especially in the subject line)
- Coloring fonts bright red or green
- Coding sloppy HTML, usually from converting a Word file
- Creating an HTML 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
- Sending a test to multiple recipients within the same company (that company's email firewall assumes it's a spam attack)
- Designing HTML email in Microsoft Word and exporting the code to HTML (That code is sloppy, and spam filters hate it.)


TIP: INBOX INSPECTOR

MailChimp has a spam filter checker (look for the **Inbox Inspector** under your **Account** tab) that'll tell you exactly what your email's spam score is, and what you need to change if you want to improve your chances with spam filters.

For more information, visit mailchimp.com/add-ons/inboxinspector.

MAILCHIMP REPORTS

You've imported your list, created your campaign, written smart, unspammy content, and sent it to your subscribers. Now what? Take a look at your MailChimp reports to help you analyze your campaign's performance and make notes for next time.

Click the **Reports** tab and then on the title of your campaign.
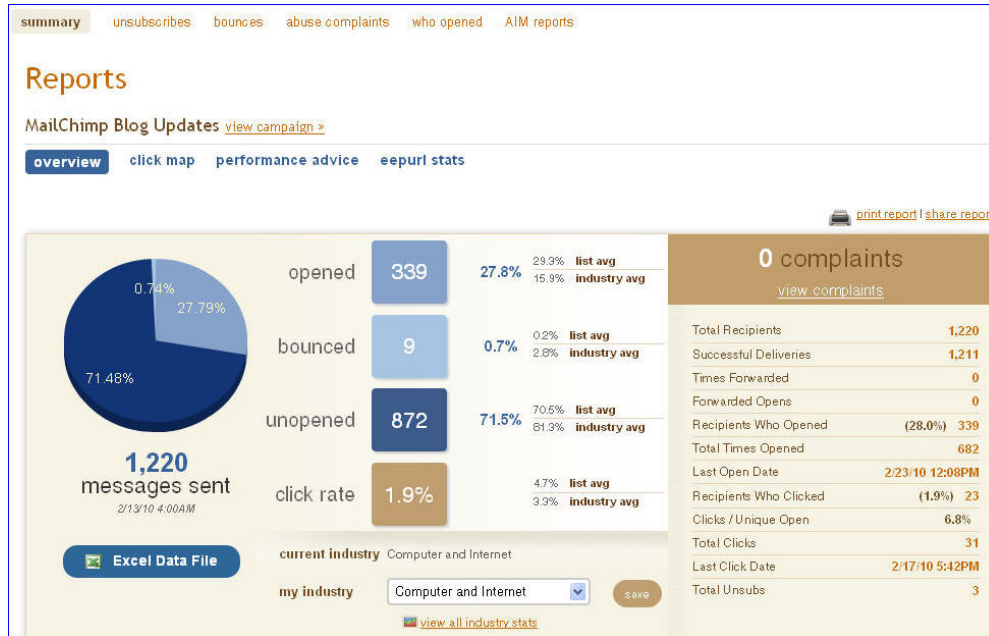
What the reports mean

In your **Reports** tab to the right, you'll see a list of numbers related to the campaign you sent. Here's what those reports mean:

1. Total recipients

2. Successful deliveries: Some emails bounce back or get blocked by email firewalls and spam filters. This states how many of your emails actually got through to your recipients' servers.

3. Times forwarded: MailChimp lets you insert a link into your email campaign that allows your recipient to forward your campaign to a friend. This number only reflects the number of people who used this tool, not those who forwarded from their inbox.

4. Forwarded opens: Say your recipients forwarded your campaign to friends. This tells you how many times those friends opened it.

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5. Recipients who opened: How many people opened your campaign. So if two (sad and lonely) people opened your campaigns 500 times each, that would be 1,000 total opens. This stat would show that two recipients opened.

6. Average times email was opened: This gives you a general idea of how many times each recipient opened your campaign.

7. Total times email was opened: Don't let this stat get to your head. Your email might have been opened 10,000 times—but what if it was just one guy who opened your email 10,000 times? It's good to know if you're looking for total impressions (for banner ads, etc.).

8. Recipients who clicked: How many people clicked on your links.

9. Clicks per unique open: Of those who opened, this percent clicked.

10. Total clicks: The total number of clicks your email got. It's handy to know how much traffic you'll get to your website after sending.

11. Total unsubscribes: If any email campaign stat can bring a tear to your eye, this is the one. We've seen average unsubscribe rates of less than half of one percent. Anything above that means people are mad.

12. Total abuse complaints: You know when you get a piece of junk email, you click that button in your email program that says "This is junk" or "Report Spam"? Every time you do that, a report and copy of that email is sent to your ISP. We track how many complaints your recipients submitted.

TIP: AIM REPORTS

MailChimp already comes with some great reports. But if you want to know even *more* about your customers, then consider MailChimp's **AIM Reports** as an add-on.

They give you extra insight about your recipients, like who opened your emails and what they clicked. See a real-time report for each recipient's email activities: when they opened, what they clicked, and when they came back. You can even generate a list of people who did *not* open, and send them a modified campaign.

The add-on is only $49 (one-time activation fee). After setup, they'll work for any list in your account, for any new campaign you create. To learn more, visit:

mailchimp.com/features/power_features/aim-reports

RESOURCES

You can search our Knowledge Base anytime, or contact our live support team between 9am and 5pm EST Monday through Friday, at mailchimp.com/support. Attend free online training sessions at mailchimp.com/support/webinars.

These resources will help you become a MailChimp pro:

Advanced features:
mailchimp.com/features/power_features

More guides:
mailchimp.com/resources

MailChimp Academy videos:
mailchimp.com/support/videos

The MailChimp blog:
mailchimp.com/blog