

Author Platform Rocket

Email Marketing for Authors: How To Transform Subscribers Into Buyers

Handout for Session 8: How to Build a Review Team – Part 2

This handout provides the step-by-step instructions and is designed to be used with the webinar taught on 9/6/2016.

Be sure to watch the webinar for Part 1 and look at the handout, which has recently been updated (as of 11/15/16). Part 1 talked about how to create Groups & Segments in MailChimp and then how you can use them to manage your Review Team. This webinar illustrates how custom forms can make the signup process easier for your Review Team.

Review Team Forms

MailChimp vs. Other Mailing List Services

Unfortunately, MailChimp does not allow the ability to create multiple webforms for a single list. If you want more than one sign-up form, you have to create more than one list and I DO NOT recommend doing this. It's not worth the trouble. The reason why is because you'll need to export that information from one list to another to be sure you capture all the information...and even then, some of the information gets left behind. Though it *is* possible, it's a bit tedious and can produce some undesirable results if you don't do it right. Too many "moving parts" as Jonny likes to say.

However, a lot of other mailing list services *will* allow you to create more than one web form to gather customized information, depending on your needs. The Review Team is an example of a group of people you should have on your main mailing list, but on whom you'll need additional information, such as their Kindle Address or keeping track of who actually leaves reviews versus who has just joined the team, which is not something you would necessarily track or need for any member of your Reader Club.

As we've discussed in the past, though, MailChimp is the only affordable mailing list service I know of that has groups and allows you to manage your subscribers easily on a single list. I did mention in the last handout that Mad Mimi would be my second choice, as her "lists" operate more like MailChimp's "Groups". Mad Mimi allows one user to belong to several lists without charging you for that same person. If you like other mailing list services and have tools necessary to manage your Reader Club subscribers separate from your Review Team, then congratulations! At this point in time, I cannot speak to those other services and how to modify their features to accomplish this.

Mad Mimi Webforms

Webforms in Mad Mimi is a feature you need to turn on. I would also recommend you turn on the add-on for Subscription Management.

1. Login to your Mad Mimi account
2. From your Dashboard, click on the “**Add Things**” option in the top-right nav area where you see “Help”
3. When I created this document, **Webforms** was the second add-on. Just click the **ON/OFF button** to turn the feature on. (Notice the little gear that appears. This is where you can modify the settings of your webforms.)
4. Scroll down toward the bottom and you should see the add-on “Subscription Management”. Click the ON/OFF button to turn this feature on. This allows users to update their own profiles. Very useful later if you’d like them to update their profiles with birthdays, their location, etc. Again, notice the little gear that appears – settings.

I can’t really speak to Mad Mimi much more than that, but the Crazy Chick has a great customer support team, so don’t be afraid to contact them for help!

Gravity Forms on WordPress

If you have a WordPress website (i.e., the WordPress software installed on your own server and NOT the WordPress.com free blog), then you have the option of using [Gravity Forms](#), which is a plugin that gives your website the ability to create customized forms. Though there is a free version of Gravity Forms, it doesn’t include the [MailChimp integration add-on](#). To get that add-on, you’ll have to buy the [Business License](#), which is \$99 per year as of the creation of this document. Well worth it, in my opinion!

I cannot go into a step-by-step instructional on how to use Gravity Forms due to the limited scope of the webinar I presented, but Gravity Forms has great customer support and documentation. If you’re experienced enough at using a WordPress website, you shouldn’t encounter too many problems.

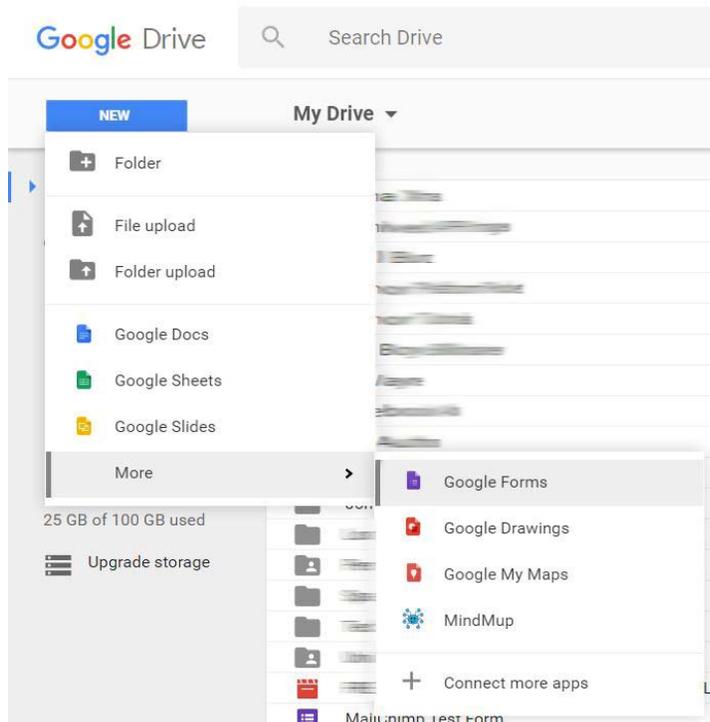
Google Forms

If you don’t have a WordPress website or you find yourself a little technically challenged in this area, you DO have the option of using Google Forms to create a customize signup sheet for your Review Team. Unfortunately, importing leads from the spreadsheet created from your Google Form is still a manual process, BUT it’s simple. You must have a Google Account before you can use them, and that’s free.

[CLICK HERE](#) to read about Google Forms and all the other uses for them.

[CLICK HERE](#) to go straight to Google Forms and start creating one.

OR if you already use [Google Drive](#), then go there and click the NEW button in the top-left corner > move your mouse over “More” on the menu > select “Google Forms” (see picture below)



[CLICK HERE](#) for step-by-step instructions from Google on how to create a form. On step 3.1, it shows you how to create a spreadsheet. This part is very important if you want to integrate with MailChimp, so be sure you set that part up.

Once you've set up your Google Form the way you want it AND your spreadsheet is ready to go, you're ready to receive new Review Team you have the option of importing users from the form. But before we get to that point, let's touch upon what you should include in your forms.

Keep the Following in Mind

When you create your Google form for your Review Team, be sure you set up the same fields you already have setup in your MailChimp account. For instance, my Review Team Form has the following fields and questions:

- First Name (required)
- Last Name
- Email Address (required)
- Do you want to be on Arial's Review Team? (checkboxes & required)
 - Yes, and I agree to the Terms & Conditions mentioned above
 - Check if you also review audiobooks
- Subscription Options for Arial's VIP Club (multiple choice* & required)
 - All Announcements & Freebies
 - New Release Notifications ONLY

*Multiple choice in the Google Forms is the same thing as radio buttons in MailChimp.

I have those same fields set up in MailChimp and, if you'll recall from the webinar, the question about being on the Review Team and the subscription options for my Reader Club are groups I created in MailChimp. You will be matching those fields and groups up whenever you do an import through MailChimp.

Importing Leads from Google Forms

There are three ways you can import leads from Google Forms:

1. CSV file by downloading it from the form (CSV can be used for any mailing list service)
2. Manually importing through MailChimp by using the Integrated Service option
3. Using Zapier to automatically import into MailChimp – this is a good option for those who do not have a WordPress website and therefore cannot use Gravity Forms.

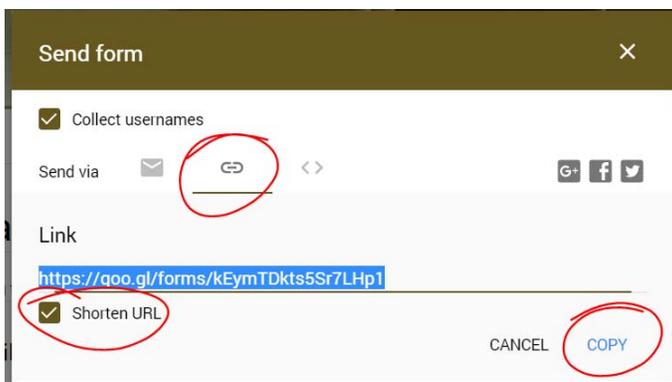
Though #3 is the easiest by far, there is a price tag to the feature. A Zapier subscription costs \$20 per month, but can also be used to import your leads into many other different mailing list services such as Aweber, ConstantContact, MadMimi and a lot more. Since you're using this for your Review Team, you might want to use #1 & 2 to save money and then decide later if you'd like to spend the extra money by using #3. AND you can setup your Google Form to send you an email notification every time someone fills it out, so this is an easy way to alert you and you can import their information as soon as you see that email come through. I will warn you, though, that constantly having to import those leads might get a bit tedious and that \$20 a month will look more like it's worth the money versus your time.

By now you should know how to import leads using a CSV file, which is what we give you whenever we export the leads for your giveaways. However, if you're going to use a Google Form, take advantage of the integration option available. I would give you the link to MailChimp's help files on this, but they don't have them updated. So I'll provide the instructions below instead.

How to Test Your Form

Before we move on to importing leads, though, you should test your form to be sure it's working the way you'd like it to AND to be sure you have at least one record in your spreadsheet so you can test out the below instructions on how to import leads. Here's how you do test your form:

1. In the top-right-hand corner of your Google Form setup, you should see a big SEND button – click that.
2. From the dialogue box that appears, click on the icon that looks like a link (see image below)
3. Be sure to check the “shorten URL” checkbox
4. Then click COPY



5. Paste that link into a new browser window and test your form.

Incidentally, this is the link you *could* use to refer people to your Review Team signup. However, as I've recommended before, I suggest you use Pretty Links (WordPress site users) or TinyCC instead to create your own custom links, which will be a lot easier for people to use AND you have the option of redirecting those custom links to another form if you change your methods later. Just copy that URL to your form, create a Pretty Link or TinyCC link and point it to the URL for the Google form.

How to Setup the Integration Option in MailChimp

The only reason I'm including these instructions here is MailChimp has OLD procedures in their knowledge base. As of this handout creation (12/1/16), their knowledge base has not been updated with the latest procedures. Otherwise, I would have linked to their help documents.

Once you've set up a Google Form and you've ensured you have an attached spreadsheet gathering your responses (as described above), you should be ready for the following instructions...

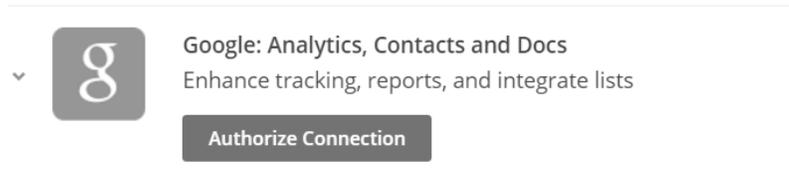
1. Login to your MailChimp Account
2. In the top-right corner, click on your Account Name and select "Account" from the drop-down list
3. Click "Integrations" from the available options:



Arial Burnz - Author

Overview Settings ▾ Billing ▾ Extras ▾ **Integrations** Transactional

4. Scroll down and select "Google: Analytics, Contact and Docs" then click the "Authorize Connection" button



5. Choose the Google account you wish to use, then click the "Allow" button on the next screen.
6. You should be returned to your MailChimp Account Integrations page.

Keep in mind, this just gets your list prepared to receive the MailChimp integration option with the Google Form for when you're ready to import your new leads collected by the Google Form. This does NOT set up automatic importing of your leads collected by the Google Form. As mentioned before, you'll need to have a subscription to Zapier if you want to automate that.

How to Use the Integration Option for Imports

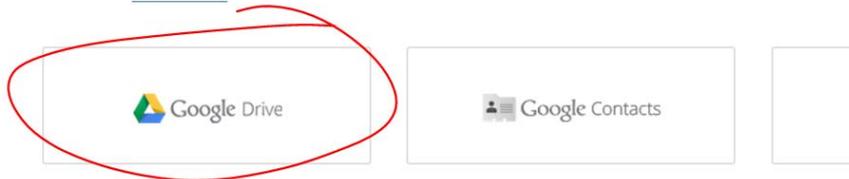
This process is how you manually import those leads gathered into the spreadsheet by your Google Form...

1. If you aren't already, login to your MailChimp account
2. Click on LISTS in the top navigation
3. Click on the list you'd like to import your Review Team signups collected from your Google Form
4. When your list view appears, click on "Add Subscribers" and select "Import Subscribers" from the drop-down menu
5. Because of the previous setup you did above, you should now see a new import option "Integrated Service". When you select that radio button, new service panels will appear below. You want to select "Google Drive"



Where do you want to import subscribers from?

- Use settings from last import
Your last import was from Google Spreadsheet on Nov 01, 2016 11:50 am
- CSV or tab-delimited text file
Import contacts from .csv or .txt files
- Copy/paste from file
Copy and paste contacts from .xls or .xlsx files
- Integrated service
Import contacts from services like Google Contacts, Salesforce, Highrise, Zendesk, and more. [Learn more](#)



6. Click the "NEXT" button at the very bottom-right corner of the screen.
7. At the next screen, you'll drop down the first option to select a spreadsheet from your Google Drive account. You should be able to see a spreadsheet named after the form you created. Once you select that, a second drop-down option will appear. For me, only one option was available.

Import from Google Drive

Successfully connected to arialburnz@gmail.com

✓ Spreadsheets in your Google Drive account

MailChimp Test Form (Responses)

Select a worksheet

Form Responses 1

Some cells in my file include new lines
Check this box if cells in your spreadsheet have carriage returns, or data on new lines.

I understand that my billing plan may be automatically upgraded.
If you import more than 172 new subscribers we'll upgrade your billing plan to accommodate them. To revert to your previous billing plan, [undo your list import](#) before you send.

8. I ignored the first checkbox, since it didn't apply for me and it probably won't for you.
9. And you must check the last box.
10. Click the "NEXT" button at the very bottom-right corner of the screen.
11. On the next screen, you'll be mapping the fields from the form spreadsheet to your MailChimp list. The first field will be the "Timestamp" field. Map that to your "Opt-in Time" under "Advanced" on the drop-down box, then click "Save".
12. Map the rest of the fields, including the Groups you should have already set up for your Review Team.

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.](#)

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

Column name	Would you like to be on my	Subscription Options for Ari Club
Timestamp advanced field Edit • Skip	Do you want to be on Ariel's Review Team? Yes, and I accept the Terms & Conditions mentioned above. Check this box if you also review audiobooks	Subscription Options for Ari Club (unmatched column) Edit • Skip
First Name text field Edit • Skip		All Announcements & Freebie
Last Name text field Edit • Skip		
Email Address email field Edit • Skip		

Keyboard shortcuts:

13. Click the "NEXT" button at the very bottom-right corner of the screen.
14. On the final screen, you'll set the import parameters like you do any other import: They should be "Subscribed", check to add the imported subscribers to groups (the boxes should already be shaded for the fields you've matched), and be sure to auto-update your existing list just in case you have subscribers filling out your Review

Team form who might already be on your list.

The screenshot shows the MailChimp 'List Import' interface. At the top, there are tabs for 'List Import' and 'Test List', and a 'Help' link. The main content area is titled 'Categorize the imported subscribers as:' and has three radio button options: 'Subscribed' (selected), 'Unsubscribed', and 'Cleaned'. Below this is a section 'Add imported subscribers to these groups:' with four checkboxes: 'Lead Status (For Internal Use ONLY)', 'Subscriber Options (Required) (matched)', 'Would you like to be on my Review Team? (matched)', and 'Review Team (For Internal Use ONLY)'. At the bottom, there is a section 'Auto-update my existing list' with a checked checkbox and a note: 'If MailChimp finds a subscriber in your import that is already on your list, it can update the subscriber's info for you. This is particularly useful if you have an existing'. In the bottom right corner, there is a blue 'Import' button. A '< Back' button is in the bottom left corner.

15. Click the IMPORT button in the bottom-right corner of the screen.

You should be taken to your List View with a message at the top telling you how many subscribers were successfully added or updated.

NOTE: When I did my tests, my Review Team group was not imported, but my subscriber options were. I honestly don't know why that part isn't working, so be sure to test this out before you decide to use Google Forms. I cannot guarantee its success.

Term & Conditions

How you manage your team is entirely up to you, but I would recommend putting some clear guidelines in place. Guidelines build expectations. If your team knows what you expect from them right up front, it reduces the chances of people taking advantage of you AND increases their ability to enjoy their membership benefits.

What goes into your guidelines or Terms & Conditions will depend solely on what you envision in an ideal Review Team member, what you expect of them, and how you'd like to communicate with them throughout the process.

[CLICK HERE](#) to view my Review Team signup page with form, where my Terms & Conditions are clearly stated. It lets them know what they can expect when they become a member and what I can expect of them in order to be an active participant on my team.

Some things I would highly recommend you keep in mind to help manage your Review Team and your books:

- **One eBook at a Time** – Don't give all your books away for free up front. I would recommend giving them one book first, then tell them when they turn in a link for the review to that book (or any of your books – remember, they could already own some of your books), you'll send them the next free eBook for them to read and review.
- **Protecting Your Files** – If you want to protect your eBook files, then I would recommend you use Amazon's Kindle email addresses to your advantage. If you email your eBooks to your Review Team, not only will they show up on their

apps/devices, but you won't be sending files out. Yes, there is a tiny bit of setup, but it only needs to be done once. So if you use this option, be sure to clearly communicate what they need to do to make this possible. [CLICK HERE](#) to see the article I wrote with instructions on how to send an eBook to the Kindle AND how one finds their @kindle.com email address. You're welcome to use this or you can do your own version on your own website. [CLICK HERE](#) to read Amazon's instructions. On my Review Team, I ONLY send ARCs directly to Kindle apps or devices. The only exceptions I make are with team members I personally know.

- **Guiding...not controlling Reviews** – I have heard of many authors kicking members off their Review Team because they gave anything less than 4 stars on a review. This is a dangerous practice. I've mentioned it before and it's worth repeating – there's nothing wrong with 1-to-3-star ratings. In fact, it helps your book look good when people give lower reviews mixed in with the high marks. Too many or nothing but 4- and 5-star reviews looks suspicious. Not everyone is going to like your books – and that's okay! HONESTY should be your goal, not just quantity. With that said, and as I mention in my own guidelines, you should question someone who is on your Review Team who consistently leaves 1- or 2-star reviews. If they don't like your books, why do they keep coming back for more??

With the above bulleted suggestions, and the example of my own Terms & Conditions, you should be able to come to some kind of document for yourself in managing your own team.

Putting it All Together

To manage your Review Team based on the information covered in Sessions 7 & 8 (both webinars and handouts), you should have at least the following in place:

1. A way for your subscribers to sign up for your Review Team
 - a. Either a checkbox on your MailChimp (or other MLS provider) main signup form
 - b. OR a customized form you've created (e.g., Gravity Forms, Google Form, web form through your MLS provider)
2. A page (or on the form) that clearly states your terms & conditions for joining your Review Team
3. Procedures for how you receive review requests and how you'll distribute those eBooks.
4. Optional but recommended – a way to easily keep track of who has actually submitted reviews.

That last one ensures that whenever you send out ARCs, you're sending them to people who have a higher probability of posting reviews and it's worth the trouble to keep track of. You'll have better sales and you'll build a reliable team you can count on.

Links in this Document

- **Gravity Forms** – I use Gravity Forms to create custom signup forms on my WordPress Website and use them to integrate with my MailChimp account.
 - **Main site link:** <http://gravityforms.com/>
 - **MailChimp Integration Add-on:** <http://www.gravityforms.com/add-ons/>
 - **Pricing Page:** <http://www.gravityforms.com/purchase-gravity-forms/>
- **Google Forms** – Can be used to create a custom signup form for your Review Team. Also good for any forms or surveys you'd like to create for other projects.
 - **About Google Forms:** <https://www.google.com/forms/about/>
 - **Create a Google Form:** <https://docs.google.com/forms/>
 - **Google Drive:** <https://drive.google.com/drive>
 - **How to Create a Google Form:** <https://gsuite.google.com/learning-center/products/forms/get-started/>
- **Arial's Review Team Signup Page with T&C:** <http://www.arialburnz.com/review-team-signup>
- **Arial's article on how to send an eBook to the Kindle:** <http://www.arialburnz.com/kindleinstructions>
- **Amazon's instructions on how to send an eBook to the Kindle:** <https://www.amazon.com/gp/sendtokindle/email>

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