Step-by-Step Guide to Set Up Your Challenge

Opt-In Page with MailChimp $13/month Account

(last updated August 1, 2023)

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, build op-in pages, and create targeted campaigns.

NOTE 1: When you sign up, you'll get 1-month free trial + free personalized onboarding session.

Here is the overview of the steps:

STEP 1: Create an Account

STEP 2: Create a Signup Form

STEP 3: Set up an Automated Welcome Email

STEP 4: Create a Thank You Page (important to create this BEFORE step 5)

STEP 5: Create an Opt-In Page

STEP 6: Test Your 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 it's much faster the second time around.

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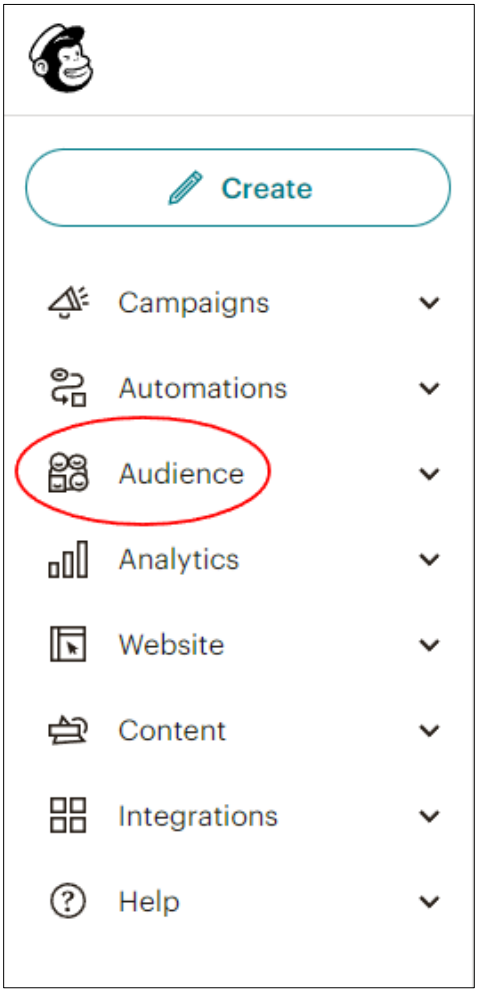
STEP 1: Create an Account

MailChimp (Essentials Plan - $13/month)

STEP 2: Create a Sign Up Form

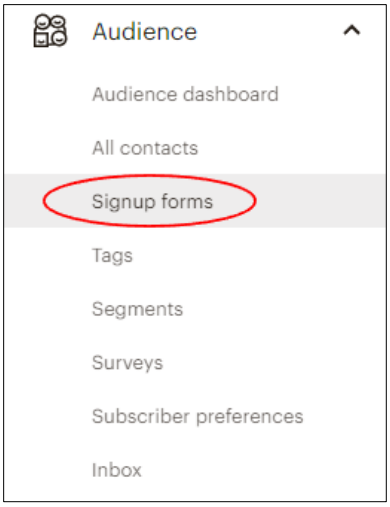
1. Log in to your **MailChimp** account.

2. Click on the **Audience** button on the left sidebar of the page to expand it.

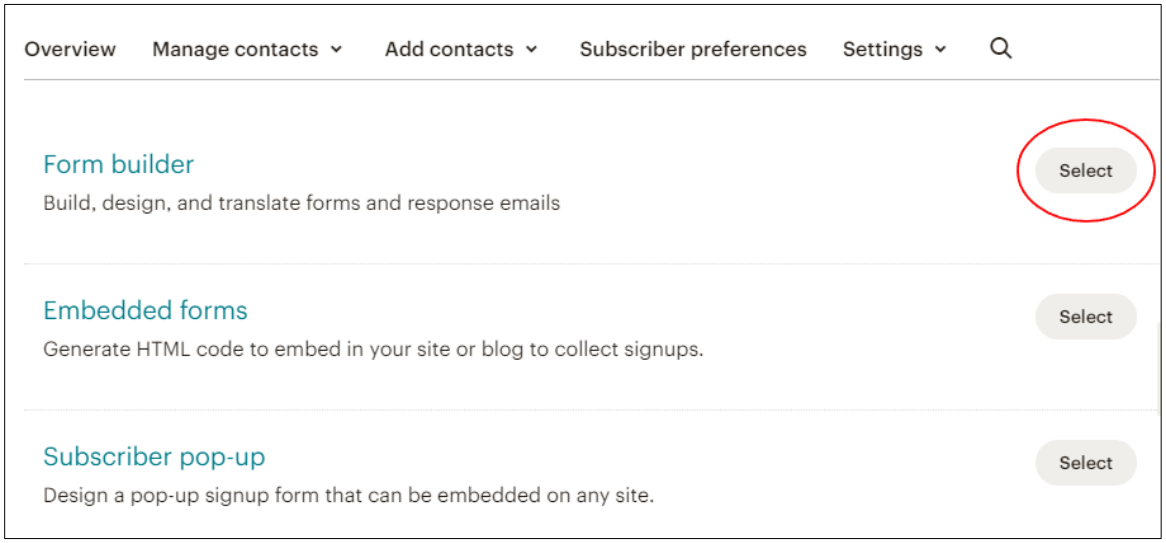


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3. Choose **Signup forms** from the dropdown menu.

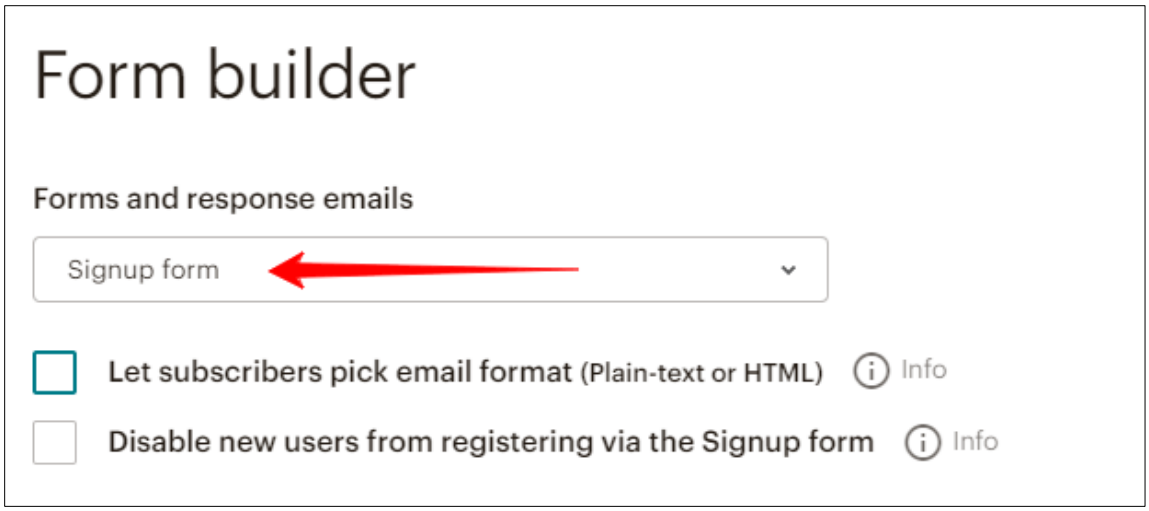


4. Select the **Form Builder** option.



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5. Make sure that **Signup form** is selected on the "**Forms and response emails**" menu. Leave the next two boxes unchecked.

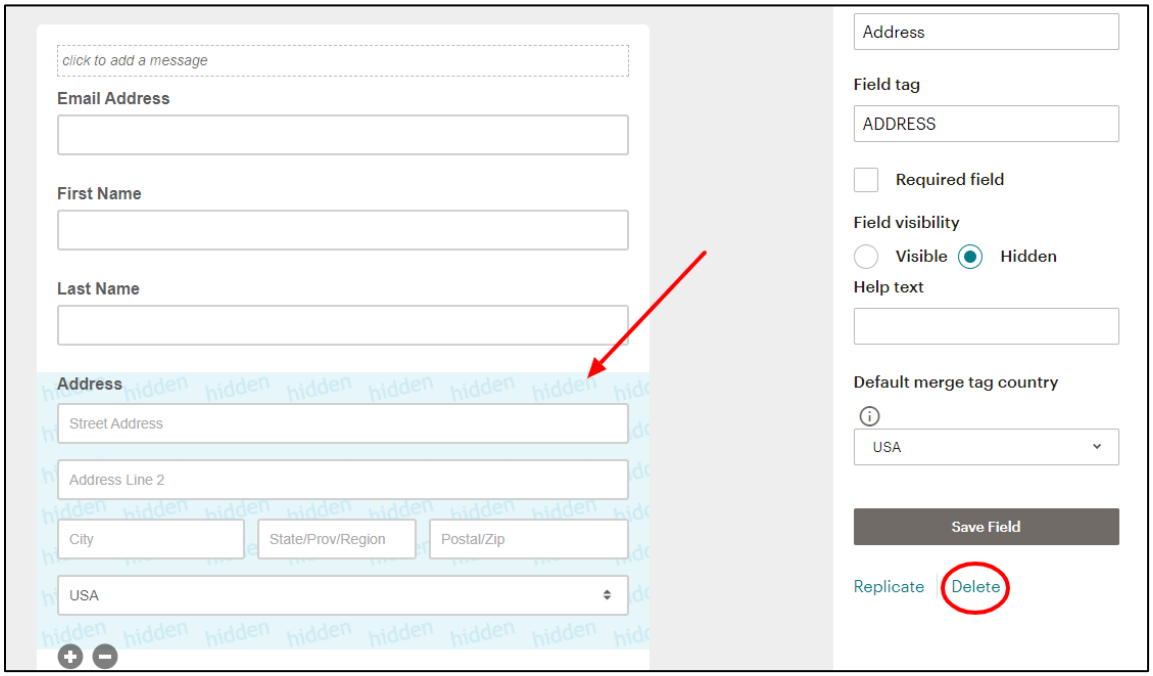


6. Stay on the **Build it** tab to select what information you will request from people.



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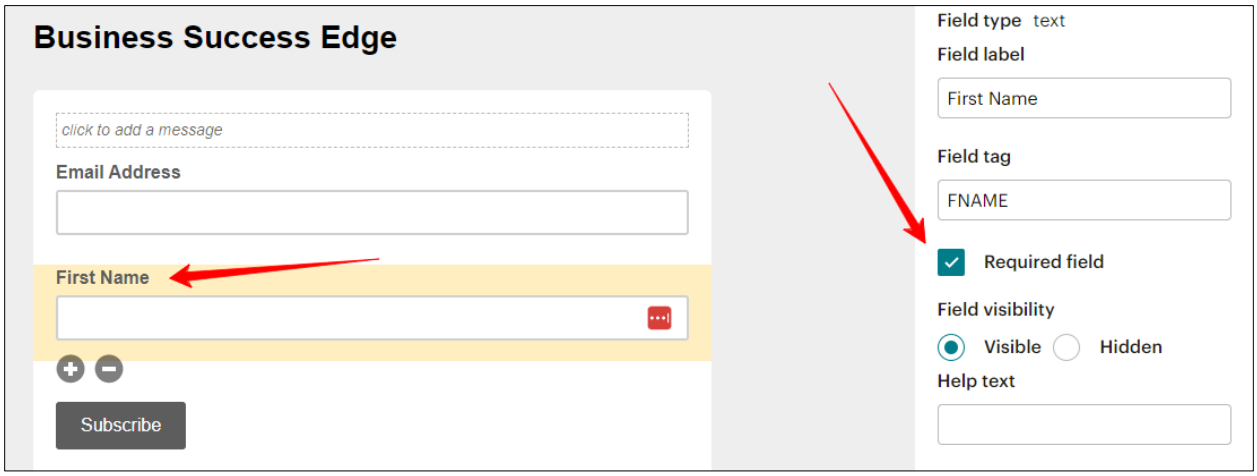
7. If it appears by default, click on the **"Address" field** on the form to highlight it and then **DELETE** it (you will be asked to confirm it). The less information you ask for, the more likely your prospects will complete the process. Ask for the minimal amount of information you will need – just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



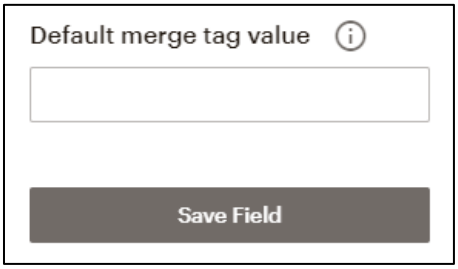
8. Repeat the process to delete the "**Phone Number**," "**Birthday**," and "**Last Name**" fields (you will be asked to confirm the deletion each time).

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9. Make sure the **"First Name" field** is set as 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.



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

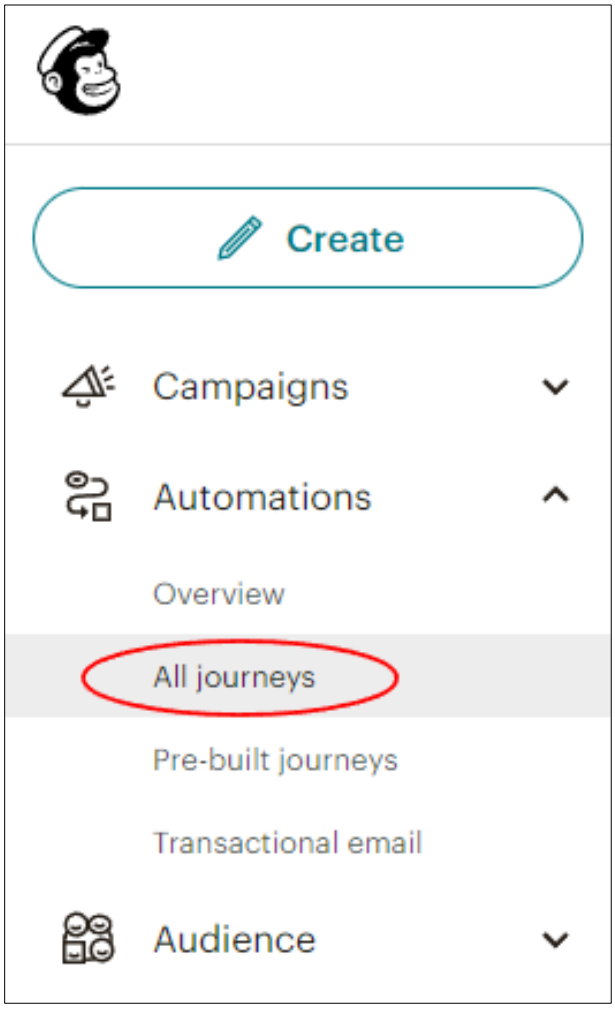


11. You are now done with setting up your Signup form

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STEP 3: Set up an Automated Welcome Email (Autoresponder)

1. Click on the **Automations** button on the left sidebar of the page and then click on **All journeys** in menu that opens up.

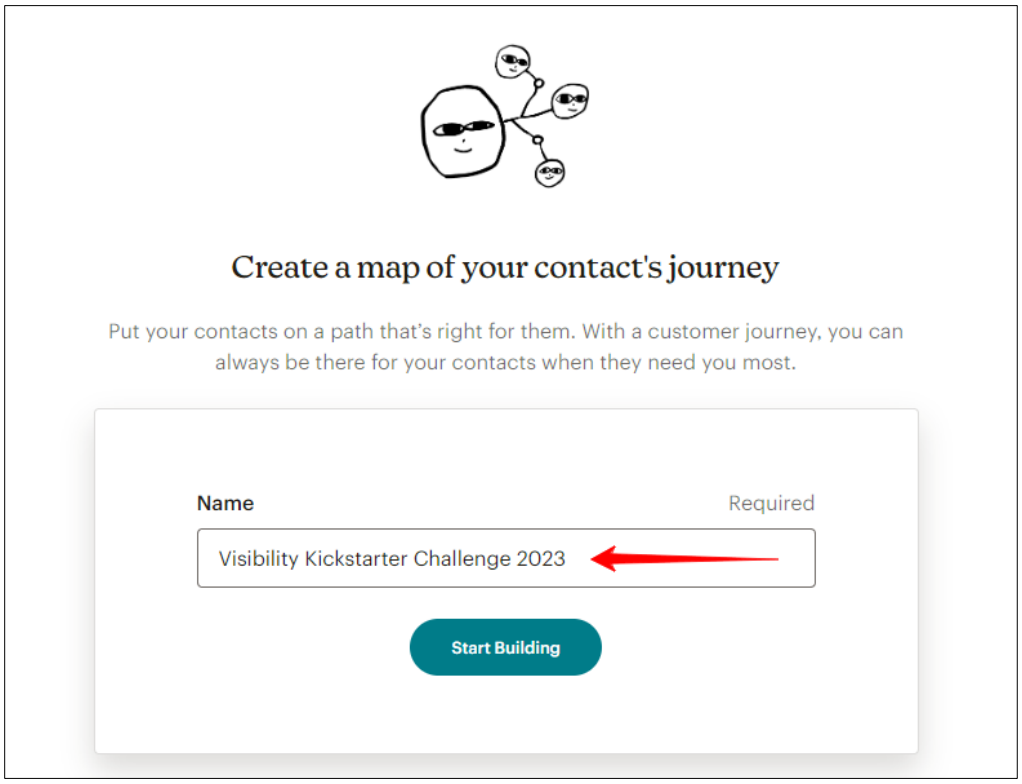


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2. On the My Journeys page, click **Build from scratch** the top right corner of the page.

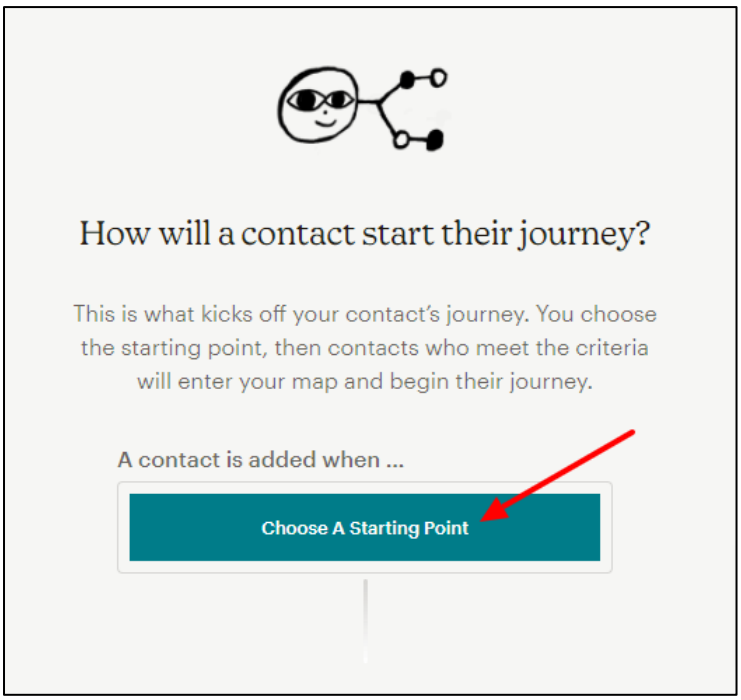


3. On the next page, **name** your journey with the name of your challenge. Click **Start Building** when done.

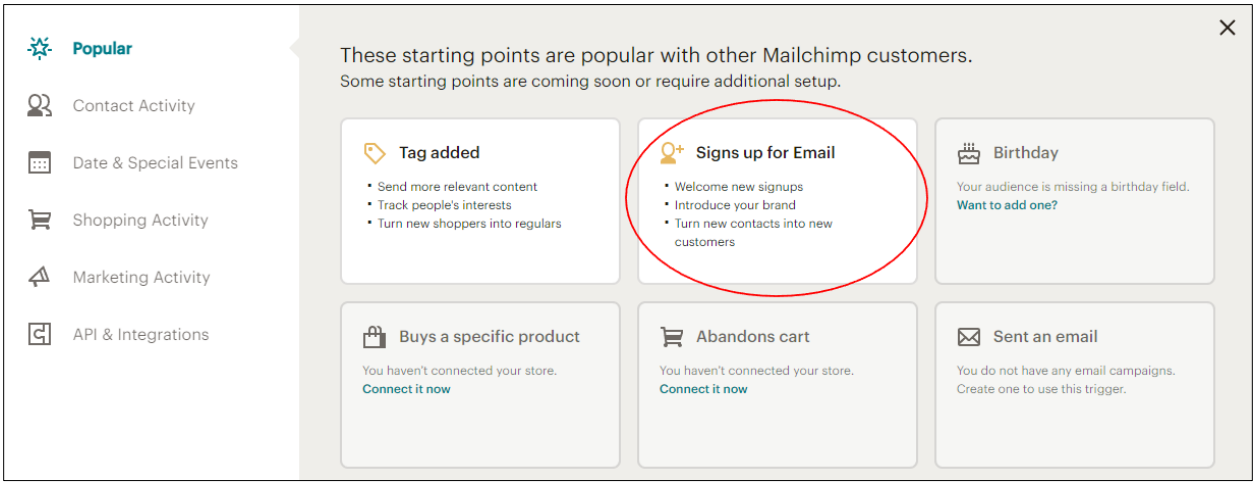


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7. On the next screen, click on **Choose A Starting Point** for your automation.

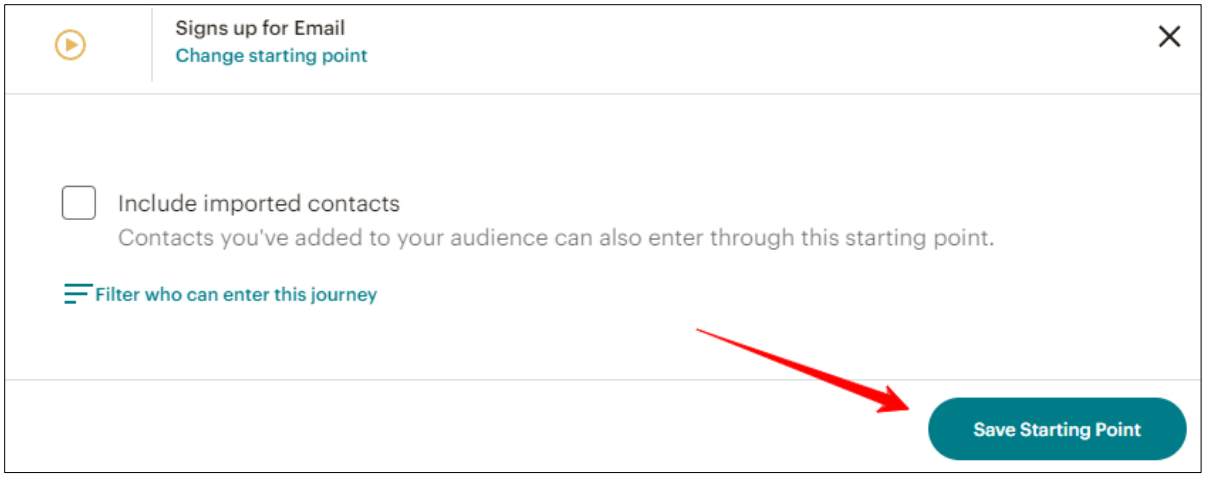


8. On the pop up, select the option **Signs up for Emails**.

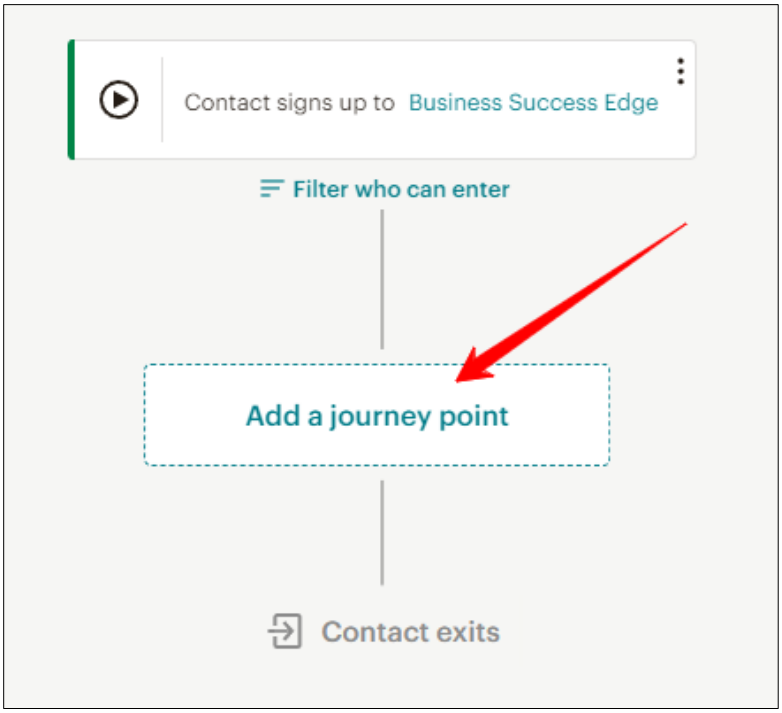


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9. Next, click **Save Starting Point** at the bottom of the popup.

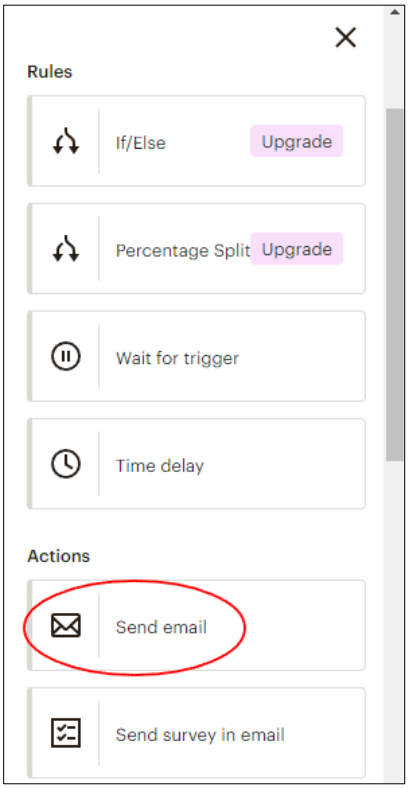


10. Next, click on the **Add a Journey Point.**

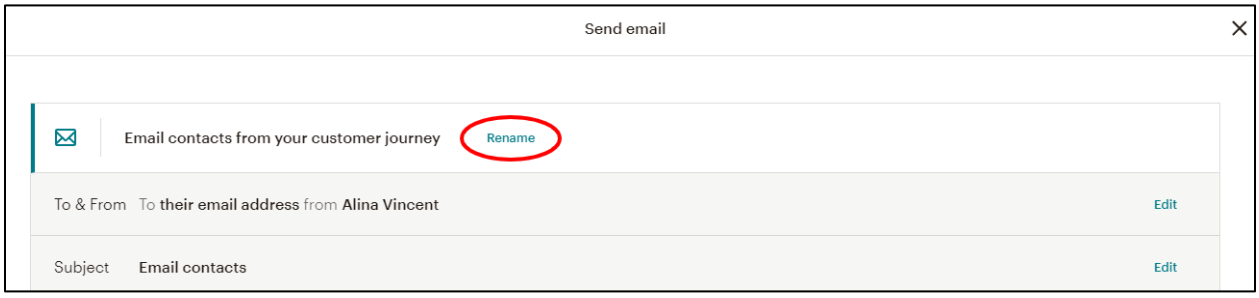


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11. On the pop up, select the option to **Send email** under the Actions category. You may have to scroll to see all the selections.

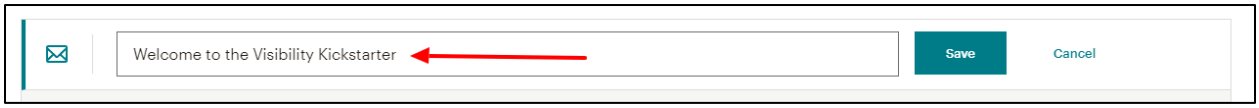


12. On the next screen, click Rename to change the name of your automated email.



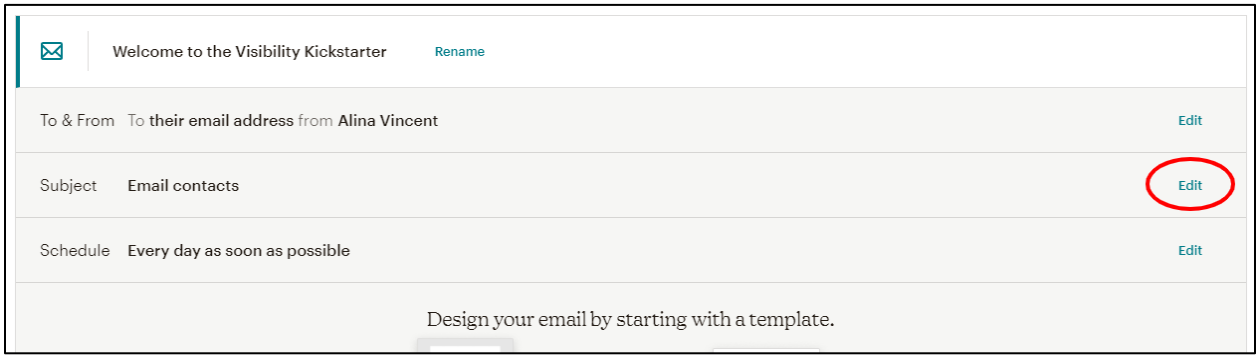
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13. Change the name of your email automation and then click **Save**.

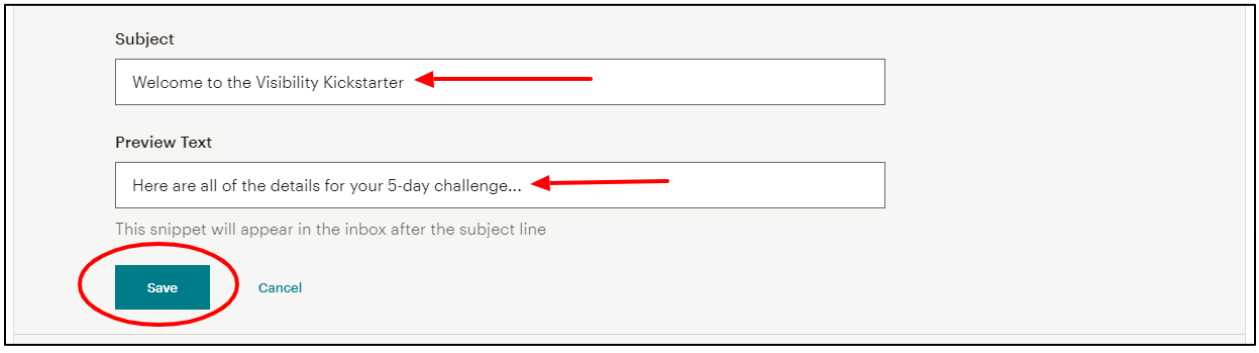


14. Verify the **To & From** options are correct.

15. Click Edit next to "Subject – Email contact" to edit the **Email Subject**.

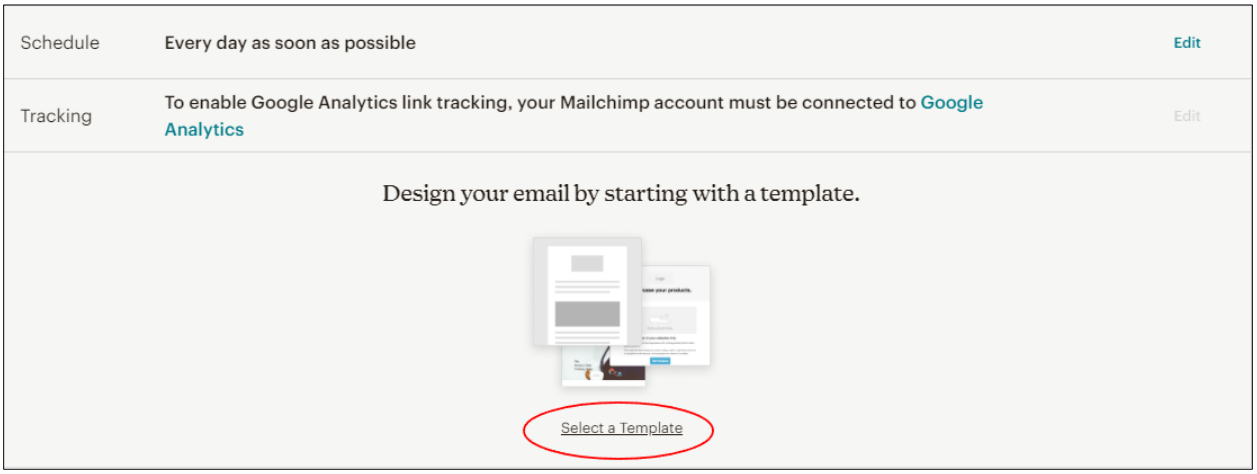


16. Enter your **Email subject** and **Preview text** and then click **Save.**

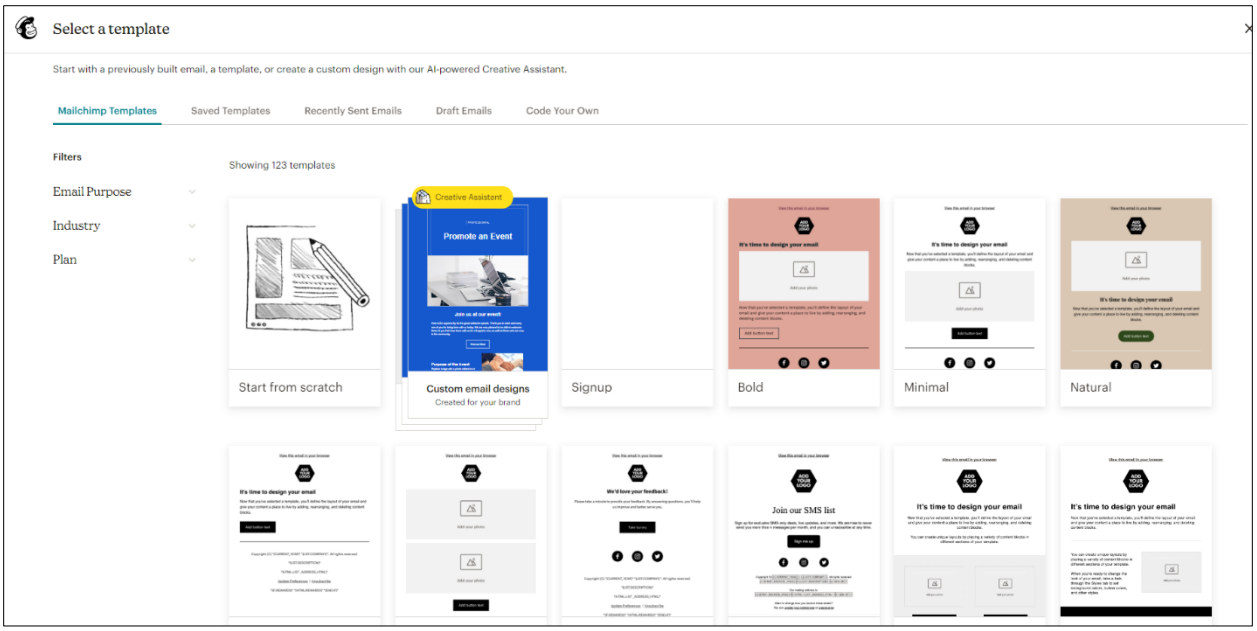


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17. The next step is to design the actual welcome email. Click on **Select a Template**.

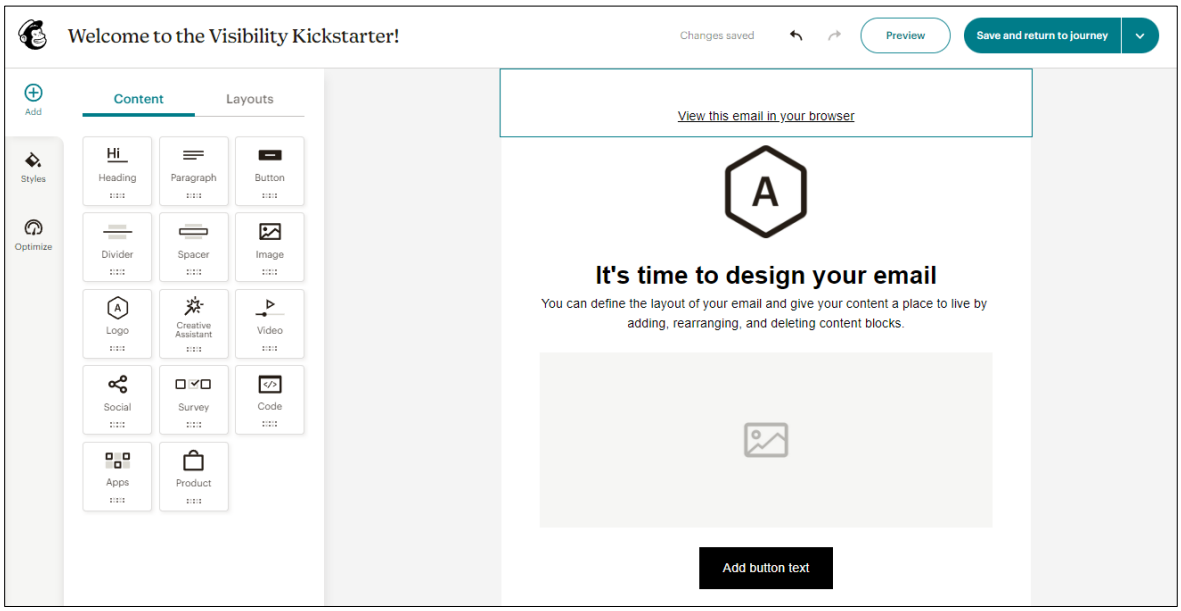


18. On the next page, click on a template you'd like to use for your welcome email. Choose any template you want based on your personal preference.



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19. 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 – check out this article from Mailchimp.

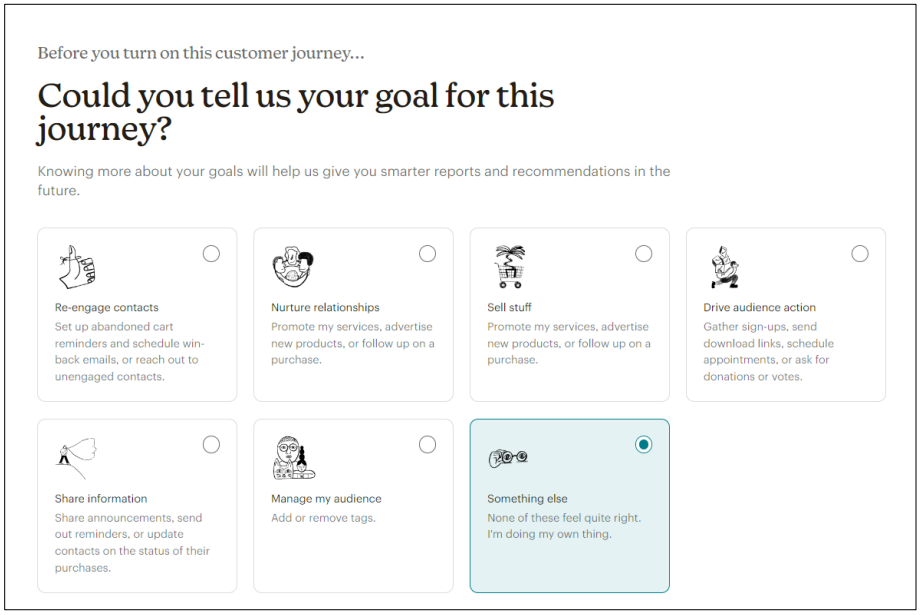


20. Once you are done designing your email, make sure to preview it. Once you are done - click **Save and Return to Journey** at the top of the page.



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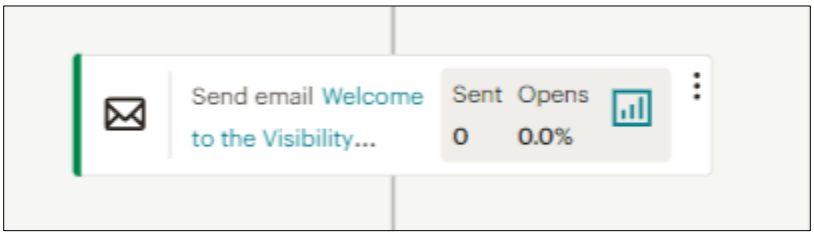
21. On the next screen, select the goal for the campaign – whatever feels right to you.



22. Next, click **Turn On** in the top right hand corner. Don't miss this step!!!



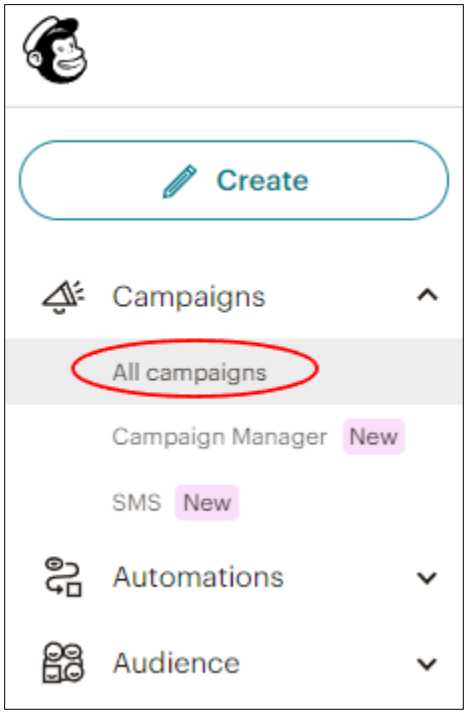
23. Then click **Continue** or **View All Journeys** to verify that email is active.



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STEP 4: Create a Thank You Page

1. Click on the **Campaigns** button on the left sidebar of the page. And then select **All campaigns** in the dropdown.

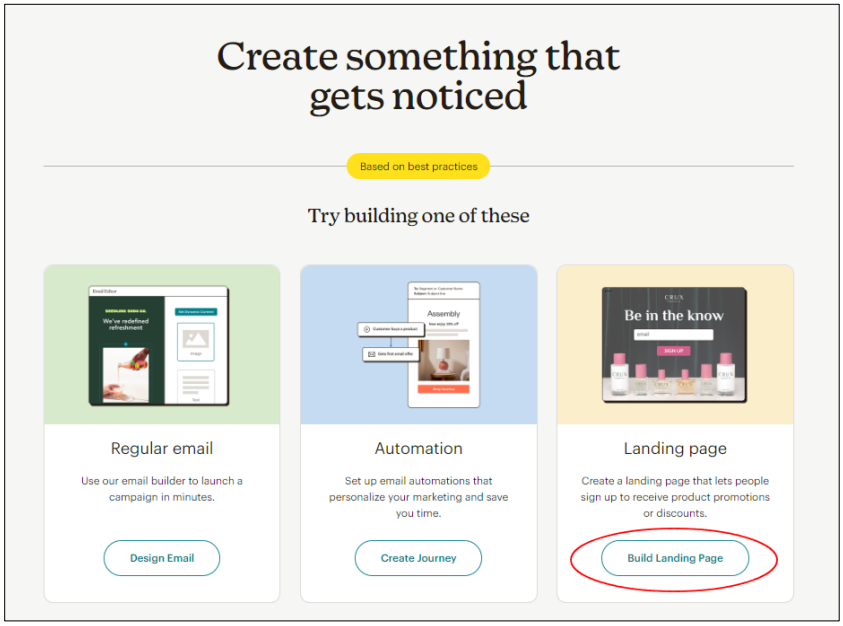


2. On the top right of the page, select **Create New.**

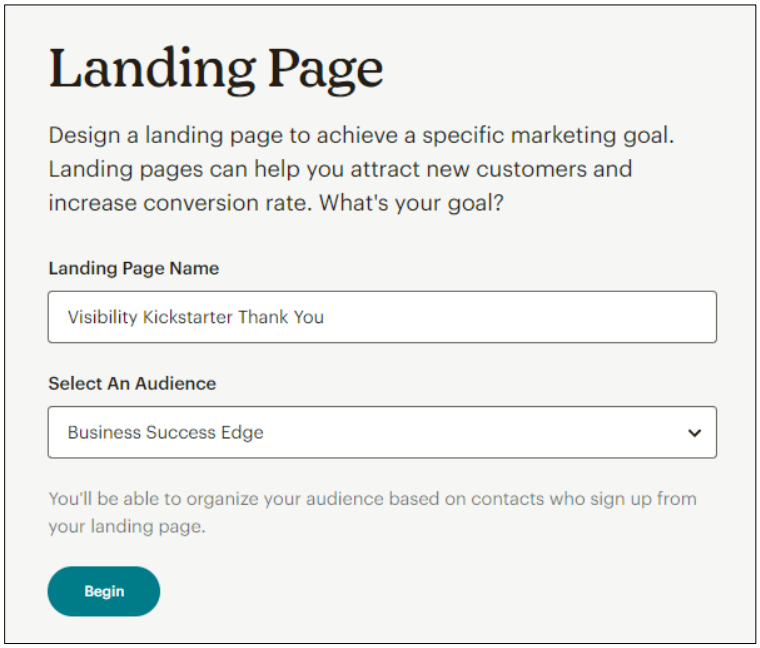


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3. On the next page, select "**Landing Page**" from the options.

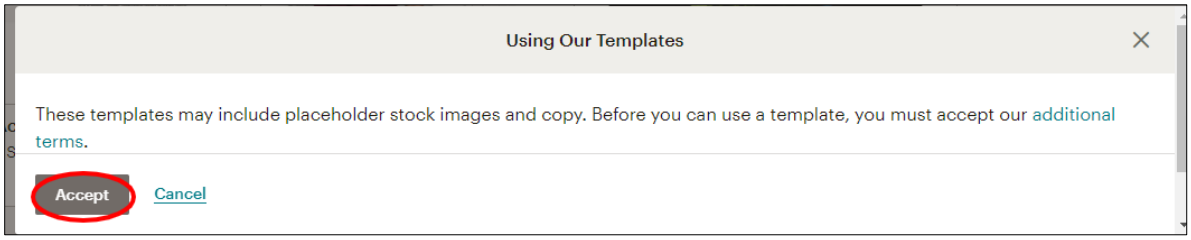


4. On the center screen, enter a **Page Name**. Then, click **Begin** to start designing.

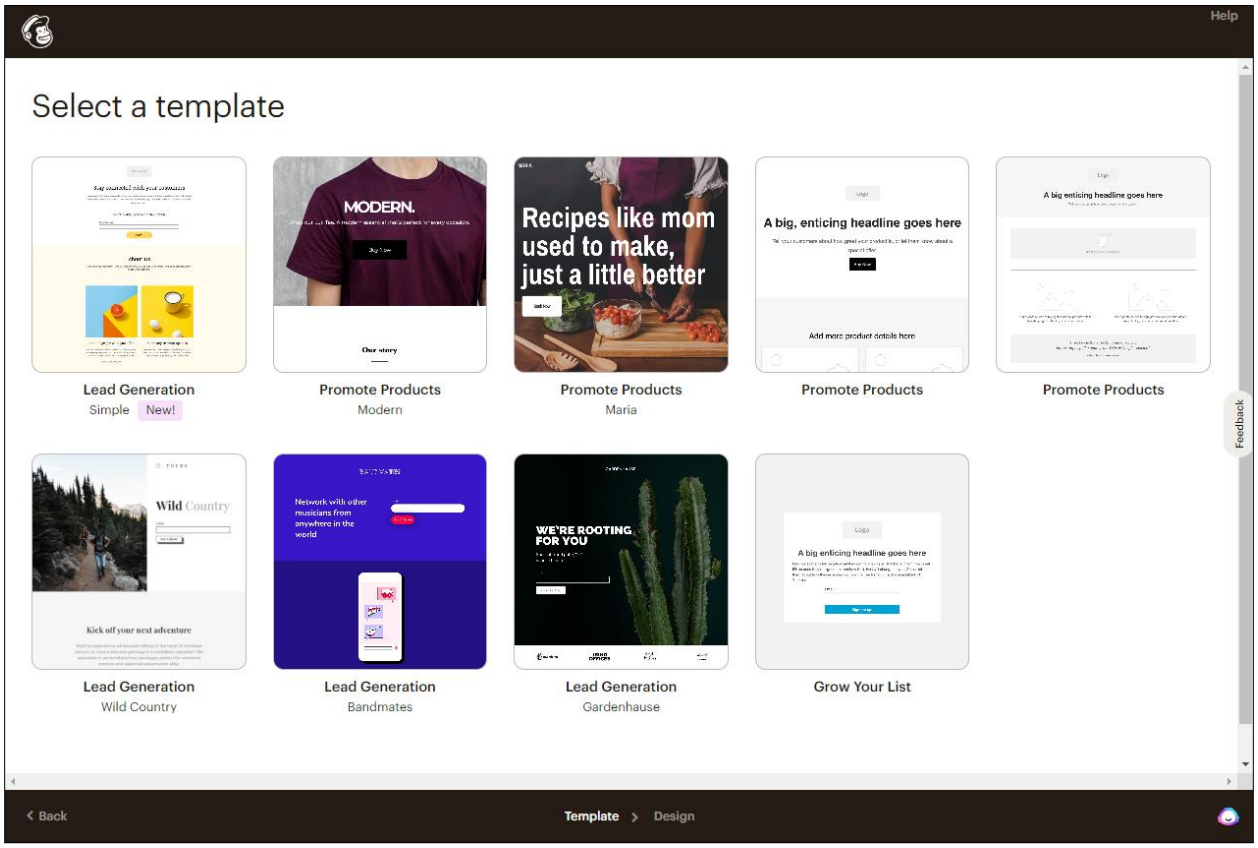


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5. If you see this pop-up, click Accept.



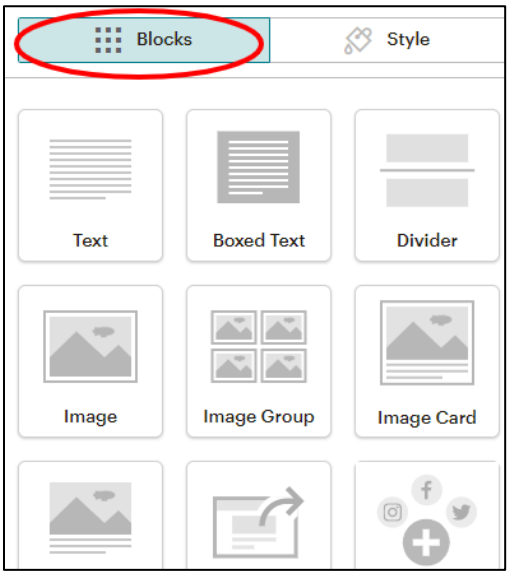
6. On the Template step of the Thank You Page, select any template you want to customize the look of your page. All layouts are fully customizable and elements can be added or removed.



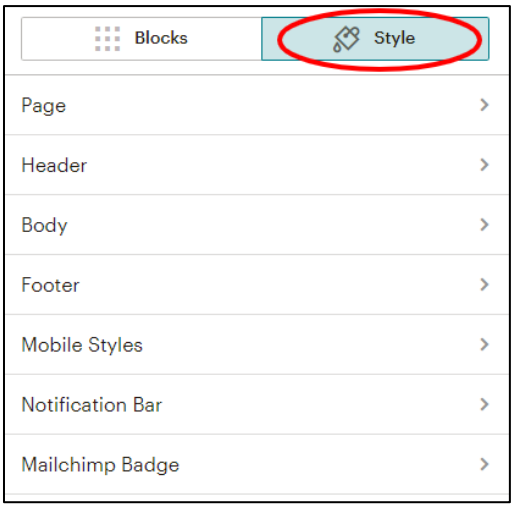
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7. Customize your Challenge **Thank You** page.

    a. The right side bar has two tabs, **Blocks** and **Style**. The **Block** tab allows you to create new elements by dragging and dropping items onto your page.



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

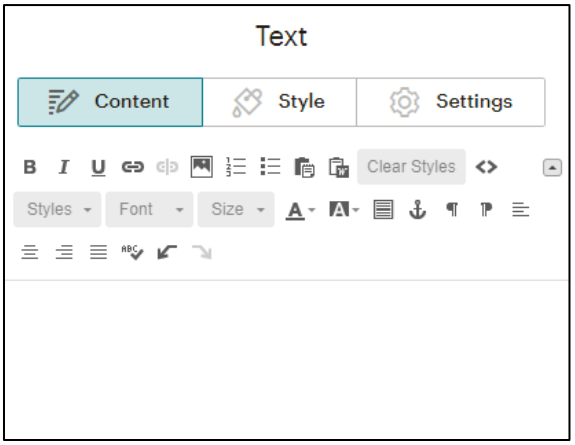


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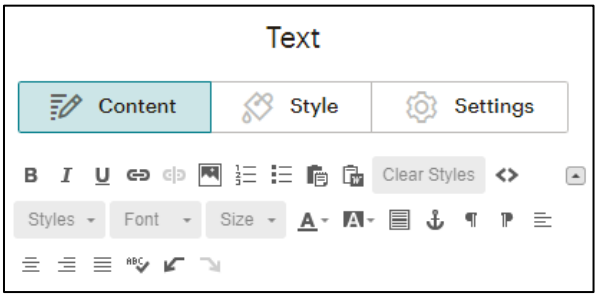
c. Every element on the page can be moved, edited, duplicated, or deleted. Hover over the element you want to change and the different options will appear (hovering over the buttons tells you which button does which).



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.

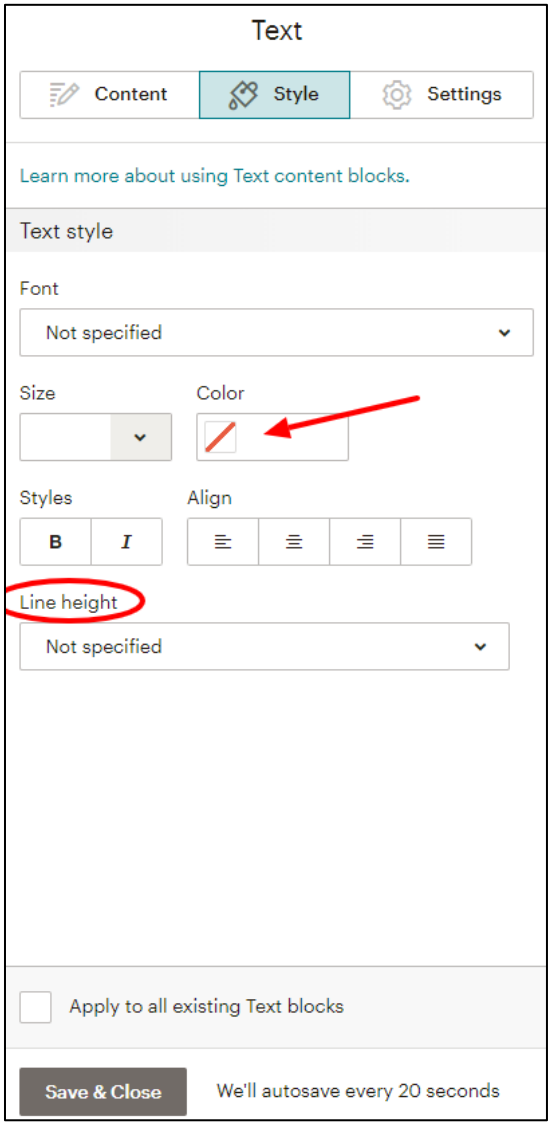


e. Use the **Content** tab to edit the content (text, images, etc.) and some styles (text color, highlight, alignment, font, etc.).



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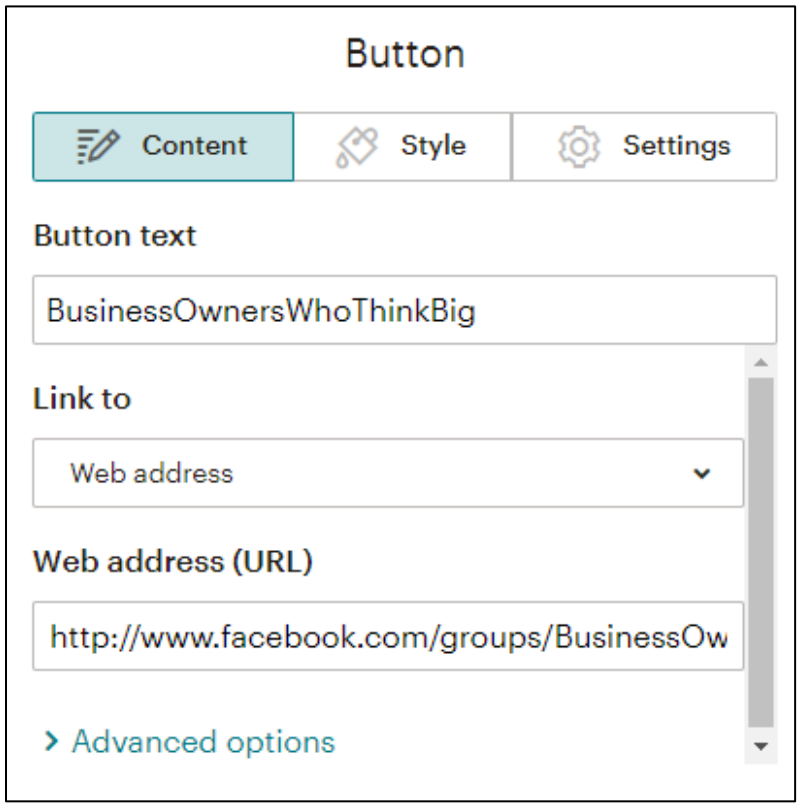
f. Use the **Style** tab to customize colors and line height.



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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:

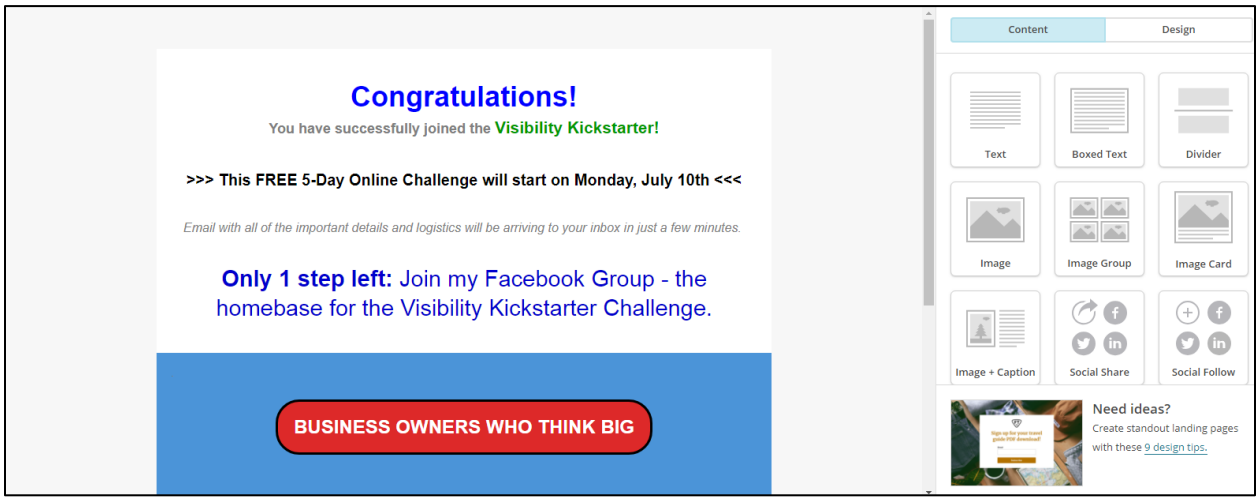
1) Invite people to join your FB group.
2) Send people to your shopping cart to pay for the recordings.



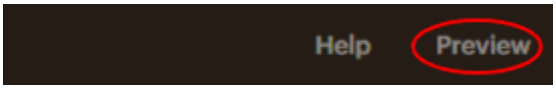
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8. Since this is your Thank-You Page, make sure to **delete the opt-in form** that might appear on the bottom of the landing page (that will be on your opt-in page).

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

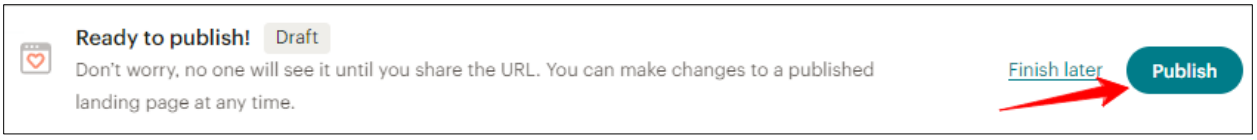


9. Click **Preview** on the top of your page to see what the page looks like.



10. Once you are done – click **Save & Close** on the bottom of the page.

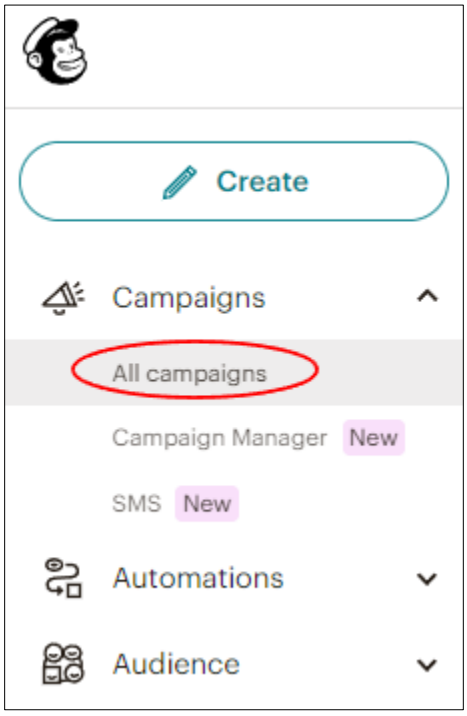
11. On the next page, click **Publish** to make the Thank You page live.



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STEP 5: Create an Opt-In Page

1. Click on the **Campaigns** button on the left sidebar of the page. And then select **All campaigns** in the dropdown.

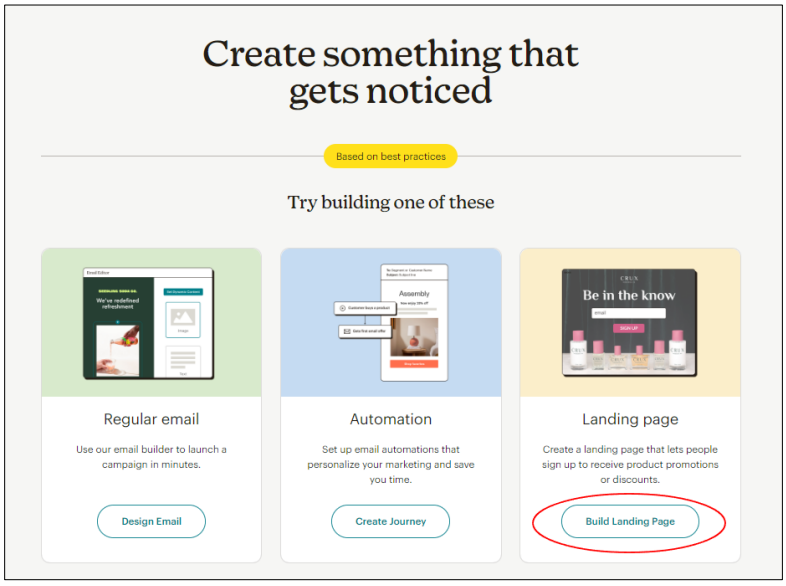


2. On the top right of the page, select **Create New.**

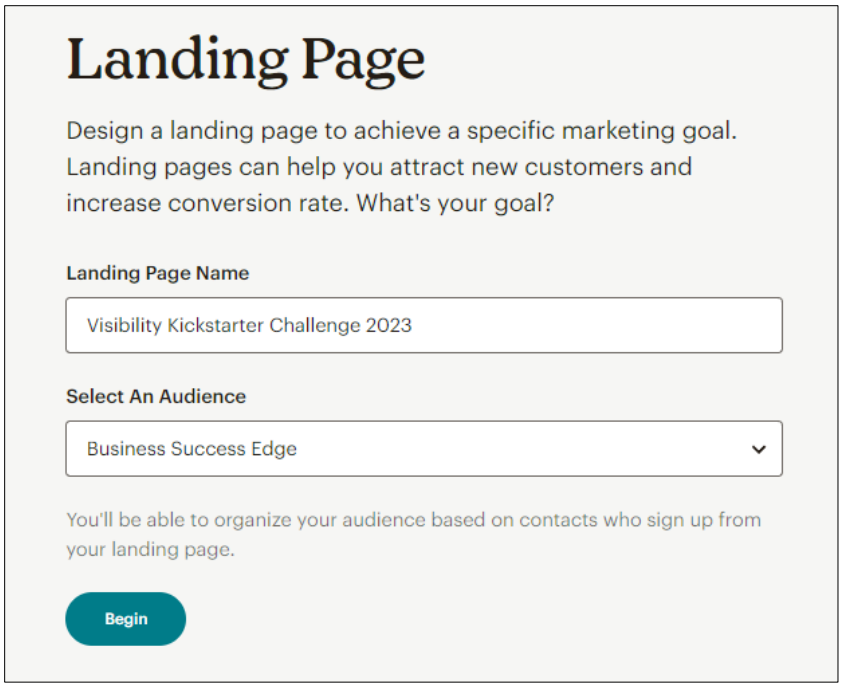


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3. On the next page, select "**Landing Page**" from the options.



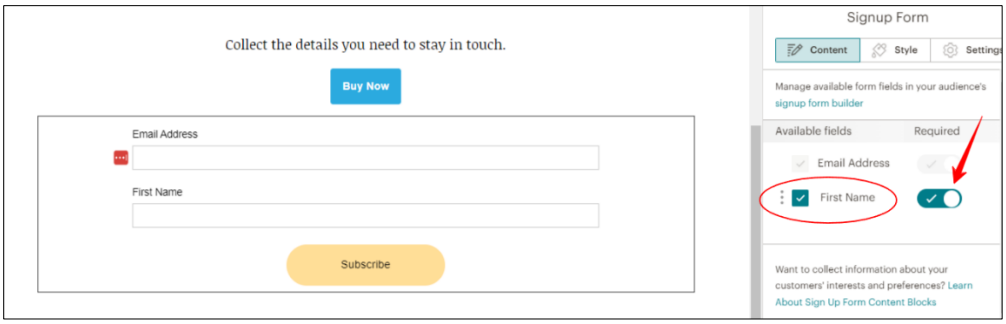
4. On the center screen, enter a **Page Name** and on the dropdown, select the **Audience** that you just created. Then, click **Begin** to start designing.



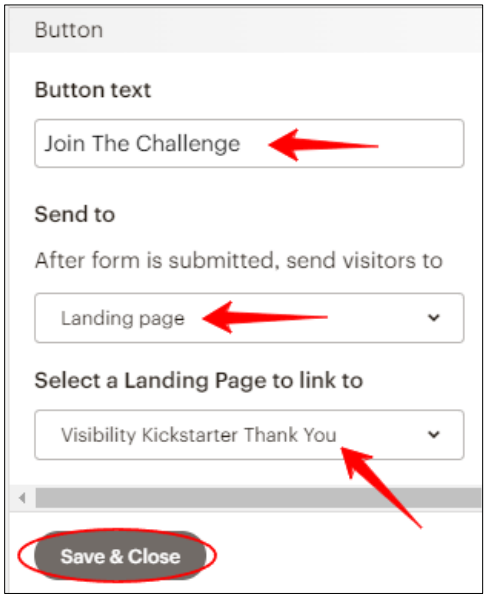
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5. Customize your Challenge **Opt-In Page**. You can use the same instructions to style this page as you did your **Thank You Page**.

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



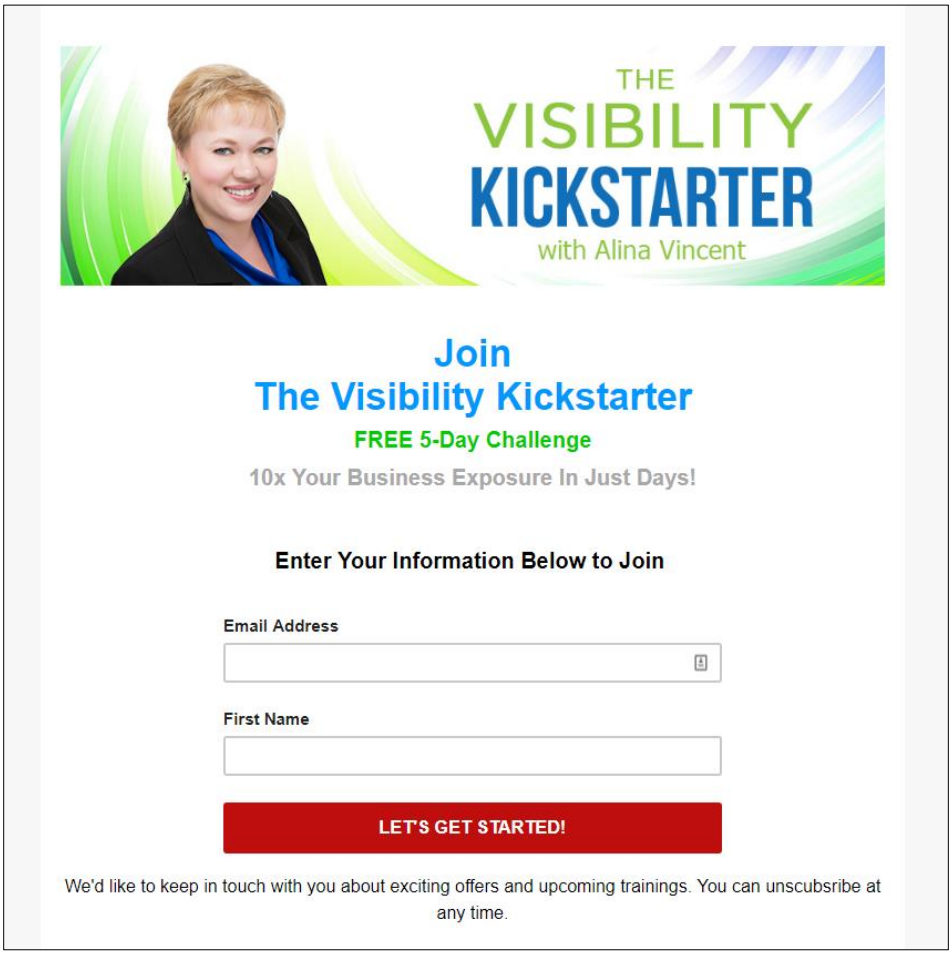
7. **VERY IMPORTANT: Connect the Optin Form to the Thank You Page.** Scroll down on the sidebar and change the "**Send to**" dropdown to "**Landing page**." Then, select the thank-you page you just created from the drop down list. You can also edit your button text here. Make sure to click **Save & Close**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



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

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



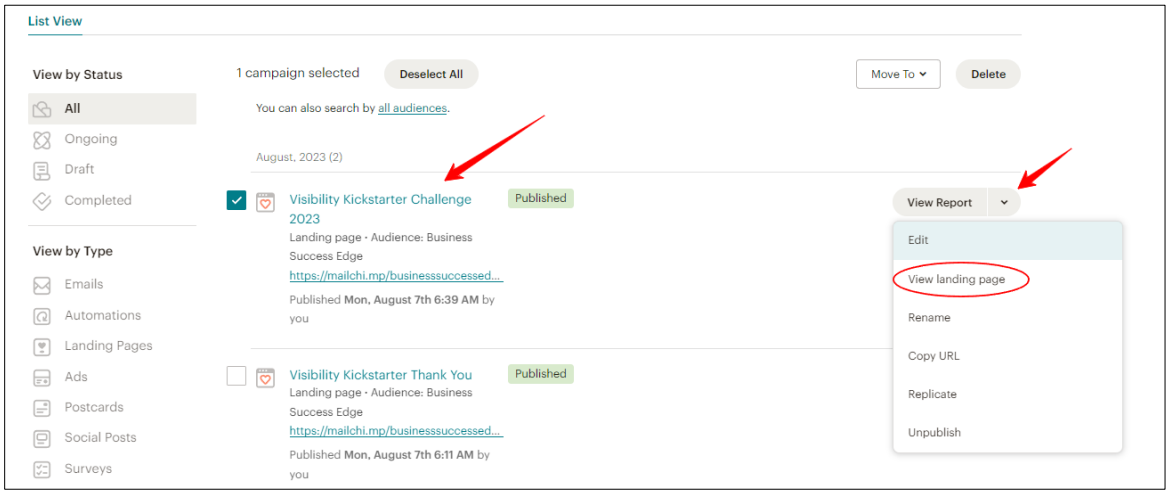
9. Click **Publish** on the next page.

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6. Test Your Opt-In Page:

1. Go to Campaigns → All campaigns.

2. Click on the menu next to the challenge Opt-In page and select **View Landing Page**. The URL of this page is the URL you can use to promote your challenge.



3. Make sure the page looks good.

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

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

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