

How to Use Mailchimp for Email Marketing: A Practical Workflow



- **Course covers:** account setup, healthy audience, campaign creation, welcome automation, and reports



- **Outcome:** repeatable, beginner-friendly workflow for newsletters, launches, or nurture sequences



- **Structure:** core concepts to execution, then targeting, automation, and measurement



- **Hands-on approach:** practical steps for small-business marketers and campaign coordinators



Core Mailchimp Concepts and Terminology



- Audience is your master contact database; use one primary audience with tags and segments.



- Tags are labels you assign for facts or behaviors; segments are smart, dynamic filters.



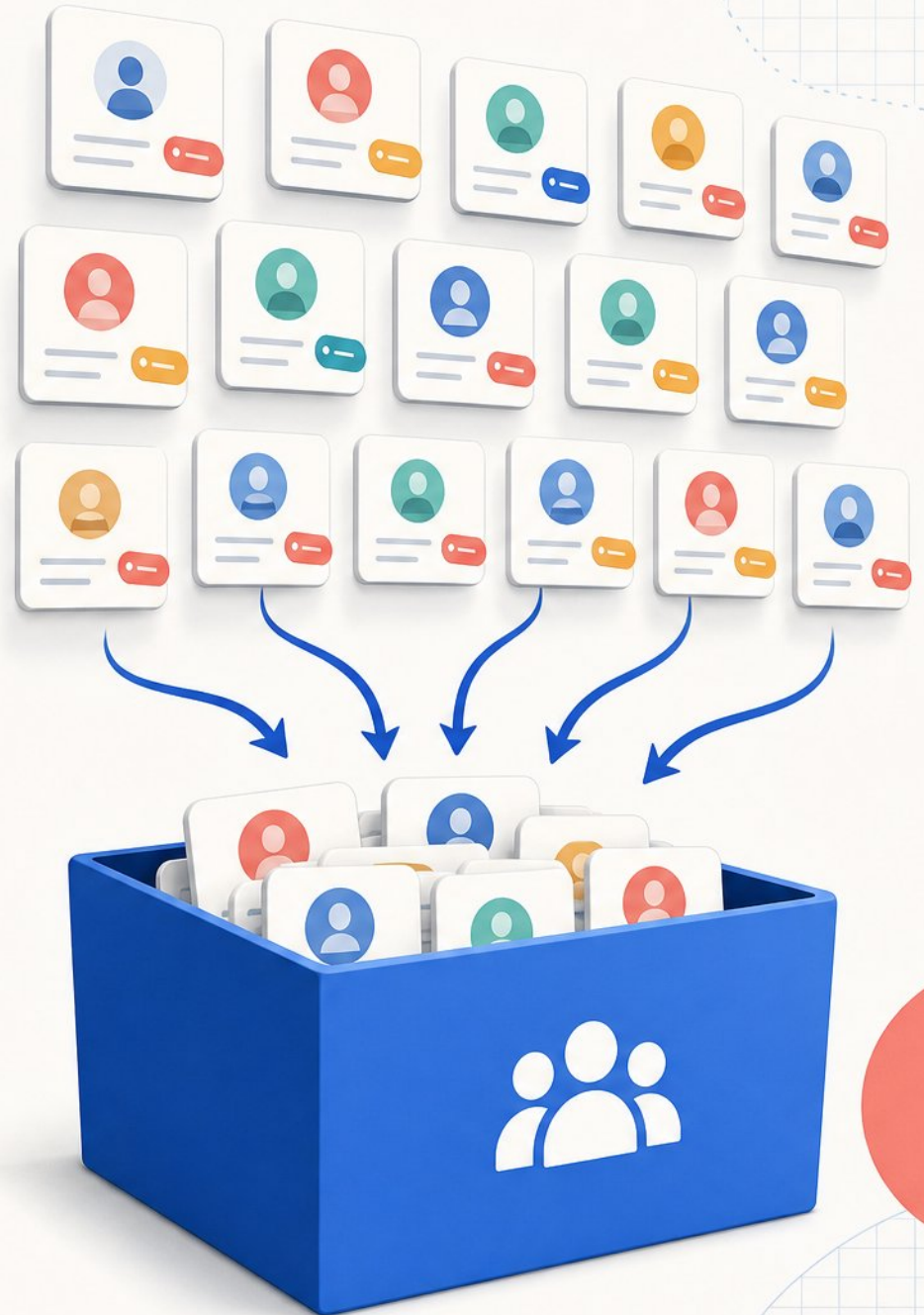
- Segment by engagements like opens, clicks, purchases, or signup source.



- Key metrics: open rate, click rate, bounce rate, and unsubscribe rate.

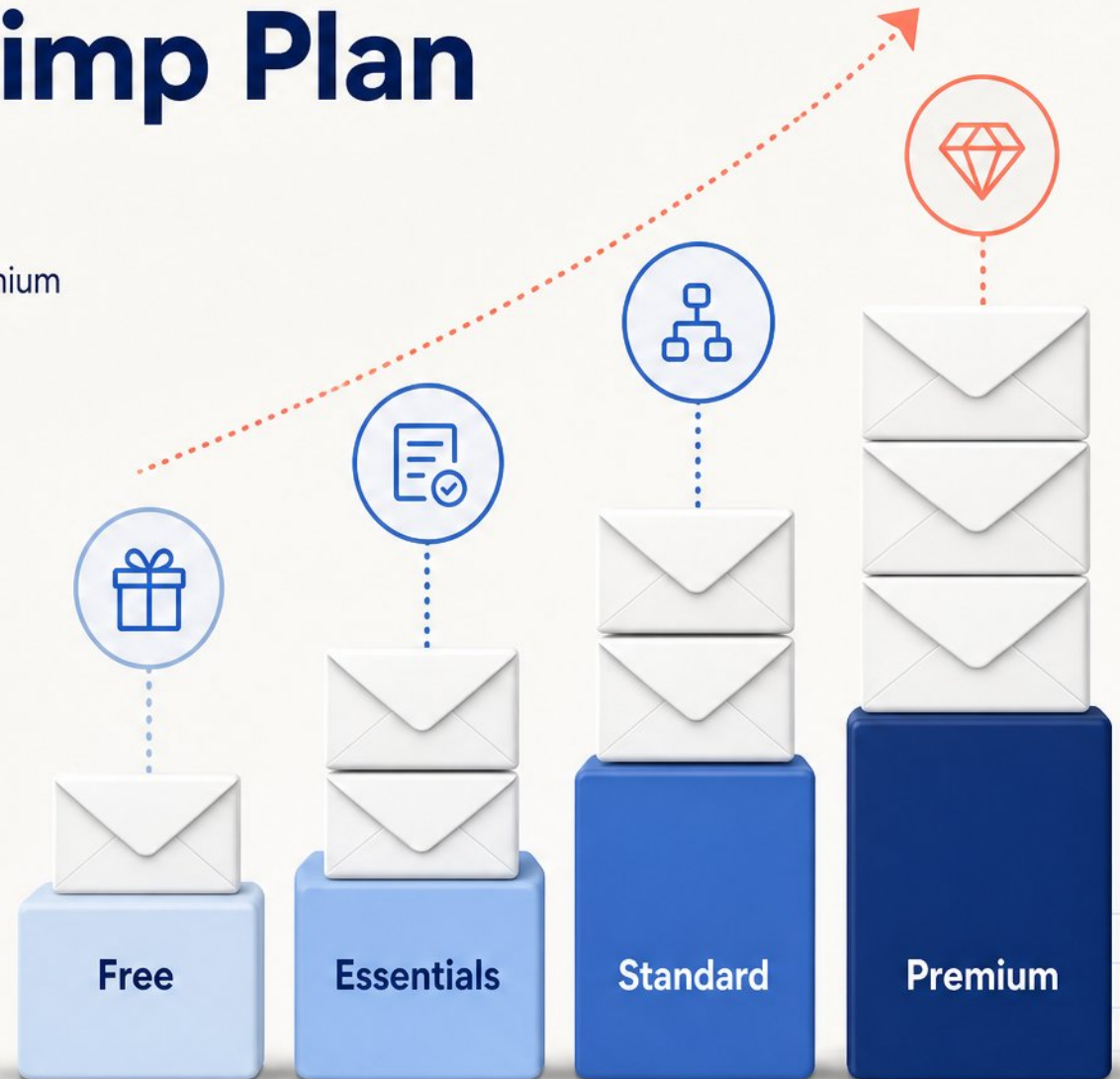


- Reports track sends, bounces, and complaints to measure performance.



Choosing the Right Mailchimp Plan

- Four tiers: Free, Essentials, Standard, and Premium
- Free plan: 250 contacts, 500 sends/month, daily limit
- Free tier lacks A/B testing, scheduling, and full automations
- Essentials adds A/B tests, scheduling, and basic automation
- Standard tier unlocks multi-step automation and advanced segments



Setting Up Your Account and Audience



- Configure sender details: from name, email, and reply-to address



- Add a physical address for legal compliance



- Choose single opt-in for speed or double opt-in for list quality



- Keep one primary audience and organize with tags or groups



- Import contacts via CSV, map fields, and select correct subscription status



Creating and Sharing a Signup Form



- Every audience includes a hosted signup form; customize its fields, message, and design first.



- Add an embedded form or popup form to your website.



- Enable reCAPTCHA to reduce fake signups.



- Use landing pages with signup blocks for lead magnets or social campaigns.

The image shows a web browser window with a blue header. Inside the browser, there's a signup form. At the top left of the form is a placeholder for a profile picture. To its right are three horizontal lines for text and a solid blue button. Below these is a dashed blue box containing a user icon, two input fields labeled 'First Name' and 'Email Address', a text area with the message 'I'd love to hear from you!', a checkbox labeled 'I'm not a robot' with a reCAPTCHA icon, and a solid blue button. To the right of the dashed box is a large blue shield with a white checkmark.

Building a Healthy Email List



Collect signups at high-intent moments: website, checkout, and social profiles



Offer a clear newsletter promise or a small lead magnet like a discount or guide



Keep signup forms short; ask only for name and email address



Use double opt-in to verify interest, reduce typos, and filter out fake addresses



Never buy or rent lists; avoid role-based addresses and unengaged imports



Designing and Sending Your First Campaign



- Complete email checklist: recipients, from details, subject, preview text, send time, content.



- Use a simple one-column template with a headline, short body, and one clear CTA.



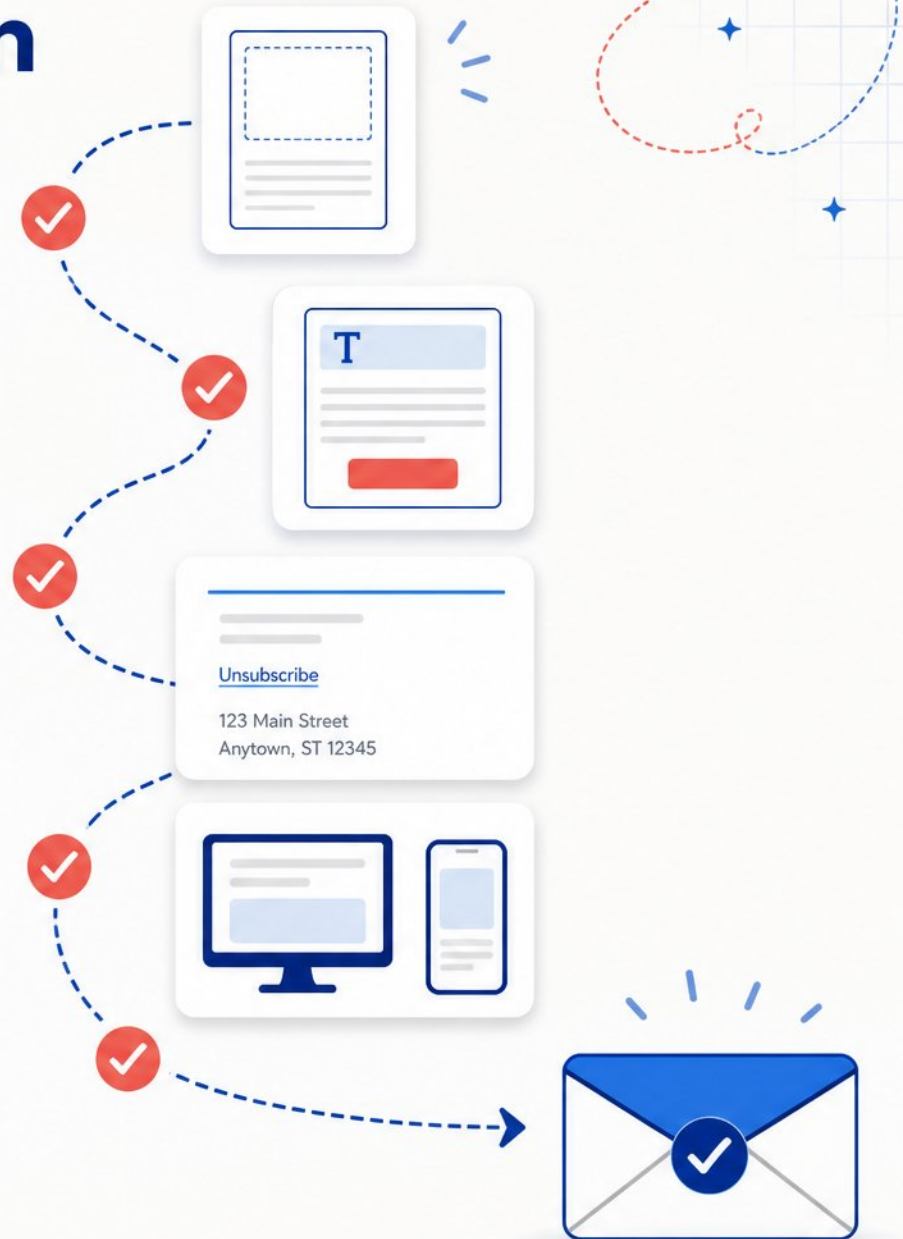
- Include a footer with unsubscribe link and physical address.



- Preview on desktop and mobile; send test emails and check links.



- Schedule or send now; review the pre-send checklist first.



Using Tags to Organize Contacts



- Tags are internal labels, like "Webinar Attendee" or "VIP"



- Add them manually, via forms, imports, or automation



- Send campaigns directly to a tag



- Combine tags with other criteria to build segments



- Naming consistency keeps your audience organized



Using Segments to Target the Right People



- Dynamic filters that update as contact data changes



- Based on tags, engagement, location, or purchase activity



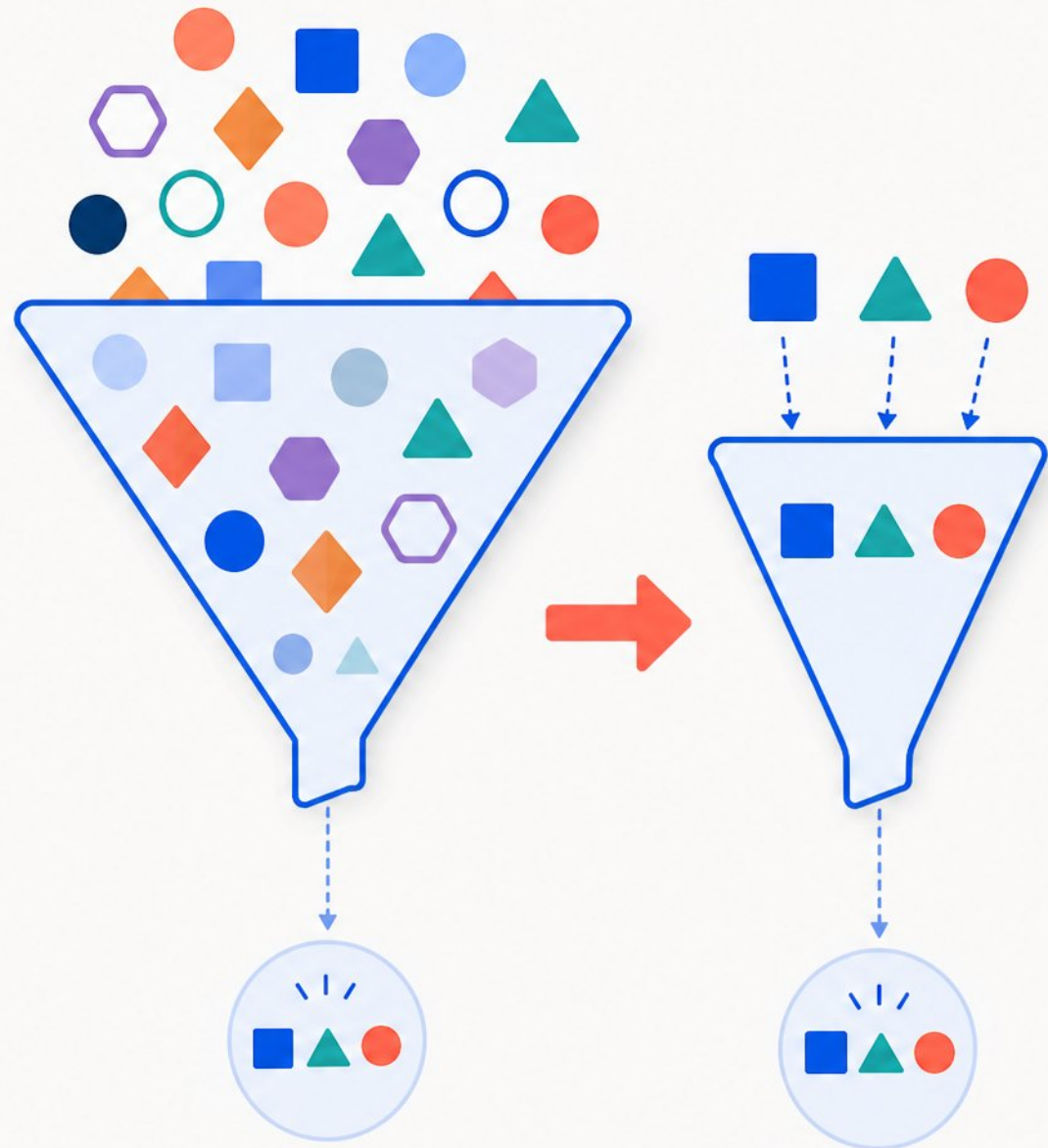
- Start with pre-built engagement and growth segments



- Save custom segments for repeated targeting



- Send to segments, not all contacts, for better results



Setting Up a Reusable Welcome Automation



- Choose a goal: welcome, abandoned cart, or post-purchase email



- Add a trigger: new subscriber joins your audience



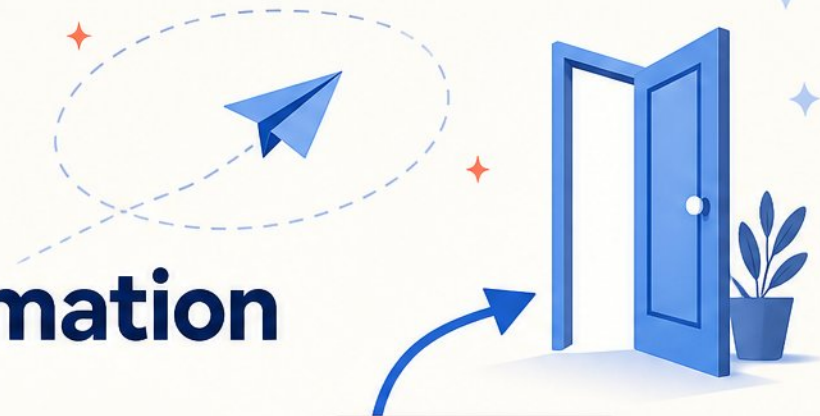
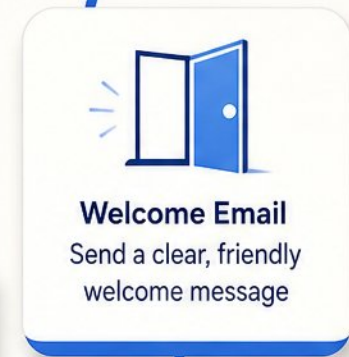
- Set a timing delay to make the email feel more personal



- Design one clear email with a strong welcome message



- Test your automation before activating it



Practical Workflow Tactics Worth Knowing



- Run A/B tests on one variable: subject line, From name, content, or send time



- Let Mailchimp auto-send the winning variation based on clicks or opens



- Use UTM tags: utm_source, utm_medium, utm_campaign for Google Analytics



- Save tested emails as reusable brand templates



- Replicate campaigns to resend to non-openers





Reading Reports and Improving Results



- Review campaign reports for opens, clicks, bounces, and unsubscribes



- Use the click map to compare link performance on desktop and mobile



- Turn metrics into action: refine subject lines, send times, or segments



- Test one variable at a time to isolate what drives better engagement



Open



Click



Bounce



Unsubscribe



Deliverability and Compliance Essentials



- Send only to contacts who gave permission



- Use double opt-in to reduce spam complaints



- Authenticate your sending domain



- Avoid free-address sender emails like @gmail.com



- Keep required unsubscribe link and physical address



- Monitor bounces, complaints, and clean inactive subscribers regularly



Recap and Next Steps



- Core workflow: clean audience, simple list, regular campaigns, smart segments, welcome automation, report review



- Next step: send test email to small group, then schedule full send



- Avoid: bought lists, missing permission, vague CTAs, ignoring deliverability, over-emailing



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