

Intro to Mailchimp

A beginner's Guide

Presented to the Sarasota County Democratic Party

by Gillian Beck

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Disclaimer:
I am NOT an expert!
(Google is my best friend)

“Know More, Do More with Mailchimp”

Step-by-step videos and tutorials

<https://mailchimp.com/help/>

Overview

- First things first
- Account Setup
- Contacts
- Formatting & Templates
- Design for Readability
- Test emails
- Statistics
- Q&A



mailchimp

First things first

Things to think about ... and why

- Email Address
- Account Name
- Editors
- Logo
- Audience
- Frequency
- Format
- Tone



Creating Your Account



- Mailchimp tutorial help:
<https://mailchimp.com/help/accounts/>
- Sign up for an account:
<https://mailchimp.com/signup/>
- And follow the steps
[https://mailchimp.com/help/create-an-account/#Before you start](https://mailchimp.com/help/create-an-account/#Before_you_start)
- The Free Marketing plan includes up to 2000 contacts and 10,000 sends per month, with a daily limit of 2,000
- Note that free email address services, such as gmail or yahoo, have policies in place that are meant to prevent email scams but can cause delivery issues for legitimate marketers.

Setting up your Audience



Audience

Bird Bay Democrats Precinct 513

This audience has **131** contacts. **117** of them are subscribers.

- You can add your audience contact by contact
- OR**
- You can upload your contacts from a spreadsheet

If you feel nervous, only add one contact: your personal one!
You can add the others later.



Importing your contacts (from a .csv file)

	A	B	C	D
1	Email Address	First Name	Last Name	TAGS
2	bb.dems.513@gmail.com	Gillian	Beck	"Registered","Volunteer","PrecinctCaptain"
3				"Registered"
4				"Registered"
5				"NPA"
6				"Registered"
7				"Registered","PrecinctCaptain"
8				"Registered"
9				"Registered"

Always make sure to add your contacts as Subscribers – this means they have given you permission to add them, i.e., by including their email when they registered to vote.

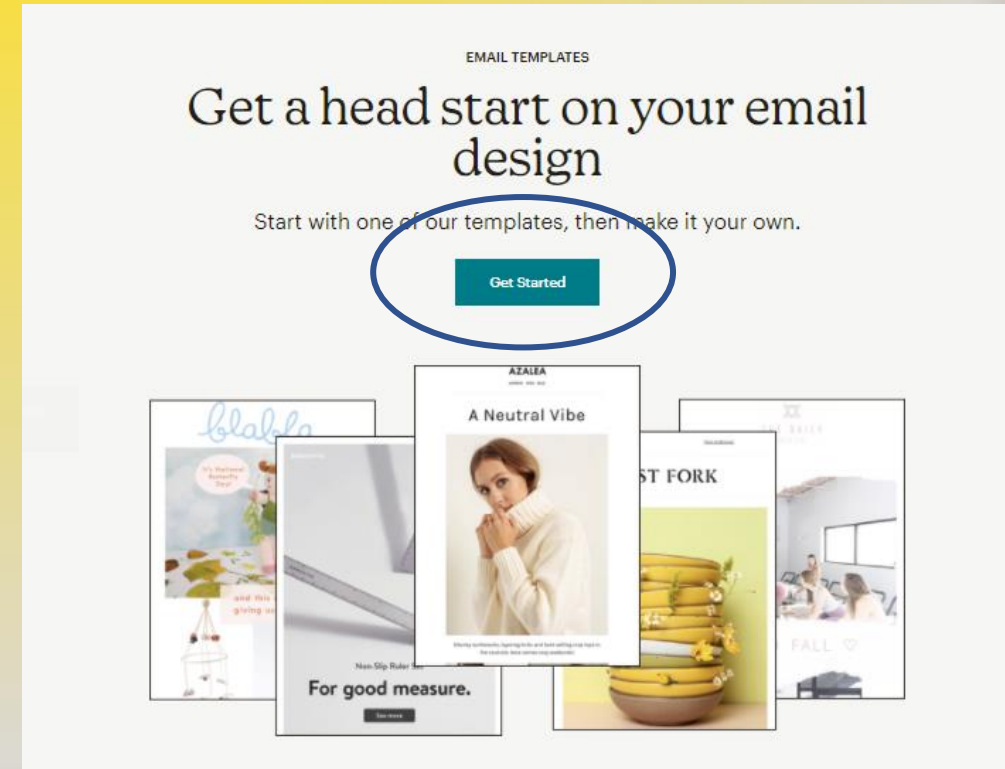
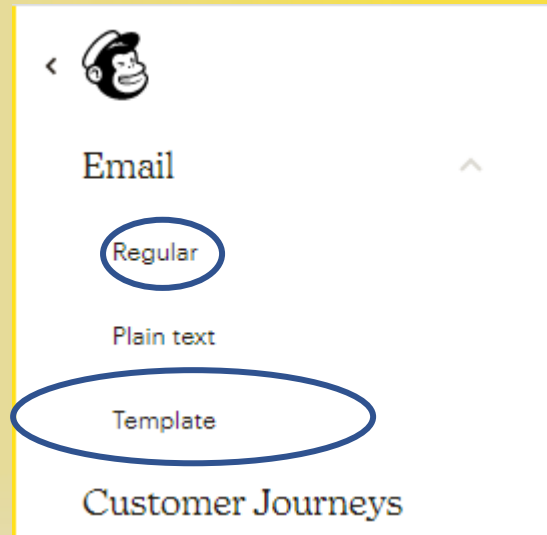
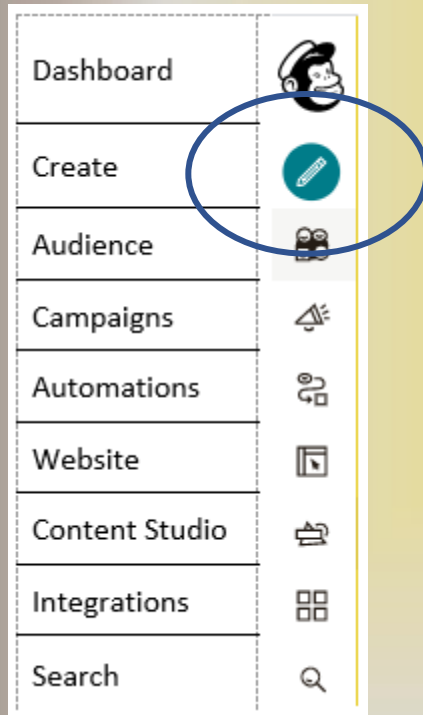


Formatting your emails

This is where people seem to need the most help.

- You've already decided on the format.
- You've decided what information to include
- You've chosen pictures, images - [Are the images copyrighted?](#)
- Let's go ...

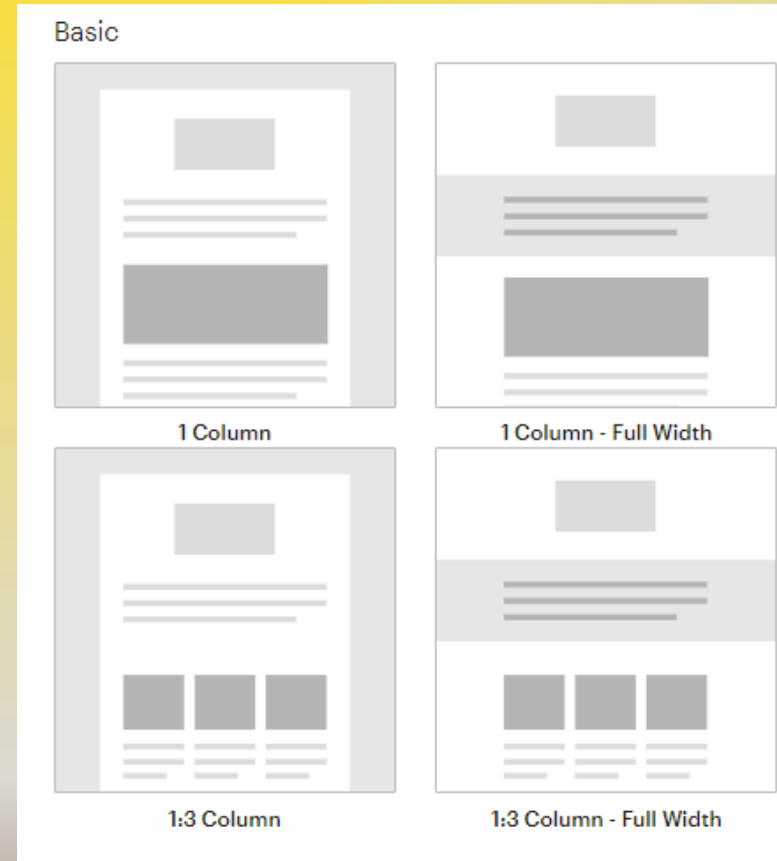
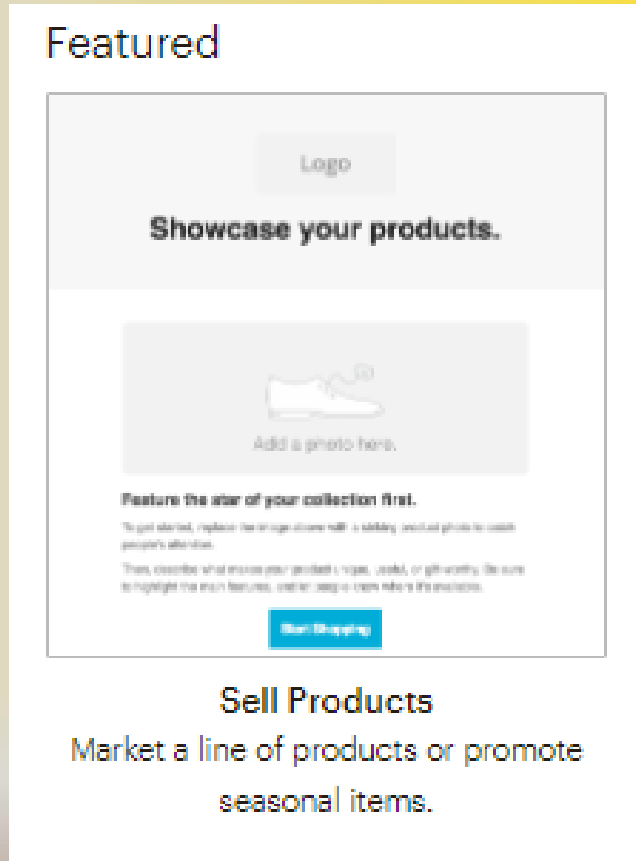
Creating Your Email



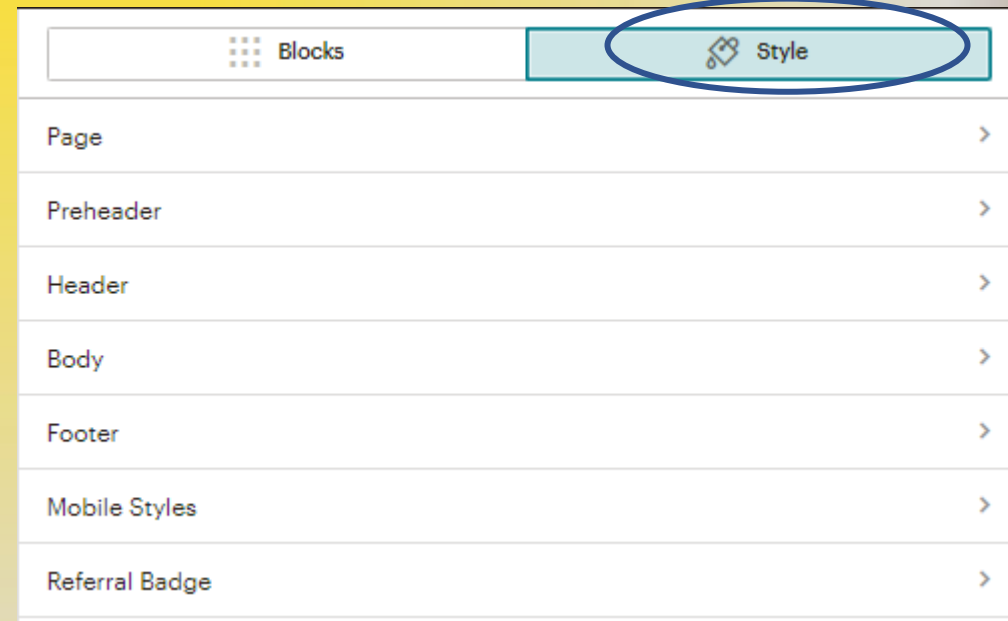
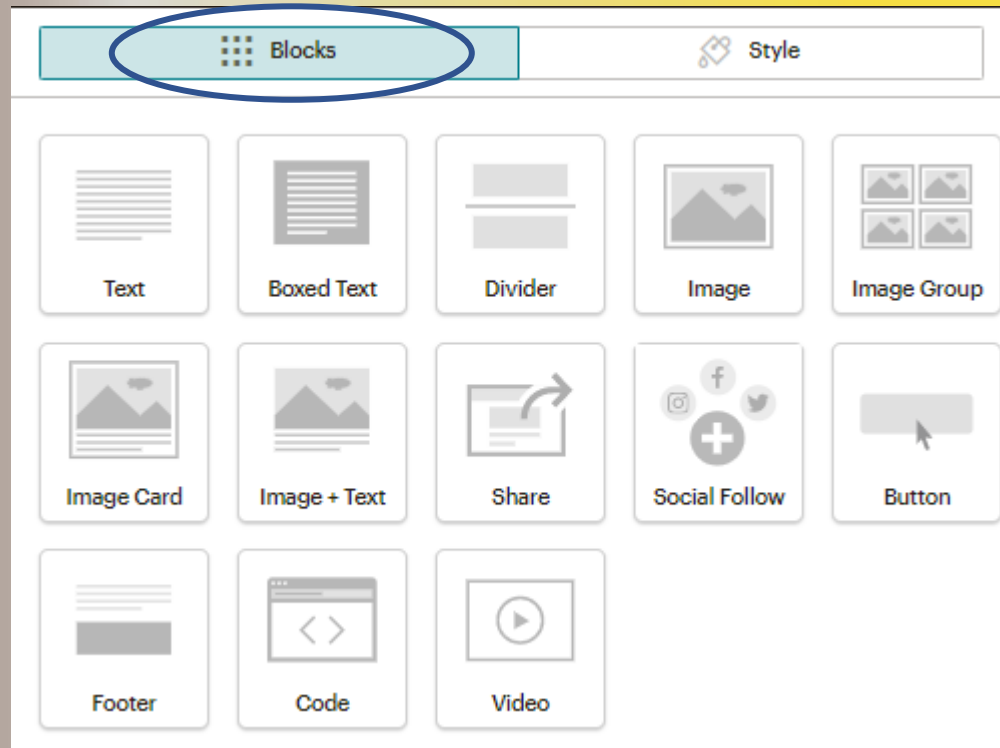
Select a starting point for your template

[Layouts](#) [Themes](#) [Code your own](#)

Choose a Template









Formatting your emails















Formatting your emails

Text

Content Style Settings


B *I* U      Clear Styles 

Styles - Font - Size -     Merge Tags -        

This is a text block. You can use it to add text to your template.


Formatting your emails

[View this email in your browser](#)



Hi *[FNAME]*

I added a text box. You can see where this appears in the email.
This is where you write your email.
The icons above the line are your toolbox. You can hover over them to find out what they do. I have added a picture of the tool box below.



It's time to design your email.


Now that you've selected a template, you'll define the layout of your email and give your content a place to live by adding, rearranging, and deleting content blocks.

When you're ready to change the look of your email, take a look through the "design" tab to set background colors, borders, and other styles.

If you need a bit of inspiration, you can [see what other Mailchimp users are doing](#), or [learn about email design](#) and blaze your own trail.

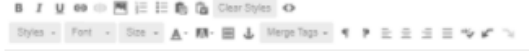
Text Set Dynamic Content

Content Style Settings



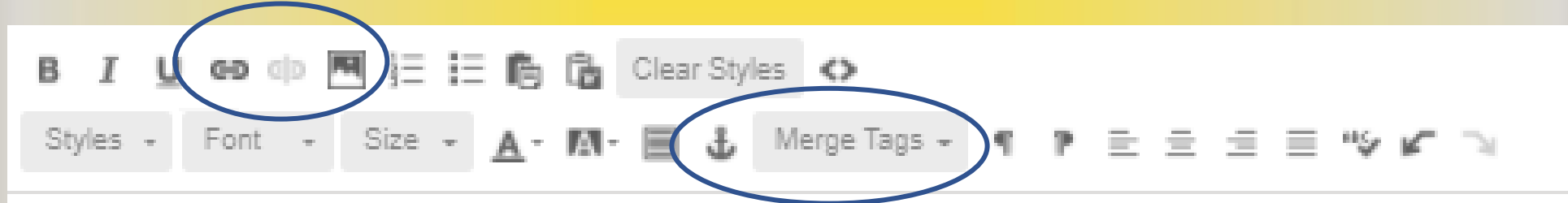
Hi *[FNAME]*

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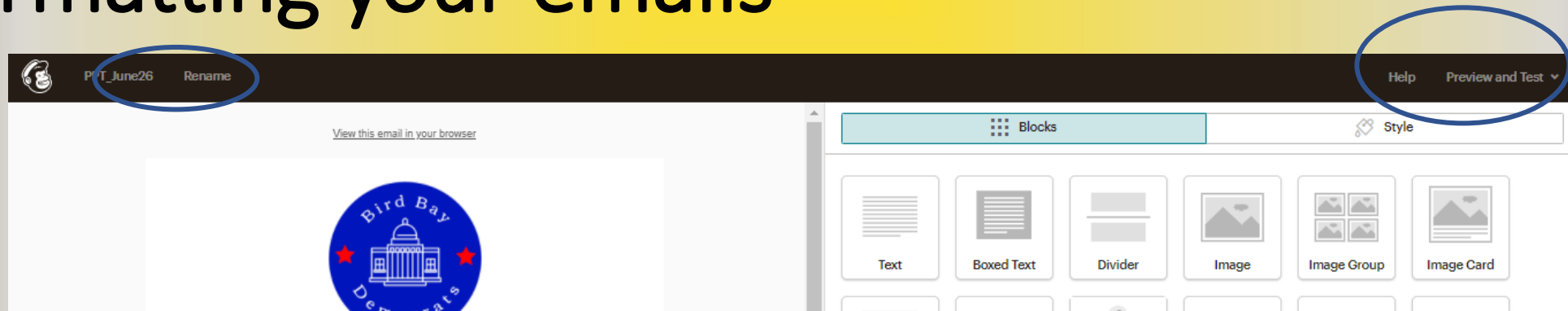
- Write in the text box using Content Tools to format.
- Click on Settings to create columns

Formatting your emails



- You can create links (and break them) to outside sources (hyperlinks) using the chain-like icons.
- Add images using the picture icon.
- Link to text or other sections within your email using the anchor icon.
- Use Merge Tags to personalize your newsletter
- You can create and add countdown timers using [Motionmailapp.com](https://motionmailapp.com)

Formatting your emails



- Preview your template
- Send a test email
- Save your template
- You can also share templates!

A 'Save Template' dialog box with a close button (X) in the top right. It contains a label 'Name your template' followed by '50 characters remaining'. Below this is a text input field with a vertical cursor. At the bottom are two buttons: 'Rename' and 'Cancel'.

Formatting your emails

The screenshot displays the 'Templates' section of a web application. At the top, there's a header with 'Templates' and buttons for 'Content Studio' and 'Create Template'. Below the header, there are tabs for 'Saved' and 'Purchased'. A sidebar on the left shows a list of templates, with 'PPT_June26' selected. The main area shows details for this template: 'Last edited on Jun 26, 2021 9:16 am by Bird Bay Democrats' and 'Classic'. A dropdown menu is open for the 'PPT_June26' template, showing options: 'Create campaign', 'Preview', 'Export as HTML', 'Share', and 'Replicate'. The 'Share' option is circled in blue. The 'Edit' button and the dropdown arrow are also circled in blue.


Templates

Content Studio Create Template

Saved Purchased

performance... with real time analytics

☐ Folders ▼ Sort by Newest first ▼ Search saved templates

☐  PPT_June26
Last edited on Jun 26, 2021 9:16 am by Bird Bay Democrats
Classic

Edit ▼

- Create campaign
- Preview
- Export as HTML
- Share
- Replicate

You now have a template!
You can even share your template!!!

Formatting your emails

Note: I'm excited that we have **two newly formed committees: Issues, and Communications.** They are getting off the ground slowly, but my understanding is that between them they will alleviate some of the creative, research, writing, and editing burdens on Precinct Captains by providing template emails with clear, concise, and coherent messaging for us to tweak before sending to our precincts.

Woohoo!!!!

That doesn't mean you don't have to know how to use Mailchimp!

Formatting your emails

✓ To
Who are you sending this campaign to?

Audience

Bird Bay Democrats Precinct 513

✓ Personalize the "To" field

Add merge tags to display your recipient's name to make it more personal and help avoid spam filters. For example, *|FNAME|* *|LNAME|* will show as "To: Bob Smith" instead of "To: bob@example.com."

Merge tag

|FNAME|

Save Cancel

✓ From
Who is sending this campaign?

✓ Subject
What's the subject line for this campaign?

Segment or Tag

All subscribers in audience

All subscribers in audience

Group or new segment

Tags

Registered

Volunteer

PrecinctCaptain

NPA

ViewTemplate

Pre-built Segments

New Subscribers

Formatting your emails

Keep it up! Draft
Draft email


[Finish later](#) [Schedule](#) [Send](#)

✓ To
ViewTemplate in the audience Bird Bay Democrats Precinct 513. [1 recipients](#)
Your 'To' field is personalized with *[FNAME]*.
If you'd like to segment your audience, you can [edit your recipients](#). [Edit Recipients](#)

✓ From
Bird Bay Democrats • BB.Dems.513@gmail.com [Edit From](#)

✓ Subject
What's the subject line for this campaign? [Add Subject](#)

✗ Content [Edit](#)



Send a Test Email

- ✗ We automatically add a required Referral badge to your email footer. To remove the badge, [upgrade your account](#).
- ✓ A plain-text version of this email will be included automatically. [Edit](#)
- ✗ To send your email, remove or replace the placeholder text:
 - "It's time to design your email"
 - "Now that you've selected a template, you'll define the layout of your email and give your content a place to live by adding, rearranging, and deleting content blocks."
 - "When you're ready to change the look of your email, take a look through the "design" tab to set background colors, borders, and other styles."

[Enable Social Cards](#)

Share Your Campaign

Campaign Link
[https://mailchi.mp/\[xxxxxx\]/\[xxxxxx\]](https://mailchi.mp/[xxxxxx]/[xxxxxx]) [Edit](#)

- Fill out **each** field – and don't forget to personalize the Campaign link at the bottom!
- Send a test email
- Go back and edit if need be before sending the final email.

A word or two about photos

- You can create your own pictures using Word, Publisher, Paint, Photoshop, Canva ... any software that you find easy to use.
- You **MUST** obey all copyright laws! Even [Creative Commons](#) pictures have usage requirements.
- **Always, always, always credit the original source** (where possible).
- Images must be [ADA compliant](#) – Use left aligned text, and fonts such as Tahoma, Calibri, Helvetica, Arial, Verdana, and Times New Roman. Do not put two spaces after a period. Avoid using all caps; screen readers have a tough time interpreting these.

Finding information for newsletters

Social Media – add a link to the post

Newspapers – follow links to sources from interesting articles.

Summarize the article and **provide a link to the source.**

Bookmark all the sources you find helpful:

- The Sarasota SOE
- Facebook pages and websites of national and local political parties, and elected officials
- The Brennan Center for Justice
- The Library of Congress, Myfloridahouse.gov
- The ACLU, NAACP, League of Women Voters

Statistics and Reports

The screenshot displays a campaign management interface. On the left is a yellow sidebar with navigation icons and labels: 'Campaigns', 'All campaigns', 'Email templates', 'Reports', and a search icon. A tooltip for 'All campaigns' reads: 'View and manage your emails, ads, social posts, and landing pages.' The main area is divided into sections for 'View by Status' (All, Ongoing, Draft, Completed) and 'View by Type' (Emails, Automations, Landing Pages, Ads, Postcards, Social Posts, Surveys). A 'Create Folder' button and a folder named 'May 2021 Newslet...' are also visible. At the top right, there is a search bar and a 'Sort by' dropdown set to 'Last updated'. The main content area lists campaigns. Two campaigns are in 'Draft' status: 'Update 05/26/2021' and 'PPT email'. Below these, a section for 'May, 2021 (3)' shows three 'Sent' campaigns. Two of these are circled in blue. The first circled campaign is 'Update 05/16/2021' with 15.7% opens and 2.0% clicks. The second circled campaign is 'Update 05/7/2021' with 25.2% opens and 2.9% clicks. Both circled campaigns have a 'View Report' button next to them.

Campaign Name	Status	Opens	Clicks	Action
Update 05/26/2021	Draft			Edit
PPT email	Draft			Edit
May, 2021 (3)				
Update 05/16/2021	Sent	15.7%	2.0%	View Report
Update 05/7/2021	Sent	25.2%	2.9%	View Report

'Insider' help

- https://insider.sarasotadems.org/messages/index_messages.php
- https://insider.sarasotadems.org/training/docs/MailChimp_Overview-RMeyers.pdf
- https://www.youtube.com/watch?v=Wrmw_cAn2c
- <https://www.youtube.com/watch?v=tZKYiiQP57I>
- https://insider.sarasotadems.org/training/docs/MailChimp_201_Tips.pdf
- https://insider.sarasotadems.org/training/docs/Tips_for_Engaging_Subject_Lines.pdf
- https://www.youtube.com/watch?v=t6nx2_m_leY



Thank you for attending this presentation.

Let's see if we can answer some questions
... and maybe even get some hands-on experience