Step-by-Step Guide to
Email Marketing with
MailChimp

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Email marketing is an important activity that most businesses know they need to partake in these days. But, many don't understand how to go about it, or what software to use. MailChimp is one of your options. But first, let's talk about why you need to use email marketing to take your business to the next level.

It's Effective – Email marketing is literally one of, if not the most effective types of marketing to ever be invented as of today. Done right, email marketing has higher returns than the traditional 3 to 4 percent magazine, newspaper and TV ads have seen. That's because email marketing is relationship building, and over time, with repetition, garners higher results.

Higher Reach – More than 90 percent of people have an email address now, and in spite of the rumors that you may hear about people not wanting email, that's not true. What they don't want is spam, and you're not sending spam. You're getting permission to market to the people you send emails to and you're sending valuable and useful content, too.

Highest Return on Investment – When it comes to marketing, according to an Email Marketing Benchmark Report, 60 percent of marketers claim a 32 percent ROI. This is enormous and only expected to grow as email becomes more direct as marketers learn more about their audience and the software becomes more intuitive.

Second to None Analytics – You can't really directly analyze a newspaper advertisement like you can online marketing and email marketing, both of which have some of the most advanced stats available. If you set everything up right you can understand how many people open your email, who reads them, who clicks through to your offers, and who takes your offer based on a particular email. The information you can gather via email marketing about your audience is tremendous and growing daily.

It's More Engaging – If you do it right, email can be very relationship building. You can use email to invite comments on your blog posts, invite discussions on your social media, and even ask for direct replies. You'd be surprised at how far this type of engagement can go if you do it with thought and consideration to your audience. It's always about them.

In addition, you can use email marketing with other forms of marketing. Some of that type of integration was mentioned in the points above. You can cross market via email about your social media and vice versa. But, having people on your email list, which you can directly market to is a little like being able to give yourself a raise whenever you want. Have a sale, promote something your audience will like, treat them special and you'll increase your ROI even more.

MailChimp is an email software program that will enable you to conduct email marketing, set up automatic e-courses, email auto series and more. Essentially it sends emails to your audience on a schedule that you set, or even at the moment you desire. The software is cloud-based and easy to set up and understand. MailChimp is probably one the easier choices when it comes to autoresponder software.

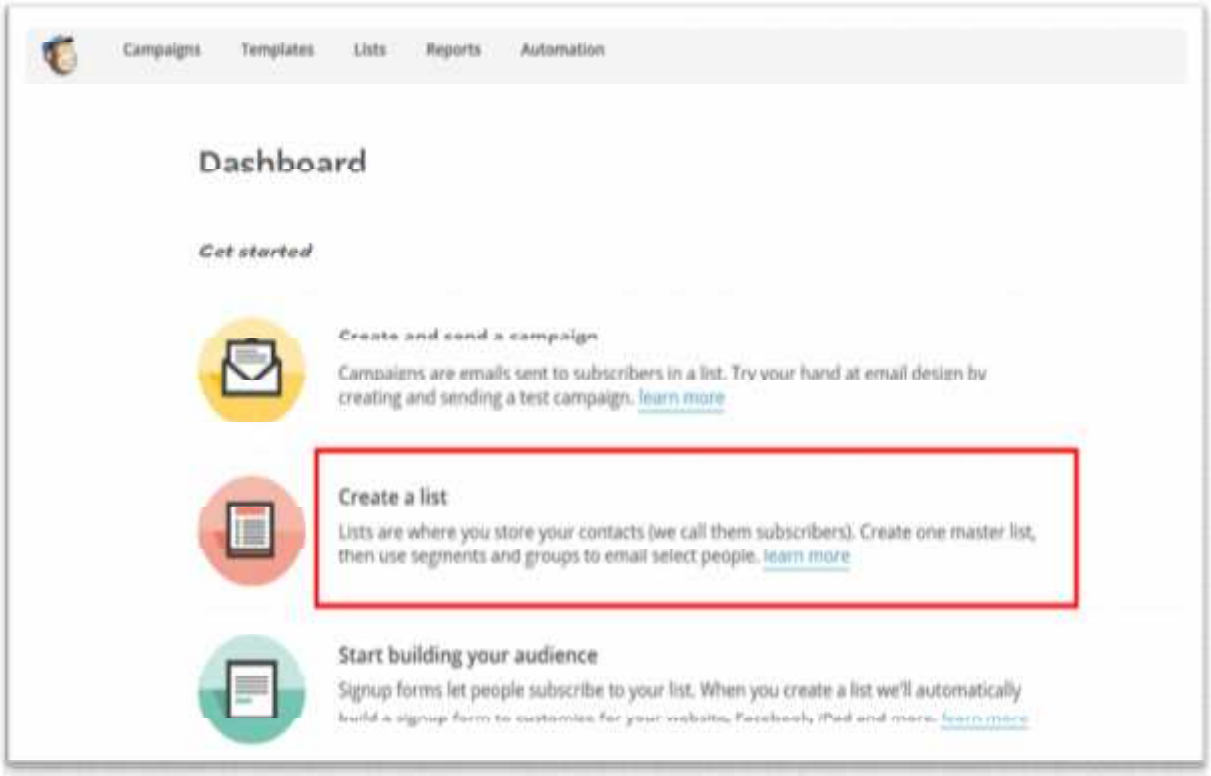
Let's take a look at how simple it is to use and start with setting up a list. An email list allows for you to send a lot of people a lot of information, by setting it up one time, and then allowing the automation of the software to take over.

You can use an email list for a variety of purposes from client relations to gathering leads and marketing to prospects. For example, if customer A purchases Widget B, you can put them on a special list automatically for people who purchased widget B so you can promote Widget C to them. Conversely, you can attract leads to a list that have purchased nothing but instead who have downloaded your free give-a-way that is laser-targeted toward a particular audience.

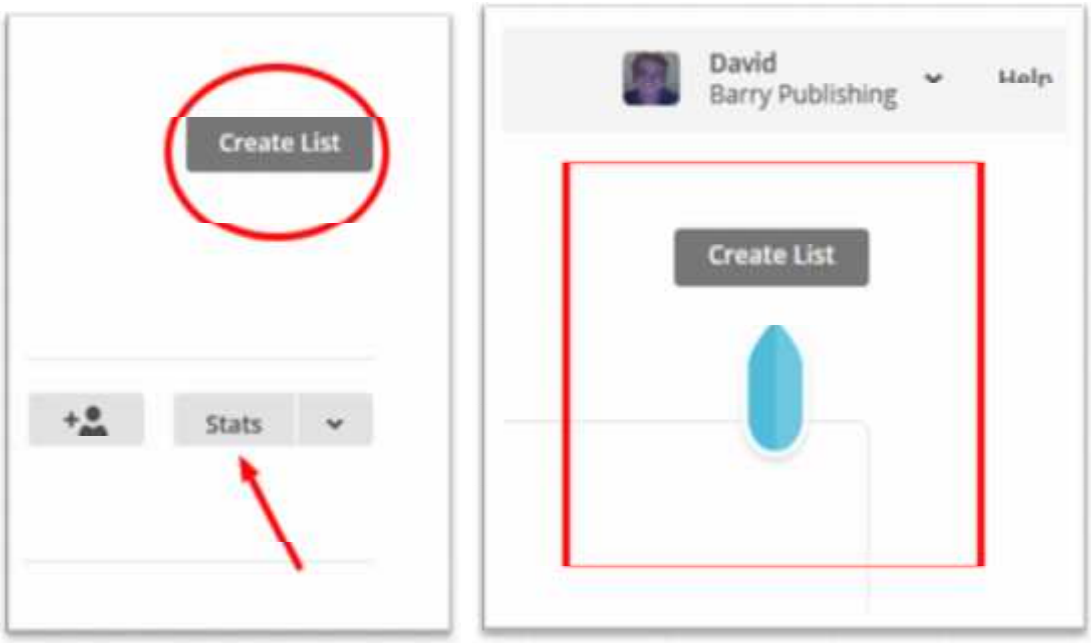
What's more, with the right software all of this can be automatic. Instead of having to individually thank each person or write out a lot of letters or emails by hand you can write them once, use the software to personalize each email, and then move on to the next idea. You don't have to do the work more than once for it to work forever.

Setting up a List

To set up a list with MailChimp go to your Dashboard on your account.



You'll see a list of features that you can use. Choose **Create a List**. After the first time you'll need to click on List at the top menu bar, then **Create List** in the upper right corner as pictured below.



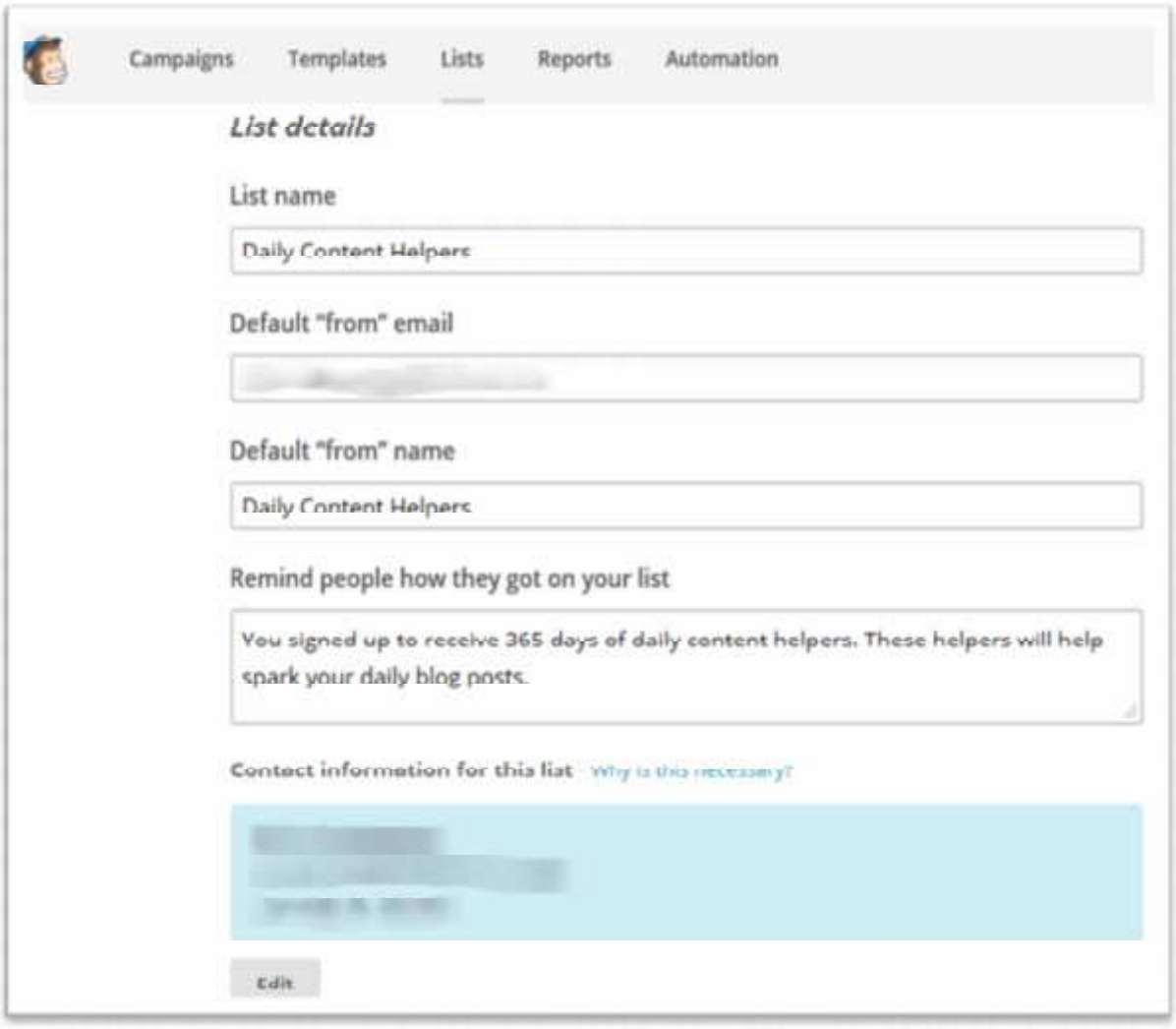
Notice for later that you can also look at your stats for each list from this view by clicking on **Stats** where the red arrow is pointed.

After you choose **create a list**, you'll be given a form to fill out to complete the list details. Fill it out completely.

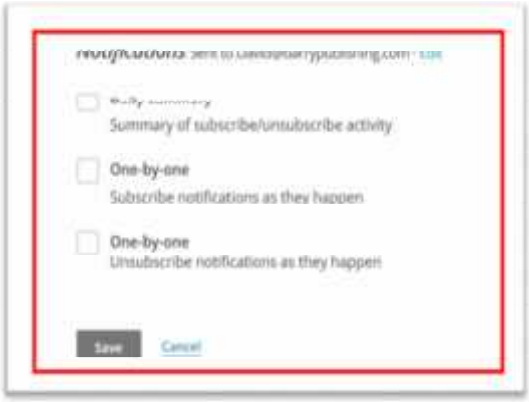
It's imperative that you don't take shortcuts when setting up your lists. While it's true that at first you won't get to do much with stats, set up everything you need to as if you had 2,000 subscribers because it's easier to do it right the first time than to go back and fix it later.

Remember that some of the requirements that MailChimp has set up, such as an address, or asking for phone numbers has nothing to do with invading your privacy but everything to do with avoiding SPAM and breaking the SPAM laws. The reason MailChimp has a good delivery rate has to do with their being careful about allowing spammers to use their software.

Name your list, and fill out each area before continuing.



Under this form are some other things you should be concerned with, too. You may want to receive a summary of activity via email so that you can always know what is happening, but if you have a very active list this might become a nuisance. It's good to set it up at first so you can be aware, but more than likely you'll want to change this later, and just train yourself to sign into MailChimp once a week or so to check stats in person.



If you want notifications of people who subscribe or unsubscribe choose that here. You can get a daily summary of all or you can choose to be notified immediately for each.

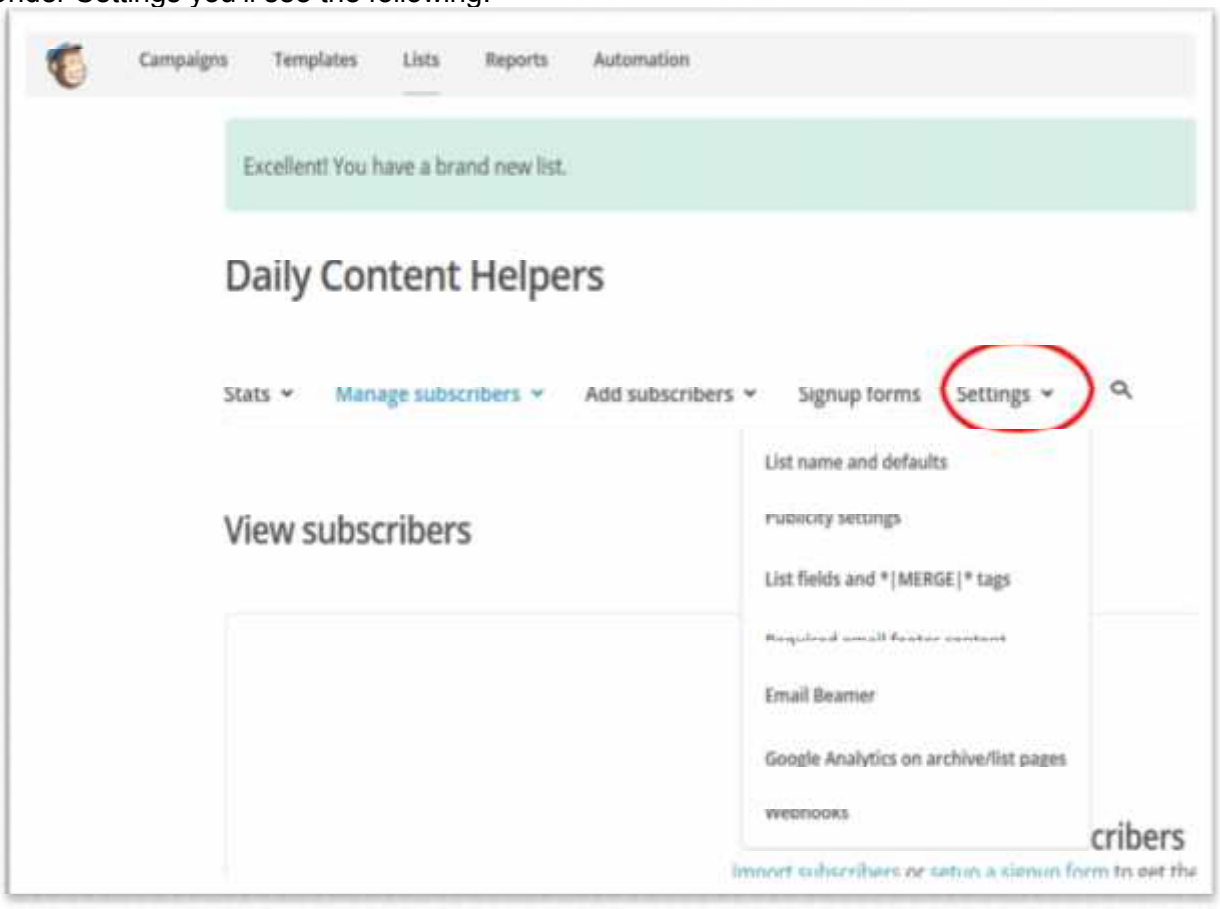
Next, you want to set up your **list settings**.

Settings

You have many choices for settings. We'll go over each of them and what they mean. Don't ignore settings - these have important features that help with when and how your email is delivered, as well as statistics. It doesn't take long and doing it right the first time will save you a lot of hassle down the line, plus you'll be glad you took the time to do it even if it's not required.

Also, some of the info in settings, you'll need if you use any third party integrations later on, so it's good to familiarize yourself with all aspects of the MailChimp software.

Under Settings you'll see the following:



- **List name and defaults:** This is where you'll find information about your list such as List ID, which some software asks for during integration, as well as your list name, campaign defaults, such as "from name", including the option for a default subject line.

  You'll also be able to check whether or not you want to send a final welcome letter for subscribers, allow your subscribers to choose from HTML or plain text emails, and if you

want to send a message to confirm when someone unsubscribes to your list, or have a daily digest of activity sent to you. You'll choose all that here.

It's not unusual to send more than one welcome letter to subscribers, especially if you have a lot of information to tell them. Sometimes receiving a lot of information in short bursts is better than getting a 2000 word email. The reason is that people have a short attention span, so consider sending multiple welcome emails to bring the new subscriber up to speed about your offerings and what they can expect from being on your list.

- **Publicity settings:** MailChimp offers you the ability to keep your list private, meaning only you and your affiliates can promote it. Or you can allow your campaigns to be public which means MailChimp users may find out about your list if they're searching for it. Plush you can activate or inactivate the archive bar, which allows people to post Facebook Comments and Likes, post links to Twitter, subscribe to your list from an email forward, view past email campaigns, and translate the email using Google Translate.

  You can automate a lot of your social media activity this way, and if you make certain emails public, that means they'll be out there on a web page some place drawing attention outside of your immediate list. There are pros and cons to doing this so keep in mind that if you want more eyes, this can help, but if you're putting this information on your website too, you may have duplicate content issues if you don't change things up.

- **List fields and merge tags**: This is where you set up fields that will enable personalization of email messages to your list plus manage fields available to sign up forms for each of your lists. You can add all the forms you want available to this list here. Email, First Name and Last Name is already available and that's all we need for this list. You can update this anytime.

  It's better to collect less information than more when someone first signs up. However, if someone is already a customer, you're going to have more information, so consider the fields you may need to use in the future and set some of them up now so you can use them easily later when you're busier.

- **Required email footer content:** Because of the SPAM laws, it's imperative that you do everything you can to minimize the problem of false spam reporting and remind your audience why and how they got on your list. This will be placed on all email footers and will help you avoid spam complaints.

  In addition, you can update your contact information. It's advised that you provide as much contact information as possible. Mail chimp prompts you for the legally required information but you can add more, like a phone number, here. You want your audience to be able to contact you easily. Don't make it hard. You want to develop trust, not detract from it. Be transparent.

- **Email Beamer**: This is a handy email address that allows you to email information, articles and more to the particular MailChimp campaign that you can later easily turn into emails that go out to your email list.

You can use this email while you're on a trip by sending things you think about to this address while you're on the go for MailChimp to collect for you to organize later. It's an awesome feature that you should try out.

- **Google Analytics on archive/list pages:** Google gives you a tracking ID that you can paste into this area of your MailChimp campaign. Using Google Analytics is important because it enables you to better create reports and track progress.

  If your emails often have limited time offers, you may not want to show your audience the archived emails. But, if your offers always exist, having the newsletters or email list mailings archived can give them a chance to look at past offers.

- **Webhooks:** This is an advanced feature that allows you to create hooks that trigger updates that you can receive when certain actions are taken such as subscribes, unsubscribes, profile updates, cleaned address, changed emails, and more. This is an area where you will want to ensure you have more MailChimp experience or that you hire an expert to help you.

Using as many of these settings as you can will only help you with your stats and improve your entire experience with email marketing. Email marketing is one of the most effective marketing channels ever invented, so you don't want to miss out on all it has to offer you. You will truly skyrocket your income by participating in email marketing. However, you have to get started.

The scariest part of email marketing is the unknown, but once you start building your list, and using the system to its advantage you'll discover that you wished you had started sooner.

Creating a Signup Form

Now, let's create a sign up form for our new list. A sign up form is an important part of your email list because without it your audience can't sign up to receive your information.

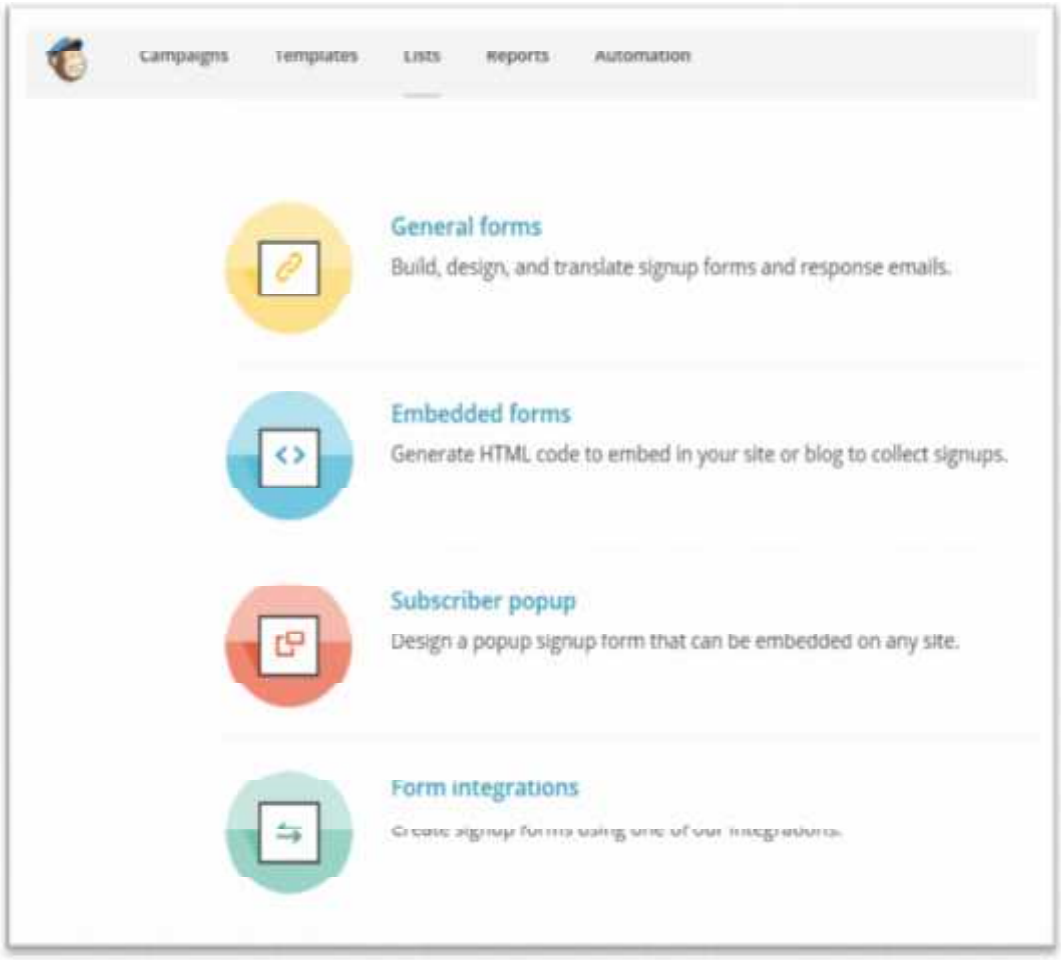
When you click signup forms in your dashboard you'll get these four choices to choose from.

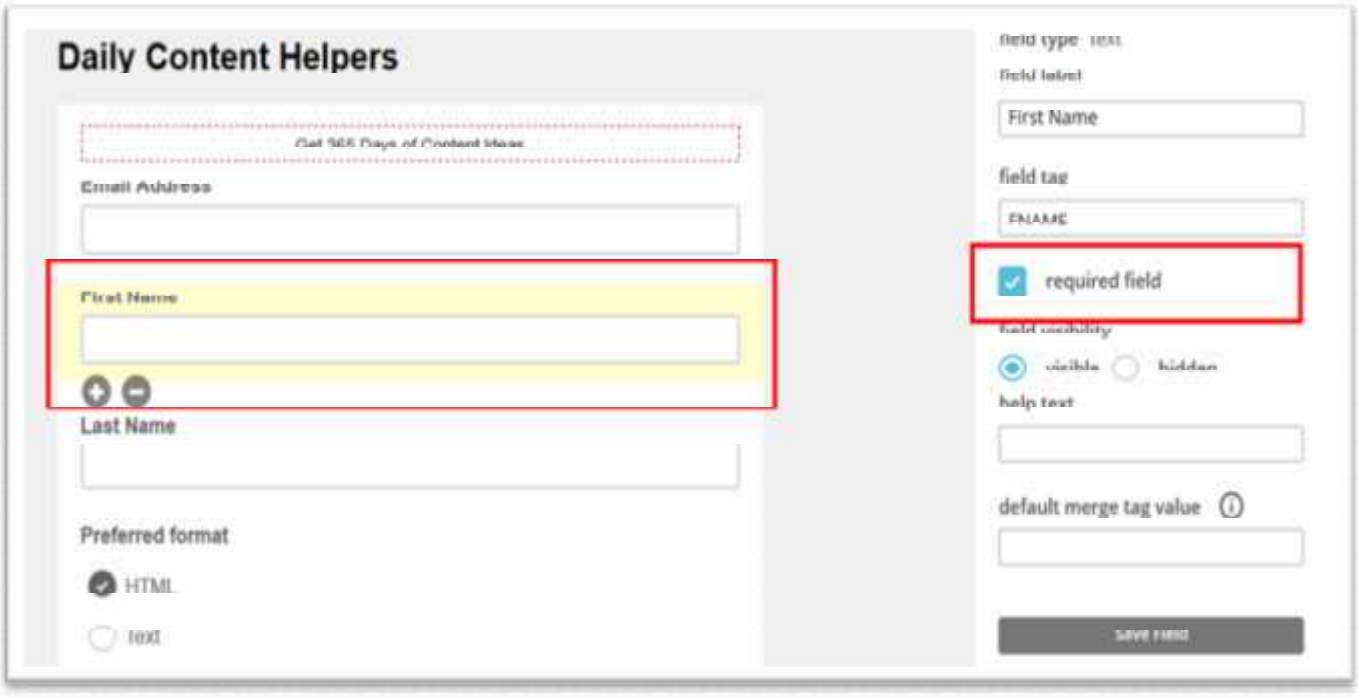
You can choose from several types of forms.

General Forms: Here you can build and design your basic sign up form. Click "build it", to make it, "design it", to control the colors and images, and "translate it" if you would like to use a different language than is in your settings.

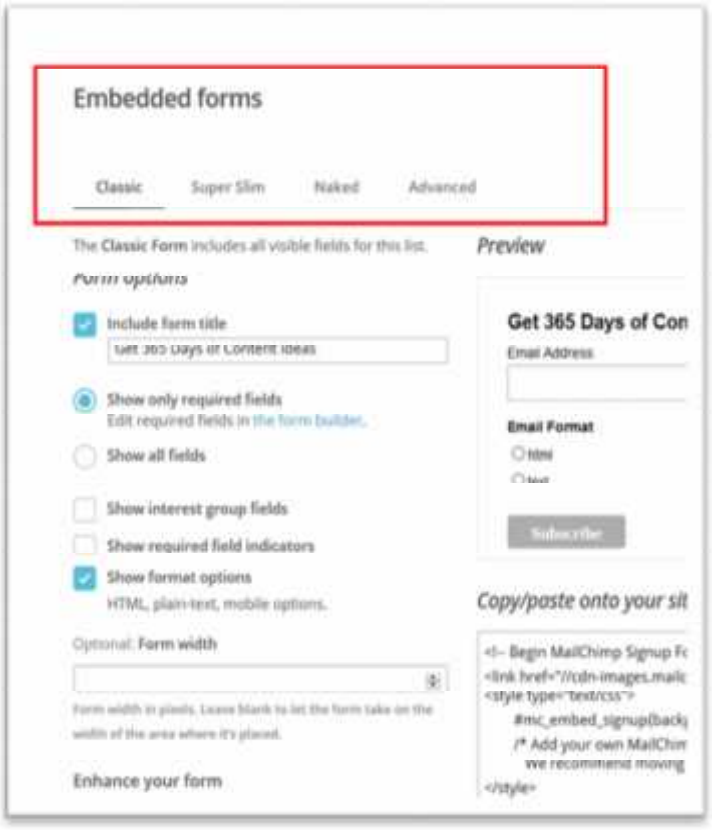
You can choose the text, intro text to go above the form, add more fields, subtract fields, and make some fields required. Just click into each field to see the choices to the right.

(See images on next page.)


Campaigns
Templates
Lists
Reports
Automation
General forms
Build, design, and translate signup forms and response emails.
Embedded forms
Generate HTML code to embed in your site or blog to collect signups.
Subscriber popup
Design a popup signup form that can be embedded on any site.
Form integrations


Daily Content Helpers
Email Address
First Name
Last Name
Preferred format
HTML
text
First Name
field tag
required field
help text
default merge tag value

Embedded Forms: Here you can choose the forms you want to embed using the HTML code that is generated. You just copy it and paste it into your website. With embedded forms you have the option of classic, super slim, naked or advanced designs.



Subscriber Popups: Popups are very effective forms of marketing. You may think you hate them, but the fact is they have a high return on investment. You can easily create your own popup here, with just a few clicks. You can even choose how long before it pops up. Just edit it, and then choose, Generate Code. Copy the code to your website. What's more if you change this form, your changes will show up on your site without pasting the code again.

Form Integrations: With form integrations you can connect your forms with third party accounts like Twitter, Wufoo, Squarespace and CoffeeCup Form builder. More integration is available for paid accounts such as PayPay and Shoptify.

What's really great about all of these options is that everything is automatically mobile friendly and optimized for use and view on any device your clients may use. Today, being fully optimized for various devices is imperative. People aren't tied to their PC any longer and you don't want to miss out on sales that could happen had you only been ready for their device.

Automation Rules

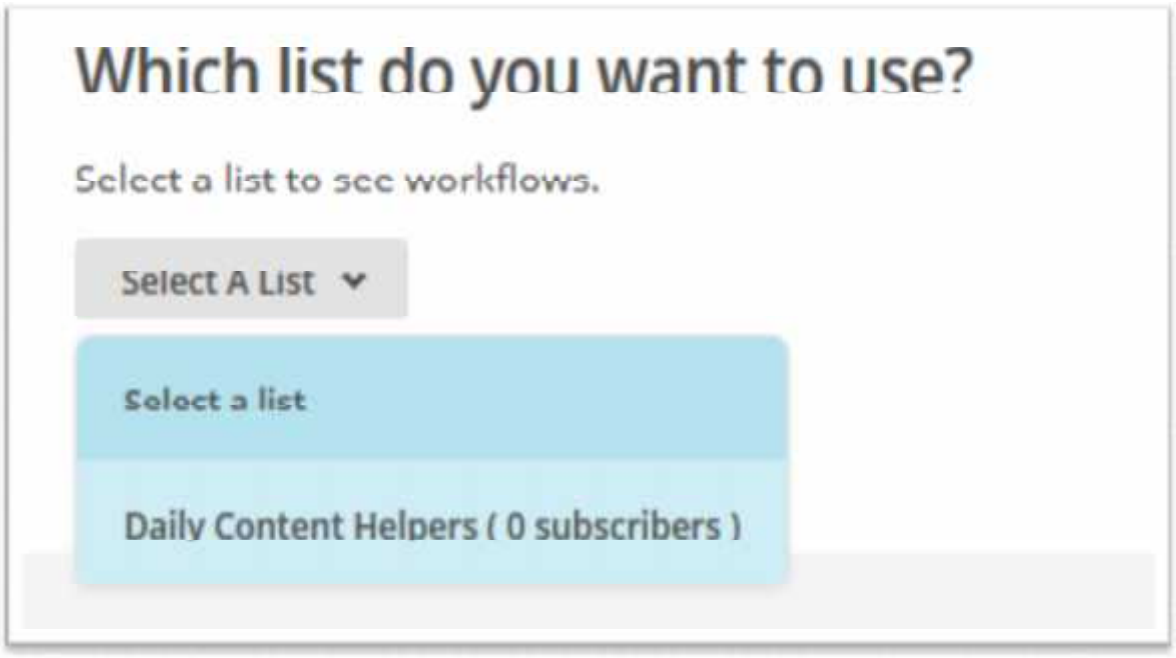
Setting up automation is simple in MailChimp, but you must have a paid account. You can start with as little as 10 dollars a month to allow you to use the automation rules depending on whether or not you already have a list built yet or not. Your fee goes up with more people on your list and with more emails going out.

Regardless of the fee, you really want to pay the fee so you can have automation. Automation is one of the most advantageous parts of having an email list. You can set up autoresponder series, paid e-courses and more to go out automatically via your email by setting up an autoresponder series.

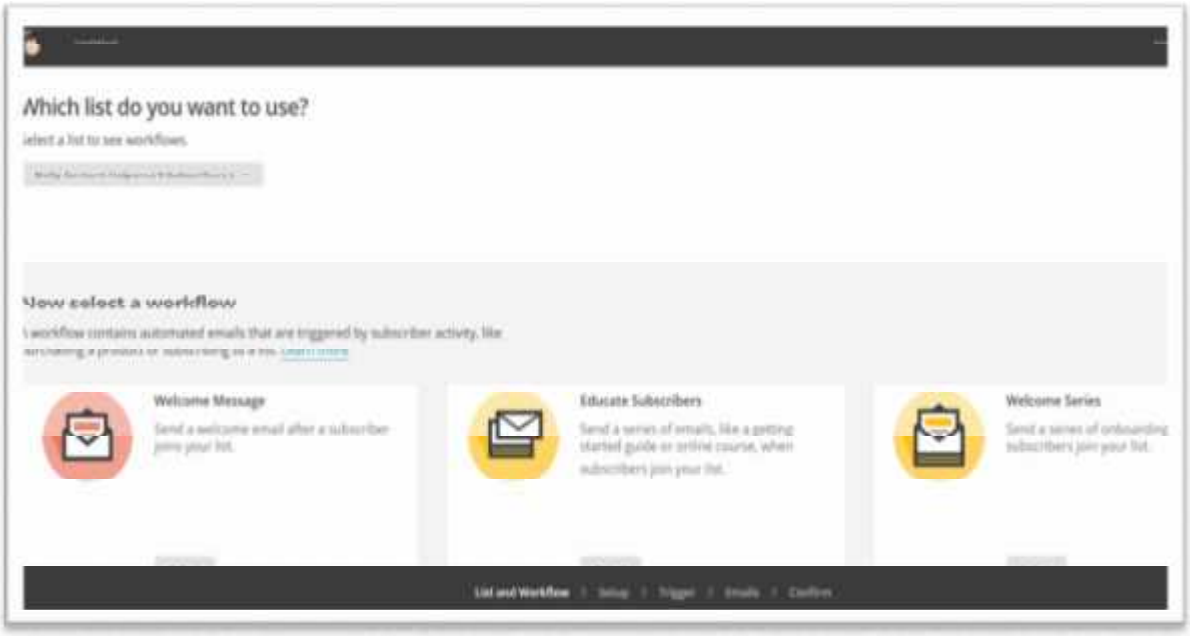
Essentially, by using automation rules, your email will work while you're asleep and on vacation. If you've set it up correctly, you will not have to do much but set it up, market your information to get more subscribers using a freebie offer or some other method to get people on your list, then sit back and collect a profit.

To set up automation, click "**Automation**".

The first thing you need to do is select which list you want to use for your automation.



After you select a list, you need to select a work flow.



You have several workflows to choose from. Some options are not available until you have a certain number of subscribers and meet certain criteria. Available to every paying member is:

- **Welcome Message:** This is the first message your customer or lead sees when they sign up for your list after their opt-in message.
- **Educate Subscribers:** This is a great place to put your email course series or information to educate your subscribers.

- **Welcome Series**: Sometimes it helps to send out more than one welcome message and instead send a series of getting started messages.

- **Custom:** Set up triggers, segment your market, and create custom workflows for your subscribers based on behavior.

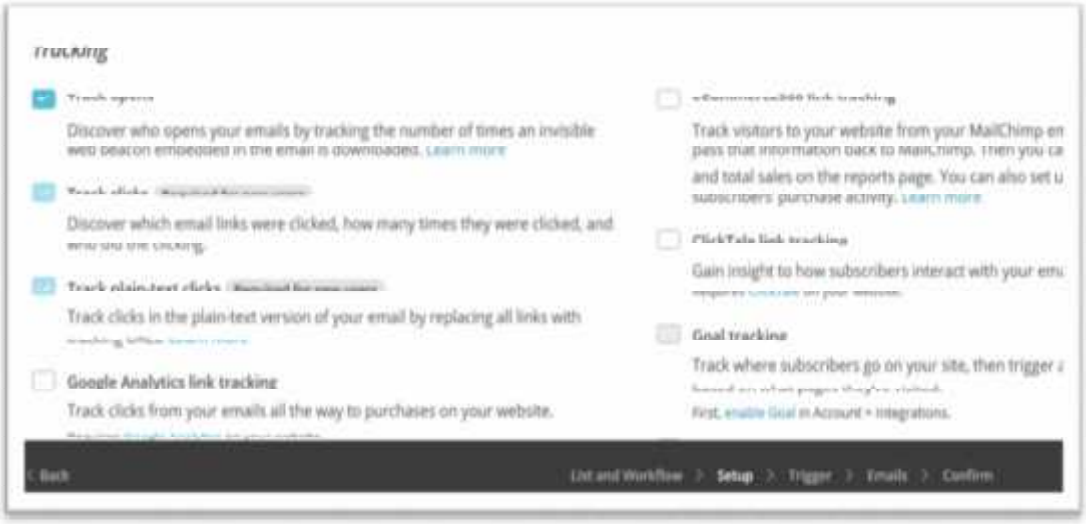
- **Date Subscribed:** Be able to look at when your member subscribed to your list assuming they completed the double opt-in information.

All of these automations that can be set up have a very important function. Imagine if you had to send out a welcome message by hand each time someone joined your list. That would be a lot of work. Imagine if you had to physically send each of your members, even if it was just clicking to send, a new email each day. It would limit how many people you can market to severely and limit how much money you can make.

But, with automation, you are truly unlimited in how high your earnings can go and how many people you can market to at once. You're only limited by how many people are in your target audience. Also, let's talk a bit about unsubscribes for a moment. It's better that people unsubscribe than if they stay on your list and don't read your messages. Therefore, you want to be sure they get enough messages that make them remember you and remain aware of you, than to send too few messages. You don't want to send multiple messages a day, but you want them to know you exist. Don't be scared of unsubscribes.

Let's show an example of a welcome message. First, click on **Welcome Message**. Then a form will open for you to complete. This is part of it.

You need to fill in the part where the red arrow points. This is not visible to your audience so name this message something you will recognize. You can also choose personalization and other factors within this form.

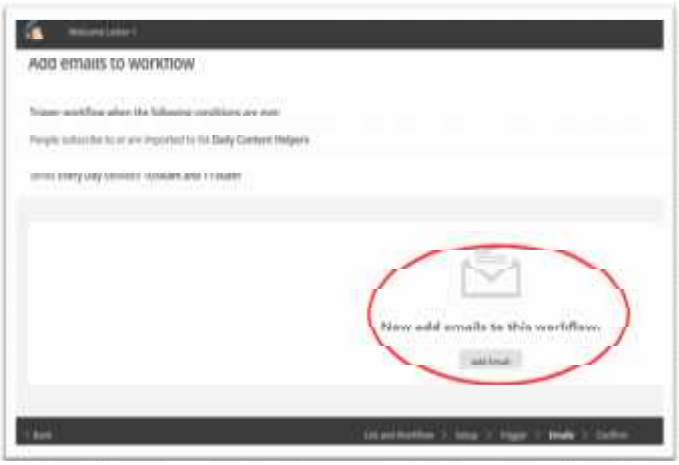


There are more options at the bottom which you can't see in this image above. This is to auto-convert video, which will enable videos to covert to more email friendly options, and email authentication which is already checked. When you've finished checking what you want, click **next** at the bottom right of the screen.

Now we're going to set up the **Configure Trigger**. This enables you to include imported subscribers into the welcome message, as well as add segmentation conditions, if you've created segments, and choose when to send the first email. You can also choose which day you want any emails sent. This is a great option if you just want to send a weekly newsletter.

Plus, you can choose the time you want your email sent. Time is an important factor when considering your audience. Read stats about when people are most likely to open and read email marketing messages. Click next at the bottom of the screen on the right to continue.

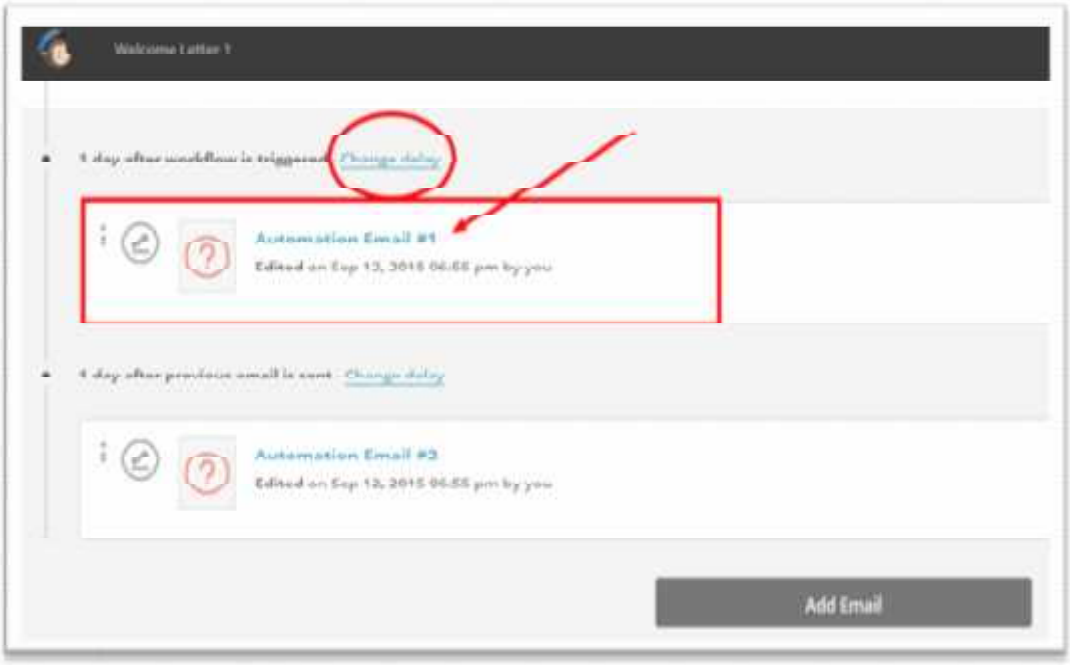
Now you'll be prompted to set up your first messages for this workflow.



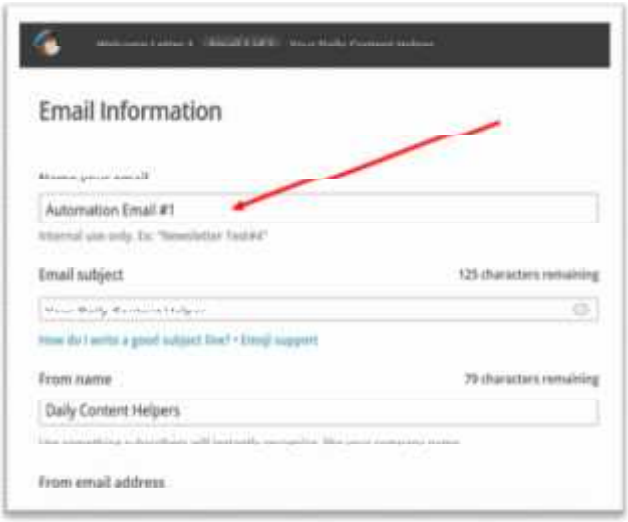
Click **Add Email**.

You can add as many as you want, and it will automatically label them and send them based on what you choose for the work flow. You can click “**change delay**” to change any delay on any email.

To edit the basic design and words in the email click the name of the email or “**design**” on the right.



Once you click on the words the arrow points to you’ll be taken to a screen that looks like this.



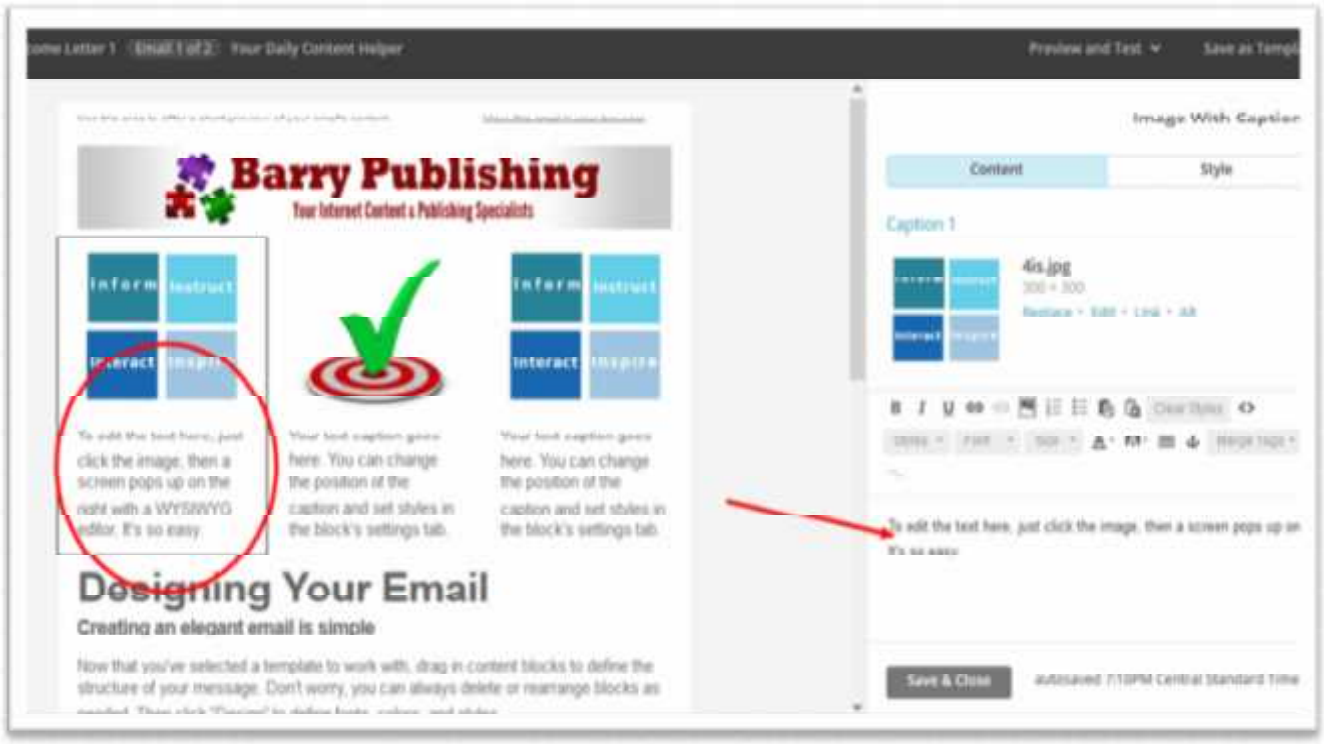
Keep this name the same or change it to better reflect your naming convention. It’s important for you to be able to differentiate emails and this is not seen by your audience. If you have many different lists, you don’t want to keep this the same. You want to give it a name that you

recognize for a particular campaign. For example if one list is promoting adult coloring books and another list is promoting your life coaching services you want to be clear in the names you choose.

When finished click **Next.** Then choose a template. MailChimp makes it simple to design your email to look good under many circumstances including on mobile devices. Plus, if you set up your email right, it will automatically convert it to plain text.

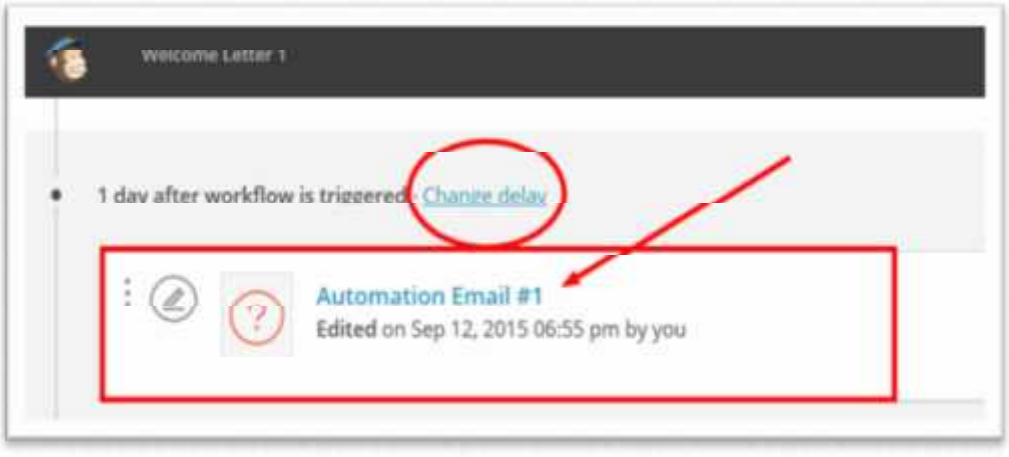
Once you choose a template you'll be taken to a new panel that lets you easily design a professional looking email message. It gives you instructions along the way so that anyone can do it.

When you click on an image area you'll be taken to a screen that allows you to upload an image from your computer, from flicker, or use one you've used already. When you click any editable area, the things you can change show up on the right side.

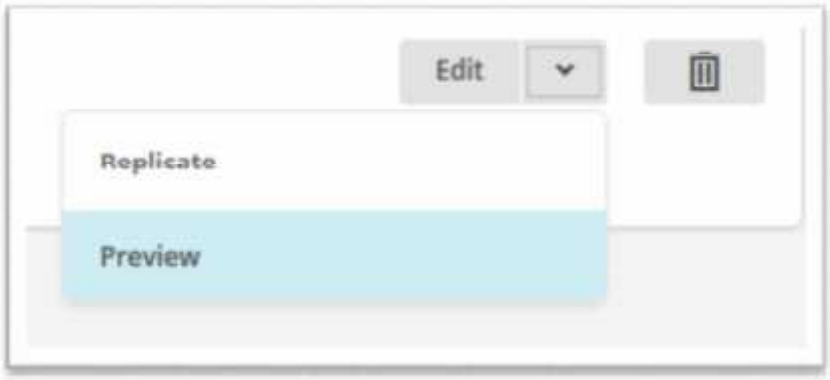


To edit the text in the circle, just click the image, and then a screen pops up on the right with a WYSIWYG editor. It's so easy. When you are done editing click save and close or save and continue if you're completely done.

If you notice on this screen things change once you've created one.



Look to the right side where it says design email, once you've designed one, it will change to say **Edit.** It will now look like this:



This is a good feature because if you want all your emails to have the same style and format, you can replicate it and then edit it starting from the finished point of your last email. You can also preview it from here to see what it will look like inside the email on a PC and on a phone. When you are done here, click “next” at the bottom of the screen on the right.

The next page is a confirmation page. It will help you clear up any problems with the emails you’ve created. Our page has many problems since it was for demonstration purposes only and is not complete.

Once you’ve built a good sized email list, plus sent out a few emails, you will now need to be concerned with your stats. Stats help you know if what you’re doing is working and whether or not you need to improve things.

Checking Stats

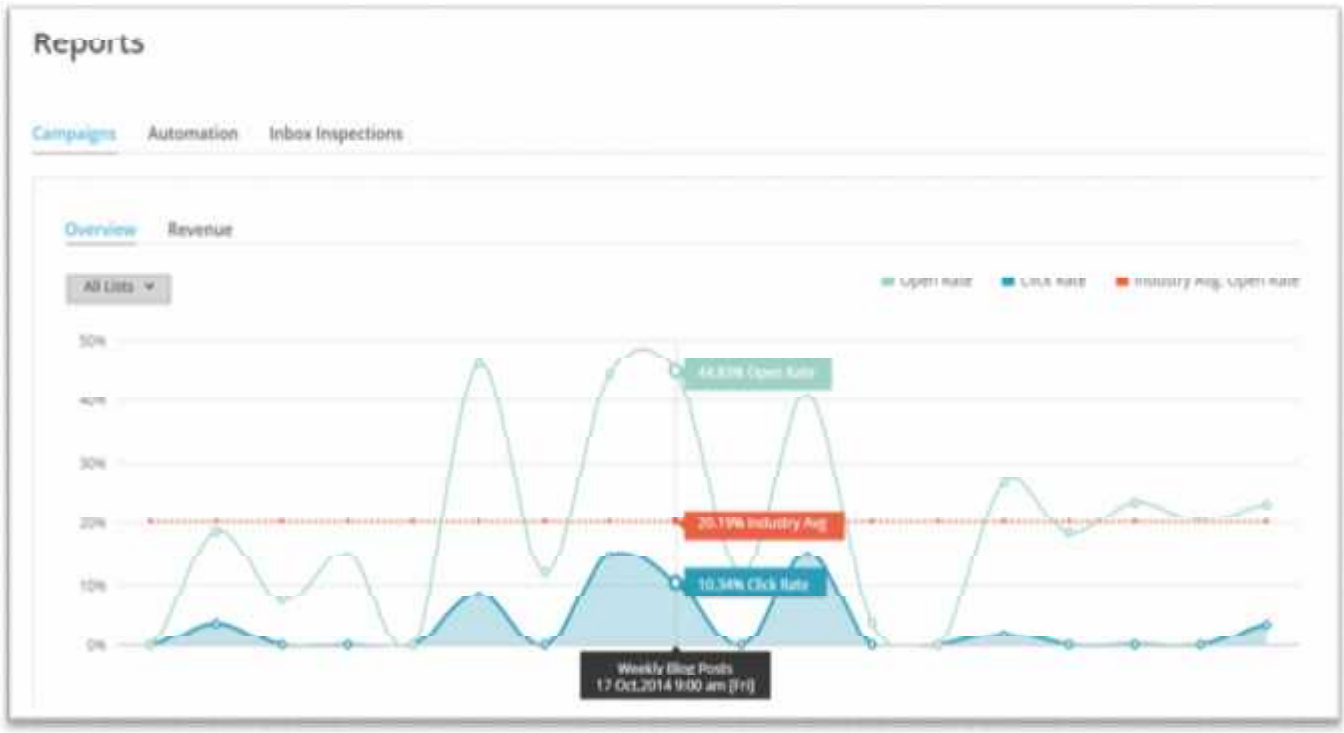
On MailChimp, stats will happen under **Reports** and also, as pictured in this image from above, under lists and beside each list as shown by the arrow.

But, you can also click on **Reports** and you'll see your **campaigns**, **automation**, and **inbox inspections**.

Reports are valuable information to let you know if your marketing campaign is working. You can learn a lot from various reports. For example, how many people have opened your email? How many people clicked through to your website? How many people who clicked through took you up on your offers?

You can learn all of that and more in reports. This demonstration is lacking because we do not have access to a full account with a lot of stats. The more people you have in your list and the more emails you send out, the more accurate and useful your own reports will become. Please set up your emails with reporting so that you can take advantage of these excellent analytics.

This screen shot is an example of campaigns.



This first shot above is an overview of all campaigns running. You can see that they have a 44.83 percent open rate, which is very good for the industry average which is only 20.19 percent. But the click rate is low at only 10.34%.

This shot below shows the stats for one particular newsletter sent out to 138 subscribers has a 23.2 percent open rate and a 3.6 percent click rate.

By using certain functions within MailChimp you can set up even more stats such as how many responded to your CTA that clicked through which is more advanced than this report. However, MailChimp does a good job of guiding you so you can do it as in-depth as you want to and as the software allows.

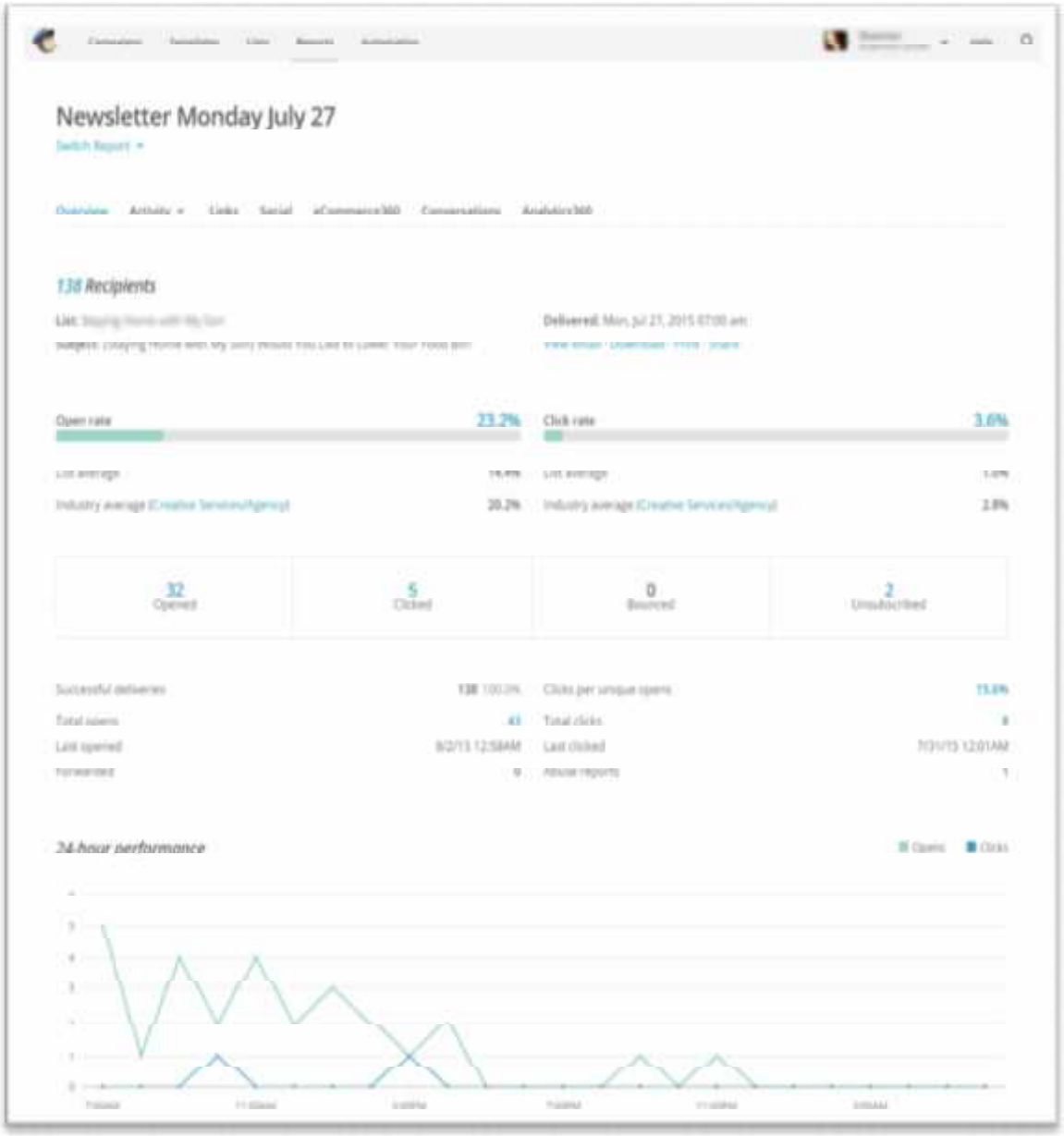
You want that information because if you have a high percent of click-through, but a low percentage of people answering your CTA that would tell you that something may be wrong with your sales page or the offer.

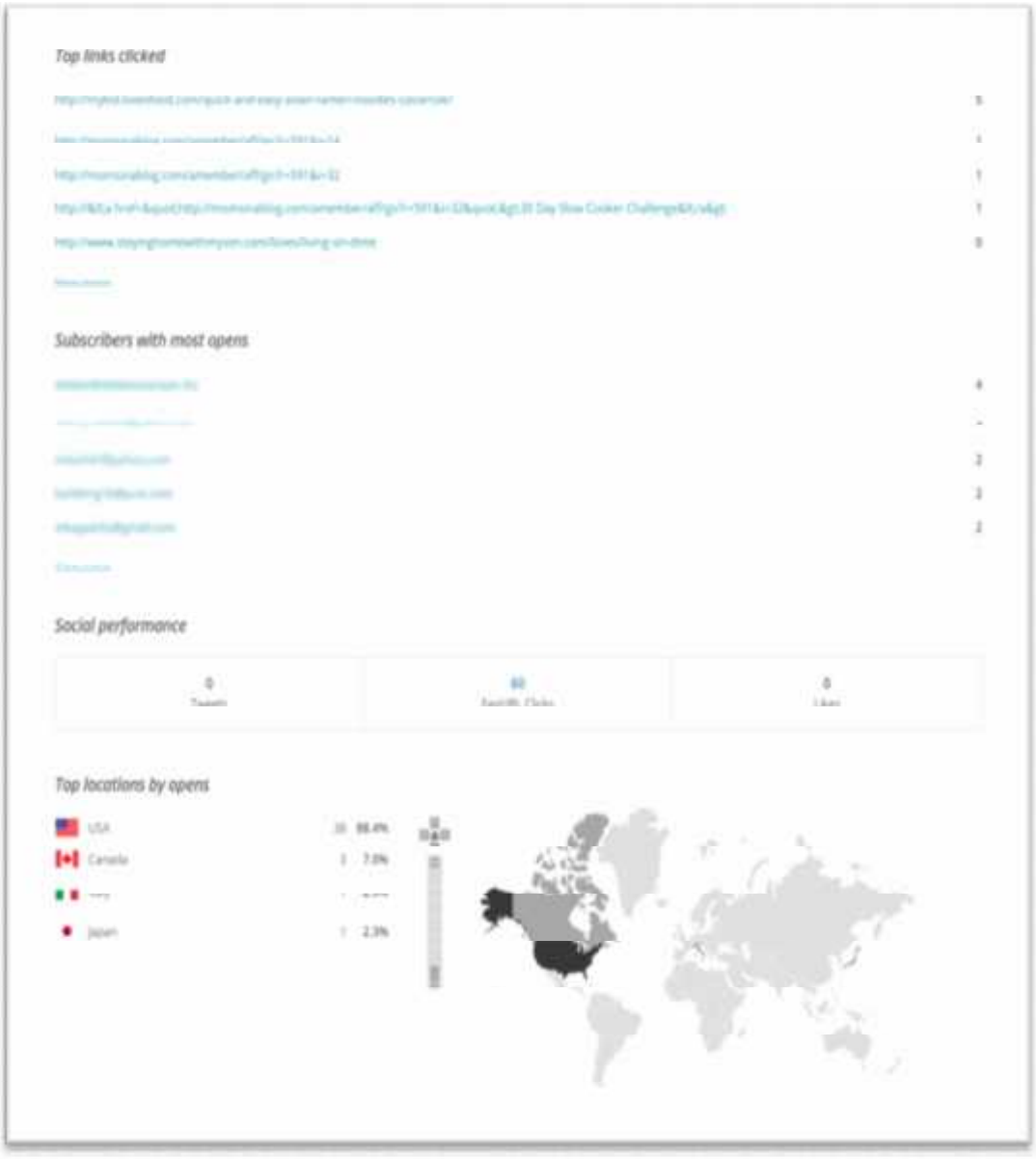
This shot below demonstrates in a different way the overview of all campaigns. Instead of a graph it is showing the results with lines.

This information is important because it shows where you stand within your industry. If you've chosen your industry well, you can see where you need to improve or where you're doing better.

The long graph below shows a lot of important information such as 24 hour performance, top links clicked, subscribers who open your messages most, and even your social performance if

you have that connected. You can even see what country most of your subscribers are from. This information is important because the more you can identify your audience, the more you can create offers and content just for them, and the better your stats will become.





Use reports to help you improve all of your marketing efforts. For example, if via the stats you collect for your reports you can determine that your audience is more likely to open your emails at 10am on Wednesday morning, then you can make sure they go out in time. If you discover most of your audience lives in the USA you can target them better using terminology that they understand. If you discover you have a high click through rate, but low sales or low sign ups depending on what your CTA is, you may need to fix your sales page.

As you see, MailChimp is a very useful and friendly software program that enables you to run very rich marketing campaigns. It's easy to use, intuitive and simple for most people, including beginners to figure out. You can stay in touch with your clients using a robust, beautifully designed email marketing tool that isn't difficult to learn.

To get started, create a free account. Some features aren't available for free accounts but you can get an idea of what the system is like by trying the free version.

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