



MailChimp Guidelines (Basics)

Adding a List of Contacts

1. At the very top click on the tab titled: 'Audiences'
2. On the right hand side there is a box titled: 'Manage Audience' click on this box and scroll down to 'View Audiences'
3. Click 'Create Audience' the grey box on the right hand side.
4. A light grey box appears with some text, click on 'Create Audience'
5. Complete the Audience details
 - Audience Name
 - Default from email address
 - Default from name
 - Click Save
6. You can add in a bespoke message to remind people how they signed up to the email to remind them.
7. Form Settings – 'Double Opt in' when people subscribe to your email list you can send an email to get them to opt in to make sure they actually wanted to be added to your list. Tick the 'Double Opt In' box if you want people to confirm through an opt in email. This is not a mandatory requirement but good practice depending on where your email list has come from.
8. Form Settings – 'Enable GDPR Settings' you can customise forms to include GDPR fields. This is required to be GDPR compliant.
9. 'Notifications' - tick the boxes you would like to receive notifications via email when someone unsubscribes to your emails.



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Creating an Email

Below are step by step guidelines to take you through how to create an email using your template:

1. Log in to mailchimp
2. Click onto 'Campaigns'
3. Click 'Create Campaign' at the top on the right hand side
4. Click 'Email'
5. Write a title for your email campaign name and then click 'begin'
6. Click on 'add recipients' on the right hand side. This is where you add from your lists who you want to send the email to.
7. Under list click the list of contacts you would like to send to
8. Within the 'segment or Tag' option select 'All subscribers on list'
9. If you added in the first name within your lists of contacts tick the personalise the "to" field'
10. Within the 'merge tags' select *[FNAME]* for first name
11. And then click 'Save'
12. Within the 'From' section write the name and email address of who is sending the email. Within the 'name' it's recommended to put your company name
13. Next in the 'Subject Line' write something that is going to make people open and read your email. Tell and don't sell. Use emoji's but not in replace of words as sometimes they may not show up and this won't make sense to readers.
14. Also add something in the preview text, this will show within the recipient's inbox under the subject line. And click 'SAVE'



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So now we move onto the content and writing the email you want to send.

1. Click on 'Design Email'
2. You will come to 'select a template' screen here you can choose different layouts and themes, select previous campaigns to edit or use a saved template you made earlier.
Click on 'Saved Templates'
3. And select the template you want to use.
4. You can hover over different parts of the email to edit.
5. Let's start with the introduction. Hover over the first sentence and you will see a pencil symbol. Click on the pencil to edit the text.
6. On the right hand side the text will load up where you can edit the wording.
7. I have used the font 'Open Sans' as this looked liked the closet to my brand as mailchimp only has a few selected fonts.
8. Once written you can then click 'save & close'
9. You can change images by clicking on the 'pencil' edit button and on the right hand side you will see the image. Click on the word 'replace' and this will upload your library of images.
10. To add new images click the 'upload' button on the right hand side and select the images you want to add to your library of images in mailchimp
11. You can also add links to your images so if people hover over them they can click through to a destination of your choice. This could be to a webpage, to an email or upload a document.



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12. Click on the word 'link' then choose the type you want to click to: web address, email address or file.

- a. For web address – add in the website link
- b. For email – add the email address you want people to email to. You can also add a subject and message for the reply email for ease and quickness for the recipient
- c. For anchor Link – you can link back to other links within the email
- d. File – click file and this will take you to your mailchimp library. You can select a file to attach or add one to your library by clicking 'upload' as mentioned above.

13. Once you have made the changes within the newsletter at the top header you will see 'preview and test'

- a. click here to preview your email here you can see the email as you would see on a laptop and also on a mobile.
- b. Send a test email – you can send an email to yourself and others to check the email before you send it out.

14. Once you are happy with the email click the 'save & close' button at the bottom right of the page.

15. You can now send your email immediately or click 'schedule' to schedule your email to be sent out at a later date or time.



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Reviewing the results of your email campaign

1. In 'campaigns' hover over the email you want to review.
2. On the right hand side a grey box will appear which says: 'view report'. Click on this and it will take you through to the email results.
3. You will see an overview of the email results which include:
 - a. Open Rate
 - b. Click Rate
 - c. 24hour performance
 - d. Top Links Clicked
 - e. Subscribers with most opens
 - f. Top Locations by Opens
4. If you scroll down you will see the 'Open Rate' of the email. (How many people opened the email). And the 'Click Rate' (How many people clicked on the links within the email). It also shows an industry average underneath so you can compare the average of other businesses in your industry.
5. Scroll down further and you'll see a '24hour Performance' this shows the time people opened your email and also clicked on the links within the email.
6. Top Links Clicked – shows the links that were clicked the most.
7. If you scroll back to the top the next tab is called 'Activity' this gives an in-depth review of who opened the email, who didn't open it, who clicked, bounced, unsubscribed and complained.
8. The next tab at the top is called: 'Links' this shows how many times each of the links were clicked on within the email.