



ACCELERATE – LESSON 7

PREPARING AN EMAIL COMMUNICATION IN MAILCHIMP

On completion of this lesson you should:

- *Understand the importance of getting clear on your objectives for your email communication*
- *Understand the importance of getting clear on the target market for your email communication*
- *Be aware of the different types of campaigns you can do in Mailchimp*
- *Understand how to source and customize a HTML template*
- *Understand how to create lists, groups & sub groups in Mailchimp*
- *Understand how to prepare an email communication in Mailchimp*
- *Understand the importance of a test run/s before hitting go on the broadcast*

In this lesson, as with many lessons in the Accelerate program, we are going to assume a certain level of knowledge for this lesson, and presume that you have decided which emarketing system you will use and already have an emarketing system up and running.

If you haven't got these key things in place, we suggest you participate in the following modules from the Get up To Speed program:

- [Emarketing](#)

INTRODUCTION

Whilst there are many emarketing programs out there, for the purposes of teaching you how to prepare an email communication, we are going to focus on one of the most popular emarketing systems, Mailchimp.

Mailchimp offers a free plan for up to 2000 names on your database and a range of other monthly and pay as you go plans.

They have many [integrations](#) and have continued to innovate through the years, and are widely recognised as an industry leader. It's also a very user-friendly system.

OBJECTIVES & TARGET MARKETS

CONSIDER YOUR OBJECTIVES

Like everything in this program, the first thing you should consider is your reason for doing an email campaign.

If your email campaign is part of a wider digital marketing campaign (which it may well be in the context of this program) consider what role it needs to play in the context of the wider digital marketing campaign.

Consider what you want the reader of the email communication to do as a result of reading the newsletter? Book into an event? Buy a product? Contact you? Make you are clear on this before you start preparing your email communication in Mailchimp.

CONSIDER YOUR TARGET MARKET

Along with your objectives, it is important to consider your target market before starting to prepare an email communication in Mailchimp.

Are you preparing this communication to go to:

- Your entire database?
- Your prospects? (customer acquisition)
- Repeat customers? (up-sell and cross-sell)
- To reactivate old customers? i.e. a client retention strategy

You may need to segment your database first using one main list and sub groups or segments before having the ability to send to certain sections of your database. See below information on lists for more info on this.

It may be that you send a similar, but slightly different email communication to different segments of your list. By being considerate of who your list is, and how they are best communicated with, you can be more relevant, and will achieve better results with your email communication.

GETTING STARTED WITH MAILCHIMP

Mailchimp is a great program to use for your own company or your clients as it is very easy to get started and use.

MailChimp is a web-based application that works in most web browsers, which means you don't need to download or install any software on your computer to use it - everything is in the cloud. To make sure MailChimp works properly in your browser, you should enable cookies, pop-ups, and JavaScript. When you watch our tutorial videos, you'll need the latest version of [Flash](#).

[To create an account simply click here](#). You can [see the different accounts and associated prices here](#), but in short, accounts are free for up to 2000 people on your database. Using a free account you can send 12,000 emails

per month (so up to 6 communications to your 2000 contacts) and there is no credit card required. There will however be some Mailchimp advertising on your communications and some features such as automations will not be available until you are on a paid account.

When you create an account with us, you agree to MailChimp's [Terms of Use](#) and to comply with anti-spam regulations. It's important that you remain in compliance - if you have questions about CAN-SPAM or other regulations, read through Mailchimp's [Compliance Tips](#) articles.

Gaining Access to an Account

Each MailChimp account has five levels of access available for users:

1. Viewer
2. Author
3. Manager
4. Admin
5. Owner.

Both the Owner and Admin can invite other users to join, and they can assign user levels. If you are using an account of your own, you'll probably be the Owner. If you are performing work on behalf of a client, it's a good idea to have access at Admin level.

To achieve admin access:

1. Log into the Mailchimp account with the supplied username/password from the client.
2. Click on the profile name to expand the Account Panel, and select
3. Click the *Account settings* drop-down menu and choose *Account users*.
4. Click the *Invite A User* button on the right side of the screen.
5. Add the email address of the person you want to grant access to and choose an option under *User type*. You can add a message to share any pertinent information or instructions for your account.
6. Click the *Send Invitation* button to invite that user to your account.

Read more about this account users and gaining access here: <http://kb.mailchimp.com/accounts/multi-user/manage-user-permissions>.

If using Mailchimp is completely new to you, you'll find a number of resources available to you on the MailChimp site including [video resources](#), a [glossary of terms](#), and a searchable [Knowledge Base](#) of reference, how-to, and troubleshooting articles.

In this lesson we'll be focussing on mobilising an email marketing communication using Mailchimp as part of a digital marketing campaign.

WHAT KIND OF CAMPAIGN WILL YOU DO?

There are many types of email campaigns that you can do in Mailchimp and on other emarketing software, and different types of campaigns suit different objectives, target markets and digital marketing campaigns (hence why it is key to get clear on these first up!)

Some of the campaigns available to you in Mailchimp include:

1. Regular Campaign

Send a lovely HTML email along with a plain-text alternative version.

This is likely going to be the option you will use to prepare your email communication in Mailchimp. It's good for a one off campaign, or a regular monthly campaign.

2. Plain-Text Campaign

Send a simple plain-text email with no pictures or formatting.

If you're in a hurry, or don't think your audience will have their email settings set to receive images/fancy HTML, a plain text campaign is the way to go. I know some very experienced internet marketers who still swear by plain text campaigns because they believe it ups the chances of the email communication reaching inboxes and getting read and they're prepared to do whatever it takes for a higher open rate (more on this later).

3. A/B Split Campaign

Send to two groups to determine the best subject line, from name, or time/day to send campaigns.

Got a particularly big/important campaign and really want to make sure that you have things right before you send? OR, want to test different images/copy/calls to action to see what gets the best results? Then this could be a good option for you.

4. RSS-Driven Campaign

Send content from an RSS feed to a list.

RSS-Driven Campaigns are extremely clever. If you can commit to regular blog posts (or social network posting) using RSS feeds you can hook your feeds into an RSS-Driven Campaign so the communication will effectively be half written by prepopulating content from your blog or social networks, and ready for you to review before sending out. Its even possible to completely automate this process, where an RSS-Driven campaign goes out on a set frequency i.e. weekly or monthly. But make sure you're topping up your content on this frequency if you go for this option or people will receive the same content!

EXERCISE: Consider what type of campaign from those listed above you will do this week, as an exercise to lock your knowledge in.

PREPARING YOUR TEMPLATE

To help you achieve the right look and feel for your email communication, Mailchimp has a variety of pre-prepared templates, or you can also customise your own.

To get started you can simply select from different template options on the *Template* step of the Campaign Builder. Read more and watch a handy video about templates at: <http://kb.mailchimp.com/templates/basic-and-themes/types-of-templates>.

Types of templates available in Mailchimp:

Basic

Basic templates provide you with blank layouts where you can add and style content to create a customized, mobile-friendly email, all using Mailchimp's inbuilt [Email Designer](#). Their *Basic* templates make full use of the Campaign Builder's Drag and Drop Editor, allowing you to fully customize the look and layout of your campaign, even if you're not a designer.

Themes

Mailchimp has an increasing number of templates that are simple to use as is, or to customise to your liking in a short amount of time. Simply pick one of these predesigned *Themes*, plug in your content, and you've got a beautiful campaign.

Auto connect

The *AutoConnect* templates use a built-in [integration](#) to pull in data to populate your campaign. Due to the nature of the integration, *AutoConnect* templates must be selected and customized each time they are used, as replicating a previous *AutoConnect* campaign will break the integration.

RSS-to-Email

Use the *RSS-to-Email* templates to easily increase reader engagement and help people get your content the way they'd prefer it. Just create an [RSS-Driven Campaign](#), give them a link to your RSS feed, and select a template.

Code Your Own

If you want more control over your email design than the mailchimp templates offer, you'll want to look at [creating your own custom template](#). Designers have the ability to import HTML that includes MailChimp's [template language](#) to create an editable template inside Mailchimp. This is a great feature for web designers who want to upload a template for a client, and create editable, repeatable, and hideable sections within the content area. If you don't see a template that's specific to your needs or to your industry, this list will help you decide which template to use.

Need more help deciding which template you need?

This table should help:

Request	Template Options
I want to use my brand on my template.	Basic
I want a basic layout with a lot of control.	<ul style="list-style-type: none"> · Basic· Themes > Newsletters > Simple Newsletter · Themes > Facebook-friendly > Postcard
I want a really fancy newsletter, but I don't know HTML.	Themes
I want repeatable sections, with multiple columns.	Basic
I'm promoting an event.	Themes > AutoConnect > EventBrite or Facebook Events
I need to include a map.	Themes > AutoConnect > EventBrite
I have a date-specific campaign that isn't an event.	Themes > Birthday or Reminders
I have products to sell.	Themes > eCommerce or AutoConnect
I run a local business.	Themes > AutoConnect or Coupons
I'm in a band.	<ul style="list-style-type: none"> Themes > AutoConnect > iTunes Music or Amazon Books Themes > Music
I want to send a flyer.	Themes > Art > Postcard
I want to send a holiday campaign.	Themes > Holiday
I want a simple text campaign with links and a logo or header image.	Themes > Stationery > Slim & Trim
I have a coupon.	<ul style="list-style-type: none"> · Themes > Coupons· Automation workflow (campaign type, not a template) · QR code for just about any template
I'd like to target my subscribers who use mobile devices.	<ul style="list-style-type: none"> · Basic· Themes > any Drag and Drop

Read more about templates at: <http://kb.mailchimp.com/templates>.

EXERCISE: Log into Mailchimp and browse through their range of available templates and select one which you believe will be suitable for your digital marketing campaign.

PREPARING YOUR LISTS

Many people get this wrong so listen up! A MailChimp list is a powerful and flexible tool that helps you manage your contacts, who we call "subscribers." The flexibility of your list and your ability to communicate with it moving forwards is dependent on how it is created, imported, and maintained in MailChimp in the first place.

With the right data and organisation, you can segment subscribers based on a variety of criteria and send targeted groups certain types of content. Take a moment to think about your email marketing goals, who your audiences are, and what information is relevant to each audience.

Consider, for example:

- Do you have seasonal-only customers, bargain-hunters, or customers who are only interested in certain types of merchandise, services, or events?
- Are you an organization that needs to send different content to donors, sponsors, members, or other patrons?
- Does it matter if your subscribers are local, domestic, or international?
- What other variables affect your audience and each list you manage? Determine what information is relevant about your subscribers and include it in a column in your spreadsheet or database.

The foundation of great email marketing is an up-to-date list of email contacts who have opted in to receive your campaigns.

When you [create a new list](#), Mailchimp will ask you for some information to [comply with anti-spam practices](#).

We cover anti-spam practices in more detail in our [Emarketing module of the Get Up To Speed program](#).

After you create a list in your account, you can add subscribers in a few ways.

- Type or paste individual subscriber data.
- Upload from a file.
- Copy/paste from a spreadsheet
- Import from [database or other service](#). Be sure to [format your import](#)
- Build a list from scratch using our signup forms and mobile apps, like [Chimpadeedoo for iPad](#) and [Android](#).

Segmenting Lists

MailChimp allows you to create segments of your list based on [almost any criteria](#) you can think of, like sign up form data, group preferences, and any subscriber activity collected by MailChimp including opens, clicks, and location.

If you integrate an e-commerce platform with your MailChimp account, you'll also be able to use [purchase activity information](#) to segment.

The segmenting tool supports up to five criteria, and lets you choose whether a segment is static (pulled once and saved) or auto-updated with new subscribers and updates. You can save any segment for future use, too.

Read more about lists at: <http://kb.mailchimp.com/lists/>.

Terms Used by MailChimp when it comes to lists

- **List field**
[List fields](#), also known as merge fields, hold information you collect from a subscriber, such as their email address, first name, and last name.
- **Subscriber profile**
Each subscriber has a profile that contains list field information and other information collected by MailChimp, like signup source, opens and clicks on campaigns, or their preferred email client. Any information stored in a [subscriber's profile](#) can be used to create segments.
- **Segment**
A segment is a portion of your list that includes only subscribers whose profile information matches your custom target criteria, like "All subscribers with a birthday in March" or "All subscribers who didn't click in my last campaign."
- **Group**
In MailChimp, groups are a means of categorizing subscribers based on things like their interests or preferences. Like other list fields, group information can be used to create segments.

When to Use Segments

Segments allow you to speak more directly to specific sets of subscribers in your list, which can help campaigns feel more like a conversation, and less like a catch-all e-blast. For example, create segments based on when someone joined your list, where they signed up, or which subscribers purchased a specific product.

After you create a segment, you can [save it for reuse](#). There are two ways to save a segment.

- **Auto-updating segment**
Checks your list to include any subscribers that meet your criteria each time you view or send to that segment. Auto-updating segments are best when you expect the subscribers targeted by that segment to change over time.
- **Static segment**
Include only subscribers that meet your criteria at the time the segment is created. Static segments are best when you don't want the subscribers targeted by that segment to ever change.

When to Use Groups

Groups are a type of list field that lets subscribers choose interests or preferences. To find out what type of content your subscribers prefer to receive, present groups on your [signup form](#) or [update profile form](#). Groups can also be [hidden](#) from your signup form if you'd rather sort your subscribers into groups behind the scenes.

To be sure groups are right for your list, ask yourself the following questions.

- Do I need to categorize my subscribers in any way, like how often they'd like to be emailed?
- Do I have different audiences I want to cater to, like country music fans or rock music fans?
- Do I want to engage specific sections of subscribers on my list based on their likes?
- Do I have the time and resources to create tailored content based on subscriber interests?

If you answered yes to any of these questions, consider [setting up groups](#) in your list.

Other Benefits of Groups

Aside from being a great way to understand your subscribers' interests and preferences, groups have a few other benefits in MailChimp.

- Subscribers can be a member of multiple subgroups in one list.
- Each list can have up to 60 subgroups.
- You can select multiple subgroups in one piece of segmenting criteria, allowing you to get more mileage out of the five-segment criteria limit in MailChimp.

List Management

Use good list-management practices to avoid being blacklisted by ISPs and anti-spam groups. Here are a few tips for managing your email lists:

- Don't send marketing emails unless the recipients gave you permission.
- Some emails will [bounce](#). There are two bounce types: a soft bounce means the recipient was temporarily unavailable, and a hard bounce means the email was undeliverable. Remove hard bounces immediately, because if you keep sending emails to a server after it has told you the email doesn't exist, they may block your future messages.
- If an email soft bounces three campaigns in a row, it's best practice to clean it from your list. If you send daily emails, you may want to wait longer to see if the bounce reason is resolved.
- Unsubscribe requests should be handled immediately.

If you set up a list in MailChimp, they'll [manage it for you](#). You can [customize](#) the signup form and opt-in process to match your branding, or use our [API](#) to pass opt-in data directly from your website to MailChimp.

PREPARING THE EMAIL COMMUNICATION

You have your objectives, you are clear on your target market. You've prepared a HTML template, and you have your lists ready to go. Congratulations, you're now ready to prepare the actual email communication you will send out!

Purpose

Every email you send should have a clear purpose and benefit to the subscriber. Before you start to design an email, think about your objective—why is this email important to send now?

Keep your audience in mind as you consider your purpose. Will your subscriber think the message is relevant? Is there an obvious benefit for them?

Strategy

Once you have defined the purpose of your email campaign, think about what you want to say and how you should say it to encourage engagement from your subscribers.

Will you offer an incentive or just provide information? Is a single campaign sufficient or does it merit a series of campaigns?

Design

With purpose and strategy in place, you're ready to design your campaign. Designing a campaign that meets your objective while also being relevant to your audience can seem like a difficult task. These Design Guide resources offer tips and guidance on how to engage your subscribers.

- [Your Style and Brand](#)
Brand recognition and engagement starts with defining your brand. Create a style guide and maintain visual consistency across all communications materials.
- [Textual Content and Messaging](#)
Some of your messages may be relevant to only a portion of your list. Determine who should receive your message and figure out the best way to share it.
- [Layout Tips](#)
Order of content is important. Create brand recognition as soon as the email is opened and display your message clearly.
- [Calls to Action](#)
Give subscribers a clear place to engage with the purpose of your email.
- [Test Your Design](#)
Go beyond testing the links in your campaign. Test and tweak your campaign design or content to further engage your subscribers.

Fundamental Principles

- **Keep it simple.**
Focus on your message.

- **Post images on a publicly accessible web server.**
Use absolute paths in your code when you embed images or link to files. Make sure your assets are hosted on a publicly accessible server, so your recipients can see the images or download the files. Avoid free hosting sites, too, because these often have bandwidth limits that may prevent your images from displaying.
- **Use tables and shim.gifs.**
Keep the code simple. All email programs use different methods to render HTML, like Internet Explorer, Microsoft Word, or their own proprietary renderer, so more high-level coding may not display as intended.
- **Set email width to 600px or less.**
Most people view messages in their preview panes, which are narrow and small. The templates we design at MailChimp are never more than 600 pixels wide, or they're fluid-width.
- **Test how it renders.**
Because all email programs render HTML differently, test your HTML email on different email programs. You can also use the [MailChimp Inbox Inspector](#) to test how your email renders in major programs.
- **Webmail services strip certain elements.**
Browser-based email services like Gmail, Yahoo, and Hotmail strip out your DOCTYPE, BODY, and HEAD tags, so your code doesn't override theirs. Anything you'd normally code inside those tags (background colors, embedded CSS, JavaScript, background music files, etc.) will be removed. Use inline CSS and FONT tags. MailChimp offers a [CSS inliner tool](#) to help with this.
- **Think like a spam filter.**
Consider [spam filters and spam firewalls](#) when you code.

TRACKING & MEASURING YOUR CAMPAIGN

You've designed, coded, written, tested, and sent your first email marketing campaign. Good work! Maybe now you're wondering if it was worth all the effort? How can you measure your performance? Figure out what's working and what could use some work? There's [data you should observe](#) and questions you should ask to make these decisions. Here they are:

Clicks

How many people clicked links in your email? Which links did they click the most? Did they click on product links, or research links? Did you see a rise in purchases? How long after you sent the campaign do links keep getting clicked? Your click rate can help you determine the success of your campaign and reveal general trends in the behavior of your subscribers.

Unsubscribe rate

What's your unsubscribe rate after each campaign? Less than one percent is average for lists that are contacted regularly, and well-maintained. If you send very infrequently or if it's your very first send, your unsubscribe rate may be much higher. Check your rate after each campaign. If you see it spike after a

particular campaign, consider whether it had anything to do with your content. Maybe you're sending too frequently, or maybe not enough.

Bounces

Watch your bounce rate after each campaign. MailChimp will break down your bounces into "hard" vs. "soft," and clean your list accordingly. Soft bounces are emails that exist, but for some reason, they couldn't be delivered. For instance, their server might have been too busy at the time of your delivery. Hard bounces are undeliverable—perhaps the email account doesn't exist anymore, or there was a typo in the address. Hard bounces should be removed from your list immediately. [This article](#) can provide a few more details about bounces.

Website traffic

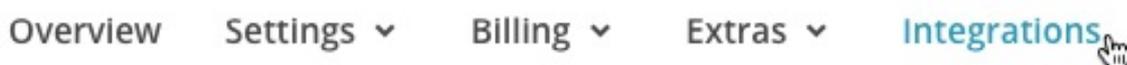
Check your website traffic logs after each email campaign. Does traffic pick up? Do orders increase? Was the spike in traffic immediate, or did it come gradually? How long does the new traffic last, and how long should you keep the graphics and pages that your email points to hosted live?

MailChimp integrates with Google Analytics to further illustrate how your emails affect website traffic and drive revenue.

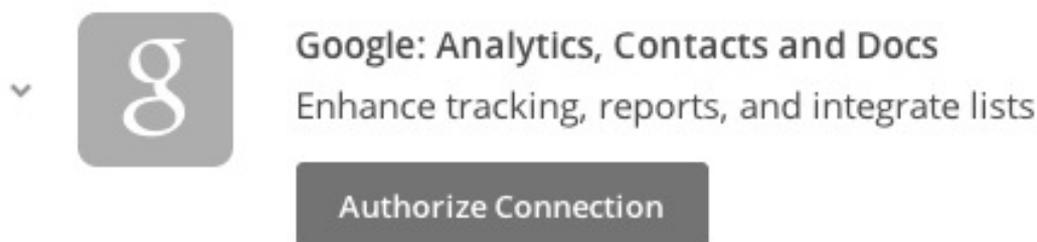
How to Connect MailChimp with Your Google Account

A connection between MailChimp and a Google account with Analytics must be authorized before Google Analytics tracking can be added to campaigns. To connect your MailChimp account with a Google account, follow the steps below.

1. Click your profile name to expand the Account Panel, and select *Account*.
2. Click the *Integrations* option.



3. Click the *Google: Analytics, Contacts and Docs* option.
4. Click the *Authorize Connection* button.



If you're not already logged into your Google account, you'll be asked to log in.

5. Click the *Grant access* button once you're logged into your Google account. You'll then be taken back to your MailChimp account and a success message will appear at the top of your *Integrations* page.

Once integrated, you're ready to send a campaign with Google Analytics tracking enabled.

Add Tracking to Your Campaign

1. [Create a new campaign.](#)
2. Navigate to the *Setup* step of the Campaign Builder.
3. Under *Tracking*, click the checkbox next to *Google Analytics link tracking*.

Tracking



Track opens

Discover who opens your campaigns by tracking the number of times an invisible web beacon embedded in the campaign is downloaded. [Learn more](#)



Track clicks

Discover which campaign links were clicked, how many times they were clicked, and who did the clicking.



Track plain-text clicks

Track opens and clicks in the plain-text version of your email by replacing all links with tracking URLs. [Learn more](#)



Google Analytics link tracking

Track clicks from your campaigns all the way to purchases on your website.

Requires [Google Analytics](#) on your website.

Title for campaign (you'll see this in Google Analytics™)

Goliath_Metrics_Weekly1_6_2015

When you check the box to enable *Google Analytics link tracking*, we display the campaign title as it will appear in your Google Analytics account after the campaign is sent. The Google Analytics campaign title combines the MailChimp campaign title with the date. The title and date format makes the campaign easy to search for in your Google Analytics dashboard. If you'd like to use Google Analytics with MailChimp, [this article](#) has more.

Signups since last campaign

After each campaign, do you get lots of new subscribers? That could mean your loyal readers are forwarding your emails to friends. Don't see any list growth at all? Maybe you need to make your content more interesting or relevant to your customers.

EXERCISE: Want to know how your campaign compares against others in your industry? [See this handy resource prepared by Mailchimp](#) and locate your industry benchmarks. Compare how your emarketing current activity rates against these benchmarks, or compare your results over time.

SUMMARY

As you can see from this lesson, there is a lot to prepare before doing your first email communication in Mailchimp, but believe us when we say it does get easier the more you do it.

If you have prepared a HTML template, and your lists are up to date and correctly segmented, all you have to do moving forwards is skip to the step of preparing a communication.

You can fast track this process by clicking on the 'campaigns' tab and ticking a past campaign which is similar to the next one you wish to mobilise, and then in the drop down menu to the right clicking 'replicate campaign'. Now all you have to do is to carefully go through and update key aspects of the campaign i.e.:

- Subject line
- Body copy
- Images
- Calls to action

ESSENTIAL EXERCISE: Copy and paste all the questions below into a Word or Google Doc. Answer all questions pertaining to your planned emarketing campaign and email it to us on learn@thecreativecollective.com.au to evaluate.

- **Objectives of the emarketing campaign**
- **How does this emarketing campaign fit into the wider digital marketing campaign?**
- **Who is the target market for the emarketing campaign?**
- **What day/s will you send the proposed emarketing campaign and why?**
- **What time/s will you send the proposed emarketing campaign and why?**
- **Please copy and paste your proposed headline + body copy for the campaign below.**
- **What images will you use for the proposed emarketing communication?**
- **Where will you source these images?**
- **Who will prepare the images?**
- **What copy will you use for the proposed emarketing communication?**
- **Who will prepare the copy?**
- **What call to action/s will you use in the emarketing campaign and why?**
- **How will you measure how effective the emarketing campaign has been? Specify some key stats you plan to measure and where you will source these stats them?**
- **Provide a screen shot or email a sample of your prepared emarketing communication as evidence of your learnings.**