

# MailChimp® – Mass emails for chapters and associations



# MailChimp Overview

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- MailChimp is web-based email service provider.
- It allows for list import and email campaign management.
- Provides reports on delivery, open, and click rates for each email blast.
- User-friendly templates.



# Why Use Mailchimp

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- Readability for your audience.
  - *MailChimp templates render great on smartphones (they use "responsive design")*
- Helps maintain compliance with the CAN-SPAM law.
  - *\$16K fine for a single violation*
- Free for lists under 2,000 names
  - *Works for majority of chapters, colonies, and associations*

# Important Note: Maintaining CAN-SPAM Compliance

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In order to be CAN-SPAM compliant, it's important your email messages follow these rules, [which can be found in full over at the FTC's website](#).

## **DO**

- ✓ Do include your valid physical postal address in every email you send out.
- ✓ Do provide a clear and obvious way to opt out of every email you send out, and honor the unsubscribe within 10 business days.
- ✓ Do use clear "From," "To," and "Reply to" language that accurately reflects who you are. This applies to the person or business sending the message, as well as the domain name and email address.

## **DON'T**

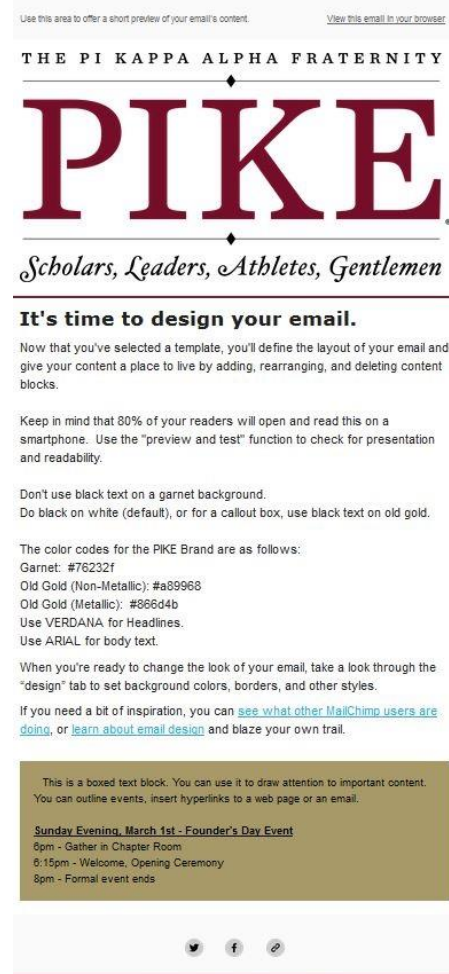
- x Don't sell or transfer any email addresses to another list.  
Member/Alumni lists are to be used for Fraternity/Chapter matters only. Do not use list for commercial solicitations outside of Fraternity/Chapter business.
- x Don't make it hard to unsubscribe from emails. You cannot **1)** charge a fee **2)** require a recipient to provide personally identifying information beyond an email address, or **3)** make recipients take extensive steps other than simply replying to an email or visiting a single page on a website to unsubscribe themselves from your emails.
- x Don't use deceptive subject lines in your emails that misrepresent the contents of your message.

# What your newsletter will look like:

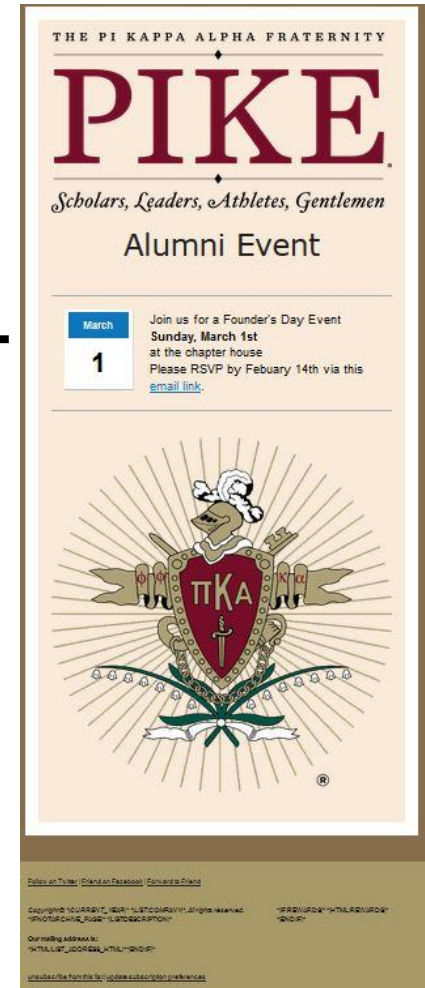
## Newsletter 1



## Newsletter 2



## Event Template



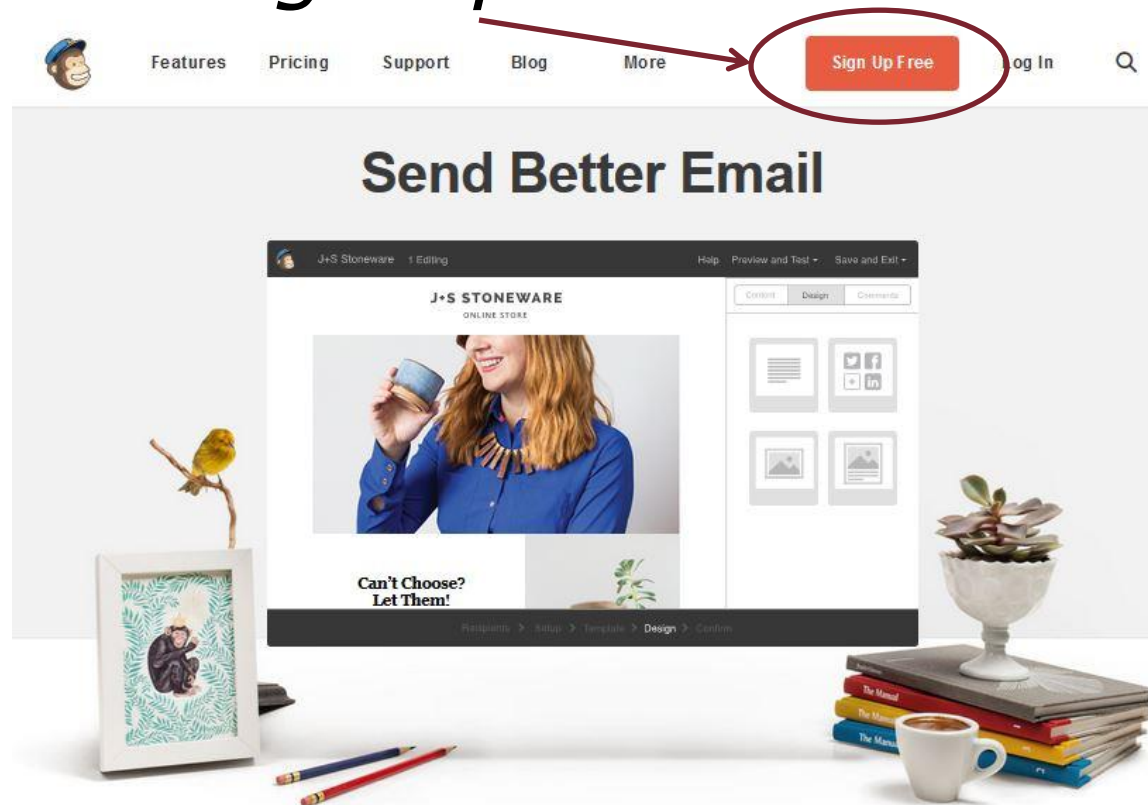
# Before You Start

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- ❑ Have an email address that will be associated with the account. Use a chapter or association web-based email account such as gmail.
  - ❑ (Secretary should keep a record of the password to allow for position turnover.)
- ❑ Establish a [physical mailing address](#) in all emails. This can be any address where you can receive mail, like an office address or P.O. Box.
- ❑ You'll need to provide a URL for your website when you sign up. If you [don't have a website](#), you can use a blog or social media channel.
- ❑ All accounts start on the [Forever Free Plan](#), so you don't need a credit card to sign up.

# Sign Up for an Account


- ❑ Go to [www.mailchimp.com](http://www.mailchimp.com) and click "*Sign Up Free*"





# Create Your Account

- ❑ On the Account Signup page, type in your email, username, and password
  - MailChimp blocks role-based emails like *"admin@pikes.org"*
- ❑ Click "Create My Account"
- ❑ You'll receive and "account activation" email to proceed.



Get started with a Free Account

Sign up in 30 seconds. No credit card required.  
Already have a MailChimp account? [Log in here.](#)

Email

Username

Password  
 ☐ Show

✔ Your password is secure and you are good to go!


[Create My Account](#)

By clicking this button, you agree to MailChimp's [Anti-spam Policy & Terms of Use.](#)



# Activate Your Account


- ❑ Open the account activation email and click "activate account".
- ❑ On the "confirm humanity screen", verify you're not a robot and confirm signup.
- ❑ Answer the profile questions and you're ready to start.




**Confirm Humanity**

Before we get your account set up, we need to confirm you are a human (it's a spam prevention thing). Check the box below and click the "confirm signup" button.

☒ I'm not a robot

  
reCAPTCHA  
[Privacy](#) - [Terms](#)

Confirm Signup 

# 3 Basic Steps to Email

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1. Create a subscriber list
2. Design a campaign
3. View the results

# CREATE A SUBSCRIBER LIST

# 1. Create a Subscriber List

## *Request to International Fraternity*

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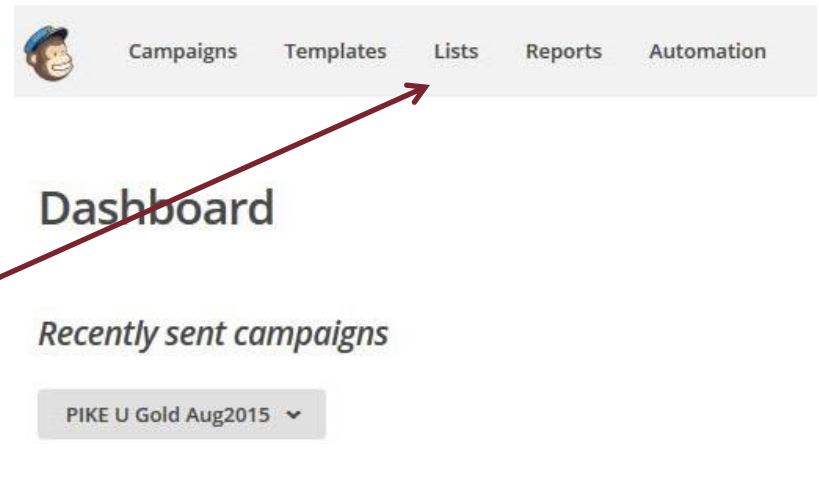
- ❑ Contact the International Fraternity at [alumni@pikes.org](mailto:alumni@pikes.org)
- ❑ Provide your name, position\*, chapter, initiation year and how you plan on using the list
- Within one week you will receive a spreadsheet of your chapter's alumni containing the following:
  - First and Last name
  - Reference ID number (allows for updates and tracking)
  - Initiation year
  - Primary email
  - Primary phone number
  - Primary mailing address

**\*Note:** *The Fraternity records policy states that membership lists may only be sent to Presidents, Chapter Advisors, Alumni Association Presidents and House Corporation Presidents.*

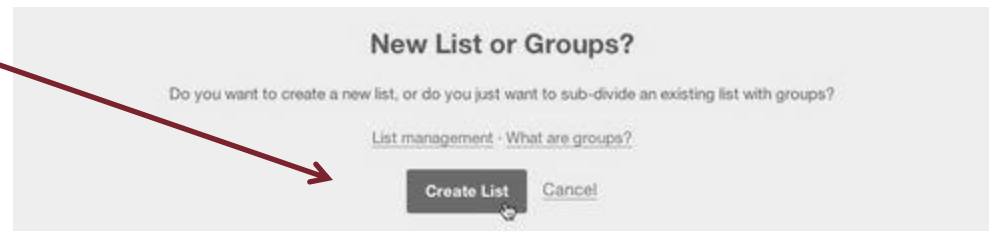
# 1. Create a Subscriber List

## *MailChimp: Navigation*

- ❑ On the top menu, navigate to the "Lists" page



- ❑ Click **"Create List"**



# 1. Create a Subscriber List

## *MailChimp: List Details*

- ❑ Fill in your list details
  - Note: If someone unsubscribes, they will see the list name.
- ❑ For the reminder, recommend stating, *"You're receiving this email as a member of Pi Kappa Alpha..."*
- ❑ Click **"Save"**
- ❑ On next screen, select ***"Import List"***

**MailChimp** Campaigns Templates Lists Reports Automation

### List details

List name  
Omega Omega Alumni

Default "from" email  
media@pikes.org

Default "from" name  
Rober Smythe

Remind people how they signed up to your list  
Reuse a reminder from another list

You're receiving this email as a member of Pi Kappa Alpha International Fraternity.

Example: "You are receiving this email because you opted in at our website ..." or "We send special offers to customers who opted in at ..."

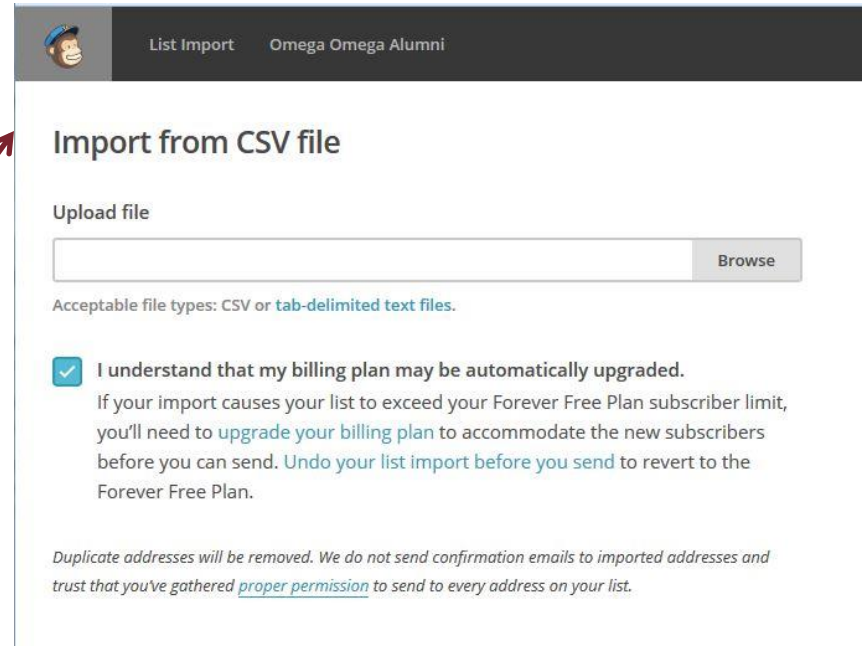
Contact information for this list · Why is this necessary?

Pike Marketing  
8347 West Range Cove  
memphis, TN 38125

# 1. Create a Subscriber List

## *MailChimp: Import Your List*

- ❑ Import your subscribers from the .csv file you received.
- ❑ Select the “CSV” radio button and click “Next” & this screen will appear.



The screenshot shows the MailChimp interface for importing a list. At the top, there's a header with a monkey icon, 'List Import', and 'Omega Omega Alumni'. The main heading is 'Import from CSV file'. Below it is an 'Upload file' section with a text input field and a 'Browse' button. A note specifies 'Acceptable file types: CSV or [tab-delimited text files](#)'. A checkbox is checked, indicating understanding of the billing plan upgrade policy. At the bottom, a disclaimer states that duplicate addresses will be removed and that proper permission should be gathered before sending.

Import from CSV file

Upload file

Browse

Acceptable file types: CSV or [tab-delimited text files](#).

☒ I understand that my billing plan may be automatically upgraded.  
If your import causes your list to exceed your Forever Free Plan subscriber limit, you'll need to [upgrade your billing plan](#) to accommodate the new subscribers before you can send. [Undo your list import before you send](#) to revert to the Forever Free Plan.

Duplicate addresses will be removed. We do not send confirmation emails to imported addresses and trust that you've gathered [proper permission](#) to send to every address on your list.



# 1. Create a Subscriber List

## *MailChimp: Import Your List (cont.)*

- ❑ Match column names to type of data and **"Save"** each column. (Choose "select new column name" from drop down menu for Reference ID and save.)

Import subscribers

Now let's match the columns in your uploaded file to your MailChimp list.  
[See an example of the import field match process.](#)

5 unmatched columns · [Skip all](#) ☒ Show skipped columns

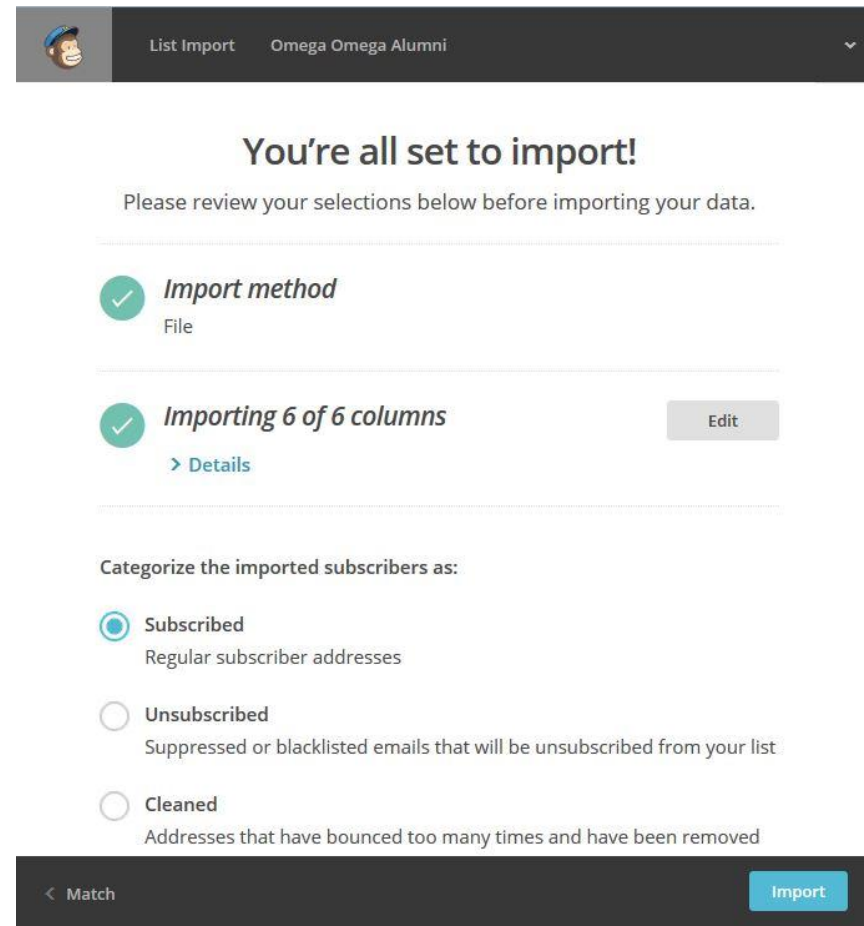
Legal First Name	Legal Last Name	Reference ID	Initiate Year	Associated Chapter
Travis	Ar. Loren	690	2011	G...
Tyler	Al...	806	2011	Delta
Dani	Delta	376	2014	Delta

- Then click **"Next"** in lower right hand corner of page...

# 1. Create a Subscriber List

## *MailChimp: Import Your List (cont.)*

- Final import screen appears.
- ❑ Select "***Subscribed***" option and click "***Import***"



The screenshot shows the MailChimp 'List Import' interface for a list named 'Omega Omega Alumni'. The header includes a user profile icon, the text 'List Import', and the list name. The main heading is 'You're all set to import!' followed by the instruction 'Please review your selections below before importing your data.' Below this, there are two sections with green checkmarks: 'Import method' set to 'File' and 'Importing 6 of 6 columns' with an 'Edit' button and a '> Details' link. The 'Categorize the imported subscribers as:' section has three radio button options: 'Subscribed' (selected) with the description 'Regular subscriber addresses', 'Unsubscribed' with 'Suppressed or blacklisted emails that will be unsubscribed from your list', and 'Cleaned' with 'Addresses that have bounced too many times and have been removed'. At the bottom, there is a dark bar with a '< Match' button and a blue 'Import' button.

# DESIGN A CAMPAIGN

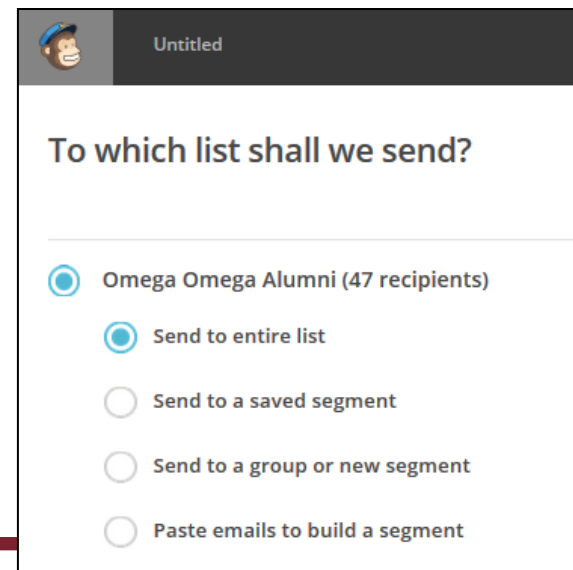
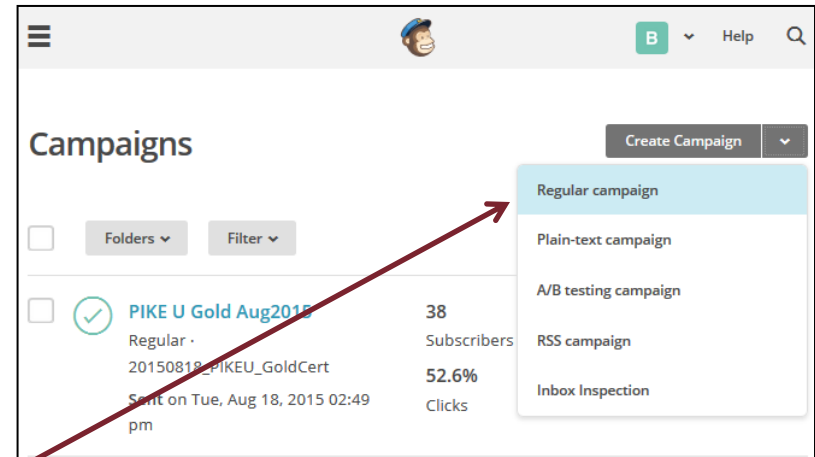
## 2. Design a Campaign Assemble Ingredients...

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- The message you send may be a mass email, newsletter, or e-blast; MailChimp calls this message a **“Campaign”**
- Have an idea of the images, text, and links you want to use in your message (Campaign)
- Use the **“Regular Campaign”** for most communications
  - (Plain-text, RSS-Driven, & A/B Testing are other options...)

## 2. Design a Campaign

- ❑ Navigate to the Campaigns page
- ❑ Click **“Create Campaign”** in upper-right corner to create a Regular Campaign
- ❑ Select your list
- ❑ Select **“Next Step”**



## 2. Design a Campaign

- Setup Step, Input your:
  - ❑ Email subject, From name, From email*(Here you can also select tracking tools and connect social media)*

Campaign info

Name your campaign

Internal use only. Ex: "Newsletter Test#4"

Email subject 150 characters remaining

[How do I write a good subject line?](#) • [Emoji support](#)

From name 88 characters remaining

Use something subscribers will instantly recognize, like your company name.

From email address

☐ Use Conversations to manage replies [Paid accounts c](#)

When enabled, we'll generate a special reply-to address "out of office" replies, then thread conversations into y display them in reports.

☒ Personalize the "To" field

Include the recipient's name in the message using [mer](#) and help avoid spam filters. For example, `*|FNAME|*` Smith" in the email instead of "To: bob@example.com help avoid spam filters.

Specify `*|MERGETAGS|*` for recipient name

`*|FNAME|*`

Tracking

☒ Track opens

Discover who opens your campaigns by tracking the number of times an invisible

☐ eCommerce360 link tracking

Track visitors to your website from your MailChimp ca

- ❑ When finished, click **"Next"** in the bottom progress bar.

## 2. Design a Campaign

### *PIKE Templates*

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#### ❑ Select a template

*Here is where you'll want to select a link below and add these templates to your account.*


- 3 PIKE templates are available for you to use and modify.
  - PIKE Newsletter with Photo
    - <http://pikes.co/NewsWithPhotoMC>
  - PIKE Simple Email
    - <http://pikes.co/SimpleMC>
  - PIKE Alumni Event
    - <http://pikes.co/AlumniEventMC>



## 2. Design a Campaign

### *Select a Template*

- ❑ Go to “**Saved Templates**”
- ❑ Select the PIKE template for your needs


Pike Mailchimp Demo
Custom - PIKE Simple Email, saved from 1 Column - Banded

## Change template


Currently selected: PIKE Simple Email

Basic
Themes
Saved Templates
Campaigns
Code Your Own

Folders ▾

Edited Date ▾


↑



PIKE Simple Email

Drag and drop

Last edited: Dec 17, 2015 02:26 pm



PIKE Alumni Event

Classic

Last edited: Nov 19, 2015 02:52 pm

## 2. Design a Campaign

### *Design Your Email*

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- The Design screen allows you to edit each “block” of the email.
- You can drag & drop from the right menu to add photo blocks, text blocks, and others.
- The body of the newsletter templates provides PIKE brand color codes.
- Headline styles are pre-loaded for your use as well

## 2. Design a Campaign *Design Page Appearance*

The Design page is where you craft your message.

The screenshot shows the Mailchimp design interface. At the top, there's a header with a monkey icon, 'Pike Mailchimp Demo', and buttons for 'Preview and Test', 'Save as Template', and 'Save And Exit'. Below the header, a preview area shows a campaign for 'THE PI KAPPA ALPHA FRATERNITY' with the word 'PIKE' in large red letters and the tagline 'Scholars, Leaders, Athletes, Gentlemen'. To the right of the preview is a 'Design' tab with a grid of content blocks: Text, Boxed Text, Divider, Image, Image Group, Image Card, Image + Caption, Social Share, and Social Follow. A tooltip instructs the user to drag blocks into the preview. At the bottom, a dark navigation bar contains links: '< Back', 'Recipients >', 'Setup >', 'Template >', 'Design >', 'Confirm', and 'Next >'.

Pike Mailchimp Demo

Preview and Test Save as Template Save And Exit

Use this area to offer a short preview of your email's content. [View this email in your browser](#)

THE PI KAPPA ALPHA FRATERNITY

**PIKE**

*Scholars, Leaders, Athletes, Gentlemen*

**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.

Keep in mind that 80% of your readers will open and read this on a smartphone. Use the "preview and test" function to check for presentation and readability.

Don't use black text on a garnet background.  
Do black on white (default), or for a callout box, use black text on old gold.

Content Design Comments

Drag any of the blocks below into the campaign preview on the left. Go ahead, try dragging a text block to the top of your campaign.  
[Skip these messages](#)

Text Boxed Text Divider

Image Image Group Image Card

Image + Caption Social Share Social Follow

< Back Recipients > Setup > Template > Design > Confirm Next >

## 2. Design a Campaign *Preview and Test*

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- ❑ Once your message is complete, select “**Next**”
- Before scrolling to the bottom and hitting “Send” use the “**Preview and Test**” function to see how your email will look on a desktop and phone.

## 2. Design a Campaign *Preview and Test*

The screenshot shows the Mailchimp 'Preview and Test' interface. At the top, a dark navigation bar contains a profile icon, the text 'Pike Mailchimp Demo', 'Custom - PIKE Simple Email, saved from 1 Column - Banded', and links for 'Help', 'Preview and Test' (with a dropdown arrow), and 'Save And Exit' (with a dropdown arrow). Below the navigation bar, the main content area has a heading 'You're all set to send!' and a subheading 'Review the feedback below before sending your campaign.' To the right of this heading is a dropdown menu with the following options: 'Enter preview mode' (1), 'Send a test email' (2), 'Push to MailChimp Mobile' (3), 'Run Inbox Inspection', and 'Social Cards'. Below the heading, there are four sections, each with a green checkmark icon and an 'Edit' button: 'List' (MailChimp will deliver this to the Omega Omega Alumni list. [\(47 recipients\)](#)), 'Subject line' ('Pike Newsletter Demo'), 'Replies' (All replies will go to Rober Smythe <media@pikes.org>.), and 'Tracking'. At the bottom of the main content area, there is a 'Schedule' button and a 'Send' button. In the bottom left corner, there is a preview window showing the email design. The preview window has a title bar with 'Pike Mailchimp Demo' and 'Preview mode'. It displays a desktop and a mobile view of the email. The desktop view shows the header 'THE PI KAPPA ALPHA FRATERNITY', the large word 'PIKE', the tagline 'Scholars, Leaders, Athletes, Gentlemen', and the main text 'Now it's time to design your email.' The mobile view shows the same content but with a different layout. A red arrow points from the 'Enter preview mode' option in the dropdown menu to the preview window.

**You're all set to send!**  
Review the feedback below before sending your campaign.

- List**  
MailChimp will deliver this to the Omega Omega Alumni list. [\(47 recipients\)](#)
- Subject line**  
"Pike Newsletter Demo"
- Replies**  
All replies will go to Rober Smythe <media@pikes.org>.
- Tracking**

**Preview Window:**

THE PI KAPPA ALPHA FRATERNITY  
**PIKE**  
*Scholars, Leaders, Athletes, Gentlemen*

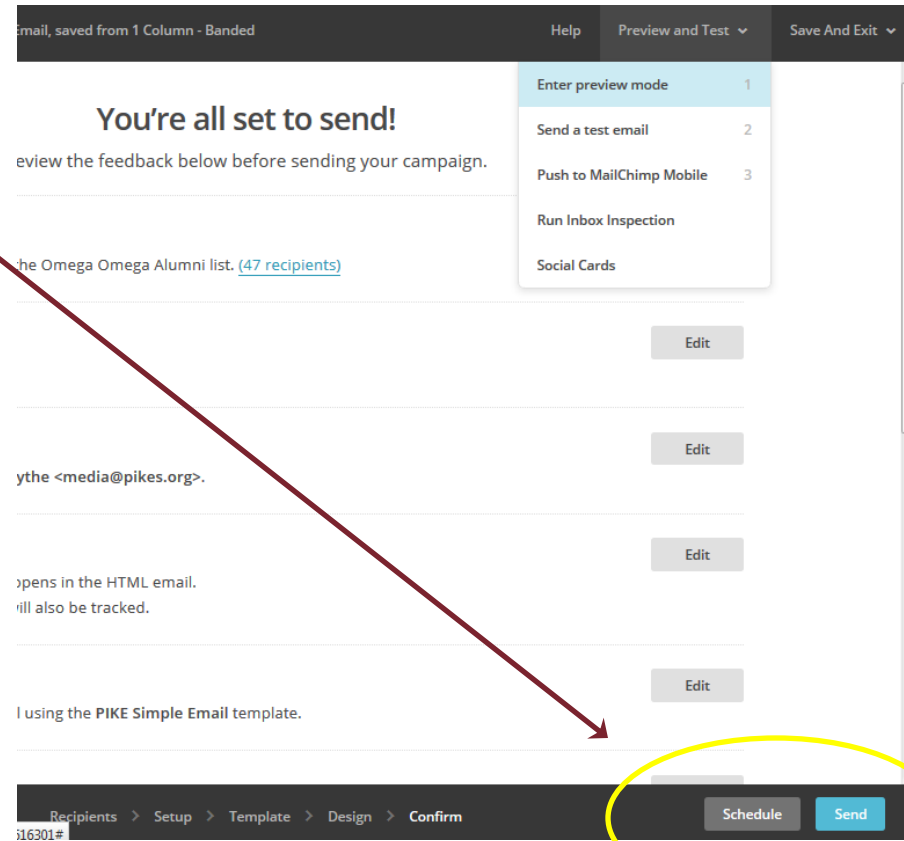
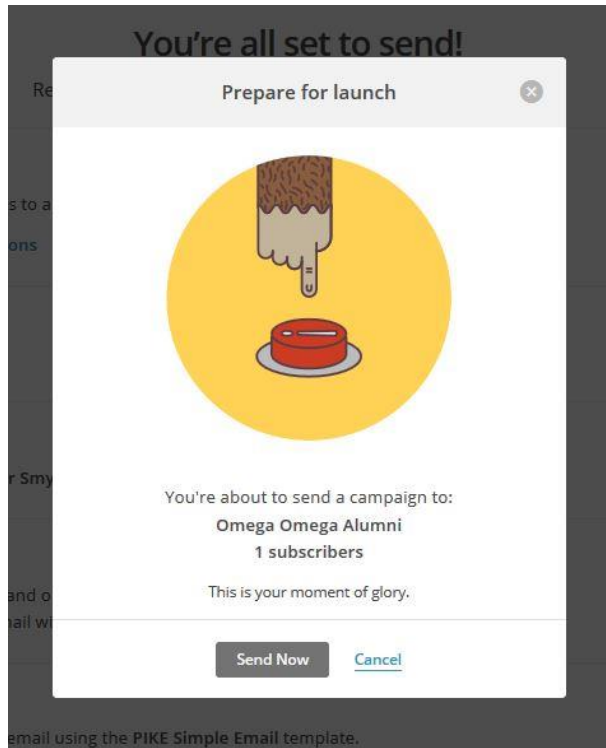
**Now it's time to design your email.**  
Now that you've selected a template, you'll define the layout of your email and give your content a place to live by adding, rearranging, and deleting content blocks.

Keep in mind that 80% of your readers will open and read this on a smartphone. Use the "preview and test" function to check for presentation and readability.

Don't use black text on a garnet background.  
Do black on white (default), or for a callout box, use black text on old gold.

## 2. Design a Campaign *Ready to Launch*

- ❑ Click **“Send”** or **“Schedule”**



Pop up window will announce your moment of glory – click **“Send”**

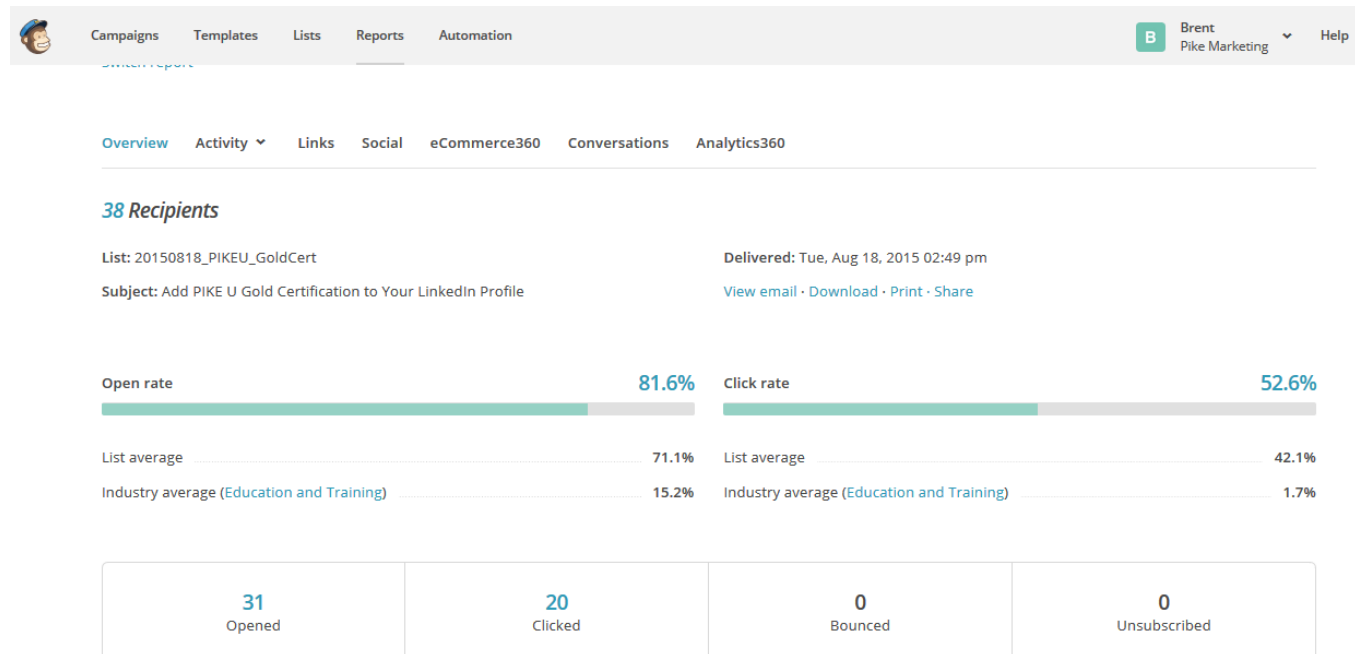
# **VIEW THE RESULTS**



# 3. View the Results

## *MailChimp Reports*

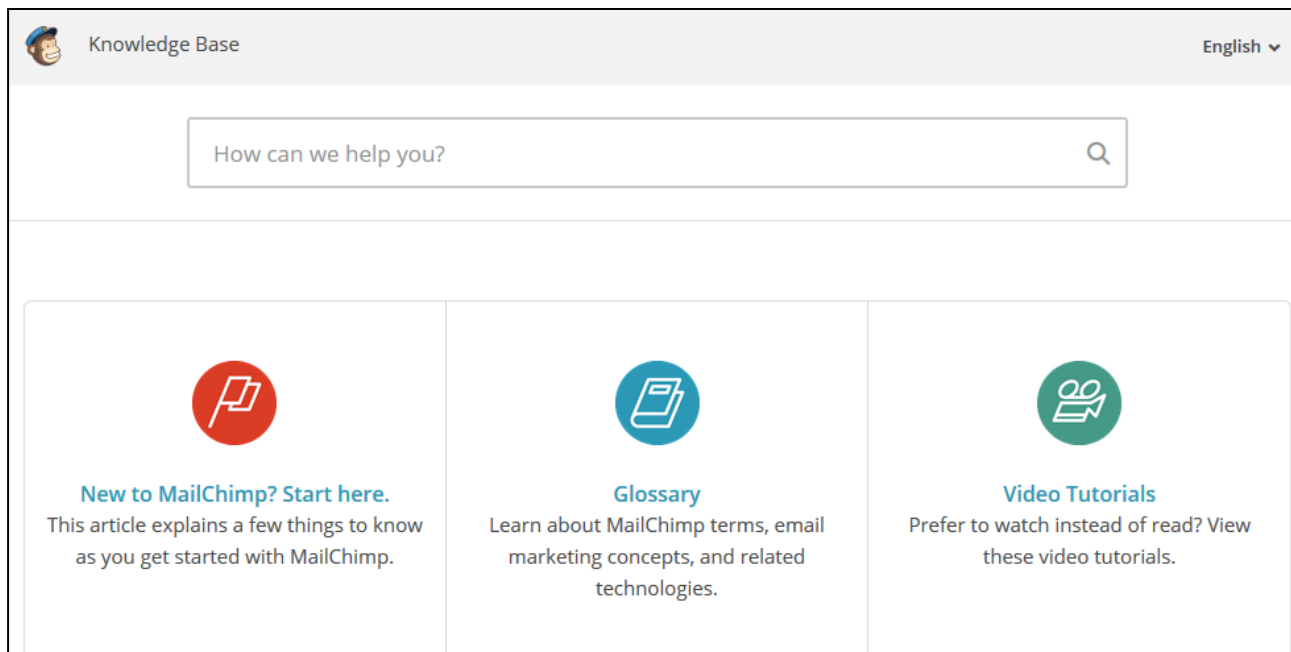
- Select “**Reports**” from top menu
- The “Overview” page provides Open rate, Click rate, Bounce (undelivered) rate, and Unsubscribed data.



# **ADDITIONAL RESOURCES**

# MailChimp Links

- Mailchimp has great tutorials to help you further develop and track your messages at <http://kb.mailchimp.com/>



# PIKE Brand Resources

- Official PIKE brand images and brand standards are available for download at Pikes.org here: <http://pikes.co/1Oztif1>



PI KAPPA ALPHA™  
*Scholars, Leaders, Athletes, Gentlemen*

ΠΚΑ®

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