London Region of U3As

SHARED PRACTICE GUIDE 016 – USING MAILCHIMP
Rev 02 - 02

1. Introduction

Shared practice guides (SPG) are a vehicle to share knowledge between the u3as in the London area. They are created by collating knowledge and experiences from those u3as. They are only a guide – what worked for one u3a might not work for your u3a. If in your experience something is wrong or you disagree with something, please write in to allow an update to be created and published. It's hoped these Guides will grow over time with more shared experiences.

2. Scope

The Mailchimp software offers many capabilities. This SPG is only about its ability to issue mass email to your u3a's membership (or certain parts of it).

If your u3a (or Network) uses Beacon already for this purpose you may consider you don't need Mailchimp. There are some additional benefits of Mailchimp versus Beacon but also some downsides. These are explained in the following Sections.

3. Background

Mailchimp allows script (ie code) to be included directly into an email format unlike some basic email systems (eg Send Grid, the system used by Beacon) therefore the 'look' of emails issued is far more attractive. Newsletter content can be included directly into the email (rather than through attachments or html links.

4. Learnings

In time it is expected that, through use, there will develop further learnings, leading to updates of this SPG.

5. Functions

5.1. Definitions and Limits

Mailchimp talks about 'campaigns' as it originated as a marketing tool. A campaign is just an email issue.

The 'Audience' is just the distribution list, the addresses, for a particular mail shot.

The Mailchimp free account holds an audience of different email addresses for up to 2000. It has the ability to separate groups into 'segments' and 'tags' (ie sub-groups of your full 'audience').

5.2. Address Lists

If you are using Mailchimp to issue eg a Newsletter to your full membership, then you may want to set up a specific Audience for that specific purpose. If you use Beacon as your member database, you can get an up-to-date spreadsheet of email addresses by clicking the right function button on the Members List page and export it in CSV format.

It is unlikely that Mailchimp's list of members' email addresses will be the master copy, and therefore it needs to be regularly updated from the u3a's master list on your Membership System (eg Beacon). To maintain your full 'audience' list you have the options of:

- Separate maintenance – as new members are added to your Membership Systems then also, in parallel, update your audience in Mailchimp. This is a duplication of effort but if you don't get many new members through the year this might be seen as the easiest option.

- Regular imports – regularly (ie prior to each Newsletter issue) import a full new membership listing from your Membership System replacing the last ones (see comment below).
- Mixed methods – you might decide that, eg after each year's renewals period, you do a clean import to start the new year (to capture those members that have left and new members joining) and thereafter only adjusting by any new members joining during the year

An easy way for regularly importing a full new membership list is to simply create a new list (a new "Audience" in Mailchimp) before sending out the new email shot. However as the free version of Mailchimp now only allows you to have one Audience, you must first delete the existing Audience and then create a new empty Audience before importing a list of your members' email addresses.

Generally the export function from Membership Systems (including Beacon) downloads too many columns for Mailchimp's needs. You can manually cut out the columns (fields) not required for Mailchimp import. Or u3a has developed a 'macro' that you can run which will convert format from Beacon export to Mailchimp import automatically.

When importing data into Mailchimp it must be converted to CVS format. CVS is a file 'association' – you can save for example an MS Excel file into a CVS format. If you are not familiar with how to do this, we suggest you Google or YouTube the subject for further guidance.

Beacon will output two rows for couples who share an address, but you can use a simple Excel Macro which finds such rows, say for John and Jane Smith. It deletes one of the rows and changes the first name of the other to, "John and Jane". It doesn't bother about the surname if your emails all start "Dear X" where X is the Mailchimp token for First Name. It also changes the column titles to match what Mailchimp expects!.

For mailing addresses that are used frequently (eg to Group Coordinators), create and add them as "Segments" e.g. Chairs, Secretaries, etc. Best practice is to combine Segments so that an email isn't sent to the same person in 2 or more different Audiences. For emails that are a one-off, use "tag".

5.3.   Process

See Appendix 1 for the steps or processes to go through to create and issue a Newsletter.

Initially to create a template (or a fist issue) there are many format and layout options available. The structure of Mailchimp is such that you work in 'blocks'. A block could be just a section header, or a photo, or a section of text, or a section break (a line). You can select a block that provides for example a single column or double column format. You can just trial each to determine which looks better to you. Generally a mixture will be selected to give variety and break up the visual look of a Newsletter.

5.4.   Content Studio

The two main uses of Content Studio are for inserting pictures and for attaching documents. You can upload pictures from your own computer or from the internet and this is one of the best features of Mailchimp. It is important to check that all images are copyright free and it is safest to use collections like Wikimedia Commons or Flickr Commons or Google Advanced Search.

There is a quirky feature to be aware of when uploading pictures. If you crop the picture into a new shape, the first time the picture's dimensions appear within the document are often squashed for some reason. Just go back and do it again and for some reason the second time it comes up correct.

In order to link to a form or other file you have to upload the file to the Content Studio. You can access the Content Studio from the campaign menu:

Click on it to open the Studio. In the top right corner there is an UPLOAD button.

Click on the UPLOAD and browse to the file on your computer, normally a PDF but it could be Word, jpeg, etc. Select the file and upload it. Set the Content to Newest first so that you can find the file again - this will make the new file top left. (This is because the thumbnails don't always show up,)

Then return to the content of the campaign that you are sending,

Type your text, eg:

"We are doing a fantastic job of running your u3a so we want you to renew. You can download the new membership form here."

Highlight the relevant text, eg:

[You can download the new membership form here](#) and click on the link icon - just after the underline icon. It looks like a chain link. When you click on the Link icon it will open a dialogue box saying Link to Web address. Press the arrow alongside this and select File. Then the Content Studio will open again and you select the Membership file.

The link is now made and you can continue with the rest of your text.

Use the block's Settings tab to change the caption position and set other styles.

One can put material into the Content Studio and use it within Mailchimp but you can also copy the document Mailchimp URL and use that in other emails, newsletters or indeed as a link on a website. In fact it does not matter if you never use it as an issue/ campaign through Mailchimp.

5.5. Methods

Best practice for hyperlinking files is for them to be in PDF format. WORD brings up the link as a little box in the corner of the page, PDF opens straight up. PowerPoint has to be converted to PDF.

It is advisable to create a template for different members that might be using it (eg one coming from the Secretary, a different one coming from the Chair). This means that the social media links and the sign off signature do not have to be repeated every time that person issues a campaign. Once the template is set up then it simply needs to be "replicated", which gives you a copy to edit and leaves the template as it was. This is much cleaner and less time consuming than redoing the social media and sign off every time. These templates are left in draft to be edited at any time.

Editing of the text takes place on the right of the page, showing what it looks like on the left. The font style and size and colour can be edited on the tool bar as a normal email. In the setting there is an option to change the line spacing. Remember when changing the colour of the text that if there are any links they need to remain in blue. Best practice is to highlight the text before the link and change the colour, then again after the link.

Note also: the blue in Mailchimp is not very saturated so you might want to change the text for links into bold type and change the colour (or the shade of blue).

Best practice is to send a "test" to yourself to check format and possibly to a few others to check content. Very often the final published format this looks different to that on Mailchimp. Helvetica 20 changes to Helvetica 13.5 and the spacing often changes. By looking at the test you can then alter the original and continue to send a test until you are happy it looks as required. If you are just the editor, then you may have to forward this final version to whoever asked for the email to go out. Always wait for the OK before sending out; you are then not responsible if there is a mistake!

5.6. Tracking

Shortly after a campaign is sent the activity log can be checked. This will show any email addresses that have bounced. Best practice is to see if there is an obvious typo in the address and then re-send

it from your own email, rather than creating a duplicate from the original just to send to one person. With an incorrect email address, permanently delete it: this will reduce the number in the audience.

It is also best practice to check after each campaign that someone hasn't "accidently" unsubscribed. This often happens if the member is no longer interested in the particular topic and thinks they are unsubscribing from just that. In fact they are doing so from any further communication on Mailchimp. Best practice is to contact that person and check if it was by accident and if so then you can send a "re-subscribe" message to them through Mailchimp. They are usually very grateful for this caring service.

In the activity log you can also see "opened" or "not opened". Best practice would be to keep a spreadsheet of "not opened" to see if these members are re-occurring culprits. They can then be contacted directly. Should they say they haven't received the email, then do a "test" sent to them from Mailchimp and ask them to let you know if and when received. Further investigation/procedure might then be required.

It is worth leaving the checking for a few days after sending an email for bounces (they may take a couple of days to bounce) and for unsubscribes (they may not happen until the reader gets round to opening the email).

There is a GDPR question about whether tracking "opens" and "clicks on links in the email" is permissible. Our view is that it is permitted as part of normal membership management but you can if you want explicitly state in your u3a's privacy policy that such tracking is conducted on emails sent to members, and that it is used purely for statistical analysis of the effectiveness of the emails sent.

One should bear in mind that "opened" statistics in Mailchimp, or other similar emailing services, rely on tracking links to invisible pixel images added to the email and can't accurately tell whether a person has actually opened the email. One should also be aware that when Mailchimp adds tracking to a weblink in the email it changes the link's address. This is an issue for two reasons.

First, if the email author puts a textual copy of the link as the clickable text, the reader's email software may say "Beware: the actual link is different from the text, and may be untrustworthy", or if repeated in other emails it may even cause the email software to become suspicious about the sender and block all emails from the sender.

Second, this modified link will be copied to anyone that forwards the email to another recipient. This is a typical problem when forwarding emails from national or regional u3a senders.

5.7.   Delete versus Permanently Delete

Best practice would be to "archive" a member that might temporarily not be interested. They can then be re-instated easily. Permanently delete is very difficult (but not impossible) to resurrect.

Data protection issues: we would recommend that no-one should be on the system beyond a year from last activity. Therefore you should regularly scroll through the audience to see dates of activity. It is time consuming so therefore it's suggested that after the initial creation of an audience wait a year and create another Mailchimp account. Then the audience in the first one can be completely deleted after waiting a year from the last campaign sent. This ensures data protection and empties that account, ready to use after the 2nd one is a year old.

Or, if you are updating your audience listing to your latest membership (via csv file import), it is again best to do this in a new account, then you can delete / clean out all addresses in the previous account (ready for the next time you are importing a membership listing).

When archiving or deleting an alias address change it slightly, e.g. from chair@ to chair1@; this is because the system only allows one unique email address whether it's live or "asleep". So if chair@

is still in the system you can't assign this to someone else; therefore it needs to be freed up, so change it.

5.8.   Additional Features

It's a nice touch to add the 'Personalise' function which, by use of 'tokens' will, for example, start your Newsletter off by saying Dear Fred, or Dear Mary. You'll find this option under 'Audience'. See Appendix 1 for further information.

There is also a preview function where you can, for example, explain what this issue is about, eg 'Welcome to your Monthly Newsletter for …u3a.. We hope you will read this and enjoy.'

Analytics are available within Mailchimp to tell you for example, how many recipients actually opened (& read) your Newsletter. O how many actually clicked on embedded links.

You can make any bit of text carry a hyperlink ('click HERE for your free voucher') but you can add 'Buttons' where the hyperlink is part of a more visible 'button' (which you can format in many ways). Thee also provide standard buttons available for carrying links to your various social media site (eg Facebook).

While you are creating (or editing) a 'Campaign' at the top left, there a couple of menu options. Under' Preview' you can either have a look at your live version to see how the format is looking or you can send it to yourself as a test.

6.   Reference Material

Apart from the Mailchimp's own tutorials and support material there are many helpful YouTube videos on Mailchimp.

7.   Contact Point

Contact Rikki Wallman (at Mailchimpadvisor.lru3a@gmail.com) or Derek Harwood (at webmaster.londonregionu3a@gmail.com) for any further information.

APPENDIX 1 – Mailchimp Tutorial Notes (an example)

Once you're logged on you will see a welcome (Home) screen like this:
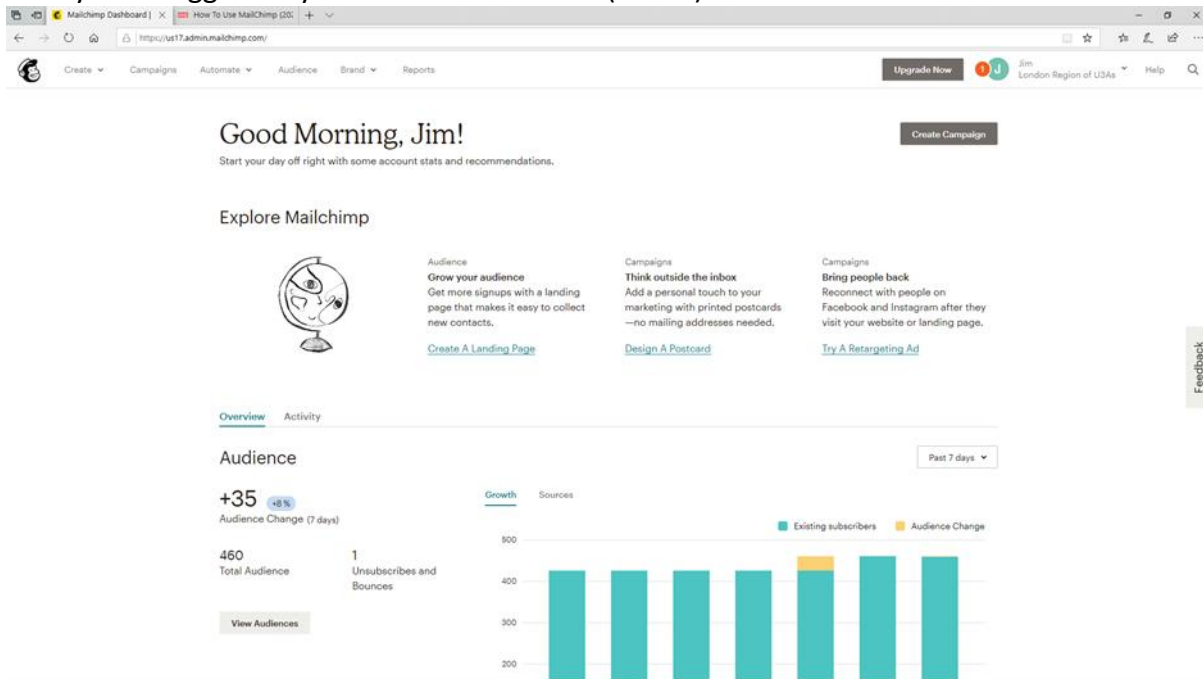
Remember that Mailchimp is an email Marketing tool so it refers to "Campaigns", "Audience", and "Customers".

A free account will allow an audience size 2,000 and allow 12,000 sends in a year.

From the Home page there are various (left hand side) sidebar options:

Create / Audience / Campaigns / Automate / Website / Content Suite / Integrations / Search.

The key functions that are used are Campaigns and Audience.

Create: this would be where you would start to form something new, like a new newsletter or a new advertising campaign. But generally rather than start from scratch we can copy the last one and then modify (see next section). From this page you can click on the little icon to 'Replicate': this will create a copy of the last issued 'Campaign' and then you can edit that.

Audience: this is where distribution lists are visible. Once on this page, if you click on 'View Audiences' the dropdown menu shows what has been set up. For example:
• Master List (all members)
• All Trustees / Committee
• Test to Self Only

The 'All Trustees' list needs to be maintained to include all Trustees/ current committee members. The Master List should also be kept up to date with all new members. 'Subscribers' can unsubscribe at any stage from this list. You can't disable this function – even although you might not want to allow your members NOT to receive your newsletter. An automated email will advise the Secretary of any leavers as they occur. So this does allow you to ask – did they really mean to unsubscribe and to describe the benefits to them in receiving ongoing Newsletter issues.

Campaigns: If you click on Campaign there is a dropdown menu. There seems no real difference between 'All Campaigns' and 'email templates. Each offers the same functionality and format options. It might be that you want to create a base 'template', a master which could always be referred back to.
It is easiest to follow the same format for consistency of look and feel as the last Newsletter. However, to create a new campaign you have 3 options (either copying from a master 'email template', copying from the last issued Newsletter or starting from scratch).
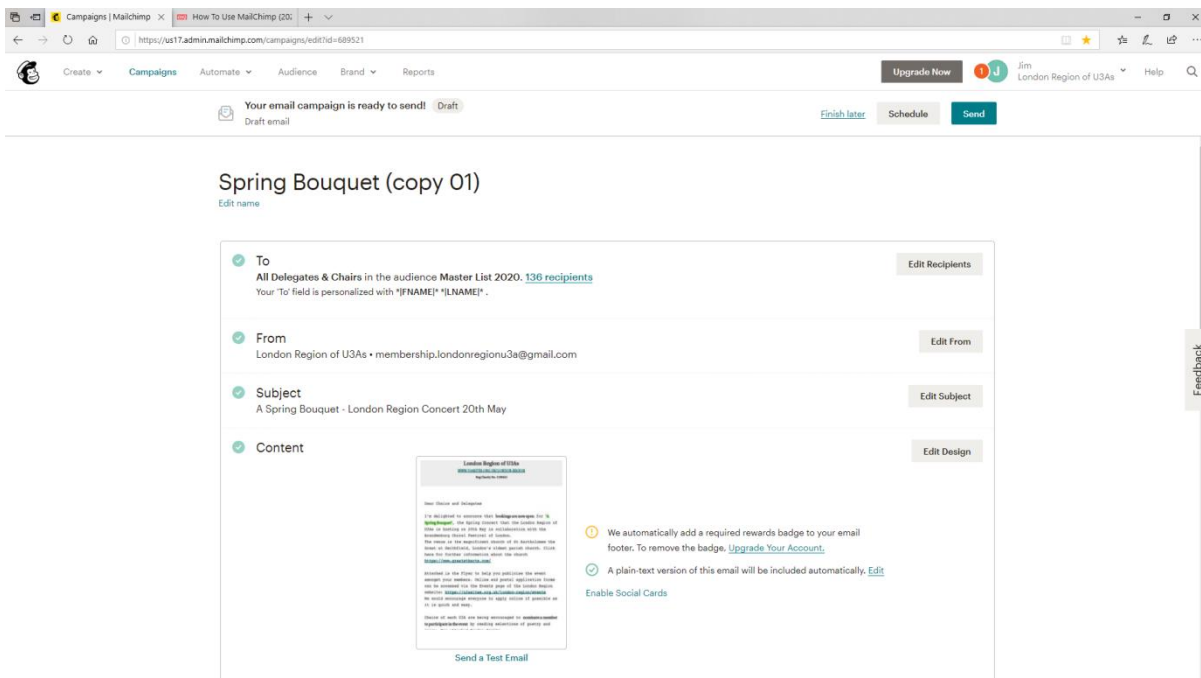
On the Campaigns page (or the email Template page) you can see the recent items issued there. Scroll down to the last newsletter and you will see, in the dropdown box, a link to "Replicate". Click this and you will be shown a list of all the elements that make up the email.

There are now 5 clear steps you need to take with the header and the 4 points below.
Header: The main header is for our internal purposes only to distinguish one message from another and can be a shorthand version of the full title that the subscribers will see.
Click "Edit name" below the title and insert a new title.

To: You will see who the last message was sent to and if this is correct for your message then don't change it. If you need to send your new message to a different audience then click on "Edit Recipients". Don't change the Master List on the left, but on the right you can change the "Segment or Tag". This is what Mailchimp calls a particular section of the Master List.

From: The template is set up for any replies to our mass emails to go to …………………….. email address. [run on] Change this if you particularly want replies to go elsewhere. Click on "Edit From".

Subject: This is the subject field of a normal email and it's what our audience will see as the title of the email. Click "Edit Subject" and put in your own title.

Content: Although it says "Edit Design" on the right, this is where you edit the Content. Click on "Edit Design". Click on the body of the email on the left-hand side and you will then see an editable version of it on the right-hand side.
Click on the right-hand side and you can now select all or part of the previous message and delete it. Type in or paste in your new message.

You can personalise the message using first names or first and second names if you wish. To do this you need to type:
• Dear *|FNAME|*
• Dear *|FNAME|* *|LNAME|*
Please note the use of vertical lines and not the square bracket symbol. Not always easy to find on the keyboard so might be best to copy and paste this text from these notes.

Before you start creating the text it is worth getting the photos together that you are going to use (with their associated titles). Best to create a specific Folder for each newsletter. These can be uploaded into Mailchimp. In the draft Newsletter, go to add image, then it will allow you to upload a Folder of images.

Once you've got a draft ready it is advisable to send a test to yourself (and some additional trustees if you want) prior to sending the Newsletter to the full list, to ensure all links are correct etc. Once you are happy and ready to send it out, select e.g. Master List and the email with the Newsletter will be sent to the full list of subscribers.
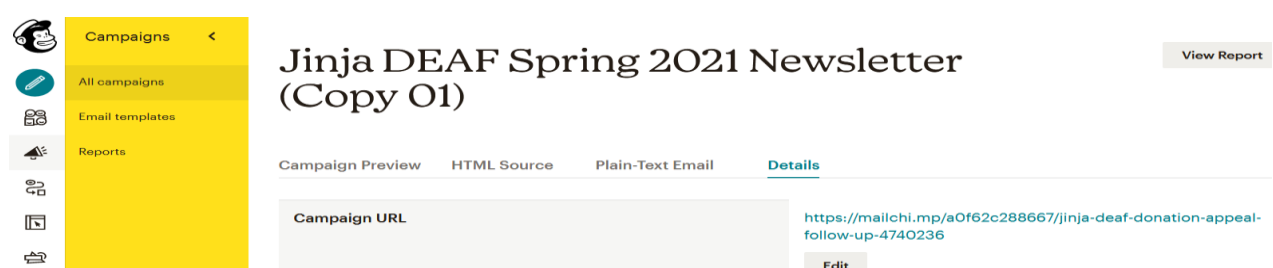
Reports can be viewed either here: https://us5.admin.Mailchimp.com/reports/ or by going to the campaign dashboard, rolling over the individual email title and clicking View report.

Once a campaign is sent, you can send out top level statistics to the trustees (committee) for information. You may also then want to add a link to the Newsletter from your website.
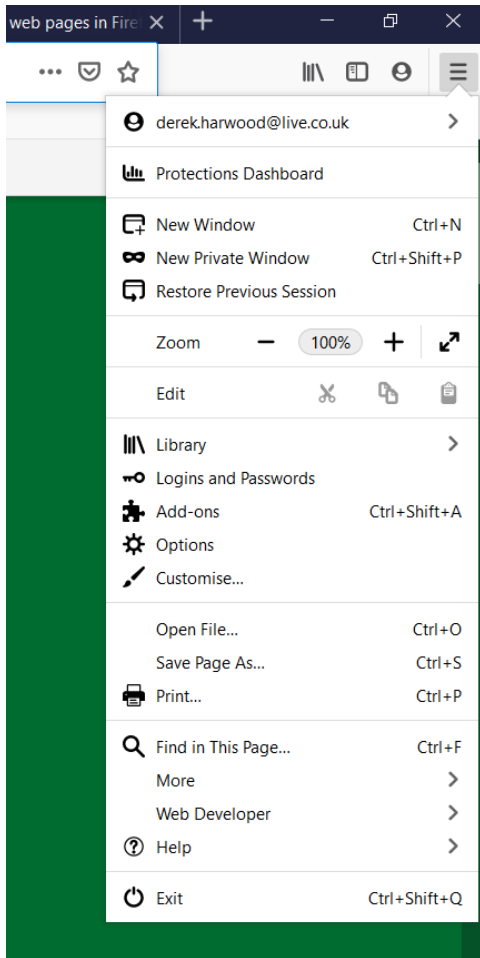
Automate: again, not a function we use (yet).

Content Suite: photographs are stored here. If you want to add a photo, e.g. to a Newsletter, best to ensure it's loaded into Content Suite first.

To create a PDF version or a URL link for the website: Click on the particular Campaign. This will take you to e.g.:

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Then under 'Details' if you click on the URL a browser version will appear. In the browser (e.g. Firefox) go to the print option of the menu:

Click on Print. Under the 'Destination' options select Save to PDF, and save the file.

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