Step-by-Step Guide to Set Up Your Challenge Opt-In Page with MailChimp

(last updated August 13, 2018)

MailChimp is a beginner-level marketing automation platform and an email marketing service. It allows you to grow and manage your list, send emails, newsletters and automated responses, and create targeted campaigns.

Here is the overview of the steps:

STEP 1: Create an account

STEP 2: Create a List

STEP 3: Create a Signup Form

STEP 4: Set up an automated Welcome Email

STEP 5: Create a Thank You Page (important to create this BEFORE step 6)

STEP 6: Create an Opt-In Page

NOTE: *Don't get intimidated by the number of pages in this guide. ☺*
Once you have the images and copy for your challenge, this entire set up can be done in 30-60 minutes. And much faster the second time around.

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STEP 1: Create an account

MailChimp (Monthly plan - $10/month)

STEP 2: Create a List

1. Log in to your **MailChimp** account.

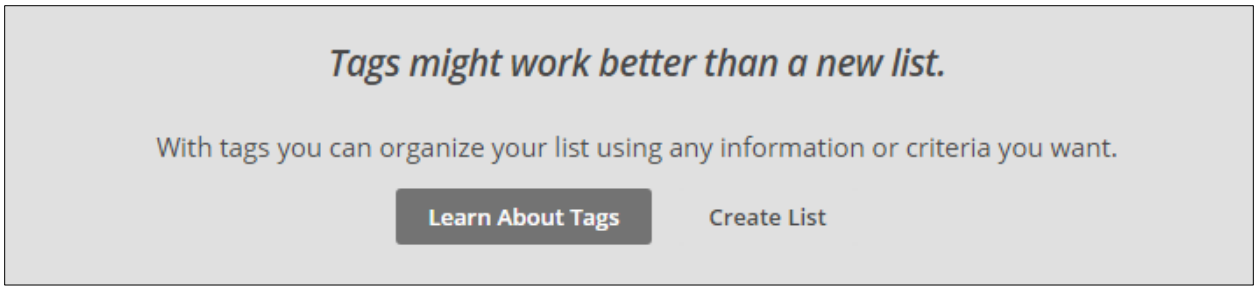
2. Click on the **List** tab on the top of the page.



3. Click on the **Create List** button.

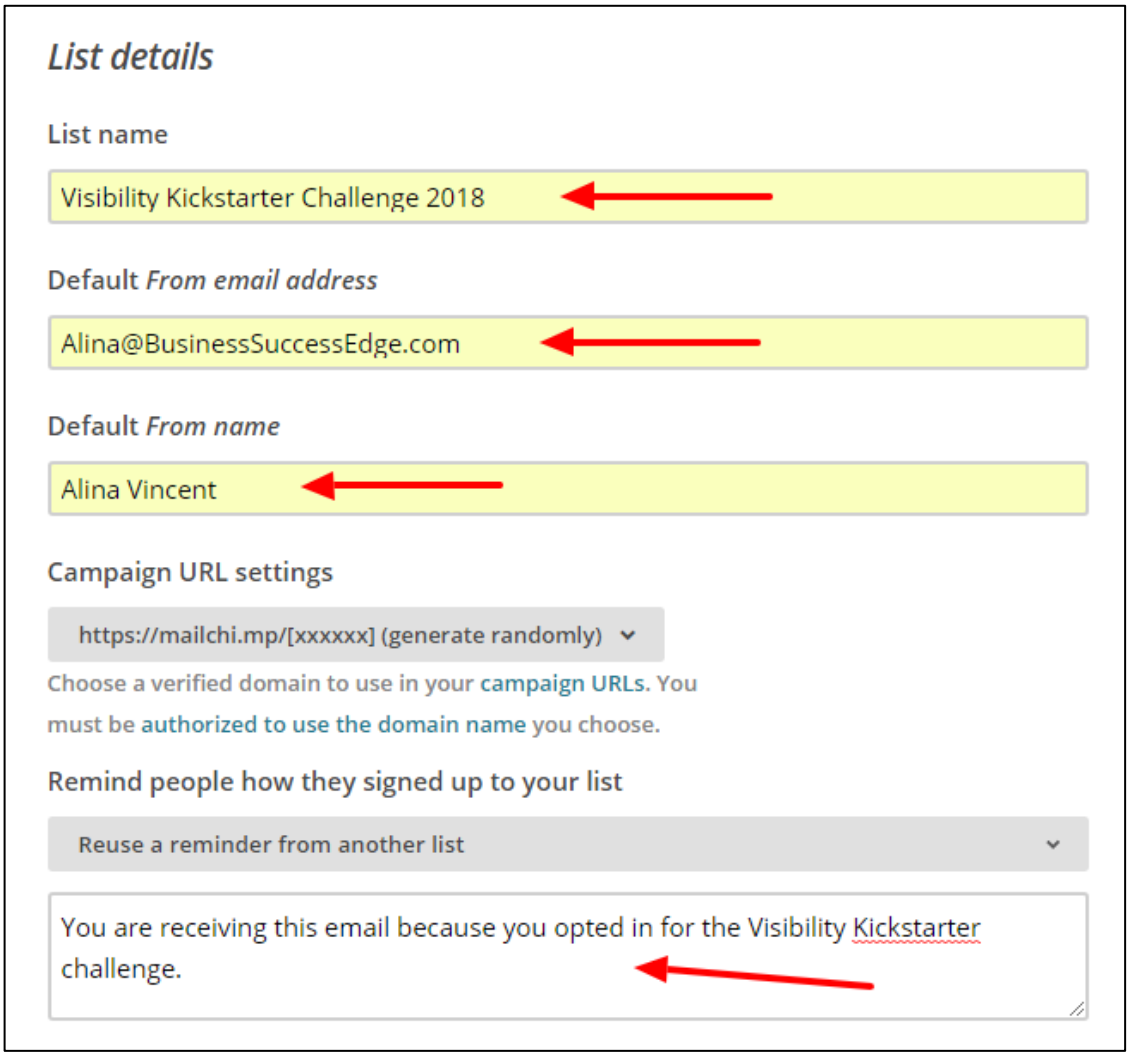


4. In the "**Tags might work better"** box select **Create List,** again.



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9. Fill in the **List Details** form. Put the name of your challenge as the list name. You can have multiple lists in MailChimp and send different emails to each list.



5. Review the **Contact information for this list** and edit if necessary.

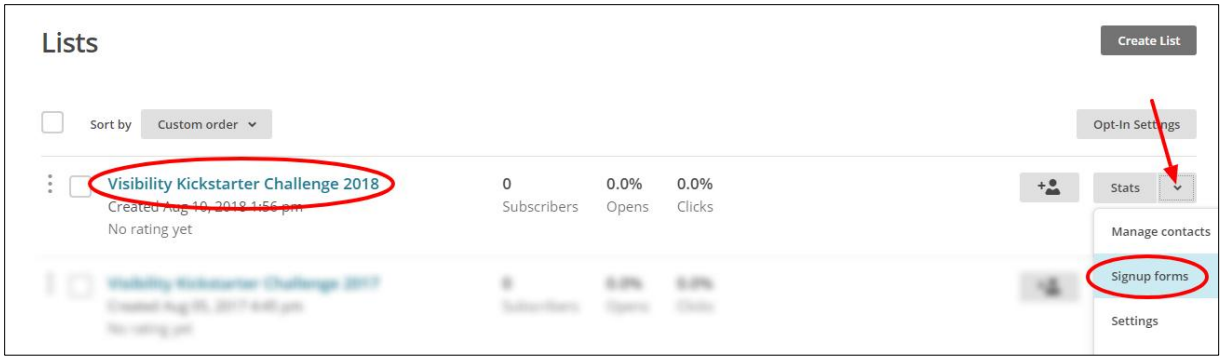
6. Choose how you want to be **notified** about new opt-ins.

7. Click **Save.** Yay! You just created a new list.

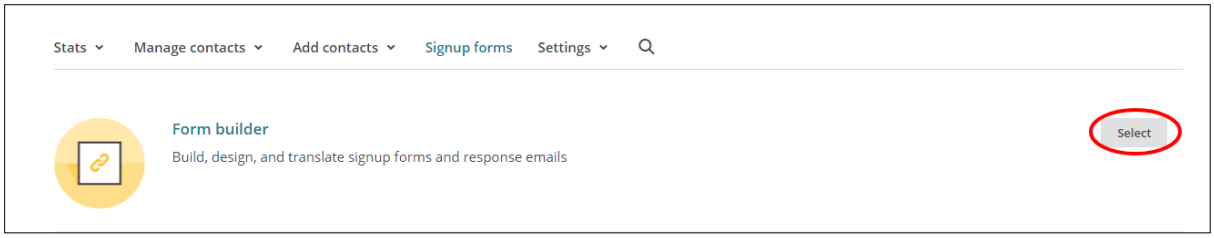
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STEP 3: Create a Signup Form

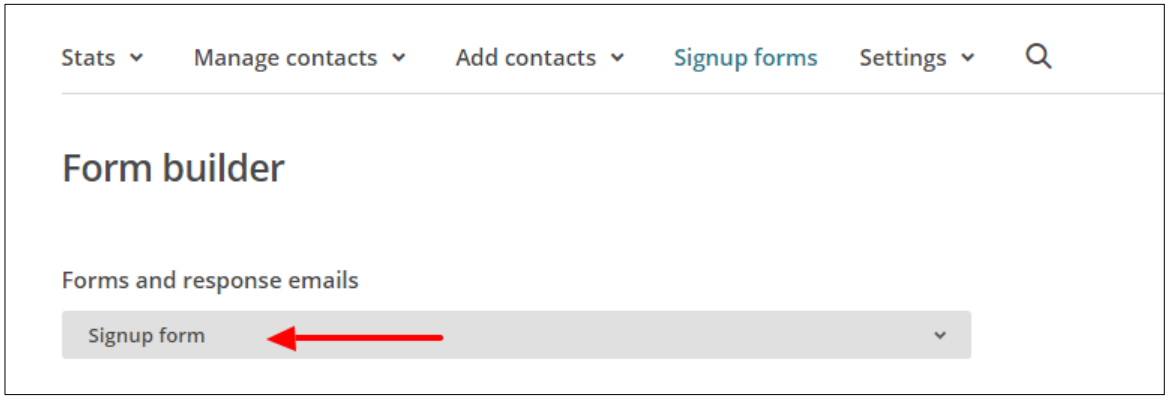
1. On the list tab, click on **options** drop down menu next to your new list, and select **Signup Forms.**



2. Select the **Form Builder** option.



3. Make sure that **Signup form** is selected on the "**Forms and response emails**" menu.

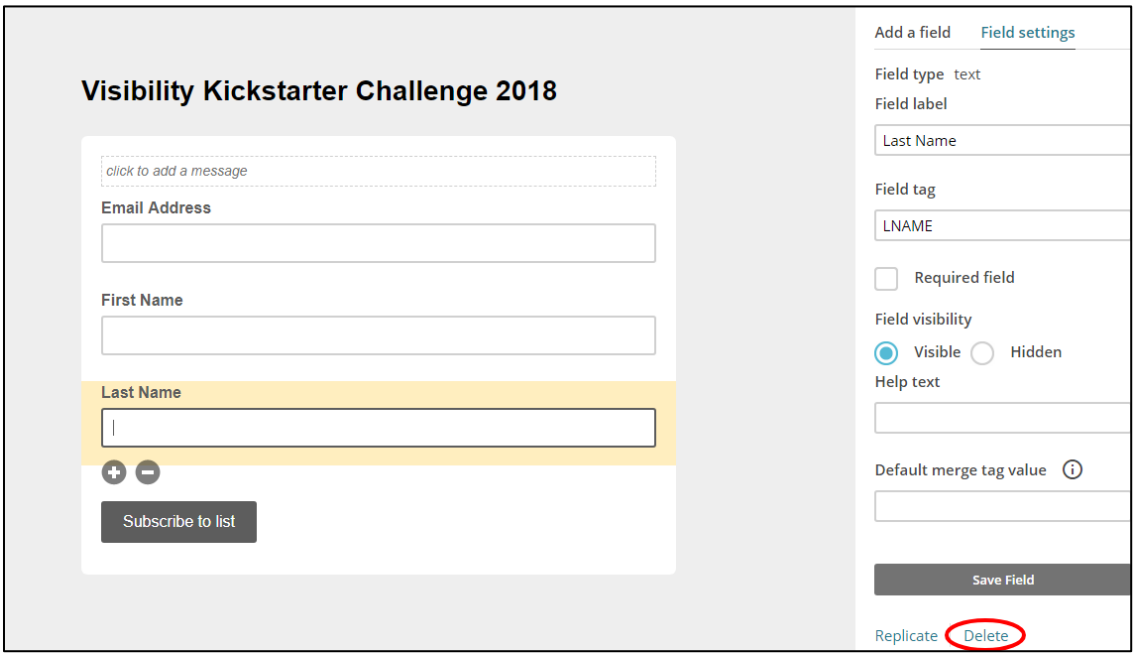


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4. On the **Build it** tab, you can select what information you will request from people. Don't worry about looking at the other tabs… you can design your form later on your opt-in page.

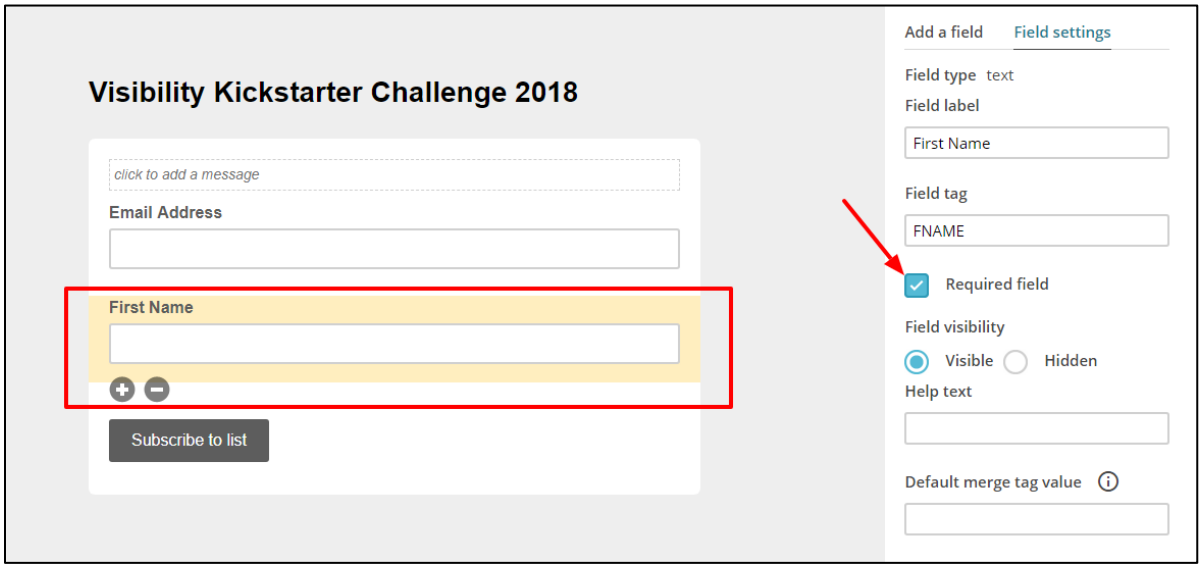


5. Click on the **"Last Name" field** on the form to highlight it and then **DELETE** it (you will be asked to confirm it). The less information you ask for, the more likely your prospects will complete the process. Ask for the minimal amount of information you will need – just First Name and Email.



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6. Make the **"First Name" field** a required field. Click on the field to highlight it, and check the **Required field** option on the tab that will show up on the right side of the form.

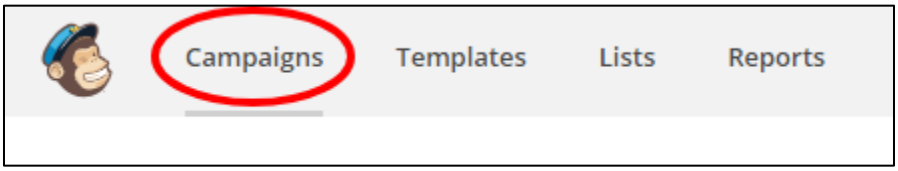


7. Click **Save Field** to save the changes.

8. You are now done with setting up your Signup form

STEP 4: Set up an automated Welcome Email

1. Click on the **Campaigns tab** on the top of the page.

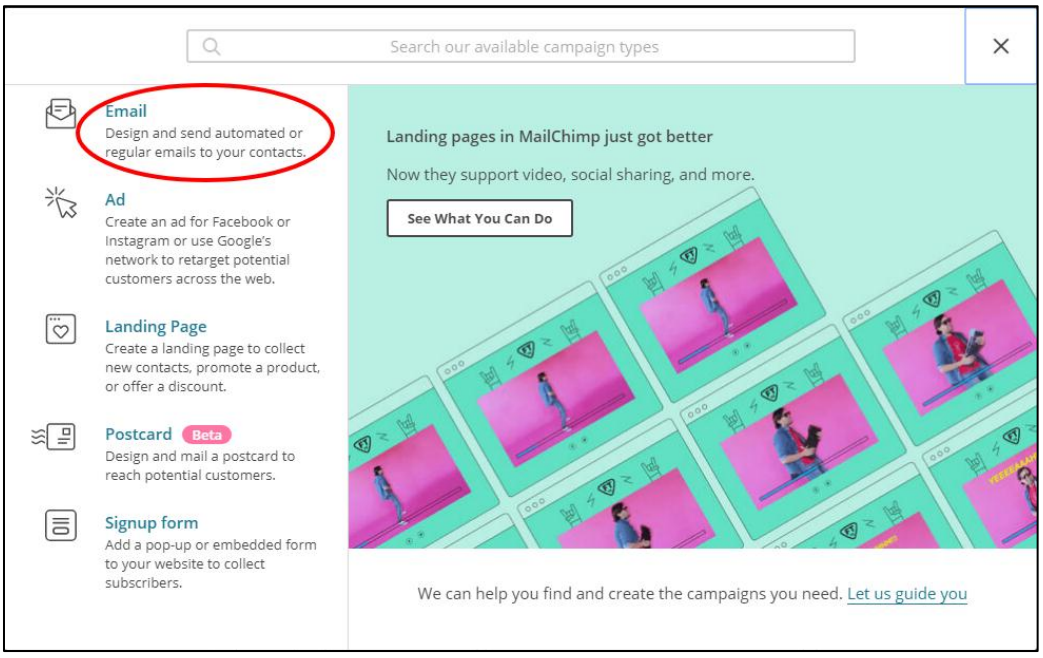


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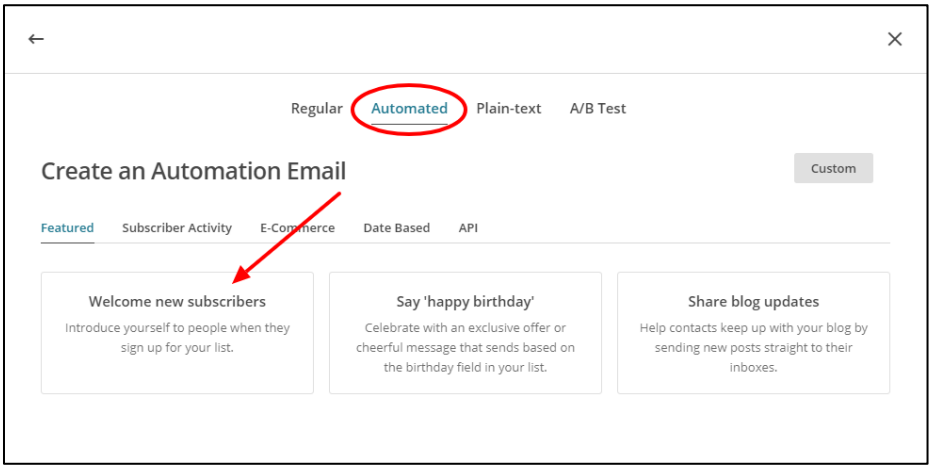
2. Click **Create Campaign**.



3. On the form that pops up, select "**Email**."

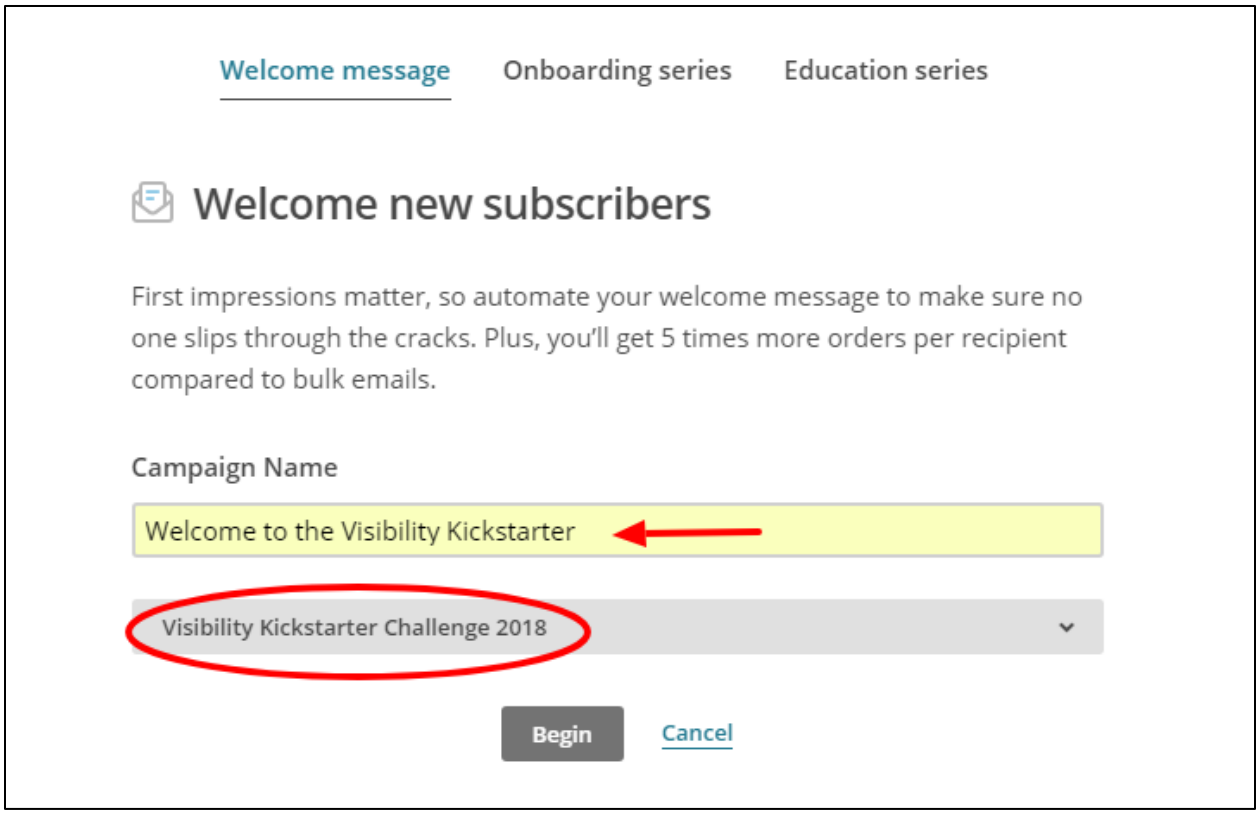


4. On the next page, go to the **"Automated"** tab and select **"Welcome new subscribers"** under the **"Featured"** tab.



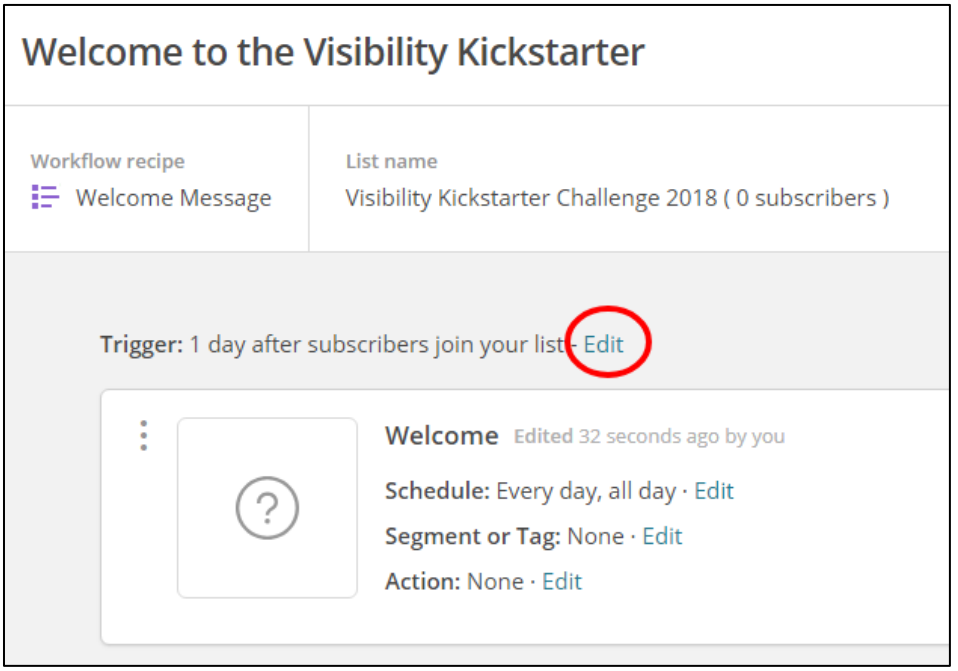
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4. On the next page, **name** your automation (Welcome to the Visibility Kickstarter) and make sure that the right list is selected. Click **Begin** when done.

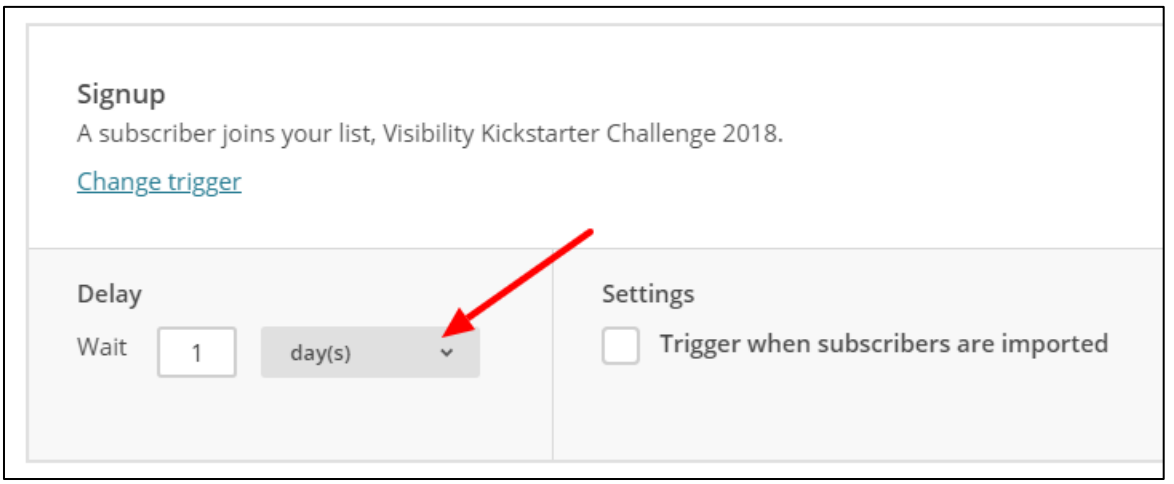


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5. Since we want the Welcome email to be sent out as soon as someone signs up for the challenge, we need to change the Trigger from the default "1 day after" to "immediate". Click on **Edit trigger**.

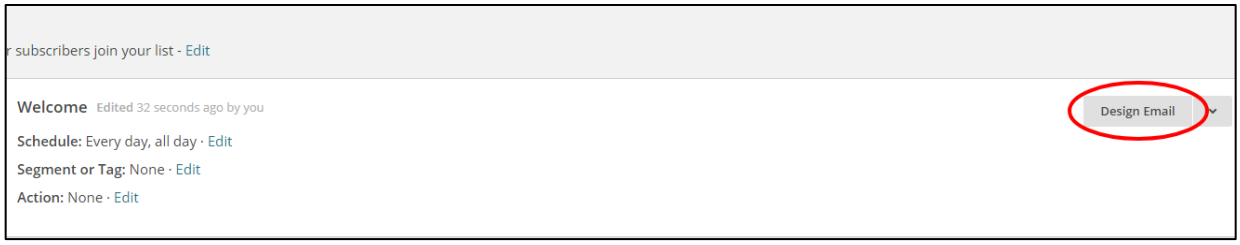


6. Click on the delay **menu** options and select **Immediately.** Click **Update trigger** when done.

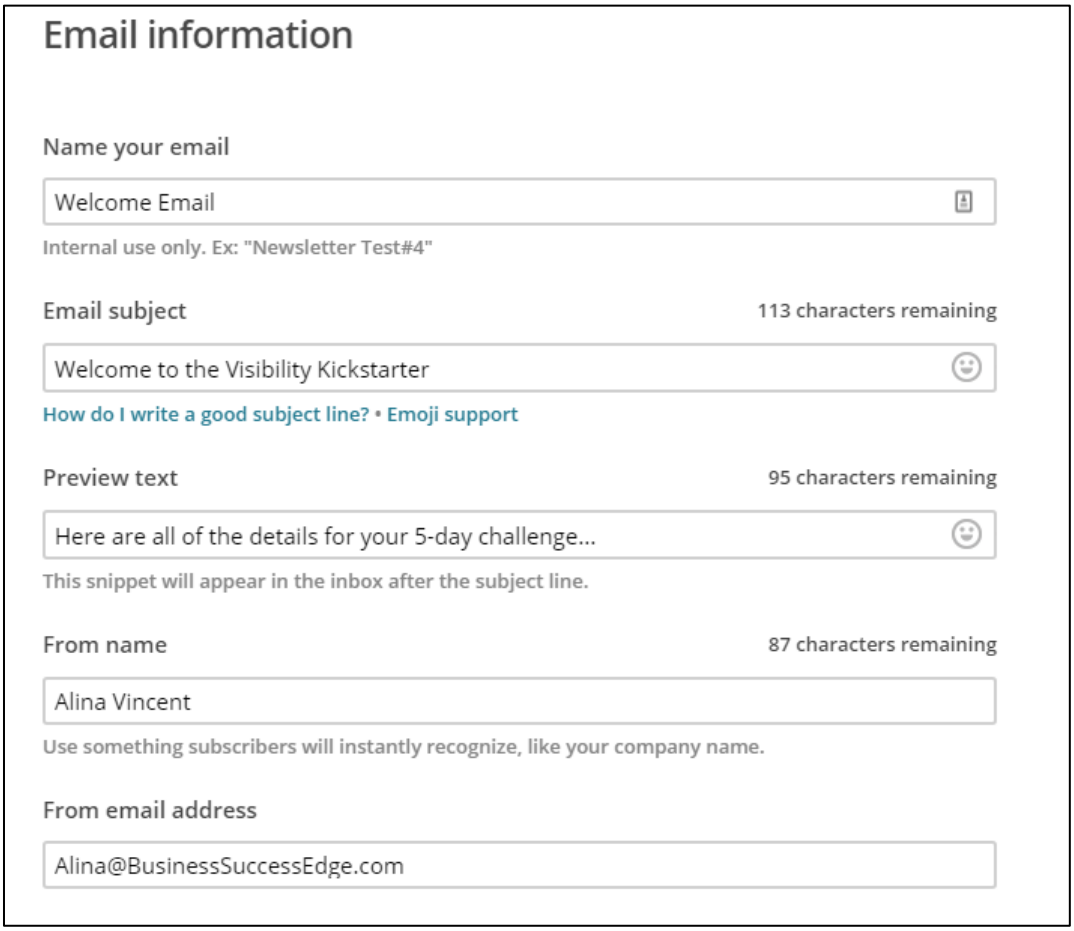


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7. Next step is to design the actual welcome email. Click on the **Design Email** button.

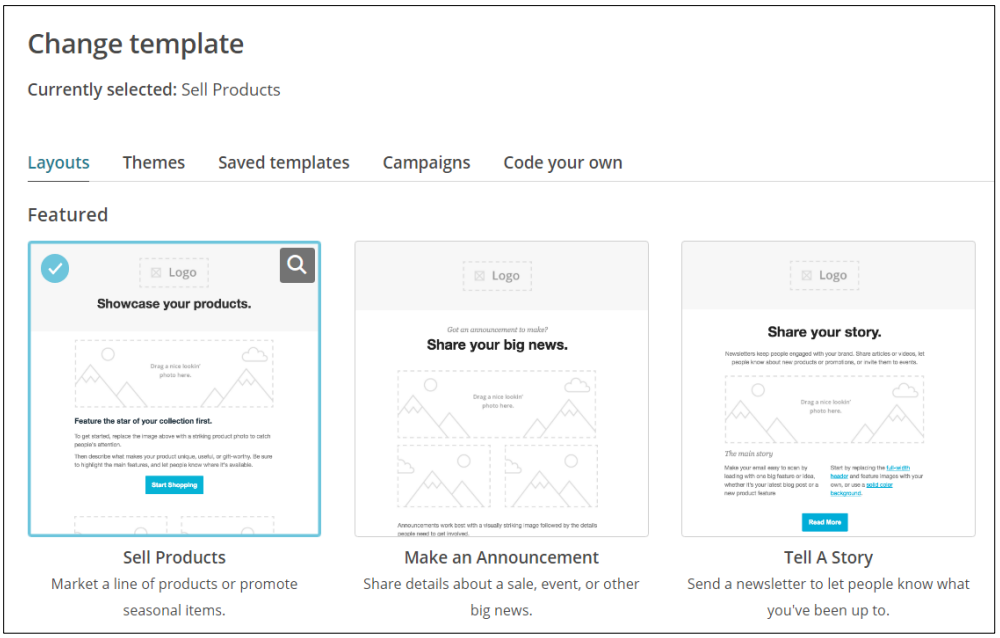


8. On the **Setup page**, fill out the **Name of your email**, **Email subject**, **Preview text**, **From name** and **From email address**. Click **Next** when done.

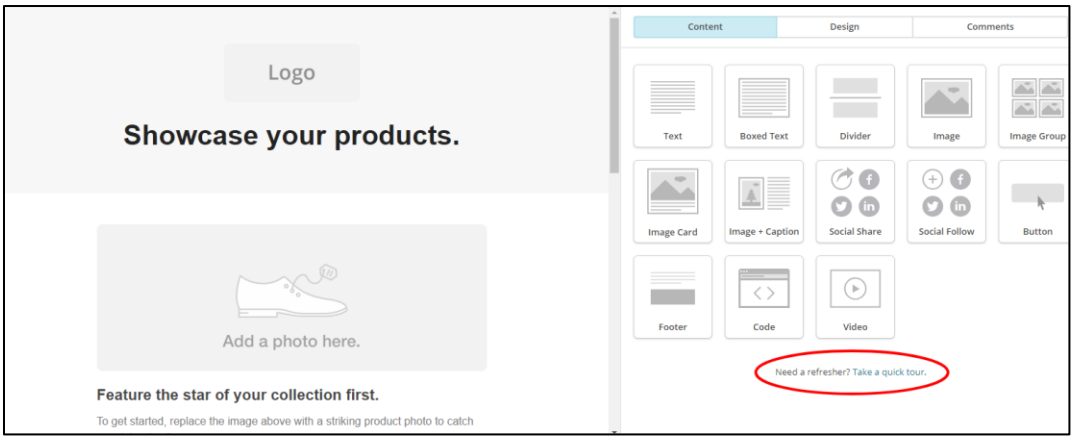


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9. On the **Template** step of the Email Designer, select any template you want to customize the look of your email. All layouts are fully customizable and elements can be added or removed. Once you select a layout, click **Next**.

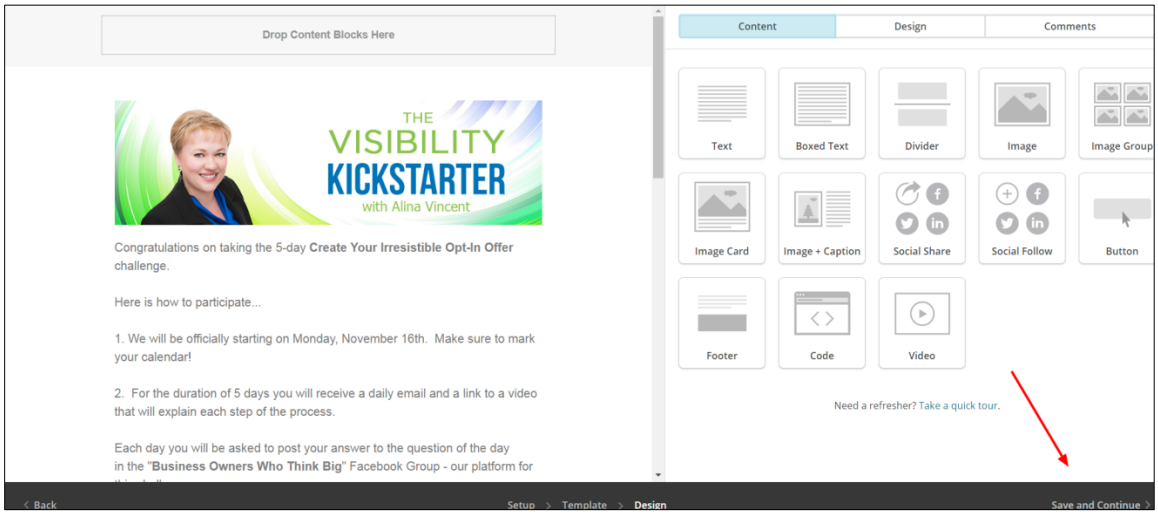


10. Customize your email using click and drag options, and add your copy for the Welcome to the Challenge email. If you need help with this step – watch the tour of all of the features.



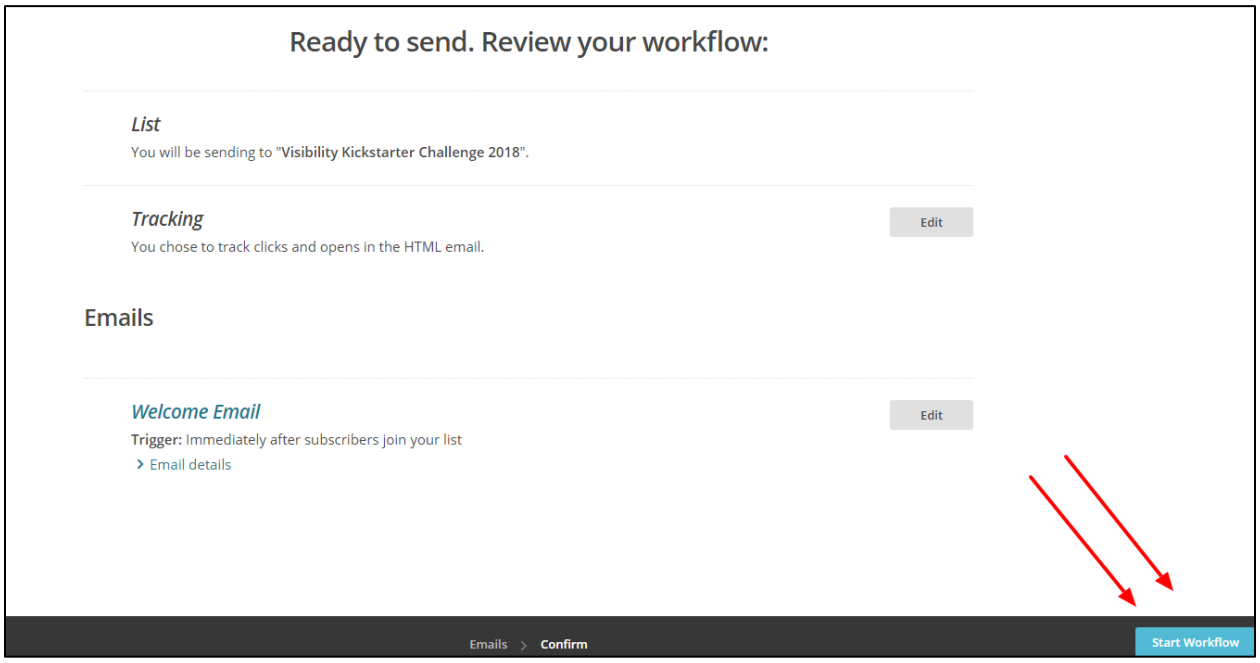
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11. Once you are done, click **Save and Continue**.



12. On the next screen click **Next**.

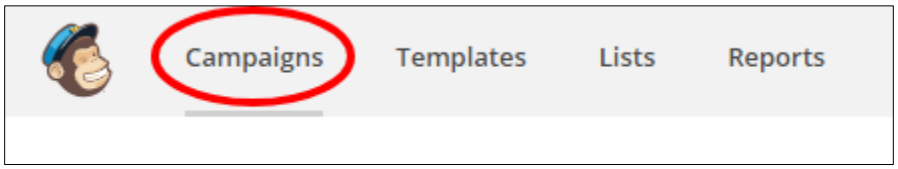
13. Click **Start the Workflow** to make the automation active. Don't miss this step!!!



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STEP 5: Create a Thank You Page

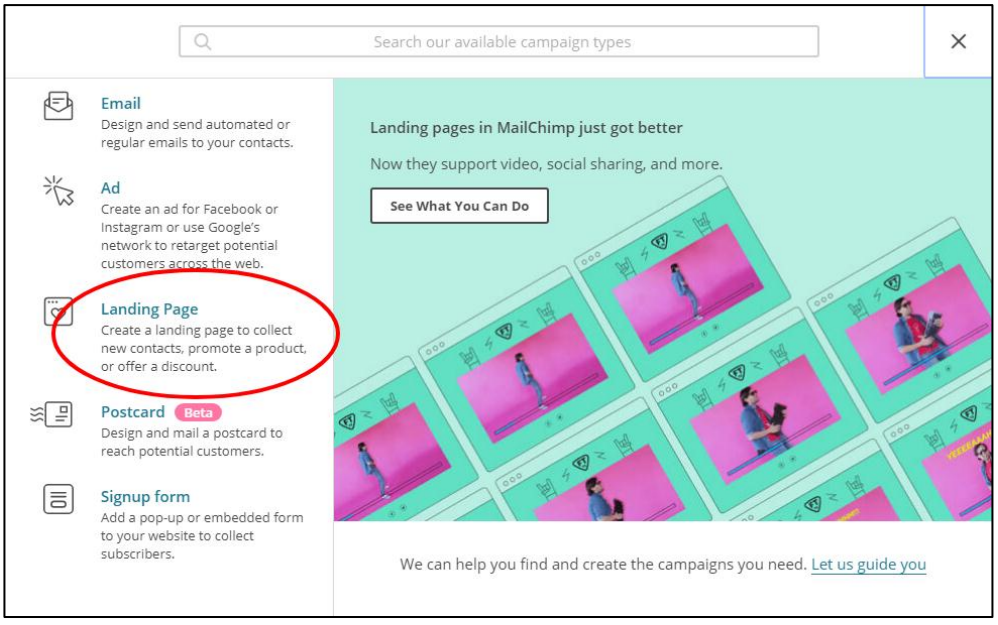
1. Click on the **Campaign tab on the top of the page**



2. Click **Create Campaign**.

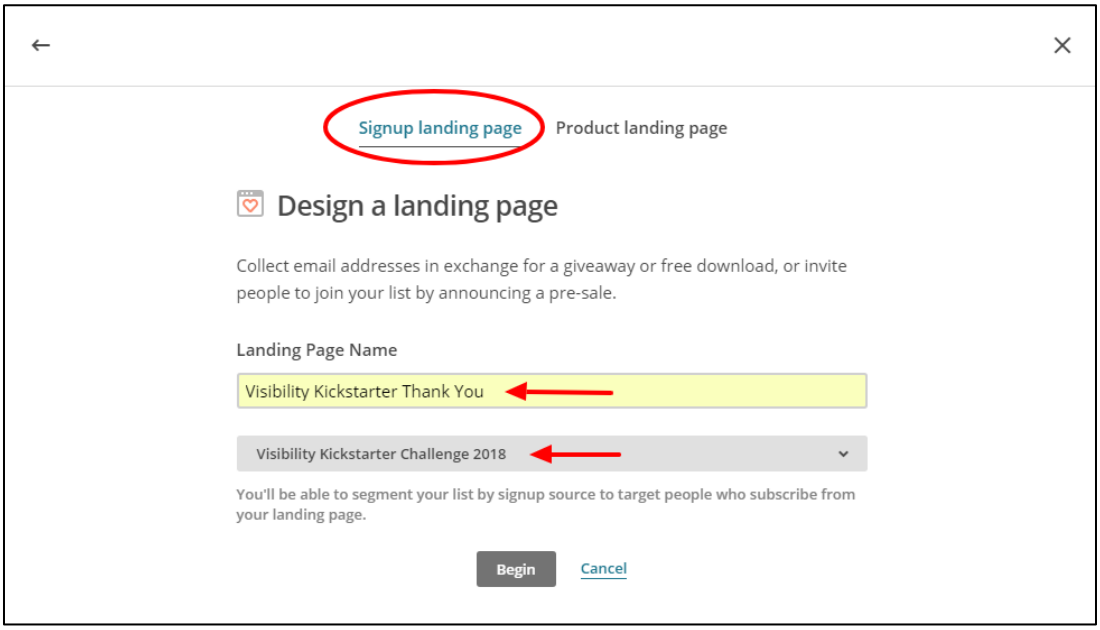


3. On the form that pops up, select "**Landing Page.**"



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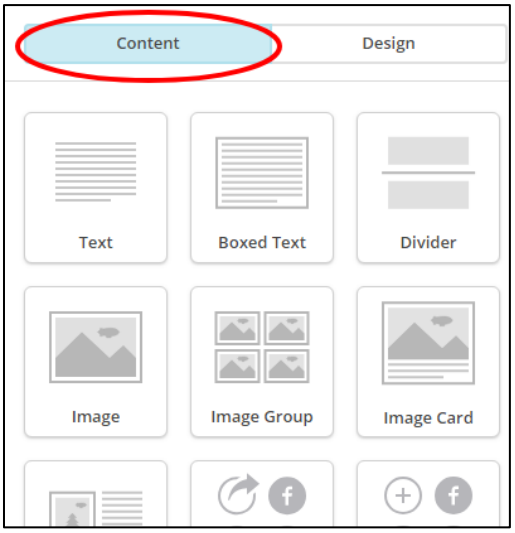
4. On the next page, under the "**Signup landing page**" tab, enter a **Page Name** and on the dropdown, select the **List** that you just created. Then, click **Begin** to start designing.



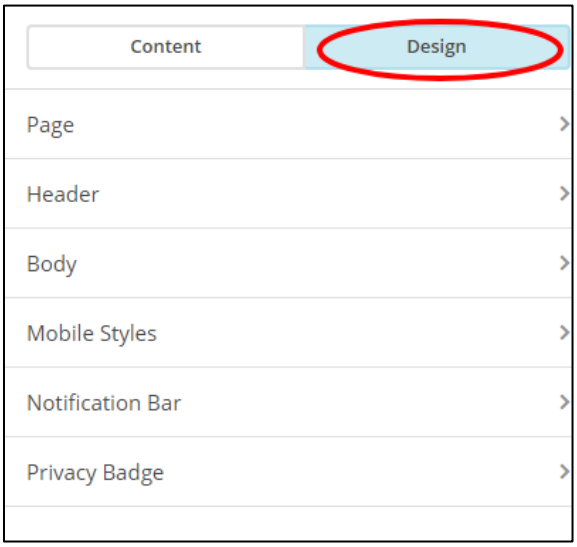
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5. Customize your Challenge **Thank You** page.

    a. When an element is not selected, the right side bar has two tabs, **Content** and **Design**. The **Content** tab allows you to create new elements by dragging and dropping items onto your page.



    b. The **Design** tab allows you to edit styles for the entire page, such as background colors, padding, width, and font styles.

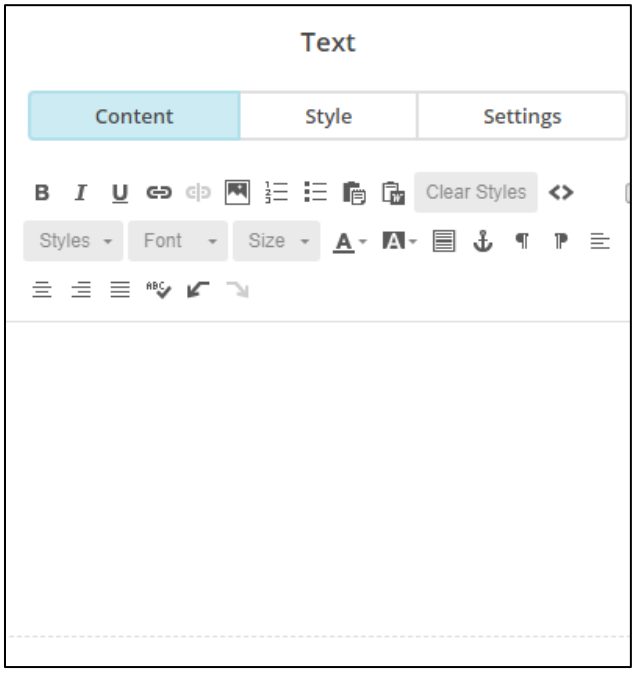


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c. Every element on the page can be moved, edited, duplicated, or deleted. Hover over the element you want to change and the different options will appear (hovering over the buttons tells you which button does which).

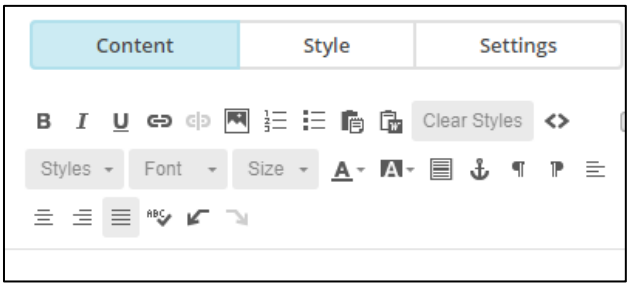


d. When you click the **Edit Button**, the editor will show up on the right side of the screen. For text, button, and form elements, there will be options for **Content**, **Style**, and **Settings**. Image elements will only have **Content** and **Settings** options.

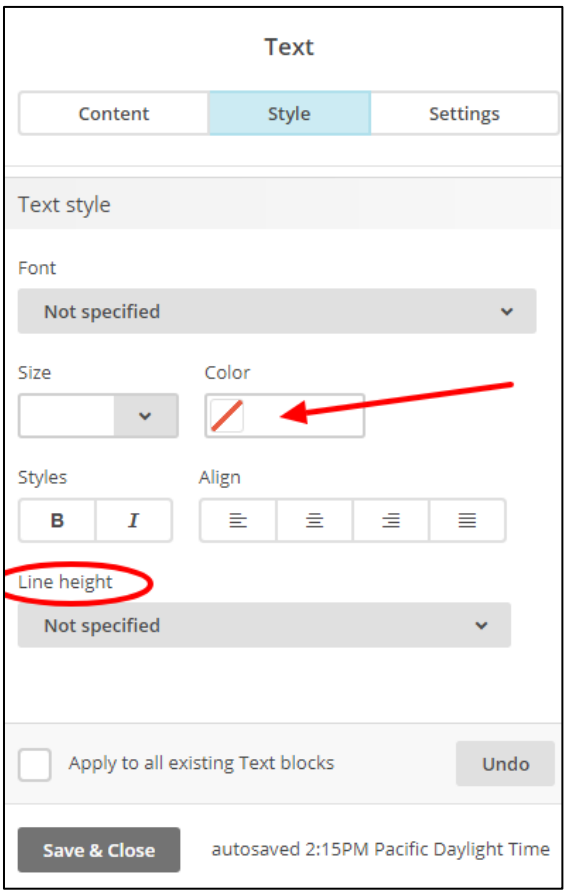


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e. Use **Content** tab to edit the content (text, images, etc.) and some styles (text color, highlight, alignment, font, etc.).



f. Use **Styles** tab to customize colors and line height.

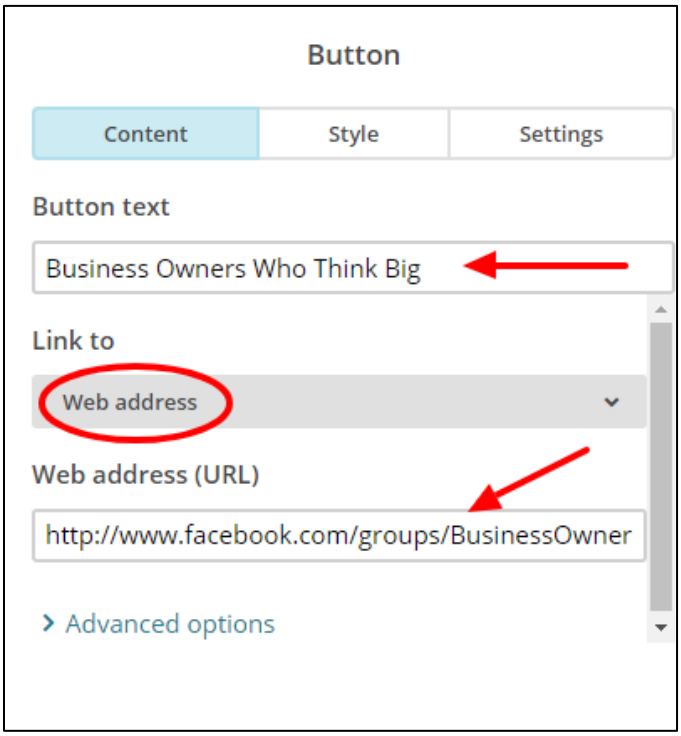


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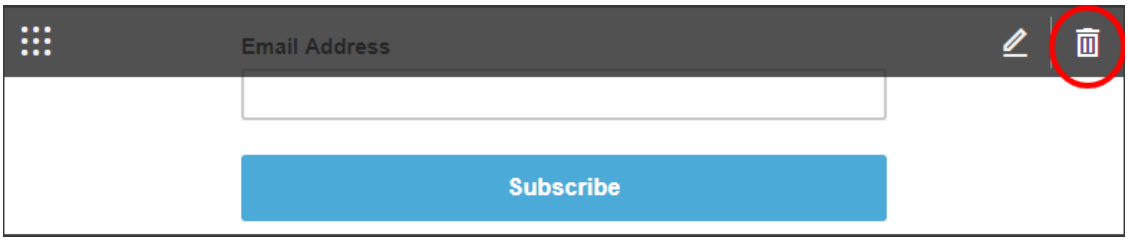
g. When editing buttons, you will see options to send a person to a web address, email address, anchor link, or a file. For the challenge Thank You page you will be using the **web address** to either:

1) Invite people to join your FB group.

2) Send people to your shopping cart to pay for the recordings.

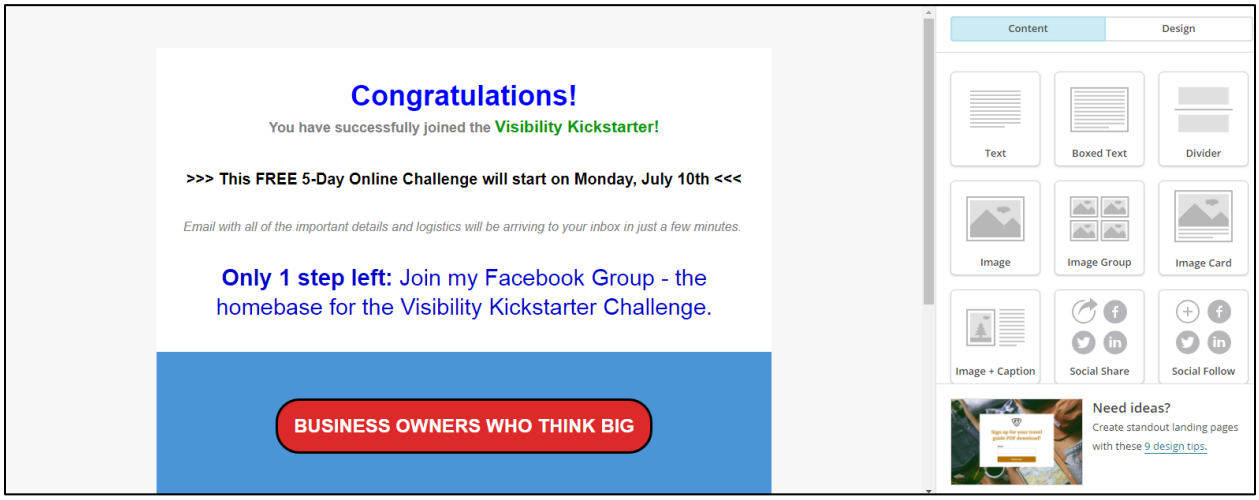


6. Since this is your Thank-You Page, make sure to delete the opt-in form from the bottom of the landing page (that will show up on your opt-in page).



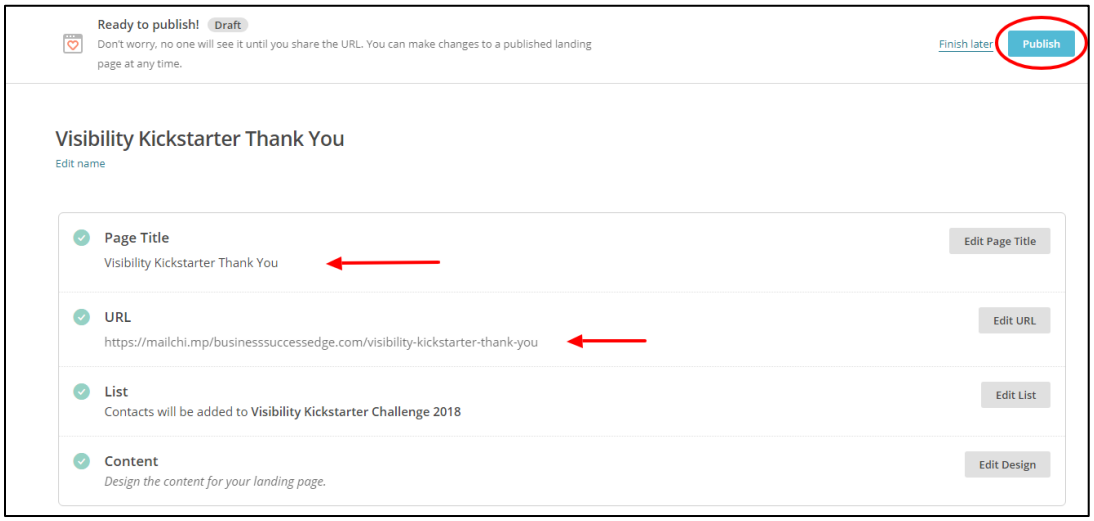
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Here is an example of what it could look like AFTER you designed your page:



6. Click **Save and Continue** (bottom right-hand corner) when you are finished making changes.

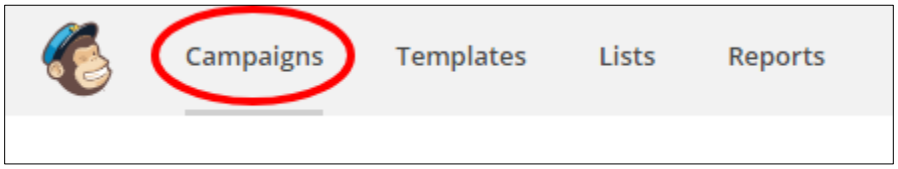
7. You will be asked to enter **Page Title** and **URL**. Name it after your challenge. Click **Publish** when finished.



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STEP 6: Create an Opt-In Page

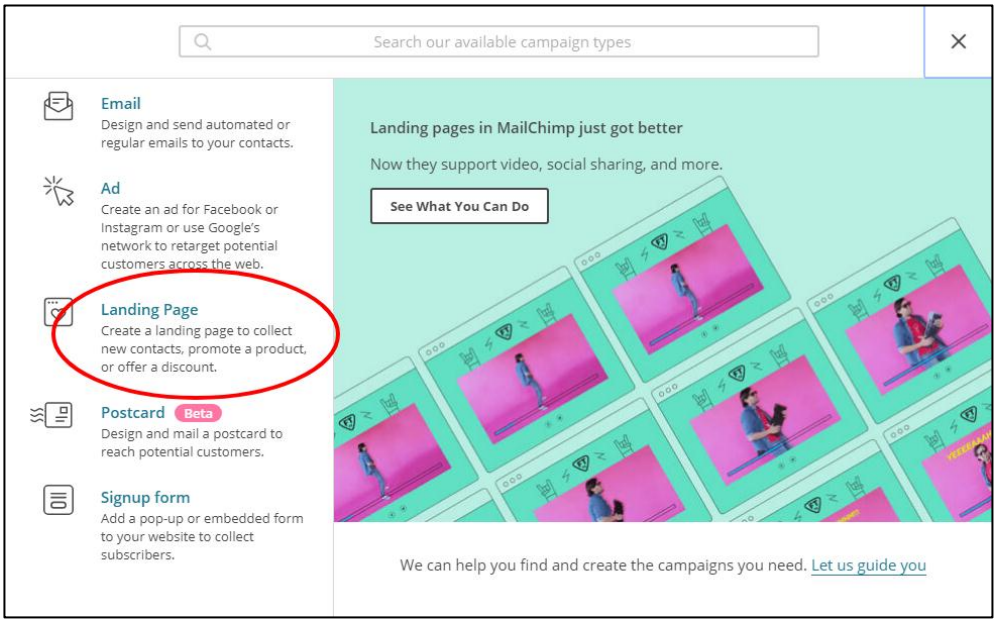
1. Click on the **Campaign tab on the top of the page**



2. Click **Create Campaign**.

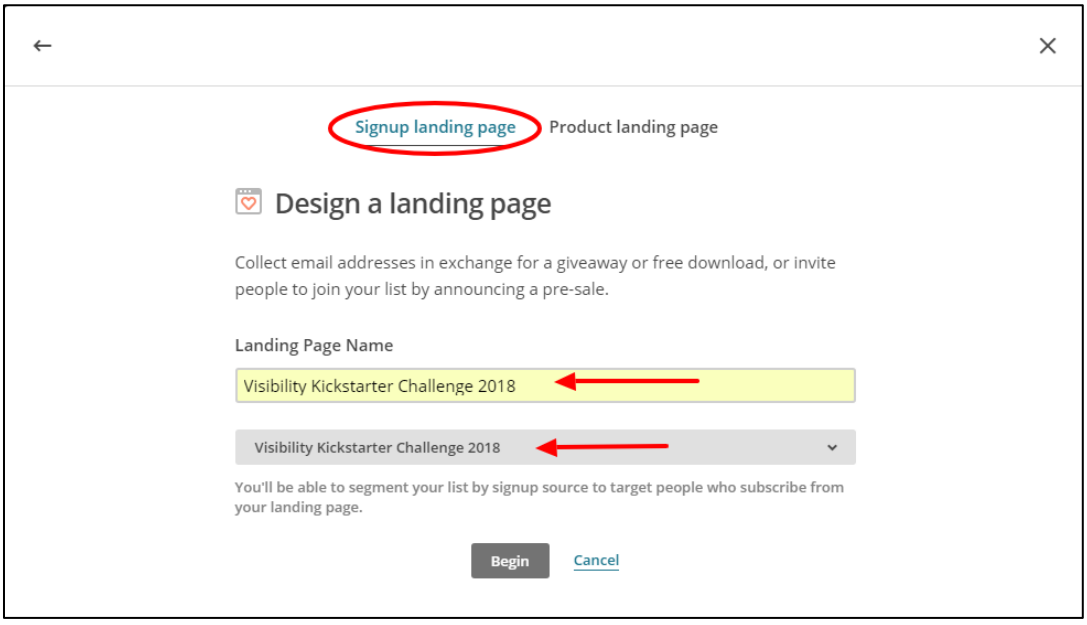


3. On the form that pops up, select "**Landing Page.**"



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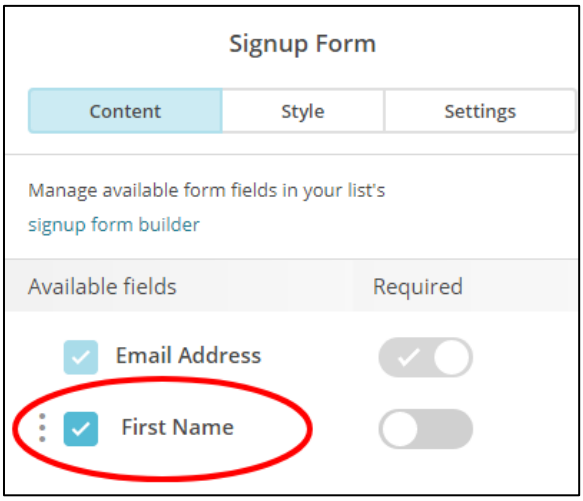
4. On the next page, under the "**Signup landing page**" tab, enter a **Page Name** and on the dropdown, select the **List** that you just created. Then, click **Begin** to start designing.



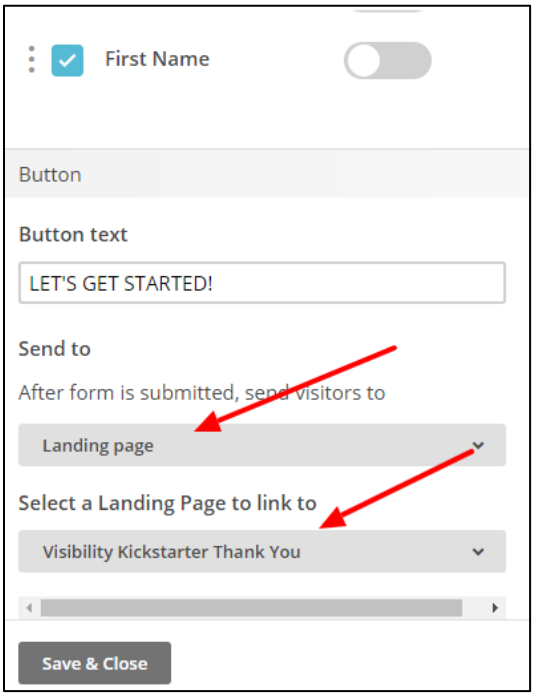
5. Customize your Challenge **Opt-In Page**. You can use the same instructions to style this page as you did your **Thank You Page**.

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6. When editing the **signup form**, under the Content tab check the box next to "**First Name**" and change it to **Required.**



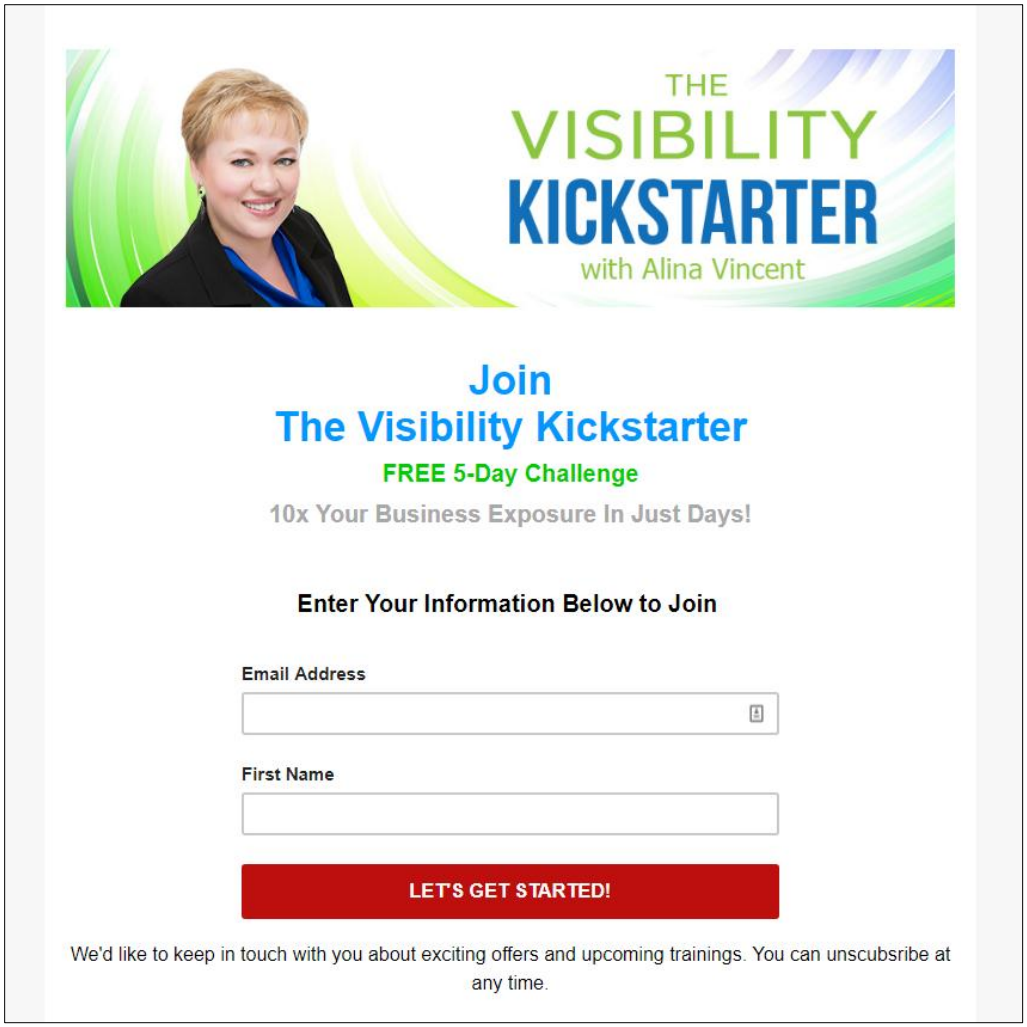
7. **VERY IMPORTANT: Connect the opt-in form to the Thank You Page.** Scroll down on the sidebar and change the "**Send to**" dropdown to "**Landing page**." Then, select the thank-you page you just created from the drop down list. You can also edit your button text here.



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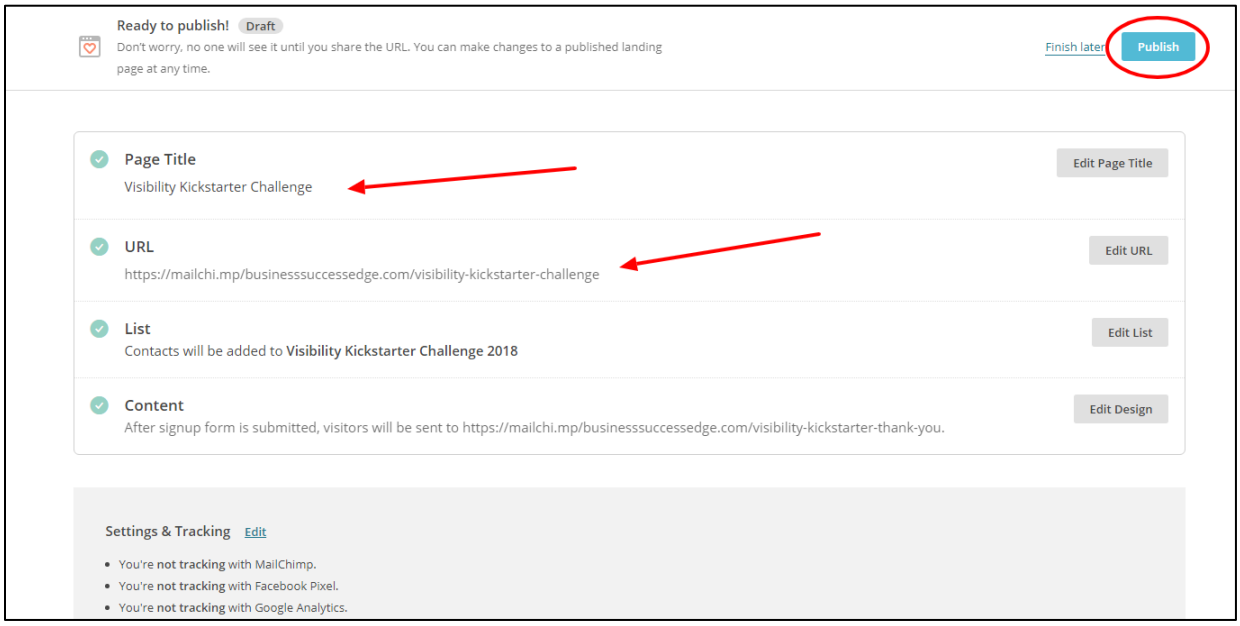
8. Once you are done designing your page, click **Save and Continue** (in the bottom right-hand corner).

   Here is a quick example of what a very simple challenge opt-in page could look like:



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9. Next you will be asked to enter **Page Title** and **URL**. **Write down the URL – this is the URL that you'll be using for testing and in all of your challenge promotions.** Click **Publish** when finished.



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Testing Your Opt-In Page:

1. Go to your Challenge Opt-In page (you created it in STEP 6). Make sure the page looks good.

2. Opt-in to your Challenge. Make sure it takes you to the Thank You page.

3. Check your email – you should get a Welcome message within 5-10 minutes.

4. Check your MailChimp account – it should show 1 new subscriber to your list.

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