Author Platform Rocket

Email Marketing for Authors: How To Transform Subscribers Into Buyers

Handout for Session 6: How to Setup Your Personal Reader Campaign (MailChimp Demo)

This handout provides the step-by-step instructions and is designed to be used with the webinar taught on 8/16/2016.

I recommend that before you go into Automation right away, you should set up a template for the look and feel of your newsletters. This will make creating your automation that much easier!

Starting Your Template

1. Login to your MailChimp account
2. Click TEMPLATES at the top of the screen to get to the templates area
3. Click CREATE TEMPLATE button near the top-right to start creating a new template of your own
4. On the next page, you should see three tabs/categories just above the large number of layout options.
    a. BASIC – This template category gives you blank template with various layouts. I DO NOT recommend you use a layout with multiple columns as you must keep in mind that almost half of your subscribers will be viewing your newsletters on mobile devices. As such, I highly recommend you click "1 COLUMN"
    b. THEMES – These are the templates MailChimp has pre-prepared. There are lots of colorful and inspirational layouts. Just make sure you choose a design with a single column layout to ensure your newsletters are mobile friendly.
    c. CODE YOUR OWN – If you have your own HTML formatting you'd like to use, then this is where you would use it. Some mailing list services allow you to export an HTML version of your template, so this can be useful if you've created a template format you like in another mailing list service. HOWEVER, as I understand it, once you've done your template in code, it will take coding to make changes. MailChimps drag-and-drop editor is so much easier to use. I would avoid this for now until you're more familiar with MailChimp's formatting.
5. For this exercise and the steps below, I recommend you choose 1 Column under the Basic category. You will be then taken to the Drag-and-Drop Editor screen where

you can modify the layout and basic content. Remember, you're creating the TEMPLATE here. I recommend you only include the information you know you'll be having in every message. The following steps

Modifying Your Header

The top section is your header, where you can put the graphic image you may have created in Canva. The header should have your author name in nice big letters so when it is seen on a mobile screen, it can still be read.

1. To change the header image, click on the placeholder on the left-side of the editor and the right-side panel will change, allowing you to browse for your header image.
    a. If you already have one uploaded, which you may have done for a previous newsletter, then choose it from your library of images.
    b. If not, click the UPLOAD button and find it on your computer.
2. Once you've selected your image, it should take you back to the editor. At the top of the right-side panel, you should see a wide SETTINGS button. Click that.
3. Under "Margins" tick the checkbox next to "Edge to Edge" (if you want your header image to fill the header space – recommended)
4. Now click the wide CONTENT button at the top of the right-side panel to go back to your header image properties.
5. Just below the image description, click on LINK and set your own website or URL for newsletter signup.
    a. **TIP**: Use a vanity URL (Pretty Links plugin for WordPress websites or BookLinker.net) short link is highly recommended in case your newsletter signup URL ever changes in the future. This is to ensure old emails will always go to the current signup link for your newsletter. These can be linked to any link, the same way ShortURL or Bit.ly work.
6. Click "Save & Close" button for the header block.

Setting up your Body Text

1. Highlight the first line of text - the Header - and change it to "Heading 1".
2. Hit ENTER and type "Heading 2"
3. Hit ENTER and type "Heading 3"
4. Highlight "Heading 2" and change the style of the text to "Heading 2"
5. Highlight "Heading 3" and change the style of the text to "Heading 3"
6. Click "Save & Close" button

Setting your overall template settings & style

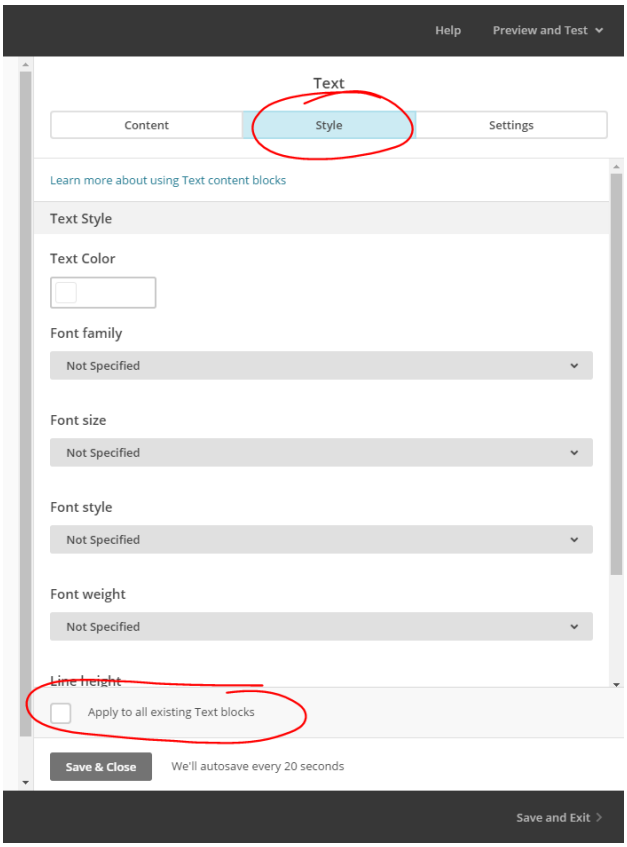
Once you've done the above, you should be seeing the drag-and-drop icons where you're able to drag the icons on the right over to the left side, which will insert the various design elements. There should be two buttons at the top: CONTENT and DESIGN.

1. Click on DESIGN

2. Click on PAGE – this will allow you to change the design elements of the overall page as it pertains to the background as well as the setting for all your headers (e.g., Heading 1, Heading 2, etc.). Play around with the settings as you wish, <u>but I personally have only changed the following</u> as demonstrated in the webinar. You, of course, can change it to whatever suits your style and themes that might match your website:
    a. Background: Click on #FAFAFA and it should open a color pallet.
       MINE: #050e17
    b. Heading 1:
        i. Font color: #660000
        ii. Font Family: Georgia
        iii. Font Size: 22px
    c. Heading 2:
        i. Font Family: Georgia
        ii. Font Size: 18px
    d. Heading 3:
        i. Font Family: Georgia
        ii. Font Size: 16px
        iii. Font Style: Italic
    e. Heading 4: I use this for the Q&A in my footer so I don't have to mess with too many font colors and still see what I've written.
        i. Font Size: 12px
        ii. Font Color: #FFFF99 (pale yellow)
        iii. Line Height: Double Space
3. I personally have elected to keep the defaults for PREHEADER
4. On HEADER, I've only changed two things:
    a. Made padding top and bottom 0px
    b. Changed header link to standard blue: #0000cd
5. For BODY TEXT, I've made the following changes:
    a. Background should be #FFFFFF
    b. Removed Border Bottom
    c. Changed padding bottom to 0px
    d. Font size should be 14px
    e. Line Height: 1 ½ spacing
    f. Text Align: Justified
    g. Body Link: #0000cd
6. FOOTER
    a. Background: #2c3e50
    b. Padding Top & Bottom: 9px (default?)
    c. Text Color: #cccccc
    d. Link Color: #6da3dd

TIPS

- Keep your images inside your newsletters to no less than 200 and no more than 250 pixels wide
- Changes to one block can be applied to others of the same type: body text, social media buttons, dividers, buttons, etc. Just look for that checkbox at the bottom when you're changing the STYLES of your page.



- Footer
    - FAQs are great for reminding people where or why they signed up for your newsletter!
    - Link to Privacy Policy
    - You can add content to the footer, but I don't recommend you change the default content MailChimp provides - MC will constantly remind you to fix your footer information. Things like your address and unsubscribe links are required by the CAN-SPAM Act. Footer info CAN be formatted though - font size, alignment, color, etc. – as I demonstrated in the webinar.
    - If you're looking for an inexpensive virtual address, I personally use PhysicalAddress.com
- Don't be afraid to be humorous or be yourself!
- Update your template as you need to.

A Note About Ensuring a Clean List

Regardless of whatever giveaway you do – either through us or some other source – the same thing applies: you're going to get treasure seekers. There's not a lot you can do about that no matter how accurate you target your audience. Some readers are treasure seekers and love to hoard gift cards, Kindles and paperbacks, and then they drop from your list. If your main concern is to ensure those greedy people aren't on your list, here's a suggestion that not only keeps the treasure seekers away, but ensures the people on your list are interested in your books:

1. Set up an InstaFreebie account (if you don't have one already)
2. Upgrade to the paid account ($20/mo – if you haven't done so already)
3. Integrate your MailChimp account with your InstaFreebie account.
4. Set up an outside mailing list service – MailerLite and MadMimi are easy to use and very inexpensive. They WILL ask you to verify where you got your leads. So far I have personally told them that I'm using targeted FB ads to direct people to my giveaway and I give them the giveaway link (e.g., authorplatformrocket.com/your-author-name)
5. Set up an InstaFreebie giveaway where you require recipients to enter their name and email address. You would be selecting the option "Mailing list opt-in required", which should only be available to paid accounts.
6. When you email your giveaway subscribers with your welcome message and they click the InstaFreebie link to claim their eBook, you will not only get them automatically added to your mailing list on MailChimp, but you'll also have their first and last name now added to your MailChimp account.

NOTE: If the reader is already on your MailChimp mailing list, they will still be able to get the eBook from InstaFreebie, but your MailChimp information will NOT be updated. Therefore, if you only have the reader's email address, their first and last name will NOT be updated, even though those fields might be blank in MailChimp. I have sent InstaFreebie a message suggesting they try to add this feature to at least fill in the empty First & Last Name fields, but they will need to coordinate that with MailChimp, so it's up in the air if that will ever happen.

As I mentioned in the webinar, if you want to treat your giveaway subscribers separate from your regular subscribers, you CAN put them in a separate list in MailChimp. Be aware of a few things, though:

- Those subscribers will count toward the number for which you're billed – even though some of those email addresses may overlap with your main list
- Moving those people from your Giveaway list over to your subscriber list is a little cumbersome...but possible.
- More importantly, moving them over cannot be an automated process.

And that last bullet point is the main reason why I recommend you don't do a separate list, but use ***Groups*** instead.

Prep Giveaway Group

What I demonstrated in the webinar was how to setup a group that you can use for those people you import into MailChimp, which will allow you to add the automation of moving people from one group to another and you won't have to do any (or little) maintenance. Two separate lists will not allow for that automatic management of your subscribers.

So, if you want to have people moved over automatically, then before you create any automations, I recommend you create at least one group for those new subscribers from your giveaways. However, for some of the other automation triggers I'll be showing you, I'm going to create TWO groups.

Next week, I've moved the order of the sessions. We're going to cover groups and segments next week instead of the spam bot avoidance topic. We'll talk about the spam bot avoidance the following week. Which means we'll also be talking about building a Review Team next week! I know many of you have been anxiously awaiting that session. So this week I'm only going over groups very briefly.

Create Lead Status Group (Hidden)

1. Click on LISTS at the top
2. Click the NAME OF LIST
3. Click MANAGE SUBSCRIBERS
4. Select GROUPS
5. Click CREATE GROUPS button
6. Select DON'T SHOW THESE GROUPS ON MY SIGNUP FORM
7. Give a name to the main group - LEAD STATUS (For Internal Use ONLY)
8. It is possible to only create one sub-group - APR IMPORTS
9. Click SAVE button
10. Click DONE FOR NOW button

Create Reader Club Subscription Options (Public)

1. Click CREATE GROUPS button
2. Select AS RADIO BUTTONS (PEOPLE CAN SELECT ONLY ONE)
3. Give a name to the main group - SUBSCRIPTION OPTIONS (REQUIRED)
4. My recommendation:
5. All Announcements & Freebies
6. New Release Notices ONLY
7. Click SAVE button
8. Click DONE FOR NOW button

Now to Create a Drip Campaign!

Setting Up the Drip Campaign & Triggers for 1st Message

1. Click AUTOMATION at the top
2. Click ADD AUTOMATION button. PLEASE explore the other various options on your own. In the webinar, we only explored *List Activity*.
3. LIST ACTIVITY is the category we're going to use for the following steps
4. Click on WELCOME SERIES
5. Name it GIVEAWAY WELCOME SERIES and choose whatever list you want to use. If your giveaway list is separate from your Reader Club, then choose your giveaway list. The automation screen will have 3 prepopulated messages in the series.
6. The default for when the first message goes out is when someone signs up for the main list, it will trigger the sending of the first message. This is the option you'll want when you set up your main drip campaign for your Reader Club - the one we've been encouraging you to draft with all your freebies and books from your backlist. HOWEVER, for the imports from your giveaways, you'll want to change this trigger. Click EDIT TRIGGER just above where you see the first message.
7. Click CHANGE TRIGGER at the top. The bottom of the screen will change.
8. Click the LIST MANAGEMENT tab. Again, explore all these other options on your own. Read the descriptions they have here. They're pretty helpful.
9. Select JOINS A LIST GROUP. The bottom of the screen will change again based on the option you selected.
10. The delay defaults to 1 day. Delay should be changed to IMMEDIATELY
11. Select Grouping > APR IMPORTS - NOTE that you cannot select "Lead Status". You must select "APR Imports" under "Lead Status" (or whatever you named your group where you put "APR Imports")
12. Click UPDATE TRIGGER button at the top-right
13. SCHEDULE > This is where you can opt to send messages out on Tuesdays and Thursdays at 8am-11am, which is what I read is the prime time to send out emails for maximum results. I'm still experimenting with this, so I can't personally recommend if this is good, bad or neutral. If you already know when your list responds well OR you've done your research on best times of the day to send email messages, then you can change that here. Otherwise, just leave it be.
14. SEGMENT > WHEN you do your Reader Club drip campaign/automation, you would select…
    a. *Subscribers match the following conditions* radio button
    b. *Groups* > *Lead Status* from the drop-down list (or whatever you named your group where your APR giveaway leads' sub-group is located)
    c. *None of* from the drop-down list
    d. *APR Imports* in the sub-group options (or whatever you named your sub-group for the APR giveaway leads)
    e. Click SAVE SEGMENT button in the top-right corner of the screen
15. ACTION – Nothing for this, but we'll be addressing Actions in Message #3.

16. Click DESIGN EMAIL button to start drafting Message #1
17. Use the Template you created in the previous steps
18. Compose your first message based on your drafts, if you already drafted your giveaway induction drip campaign messages. If not, compose your message from scratch.
19. IF you need to change your text body background to match a picture you're including (such as an off-white background versus the white background you may have setup in your template), I recommend using the free Pixlr online graphic editing program at https://pixlr.com/editor/
20. Remember, when you insert an image, you can go into the image properties and change the size (200-250 pixels recommended width), alignment (sitting to the left of your text, or the right of your text, etc.) and whether or not you have some padding (space) between your text and your image (5-10 pixels recommended). Regardless of your settings, though, some email programs will not respect those settings and some text will butt up against the picture.
21. Create Button for a strong call to action to encourage people to download your free eBook or whatever you're asking them to do (e.g., DOWNLOAD NOW)
22. Click the *Save & Continue* button at the bottom of the properties panel on the right.

You're done with Message #1!

Discussing how to manage new subscribers...

Before we go on to creating messages 2 & 3 and the settings for automation, you have to decide how you'd like to manage your new subscribers. In the webinar, I created some silly animal names for the types of campaign options you might consider when thinking about how you'd like to handle all these subscribers after they've been through your initial giveaway induction. So…

1. On MESSAGE #2, the trigger is 3 days AFTER Message #1 is SENT
2. On MESSAGE #3, we're going to talk about some ACTION triggers, which will help determine where your subscribers go and what automation campaign they might receive next based on how you move your subscribers either to a new group or if decide to manually handle them. How you set this up will depend on which approach you're taking…
    a. **Puppy Campaign**:
        i. *Description*: This is the campaign where you accept everyone to your Reader Club after they've been through the giveaway induction AND regardless of how they responded to the campaign.
        ii. *Pros & Cons*: Though your subscriber numbers might remain high, your open and click rates might be lower than you'd like, which tends to build a very weak list. Periodically cleaning out those non-responsive subscribers will help strengthen your list.
        iii. *Setup*: Message #3 will go out 7 days AFTER Message #2 was SENT. Once that happens, set an ACTION trigger that says once the trigger is

tripped, subscribers will automatically be added to your Reader Club Group. Basically, when Message 3 is sent, they will get added to your Reader Group to get their weekly messages.

b. **Bull Campaign**:
    i. *Description:* This is a very aggressive approach based on LACK of response. In short, you're axing everyone who does not open any of the 3 messages from the induction campaign.
    ii. *Pros & Cons:* This will build a very strong list, but the numbers of your list will grow slower since you're eliminating non-responsive people very quickly. The downside to this method is you don't really give people enough time to respond – especially the ones who are imported in the last month of the 90-day period for each giveaway cycle.
    iii. *Setup:* Do not set up an action trigger for Message #3. You will manually be handling what happens to your subscribers after they get their 3 messages because your cleanup will most likely coincide with the end of each 90-day giveaway cycle.

c. **Bat Campaign:**
    i. *Description:* This is a more balanced approach and you're somewhat turning a blind eye to people who are not responsive. Based on how you're setting up these last two messages in your drip campaign, MailChimp will automatically handle unresponsive people and reward those who are responding.
    ii. *Pros & Cons* – This method with not only give people the opportunity to respond, but your list will grow more rapidly than the Bull Campaign, even though it might not be quite as strong. However, it will definitely be stronger than the Puppy Campaign, even though the numbers aren't as high.

d. *Message #3 Setup:* Message 3 will ONLY go out 7 days AFTER Message #2 was OPENED. However, the ACTION we're going to set is when the trigger is tripped, they'll automatically be moved to your Reader Group. So the people in this workflow may NEVER get Message #3 if they don't open #2, and therefore still be on your list. IF they ever open up message #2, they will still get Message #3. So this allows people to still discover your message in their inbox later, but they will still be on your mailing list. IF you send future one-off campaigns, you can elect to include this group...or exclude it through segmentation. The choice is yours. If you do include these non-responsive people in broadcast messages, you will be giving them other chances to become active, but they won't be added to your Reader Club drip campaign unless they update their own profile (subscription option - All Notices & Freebies) or they open Message #2 or you manually add them to the All Notices & Freebies group.

e. *Message #4 Setup:* For the Bat Campaign, we're also going to add a 4th message. This is a farewell message that will be sent for inactivity as it pertains to this induction campaign. The trigger for this will be 6 weeks AFTER Message #3 is NEVER OPENED. However, because I give people the chance to update their own profiles and subscription options, I'm going to add a condition to be sure I'm not unsubscribing people who may have never opened Message #3 and went straight to my Reader Club by adding themselves. So I will exclude those who are members of my Reader Club in the SEGMENT conditions…

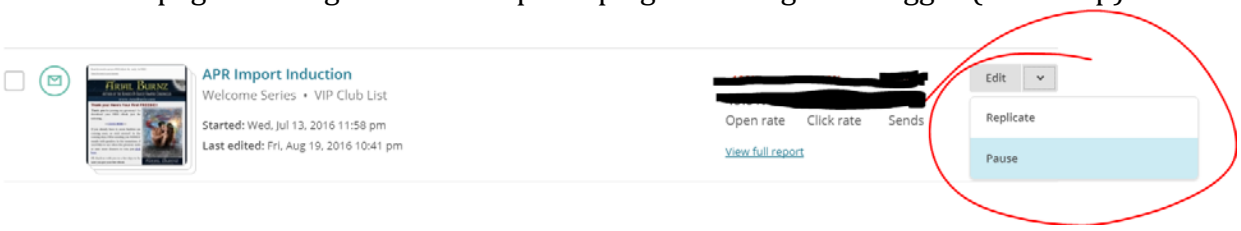
Setting Up the Segment Triggers for Message #4

1. SEGMENT: *None - Edit Segment* - Click EDIT SEGMENT
2. Tick the checkbox for *Choose Segmentation Conditions*
3. Choose *Subscribers Match the Following Conditions*
4. Choose *Subscriber Options (Required)* from the drop-down list
5. Choose *None of* from the next drop-down
9. Click + CTRL + Click on both options – *All Announcements & Freebies* and *New Release Notices ONLY*
6. Click the SAVE SEGMENT button in the top-right corner.

Once you've set up the triggers for Messages 2-4, click the DESIGN EMAIL button for each of the messages in the rest of the series to begin composing them. Remember to use the template you created to make it easier to have a uniform look for all your messages. SAVE & CONTINUE when you're done with each message.

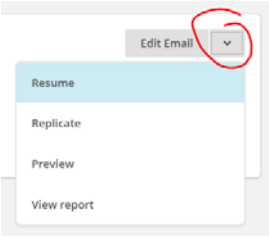
At a later date, if you need to change anything on your automation, such as triggers or message content, here are some tips:

- If you want to change the trigger for the entire automation, do so from the Automation page. THEN go into the drip campaign to change the trigger (at the top).



- Remember to START WORKFLOW when you've made all your changes to the entire automation – just click the NEXT button on the bottom-right of the workflow screen (where you see all the messages in the series), and it will restart all the messages for that automation.

- If you want to edit one of the messages in the series, click on the EDIT button of the series from the Automation page, then click the PAUSE & EDIT button for that message > which will change to say EDIT EMAIL > click that and edit the message. When you're done, click the down arrow next to the EDIT EMAIL button and choose RESUME.



CONGRATULATIONS! You've just set up a drip campaign!

Links in this Document

Pretty Links for WordPress - https://wordpress.org/plugins/pretty-link/

BookLinker.net - http://booklinker.net/

PhysicalAddress.com - https://physicaladdress.com/

Questions?

Try as I might, I know I can't be 100% effective in my communications. What sounds clear to me might be really confusing to you. No problem! If you have any questions about the ideas I've shared above, just email us at aprgiveaways@gmail.com and either I, Brenda or Jonny can answer your questions.

I hope you found this handout helpful and you're enjoying the webinars.

Thank you!!

Arial Burnz

Author of HOT Scottish Vampires