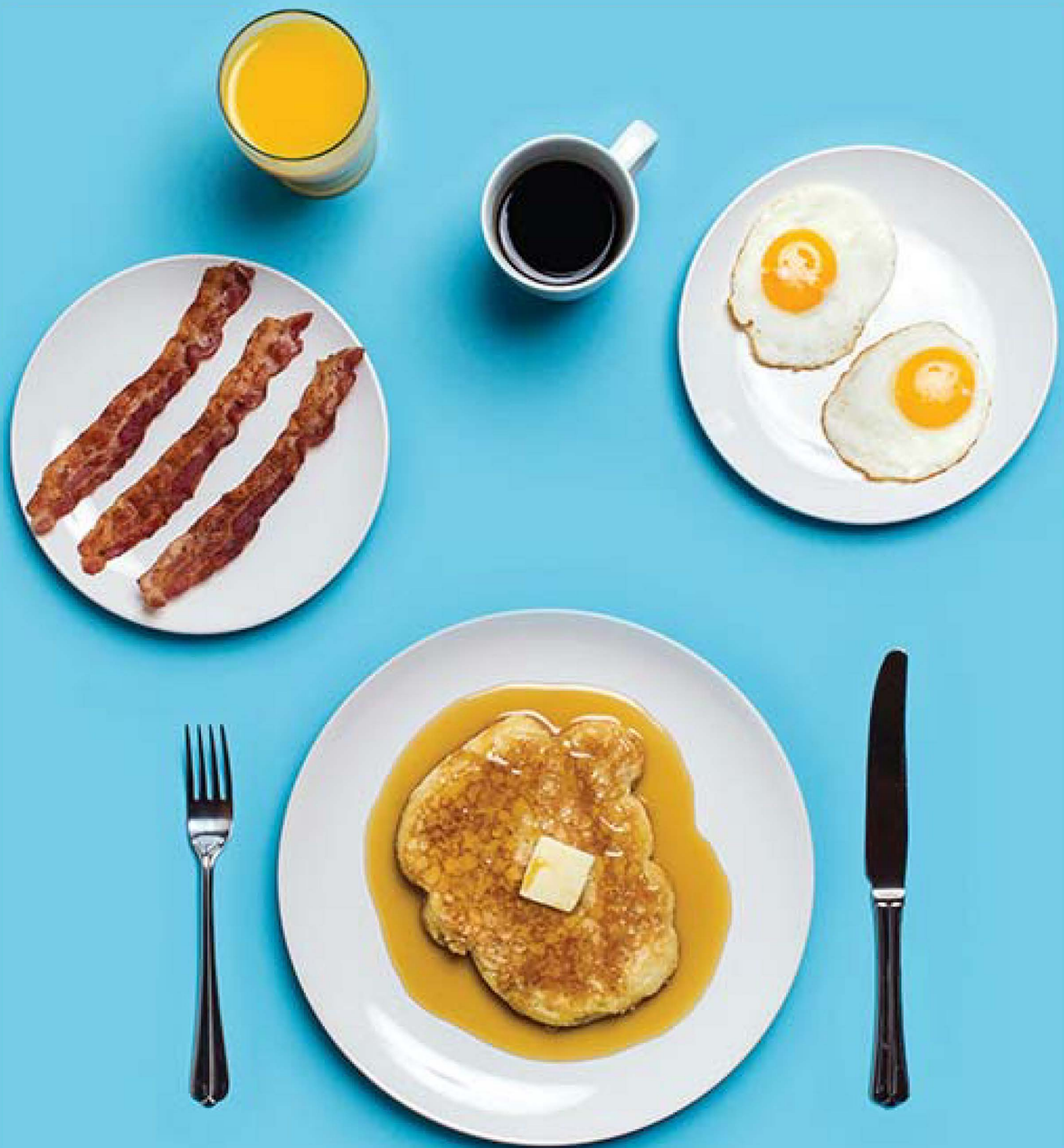


# Getting Started

WITH MAILCHIMP





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# Welcome to MailChimp

Email doesn't need to be overwhelming. This guide will help you get your first campaign off the ground. We'll also offer tips for managing your list, viewing your reports, and making sure your newsletters get into the right inboxes.

In this guide, you'll learn how to:

- Make sure your list is compliant
- Create and import your list
- Make and send your first campaign
- Avoid spam filters
- Understand your reports

If you have any questions that are not addressed in this guide, MailChimp offers a variety of valuable resources for getting started, including our [video index](#), a [glossary of terms](#), a searchable [Knowledge Base](#) of how-to and troubleshooting articles, a selection of [guides on our Resources page](#), and a [helpful support team](#).

Now, let's get started.

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# The Basics

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

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# Creating and Importing a List

The foundation of great email marketing is a clean, updated, engaged list of subscribers. Once you've [created](#), confirmed, and logged in to your MailChimp account, you're ready to start building that list.

You can create as many lists as you'd like within your account, but for most users, we recommend [maintaining a single list](#) along with [segmenting data](#) and [interest groups](#), as needed. This helps keep your list clean and your billing rate low, since our [monthly rates](#) are determined by your total subscriber count. Duplicate subscribers across multiple lists count toward that total.

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## Creating your list

To [create a list in your MailChimp account](#), follow these steps:

1. Choose **Lists** from your MailChimp dashboard, then click the **Create List** button in the upper righthand corner.
2. On the **List details** page, you can choose a name for the list, set the default From name and email address, and write a short "permission reminder" to remind your subscribers how and why they're receiving email from you.
3. When you're finished, click **Save**.

If you don't have any subscribers yet, don't worry! MailChimp will automatically generate a signup form for your list, which you can easily [customize](#), [share](#), [post on your website](#), or even [add to your Facebook page](#). We give you lots of options when you're building the form, so you can gather exactly the information you need from your contacts. You can also use this information to [segment your list](#) later on.

At MailChimp, we're serious about security and sending reputations—yours and ours. By default, our signup forms require double opt-in, which helps maintain the

integrity of your mailing list and can improve email deliverability and performance. For more information about the double opt-in process, refer to [this article](#).

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## Importing your list

If you have an existing list of contacts or subscribers who have [opted-in to receiving email from you](#), there are several different options for [importing them into MailChimp](#). They include:

- Uploading a CSV or tab delimited text file.
- Copying and pasting your list from Excel.
- Importing contacts from your Mac Address Book with the help of our OSX app, [MailChimp Import](#).
- Importing directly from a third-party application or program—like Salesforce, Google Docs, or Highrise—that integrates with MailChimp. For more details about our available integrations, visit our [Integrations Directory](#). If your contacts are stored in an application or program that doesn't currently integrate with MailChimp, refer to that program's support documentation or customer support team for assistance with getting a CSV file of the contacts.
- Importing contacts using [MailChimp's API](#). (A quick warning here: the API is for *experienced programmers and developers*. If you don't currently have someone on staff that can assist with this, consider reaching out to one of our for-hire, third-party [MailChimp Experts](#) to lend a hand.)

Do you only need to add a single email address to your list? You can do so by clicking the [add subscriber icon on the Lists page](#).

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# Building and customizing signup forms

When you create a list in MailChimp, we'll automatically generate a series of signup forms and response emails. You can use the tools on the **Create forms** page to customize the **Unsubscribe** sequence, the **Update profile** sequence, and other list forms and emails that make up our double opt-in process. MailChimp forms are mobile-responsive, so potential subscribers can easily view and submit their information from a smartphone or other mobile device.

Below, we'll cover the basic steps for creating and designing general forms in MailChimp, but there are a few other options on the **Signup forms** page for each list as well.

- **Embedded forms** - Generate HTML code for a form that can be embedded on your website or blog. Learn about the embedded form options [here](#).
- **Subscriber popup form** - The [subscriber popup](#) is a customizable form option that automatically displays a MailChimp signup form in a popup modal on your website shortly after someone visits the page.
- **Form integrations** - Build sophisticated forms and connect MailChimp to your blog and social media profiles. Integrations with Wufoo, CoffeeCup, Twitter, WordPress, and Squarespace are available here, too.
- **Facebook form** - Add a signup form to your Facebook page.
- **Tablet form** - Collect signups in your brick-and-mortar store or at events with MailChimp Subscribe for [iPad](#) or [Android](#) tablets.

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## Build it

To build your signup form and begin customizing:

1. Navigate to the **Lists** page.
2. Select the appropriate list.
3. From within that list page, click **Signup forms**, then **General forms**.
4. Click the **Build it** tab.
5. All forms start out with three default fields: **Email address**, **First name**, and **Last name**. If you've imported a list containing additional fields, they'll be present on the form as well. To add extra fields, choose a field type from the **Add a field** tab on the right side of the page.
6. Once you've added any extra fields you need, you can customize field text and [set default merge field values](#).
7. Click **Save & Exit** to save all changes to your form.

**Note:** If you would like to add an extra layer of security to your form, check the **Protect your signup form with reCAPTCHA** box on the **Create forms** page. When this option is enabled, a [Google reCAPTCHA](#) checkbox that says "I'm not a robot." will be included on your signup form, preventing spam bots from adding email addresses to your list.

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## Design it

To the right of the **Build it** is the **Design it** tab. Here, you can choose the colors, styles, and fonts for the form or response email you've selected. It's important to note that style changes are made universally and not form by form. When you edit or make a change to any element of the form, we apply the same change to each of the other forms and response emails for your list.

Visit our Knowledge Base for more tips on customizing the look and feel of your [list forms and response emails](#).

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## Translate it

Use the **Translate it** tab to [enable or customize translations](#) for your list's forms and response emails in any of MailChimp's 40+ supported languages.

**Note:** The subscriber popup form does **not** support translation.



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# Creating Templates and Campaigns

Once your list and forms are set up, you're ready to start building an email message to send out to your subscribers. There are lots of names for this email—newsletter, blast, or e-shot just to name a few—but at MailChimp, we call each email message that you design and send to your subscribers a “campaign”. [Each campaign is built using a preset layout called a “template.”](#)

In this section, we'll cover the basics of importing or coding a custom template into MailChimp. If you'd prefer to use MailChimp's built-in selection of templates to create a campaign, feel free to skip ahead to the *Creating a Campaign* section.

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## Creating or importing a custom template

MailChimp provides a variety of customizable *Basic* Templates and predesigned Template *Themes* that can be used as starting points for email campaigns, but you're not limited to those options. If you'd like to import your own templates or [create custom coded templates](#) to help fill a specific design or branding need, just visit the **Templates** section of your account and click the **Create Template** button. Here, you're able to [paste in your own custom coded design](#) or upload templates from an [HTML](#) or [ZIP](#) file. If you'd like to use one of our existing templates as a base for your custom design, you can do that here as well. Any templates that you create here will be found under the **Saved Templates** tab when you reach the Template step of the Campaign Builder.

**Note:** To allow use of our visual content editing tools, you will need to code your templates using the [MailChimp Template Language](#).

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## Creating a campaign

The MailChimp campaign builder walks you through building a campaign, step by step. When it's time to design your campaign, if you're not using an uploaded template, you'll find a variety of basic email layouts you can customize easily without HTML knowledge. Many of our layouts use a drag and drop editor, which makes it easy to add, move, delete, and style content blocks. If you want to use the same layout again later, you can save your design as a template for future campaigns.

To get started, click the **Create Campaign** button from the **Dashboard** or **Campaigns** tab, and choose the type of campaign you'd like to create.

- **Regular Campaigns** are the most common type of HTML email our users send. You can design and customize the designed HTML and plain-text versions of these emails, and choose whether to send them immediately or schedule them for later.
- [Plain-Text Campaigns](#) are the simplest form of mass email you can send. As the name suggests, these campaigns will only contain text, and have no formatting options.
- [A/B Testing Campaigns](#) are a great tool for testing subject lines, From names, sending times, and content. We'll send up to three different versions of the email to small portions of your list, track their performance, then send the "winning" version to all remaining subscribers.
- [RSS Campaigns](#) allow you to automate your email marketing by combining content from an RSS feed with user-friendly MailChimp templates. Like the other campaign types, you can control when these campaigns go out and who receives them.

If you'd like to create a series of automated emails, check out our robust [Automation](#) features. Our [Working With Automation guide](#) will help you get

started.

For now, we'll work with the **Regular Campaign**. The steps in the campaign builder will vary slightly across other campaign types, but the general behavior of templates will remain the same.

After you choose your campaign type, you'll begin the campaign building process. In a **Regular Campaign**, the first step is **Recipients**. Here, you'll determine which subscribers will receive the campaign. You can choose to send it to the entire list, or use our segmentation tools to send targeted content based on subscriber data, campaign or e-commerce activity, group membership, manual selection, and more.

[This article](#) contains a quick tutorial on building segments and provides a full list of the available segmenting options.

In the **Setup** step, you'll decide on a name for the campaign (this will not be visible in the sent campaign) and enter general information like the email subject, From name, and From email address. You'll also have the option to set up our [Conversations](#) feature to help manage replies and to personalize the "To:" field of your campaign through the use of merge tags.

**Note:** If the associated list contains the names of your subscribers, checking the "Personalize the To: field" feature will allow you to use merge tags to help personalize each email. For example, \*|FNAME|\* \*|LNAME|\* would display as "To: John Smith" instead of "To: john.smith@domain.com." Not only are personal emails more likely to be opened, they're also less prone to get flagged by spam filters.

Also included on the Setup step are a number of [native and third-party tracking options](#), the ability to enable automatic sharing of your campaign on [Facebook](#) and [Twitter](#), and [authentication](#).

Next up is the **Template** step. MailChimp offers a variety of basic templates and themes in each account.

Basic templates provide you with a highly-customizable blank layout, so you can easily add your own styles and content using the drag and drop functionality of our Email Designer. The following basic layouts are available:

- 1 Column
- 1 Column - Banded

- 1:2 Column
- 1:2 Column - Banded
- 1:2:1 Column
- 1:2:1 Column - Banded
- 1:3 Column
- 1:3 Column - Banded
- 1:3:1 Column
- 1:3:1 Column - Banded
- 1:3:2 Column
- 1:3:2 Column - Banded
- 2 Column
- 2 Column - Banded
- 2:1 Column
- 2:1 Column - Banded
- 2:1:2 Column
- 2:1:2 Column - Banded
- 3:1:3 Column
- 3:1:3 Column - Banded
- Left Sidebar Layout
- Right Sidebar Layout
- Simple Text
- Basic RSS (RSS Campaigns only)
- Right Sidebar RSS (RSS Campaigns only)

The only difference between non-banded and banded templates is their appearance. Non-banded templates are one solid color and have a defined border. Banded templates will have a “band” of color that stretches across the page and contains the footer information.

Themes, on the other hand, are predesigned, preconfigured templates that don't require any programming or design knowledge to use. Simply pick a theme, plug in your content, and you'll have a beautiful campaign. Themes come in two varieties: “drag and drop” and “classic.” Drag and drop themes offer functionality similar to that of basic templates, while only the color and content of the classic templates will be editable within MailChimp's email designer. The template type will be displayed below each theme, so you can easily differentiate between the

two.

You also have the option to use **Saved Templates**, reuse layouts from drafted and recently sent **Campaigns**, or upload a template/paste in your own custom code from the **Code Your Own** tab.

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## Add your content

Once you've selected a template, proceed to the **Design** step. Here, you'll use MailChimp's email designer to add, rearrange, duplicate, and delete content blocks to create a unique campaign that is fully customized to your needs. You can modify and style the content for specific content blocks using the **Content**, **Style**, and **Settings** tabs in the editor.

Choose from the following content blocks:

- Text
- Boxed Text
- Image Group
- Image Card
- Image + Caption
- Image
- Divider
- Social Follow
- Social Share
- Button
- Footer
- Code
- Video
- RSS Header (RSS Campaigns only)
- RSS Items (RSS Campaigns only)
- Product (Available once you [connect your store to MailChimp.](#))
- Product Rec (Paid accounts only. Available once you [connect your store to MailChimp.](#))

In each content block, you can add and format text, upload images, link to files, and further tailor the layout for maximum flexibility and personalization using the editor toolbar. After you've added content, the blocks can be dragged vertically or horizontally within the template to mix up the layout and design. Click the upper lefthand corner to drag each block up, down, or sideways as needed.

Will you have multiple users editing a campaign at the same time? No problem. With our [collaboration](#) features, team members can watch each other edit copy and make design changes in real-time, with no refreshing needed. They'll also be able to send test emails, solicit feedback, and leave comments right in the editor.

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## Merge tags

In the **Setup** step, we used merge tags to personalize the “To:” field of the email. They can also help you add a personal touch to response emails, Automation workflows, and regular campaigns. Merge tags are designed to pull in personalized or dynamic data from your list or MailChimp account and can be used for an array of different tasks. Whether you want to greet each subscriber by their first name in the email, populate RSS or social media information, translate content in a campaign, populate unique coupon codes or links for each subscriber, or [recommend products](#) based on a subscriber's purchase history, merge tags help simplify the process.

For full tutorials on using MailChimp's merge tags and a list of all available merge tags, consult the following KB articles:

[Getting Started with Merge Tags](#)

[All the Merge Tags Cheat Sheet](#)

[How Conditional \(or Smart\) Merge Tags Work](#)

[Smart Merge Tags and Groups](#)

[Troubleshooting Merge Tags](#)

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## Keyboard shortcuts

We've added some handy keyboard shortcuts to make editing your content even easier:

- ESC - Save and close editor, hide preview
- CTRL + 1 - Toggle Preview mode
- CTRL + 2 - Send a test email
- CTRL + 3 - Push to MailChimp Mobile
- CTRL + ? - Show/hide hotkeys cheatsheet

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## Text editor shortcuts

Use the ⌘ (Mac) or Ctrl (Windows) key on your keyboard for editor-specific shortcuts.

- ⌘ + Z - Undo action
- ⌘ + Y - Redo action
- ⌘ + L - Add link
- ⌘ + B - Bold selected text
- ⌘ + U - Underline selected text
- ⌘ + I - Italicize selected text

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## Customize the design

The **Page**, **Preheader**, **Header**, **Body**, **Columns**, and **Footer** options (located in the **Design** tab) allow you to adjust colors, borders, text alignment, fonts, and link styles for each respective section of your campaign.

The [Mobile Styles](#) option will help you optimize the layout for mobile devices. You can use the mobile options to tweak font styles and improve the mobile experience of your campaign.

Finally, select [MonkeyRewards](#) to pick a different badge design, or, [if you have a paid account](#), to toggle the badge on and off.

Once you're satisfied with the styles you've picked, click **Save** to apply your changes.

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## Preview and test your campaign

The [Preview and Test](#) menu houses all of our in-app campaign testing features. From this menu, you'll be able to access **Preview Mode**, which will give you an idea how your campaign will render on desktop and mobile environments. In Preview Mode, you'll also have access to [Inbox Preview](#). This feature automates the testing process and provides you with renderings of the campaign as they will appear across more than 40 different email clients with just a few clicks. Inbox Preview uses a token system; each time a preview is successfully created or updated, you'll use up one token. Certain account types will receive a monthly stipend of tokens, and all users can purchase bundles of 25 tokens for \$3 apiece.

**Note:** If you're using merge tags in your campaign, you'll find they're replaced with placeholder text when you view the campaign in **Preview Mode**. These placeholders let you know that the merge tags are working properly and will be replaced with subscriber-specific information when you send the campaign. To preview subscriber-specific information before a campaign is sent, follow the instructions described [in this article](#).

From the **Preview and Test** menu, you'll also be able to send test emails to any email address you'd like, [preview the mobile version of your campaign directly from your mobile device](#), use the Link Checker to make sure that all links in your campaign are valid, or set up [Social Cards](#) for your campaign. When enabled, Social Cards will give you the opportunity to choose a featured image and snippet of text that appears when your campaign is shared by anyone on Facebook and Twitter, or when viewed in Gmail's grid view.



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## Sending your campaign

Once you've finished designing your campaign, you'll navigate to the **Confirm** page—the final step of the campaign building process. Here, we'll scan the campaign to make sure that all of the previous steps have been properly completed and alert you to anything that might need your attention before sending. Here you can also preview both the HTML version and the automatically generated plain-text copy of the campaign one last time, run a final Inbox Inspection, or send one last test email to make sure everything is just right.

When you're ready to send, there are several different delivery methods available. All users have the option to send the campaign immediately or to [schedule it for a specific date and time](#). Users with paid accounts will have 3 additional scheduling features to choose from as well:

- [Send Time Optimization](#) analyzes the activity history of the subscribers in your list to determine and distribute the campaign at the optimal sending time.
- [Timewarp](#) delivers the campaign to your list based on the recipient's time zone, rather than the time zone selected in your MailChimp account.
- With [Batch Delivery](#), rather than sending your campaign out to the whole list at once, this feature will send the campaign in timed batches.

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# About Spam Filters

After you've taken the time to design the perfect campaign, the last thing you want to worry about is getting flagged by a spam filter. But, this is where things can get tricky. Spam filters look at a long list of criteria when they're analyzing incoming email. They'll weigh each factor, and then add them together to assign a spam score to the email. This spam score is what the server uses to determine if the email will pass through or be flagged as spam. The problem is, though, that each filter tends to function a bit differently than the others. So, an email could pass through Spam Filter A without issue, but get flagged by Spam Filter B and never make it to your subscriber. Even compliant senders with permission-based lists have been known to get flagged by aggressive spam filters. The best way to avoid encountering a problem is to better understand how spam filters work.

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 *Mark as spam* or *This is junk* button in their email client. Spam filters even sync up with each other to share what they've learned. There's no magic formula, but the following tips will help you avoid some of the most common mistakes that often send email to junk folders.

- **Campaign metadata:** Spam filters want to know that you're acquainted with the person receiving the email. We recommend using merge tags to personalize the To: field of your campaign, sending through verified domains, and asking recipients to add you to their address book.
- **Your IP address:** Some spam filters will flag a campaign if anyone with the same IP has sent spam in the past. When you send through MailChimp, your email is delivered through our servers, so if one person sends spam, it could affect deliverability for our other users. That's why we work vigilantly to keep our sending reputation intact, and it's important that all users abide by our Terms of Use.

- **Coding in your campaign:** Spam filters can be triggered by sloppy code, extra tags, or code pulled in from Microsoft Word. We recommend using one of our templates or working with a designer.
- **Content and formatting:** Some spam filters will flag emails based on specific content or images they contain, but there's not an all-encompassing set of best practices to follow or things you absolutely need to avoid. But, we do have a few recommendations.
  - Design your campaign to be clear, balanced, and to promote engagement from your subscribers.
  - Make sure your subscribers have opted-in to receiving your emails.
  - Be consistent. Try not to stray too far from the content and design that your audience already associates with your brand, website, or social media channels.
  - Use A/B or Multivariate Testing to learn how changes with your content affects delivery and engagement.

If you're interested in learning more about spam filters, we have [a dedicated guide](#) for that, too.

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## General compliance tips

MailChimp has a dedicated compliance team that closely monitors for content that's flagged as spam and makes sure that the MailChimp ecosystem remains healthy and free of activity that violates spam laws and our own Terms of Use. The following tips will help your account remain in good standing.

When you create a MailChimp account, you agree to [comply with all anti-spam regulations](#) and MailChimp's [Terms Of Use](#). These terms require that all lists be permission-based, consisting of subscribers who signed up through a mailing list signup form or gave explicit permission for you to add them to the list. You must have tangible, confirmable proof that the subscriber wants you to communicate with them. Be mindful of these guidelines as you're getting started:

- Make sure the intent of the signup form is clearly stated. All potential subscribers should understand that, by submitting their contact information through the form, they are agreeing to receive bulk email from you.
- “Contact Us,” “Apply For A Quote,” or “More Information” forms are not considered an acceptable opt-in method for bulk emails. These forms generally indicate a one-to-one email, not permission to be added to a bulk mailing list.
- Email addresses collected verbally, from personal address books, from business cards, or from social media/LinkedIn followers are not considered viable opt-in methods, due to their lack of tangible, verifiable proof of consent.
- While it’s generally okay to add existing customers to a mailing list—purchase history with a customer does qualify as permission under our Terms of Use—your recipients are more likely to engage with your messages if they’ve given you direct permission to send them email. We recommend including a link to your signup form on your purchase confirmation or receipts, or sending your customers a [reconfirmation email](#) to make sure they want to hear from you before you send new marketing content.
- We do not allow any kind of [third party lists](#) in our system. This includes publicly available, purchased, rented, or partner lists.

[This KB article](#) can help you determine if your list is acceptable. If you’re still unsure, [contact our compliance team](#) for further clarification.

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# Understanding Your Reports

You've built your list, created a beautiful campaign, and sent it to your subscribers. Now it's time to sit back, relax, and watch your reports come in.

MailChimp has a [ton of reporting features](#) that can help you analyze the performance of your campaign and provide insights to fuel future campaign successes. When you log into MailChimp, you'll see a detailed [account dashboard](#) full of stats to help you track your growth, engagement, and revenue. There's also a [MailChimp Mobile](#) app so you can view your reports (or manage lists, add subscribers, and send campaigns) while you're on the go.

In this section, we'll cover the basic information and data available in MailChimp's reports.

First, click the **Reports** tab and then select the desired campaign.

- **Overview** is where you'll find valuable at-a-glance information about how your campaign performed, including details about opens, clicks, social engagement, unsubscribes, and bounces. Curious how [open](#) and [click](#) tracking works? Looking for details about how [open and click rates](#) are tallied—and why they're important? Our Knowledge Base [has you covered](#). Your **Inbox Preview**, **A/B Testing**, and **Time Warp** results will also be available from the Overview page.
- From the **Activity** menu, you can dig even deeper into your campaign results. Selecting one of the menu options allows you to view or export a segment of recipients that interacted with your campaign in a specific way. Would you like to view a list of all subscribers who received, opened, didn't open, or clicked a link in your campaign? Want to see which addresses bounced, unsubscribed, or even filed an abuse complaint? You'll find all of that data here.
- **Links** gives you a better idea of how well each tracked link within a campaign performed. On this screen, you'll find a list of all tracked URLs from the

campaign, along with the number of total and unique clicks for each one. If you're viewing the report for a Regular or RSS campaign, we'll also populate a click map to give you a visual representation of how each link performed.

- **Social** reveals who has liked your campaign on Facebook, provides a list of the top influencers and referrers, and displays a map of clicks from around the globe. Keep in mind that before we can add Facebook stats to your campaign reports, you'll need [integrate your account with Facebook](#).
- If you've set up [e-commerce tracking](#) in your account, all reports that it generates will be displayed in the aptly named **E-commerce** section. Here, you'll find the total sales generated by the campaign, total number of conversions (orders received), and a breakdown of each subscriber's purchases. You can track sales from a click in your campaign all the way to purchase. This lets you see which customers make a purchase—and what they buy—after opening your campaign. If your campaign includes products from multiple connected stores, you can filter purchase data by store.
- The **Conversations** tab shows replies to your campaign when conversation tracking is enabled. Conversation tracking offers more flexibility than a standard reply-to email address by allowing [other account users](#) to receive email notifications when a subscriber replies to your campaign. Learn more about Conversations [here](#).
- The **Analytics360** reports section displays Google Analytics/ [Analytics360](#) data when applicable, as well as stats from integrations such as [SurveyGizmo](#), [Eventbrite](#), or [SurveyMonkey](#). We'll also show you a breakdown of the top email domains for your subscribers in the Email Domain Performance chart.

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# Education and Support

Good work! This guide covered all the basics for getting started and sending your first campaign with MailChimp, but we've only scratched the surface of our available resources. As you learn more about MailChimp (and your subscribers), you'll find new data, options, integrations, and even a [powerful suite of Pro features](#) that you can use to help take your email marketing to the next level.

If you have any questions that weren't addressed in this guide, visit our [Knowledge Base](#) for more information or [contact our support team](#) directly.

**COMMON  
ROOKIE  
MISTAKES**



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# Hello.

Since 2001, MailChimp has been helping people of all experience levels—from email marketing rookies to seasoned veterans—create, send, and track email newsletters. In this guide, we'll outline some of the most common mistakes that new email marketers make, and give you tips on how to avoid making those same mistakes as you're getting started.

If you have questions along the way, feel free to [contact our support team](#).

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## Mistake: Not having permission

When you create a MailChimp account, you agree to comply with [all anti-spam regulations](#) and MailChimp's [Terms Of Use](#). These terms require that all lists be permission-based, consisting of subscribers who have signed up through a mailing list signup form or have given their explicit permission to be added to the list. You must have [tangible, confirmable proof](#) that the subscriber wants you to communicate with them, and your intent must be clearly identified.

There are two very important things to keep in mind:

- **Make sure you have received permission from *all of your recipients* before you send your first email.** [Permission](#) ensures that your recipients want to receive email marketing content from you. Before investing your time and money in an email marketing program, start getting permission from your customers. It's [easier than you may think](#), and some of the benefits might surprise you. Not only will it result in fewer spam complaints and decreased legal liability, but you'll also experience improved deliverability and increased open and click rates.

- **All recipients should understand *what they're signing up for and why they're receiving email from you.*** Your signup form should be very clear about your intent. It should also properly manage the expectations of your subscribers. Be sure to explain not only that your subscribers will be receiving email from you, but also what type of emails they will be receiving. Your [permission reminder](#), which you'll create as you set up a new list in MailChimp, should remind your subscribers where they originally opted-in and why they are receiving the email.

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## Mistake: Purchasing email lists

By now, everyone should know better than to buy a "totally legitimate list of 30 million opt-in emails" from a sketchy piece of spam they found in their inbox. That's pretty obvious, but there are still some vendors out there selling "opt-in" lists the old-fashioned way. They collect email addresses and ask members if they'd like to "receive special offers from third parties." Then, they sell those email addresses to other senders. It's not *technically* illegal, but many ESPs—MailChimp included—prohibit sending to purchased lists.

MailChimp is a strict permission-based newsletter delivery service. This means we do not provide, sell, share, or rent lists to users, nor do we allow [purchased, publicly available, third party, or rented lists](#) in our system. No exceptions!

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## Mistake: Assuming people want to hear from you

Did everyone on your list specifically give you permission to email them? If not, and you've added them to your list because you *assume* they want to hear from you, then you are sending spam. This is true even if you "spent lots of time assembling that list of prospects," "spent lots of money for this opt-in list," or the list is made up of "people in your industry who have certainly heard of you." MailChimp is a tool for sending email newsletters and permission marketing. It's

not for “sales” or “prospecting” to people who have never heard of you. If you want to send email to prospects, you should use your own server, not a hosted solution like MailChimp.

You might be thinking, "I get emails all the time from people I've never heard of, and I appreciate it." It's important to clarify that it's different if someone sends one email directly to you, with a sales pitch. If, however, that same person "blasts" his sales pitch to an entire list of people, it's spam.

Do not, under any circumstances:

- Send email campaigns to a list of “prospects.”
- Compile a list from all of your sales contacts—some will be potential prospects who've never heard of you or your organization.
- Use [purchased](#), rented, or third party lists.

If you have a list of clients and customers that know you, but they haven't specifically opted-in for newsletters from you, send them [personal, individual email invitations asking them to join your list](#).

If you're sending on the behalf of a client, make sure that you know the origins of their list. Don't be afraid to ask the client how they got their list and if it's permission-based. Remember, you can be held liable for spam even if you're sending on behalf of someone else.

Not sure if your list is okay to use with MailChimp? [This article](#) provides a few scenarios that can help you decide.

Still not sure? Review our [Acceptable Use Policy](#) or [contact our compliance team directly](#).

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## Mistake: Sending to a stale list

When someone opts in to your MailChimp list, they're giving permission to receive your email marketing campaigns. That permission can [go stale pretty quickly though](#), so you have a limited amount of time to reach out to your new subscribers before they forget having signed up for your list. Stale lists can lead to high rates of bounces, spam complaints, and unsubscribes. If you think that your

list might be stale, you might need to [reconfirm](#).

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## Mistake: Confusing transactional emails with email marketing

Do you have a list of customers who have purchased products from your e-commerce store? They'll probably expect receipts and shipping notifications via email. Those types of one-to-one messages are called *transactional* emails, and they're different from email marketing. That's why we developed Mandrill. [Mandrill](#) is a delivery API for MailChimp users who want to send transactional emails. Mandrill is optimized for emails like password reminders, order confirmations, receipts, and personalized notifications, and will help you manage and monitor your transactional messaging through advanced tagging, webhooks, and more.

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## Mistake: Being in a rush

One of the most common mistakes that people make with email marketing is hasty sending. Take the time to make sure your list is clean and all subscribers have properly opted-in. Asking the sales team for their contact lists and "blasting" out an email may seem like the best solution if you're on a strict deadline, but it can result in unanticipated headaches. Those contacts could have gone stale. Worse, they may have never given permission at all.

Let's say that you do send an email to a purchased or stale list. If those people don't know why they're receiving the email or never signed up in the first place, they might click the "Mark as spam" or "This is junk" button in their email program. Studies have shown that 10-30% of recipients have done this—even to emails they requested—thinking it was the only effective way to unsubscribe from a list. When that happens, alerts get sent to their ISPs, which may blacklist the sender for spamming. So slow down, take a breath, and make sure your list is in pristine condition before you push it out the door.

Rushing through the campaign creation process and not taking the time to consider the design, content, and subject lines of your email can prove problematic, too. You could find yourself faced with a decrease in your open and click rates and increase in your spam and unsubscribe rates. In the next few sections, we'll cover some of the most common content-related mistakes made by email marketing rookies.

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## Mistake: Not knowing your audience

Email marketing is often one of the first attempts at "real" marketing for small businesses. For email marketing newcomers, it might be tempting to use sensational phrases like "BUY NOW!" and "LIMITED TIME OFFER!" or to emulate marketing tactics that you've seen Company XYZ use in the past. Keep in mind, however, that the things that worked for another company might not be the best methods for addressing your own subscribers.

- Create content that will be relevant, interesting, and useful to your subscriber base.
- Keep [your subject line](#) simple and to the point. The best subject lines don't *sell* what's inside, they *tell* what's inside.
- Don't use pushy sales copy or gimmicky catchphrases. Not only can be it a distracting turn-off to your subscribers, but spam filters could penalize you if they deem your content to look "spammy."

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## Mistake: Not understanding spam filters

Spam filters look at a long list of criteria to decide whether or not an email is junk. In fact, 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 junk* or *Mark as spam* button in their email client. 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 to junk folders.

- **Campaign metadata:** Some spam filters will flag a campaign if anyone with the same IP has sent spam in the past. When you send through MailChimp, your email is delivered through our servers, so if one person sends spam, it could affect deliverability for our other users. That's why we work vigilantly to keep our sending reputation intact, and it's important that all users abide by our Terms of Use.
- **Coding in your campaign:** Spam filters can be triggered by sloppy code, extra tags, or code pulled in from Microsoft Word. We recommend using one of our templates or working with a designer.
- **Content and formatting:** Some spam filters will flag emails based on specific content or images they contain, but there's not an all-encompassing set of best practices to follow or things you absolutely need to avoid. But, we do have a few recommendations.
  - Design your campaign to be clear, balanced, and to promote engagement from your subscribers.
  - Make sure your subscribers have opted-in to receiving your emails.
  - Be consistent. Try not to stray too far from the content and design that your audience already associates with your brand, website, or social media channels.
  - Use A/B or Multivariate Testing to learn how changes with your content affects delivery and engagement.

Looking for more information on this topic? Check out our [How to Avoid Spam Filters](#) guide and the [About Spam Filters](#) article in our Knowledge Base.

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## Mistake: Not testing a campaign before sending

Before you send a campaign to your entire list, make sure that you look at it in MailChimp's [Preview Mode](#) and send yourself several test copies of the email, utilizing as many email clients (Gmail, Yahoo!, Outlook, etc) as you can. Check to

make sure your images and links are behaving correctly and that everything looks just right. Once you hit send, there's no "undo" button, so it's very important to test as thoroughly as possible before sending to your entire list.

MailChimp's [Inbox Preview](#) can be a valuable resource as well. This feature automates the testing process and provides you with renderings of the campaign as they will appear across more than 40 different email clients in just a few clicks. MailChimp Pro and Monthly Plan account holders will be provided with a number of [free Inbox Preview tokens to use each month](#), and all users will be able to purchase 25-token bundles for \$3 each.

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## Mistake: Ignoring your campaign reports

One of the benefits of using MailChimp for your email marketing is the ability to [measure the results](#) of every campaign that you send. MailChimp's [account dashboard](#) and campaign reports contain [a lot of valuable information](#), and they can help you analyze your campaign's performance and provide insights that you can use to improve your future campaigns.

If a marketer isn't checking their reports regularly, they might not notice when their open rates drop significantly or that their list size is steadily shrinking after every campaign. They may not realize that emails they send on Thursday have the highest open rate, while emails sent on Monday tend to have much lower engagement.

After you send a campaign in MailChimp, take the time to navigate over to the **Reports** page in your account. Look for trends. Make changes to campaigns—or even try out [A/B testing](#)—to see if you can improve your open rates, click rates, and, perhaps most importantly, conversions.

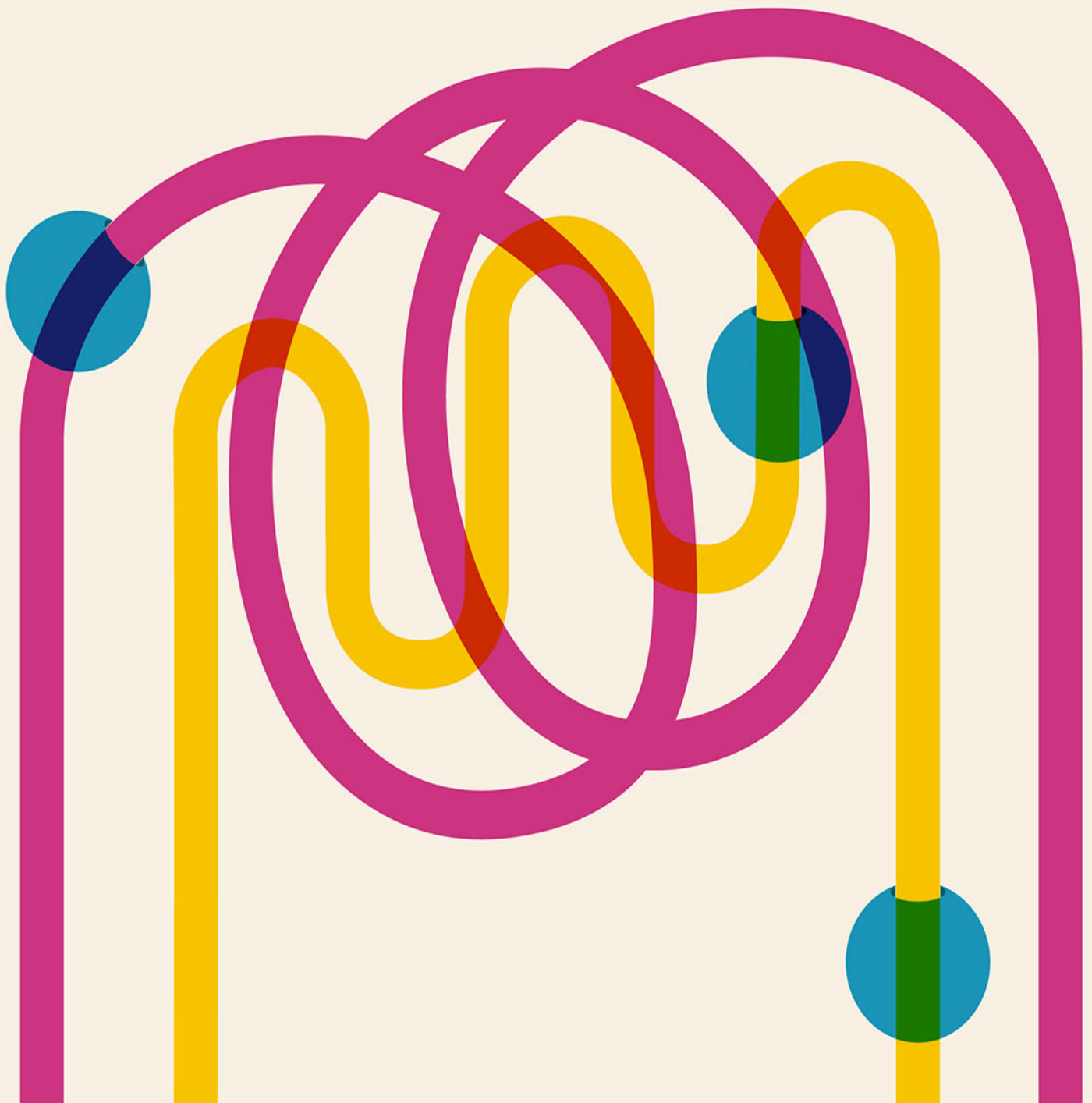
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## Further education and support

**These tips should help provide a solid foundation to build on as you start your journey into email marketing. If you have any questions along the way, visit our Knowledge Base or contact our support team.**

**Getting Started With**

# **Marketing Automation**





# Introduction

Marketing automation helps you reach the right people with the right content at exactly the right time, so you can eliminate repetitive tasks and focus on other parts of your business.

You can introduce folks to your company with a welcome series, get repeat customers by sharing product recommendations, re-engage lapsed customers, send happy birthday messages, and more. No matter what type of business you operate, it's easy to set up the perfect automation for any situation.

In this guide, we'll discuss the ways you can use [MailChimp's powerful marketing automation features](#) to connect with—and retain—your customers, sell more stuff, and address the unique needs of your business. We'll also show you how to learn from your reports, and share tips and examples to help you get started.

## How Marketing Automation Works

Unlike one-off campaigns, automations are triggered when specific people meet the pre-defined criteria you set. For example, you could send an automated follow-up message to a customer when they buy something from your store for the first time.

MailChimp offers a number of [automation types](#) with built-in triggers for common activities, but if our pre-built options don't address your needs, you can always create a custom automation instead.

Once you've chosen an automation, added your content, and set your sending criteria, MailChimp will manage your subscriber queue and email sends. After someone receives the first message in an automation series, they'll receive every email in the series in sequence, unless they are [removed from the automation](#).

## Connect With Your New Contacts

Automation is a simple, effective way to make a powerful first impression. Reach out to your newest subscribers and customers to keep them engaged, improve retention, and cultivate lasting relationships.

- **Introduce yourself.** [Welcome your new subscribers](#) with a single email—or an [email series](#)—to help them get to know your company, organization, or products.
- **Say ‘Happy Birthday’.** Let your contacts know that you’re thinking about them on their birthday or anniversary. Create an automation, set it to send annually, and we’ll take care of the rest.
- **Send an educational or onboarding series.** Provide new subscribers, students, or customers with the helpful resources they need to get acclimated with your organization or business.

## Sell More Stuff

Once you [connect your store to MailChimp](#), you can put your purchase data to use by creating automations that make it easy to communicate to—and follow up with—your customers, so you can drive more sales and improve your bottom line.

- **Recover abandoned carts.** Reach out to customers who navigate away from their online shopping cart without completing a purchase. [Send an email \(or series of emails\)](#) to remind them what they’ve left behind and encourage them to return to your store. You can even add personalized [product recommendations](#) to give your customers more options and [increase your conversion rate](#). On average, campaigns that include product recommendations generate 31% more revenue than campaigns without them.
- **Follow up on purchases.** Ask for product feedback, [send a quick survey](#), or provide customers with helpful information—like usage or care instructions—after they buy a specific product or make a purchase from a specific product category.
- **Get more out of order notifications.** After a customer makes a purchase from your store, [automatically send them an invoice, shipping confirmation, and other transactional notification messages](#). You can enable (or disable) any notification messages you need, and customize them with your brand’s logo and color palette so they match the look and feel of other campaigns you’ve created. You can even include a personal message to thank customers for their purchase or [drag in a product notifications](#) block to showcase related items.

## Boost Customer Loyalty

The customers who support your business are vital to your growth and success, so it's important to let them know they're valued. And since retaining your existing customers is more cost-effective than acquiring new ones, MailChimp offers several easy-to-set-up automations designed to keep bringing people back.

- **Thank first-time customers.** Reach out to brand new customers who've just made their first purchase from your store to thank them for their business or offer a discount to encourage them to shop with you in the future.
- **Reward your best customers.** Show appreciation for your most loyal customers or biggest spenders by sending them a special offer, coupon, or download.
- **Respond to subscriber updates.** Automatically send an email to subscribers who join (or leave) a group in your list. Provide a sample of the new content they'll be receiving, suggest other groups that might be of interest, or collect feedback about their experience.

## Bring People Back

Automation can be a powerful asset for businesses during all stages of the customer journey, but can be especially helpful for re-engaging people who haven't interacted with your brand recently.

- **Win back lapsed customers.** Create an email or series of emails to [encourage lapsed customers return to your store](#) or re-engage with your campaigns. Showcase your latest products to customers who haven't made a purchase in a while, or offer an incentive to potential customers who have signed up for your list but haven't bought an item from your store just yet.
- **Improve email engagement.** Automatically reach back out to subscribers who don't open or click a link within one of your email campaigns. Or, [use post-sending actions](#) to update one of their merge fields, move those contacts to a different interest group, or remove them from your list completely.

## Before You Start

Whether you create a custom automation or use one of MailChimp's pre-built options, there are a few things you'll need to consider before you get started.

### Have you connected your store?

Throughout this guide, we've discussed the ways that automation can help e-commerce businesses communicate with customers and drive sales. Keep in mind, however, that many of the automations we've covered are dependent on data from your online store.

So, before you get started, be sure to [connect your store to MailChimp](#). Once connected, you'll be able to put our powerful marketing automation tools to work for you, making it easier than ever to reach your customers, build your brand, and make more money.

## When should your emails send?

You can decide the timeframe and what days of the week you want your automated emails to go out. Immediately after the initial triggering action? The next day? The next week? It's your call.

For automations that contain multiple emails, you'll also decide on the order of the emails and how much time should pass between each new message being sent.

If you're not sure about how to pace your content, experiment with sending at different times or in different intervals, review your reports to see how engagement and conversions have been affected, and then make any necessary adjustments.

If you have content that is likely to get missed over the weekend, don't schedule an email for delivery on Saturdays or Sundays. The time delays you've built between emails will take the days you exclude into account. So, if your series has a 3-day delay between emails and one message sends on a Friday, exclude Saturdays and Sundays so the workflow will start its 3-day delay on Monday. If you want a message to go out on an annual date, you'll want to have the option to send any day of the week.

## What's your trigger?

Our preset automations have triggers defined for you—you'll just need to enter values for the trigger criteria. Custom automations, on the other hand, require you to define the trigger. And as mentioned earlier, every email in your automation can have its own unique trigger.

For example, if you'd like to send a follow-up email to every person that clicked a link in your last campaign, that click would be your trigger.

Inactions can also act as triggers for your automation. Maybe a subscriber opened a campaign, but didn't click anything—that non-click can be your triggering event.

Or, you could add a customer to an automation after they join your list, send a message after they open an email, send the next after they make a purchase, and so on.

## Are you targeting the right people?

A customer may like getting occasional updates about your products, but not want weekly reminders about seasonal items or sales. Consider creating [groups](#) based on the interests of your subscribers—or the frequency at which they'd like to receive your email—and developing automations that are tailored to each group.

## Do your messages sound human?

The key to effective marketing automation is to create content that doesn't sound like it's automated. Communicate your message in a natural way, and be mindful of the voice and tone of your brand.

Example: Gauge Interactive, an agency that specializes in e-commerce design and development, [strives to create automated messaging that feels authentic](#). They have 3 rules for writing better automation emails:

- Don't write like a copywriter.
- Know your customers.
- Think of the brand as a person.

## Analyze Your Results

Automation reports are similar to your [regular campaign reports](#), except they show [complete automation statistics in addition to individual email statistics](#). Review your monthly performance chart to explore your automation's open rate, click rate, and total number of emails sent for each month of activity. You'll also find helpful trend data, so you can see how the overall automation is performing compared to your daily average.

### E-commerce reports

If you've connected your store and created an e-commerce automation—like abandoned cart, customer re-engagement, or order notification automations, for example—your reports will contain more valuable data to help you measure your success.

You can track audience growth, campaign engagement, the number of orders you've received, and the amount of revenue you've generated. Then, review individual emails in the series for an even closer look at conversions, geolocation data, and more.

### Learn from your data

Your reports contain a lot of valuable information that you can use to make adjustments to your automations or inform other elements of your marketing.

For example, once your reports start to populate, you notice that certain emails have better engagement or generate more revenue than others. Maybe you'll find that your automation is more effective when you offer incentives. Perhaps your audience responds better when you use a certain template, a direct call to action, or a [descriptive subject line](#). You might even notice that

the timing of your automation emails or the number of emails within an automation series have an impact on engagement or revenue.

No matter what your reports reveal to you, don't be afraid to be proactive. Whether that means testing different content, adjusting the length and delay of your automation series, or something else entirely, it's never too late to review your reports, improve your performance, and build on your success.

## Inspiration

Here are a few MailChimp customers that do a great job with automation.

- Happy Socks built an automation series that [sends to customers immediately after they've made their first purchase](#). The 3-part series thanks the customer for their patronage, introduces them to the Happy Socks brand and selection of products, and offers a promo code to incentive a follow-up purchase. This automation has resulted in a 20% higher open rate and 50% higher click rate than their average campaign.
- Gauge Interactive uses automation to help their clients reach customers with relevant, valuable information at the right time, but [they're not afraid to try something new if an automation isn't working](#). "You have to continually test," business analyst DJ Henley says. "Create a hypothesis, run the automated series, and then look at open rates, click rates, and revenue. Does it match your hypothesis? If not, pivot."
- After [testing a few different incentives](#) in their abandoned cart automations, [Topo Designs](#) learned which type of offer resonated best with their customers—and was the most beneficial for their bottom line. Today, their abandoned cart emails consistently achieve a 20% click rate.
- Bee's Wrap, a company that produces a reusable food storage wrap made out of fabric and beeswax, has [grown their list substantially and organically](#) by adding a popup form to their website, offering a 15% discount to new subscribers, and then sending a welcome automation series.
- Fjällräven, a Swedish company that specializes in outdoor accessories and apparel, uses MailChimp [automation to introduce new signups to their brand](#). The series includes details about the company's sustainability efforts, the materials they make, and provides links to their social channels and products.

# More Resources

In this guide, we've covered the basics of marketing automation in MailChimp, but there are a bunch of other resources available to help you get started.

- [Visit our Knowledge Base](#) for helpful articles, walkthroughs, and tutorials about marketing automation.
- Our [Integrations Directory](#) contains hundreds of integrations with the web services and platforms that businesses use each day, making it easy to sync your data, import content, grow your list, and more.
- You can connect with third-party MailChimp experts for help with anything from strategy and design to development work with the API in our [Experts Directory](#).
- We've got a [number of other resource guides](#), a lot of [research](#) to share, and a [Skillshare class](#) with tips for increasing online sales.
- Our [helpful support team](#) that can assist you if you run into any trouble along the way.

