Step-by-Step Guide to Set Up Your Challenge Opt-In Page with MailChimp $13/month Plan

(last updated June 5, 2025)

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.

Here is the overview of the steps:

***NOTE**: The order in which they are created is important!*

STEP 1: Create a Mailchimp Account

STEP 2: Create a Tag

STEP 3: Create a Thank You Page

STEP 4: Create an Opt-In Page

STEP 5: Set up an Automated Welcome Email

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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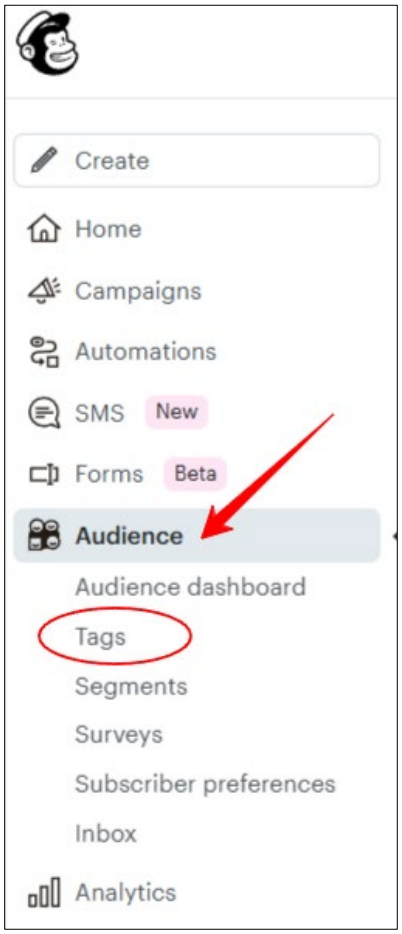
STEP 1: Create a Mailchimp Account

MailChimp (Essentials Plan - $13/month)

STEP 2: Create a Tag

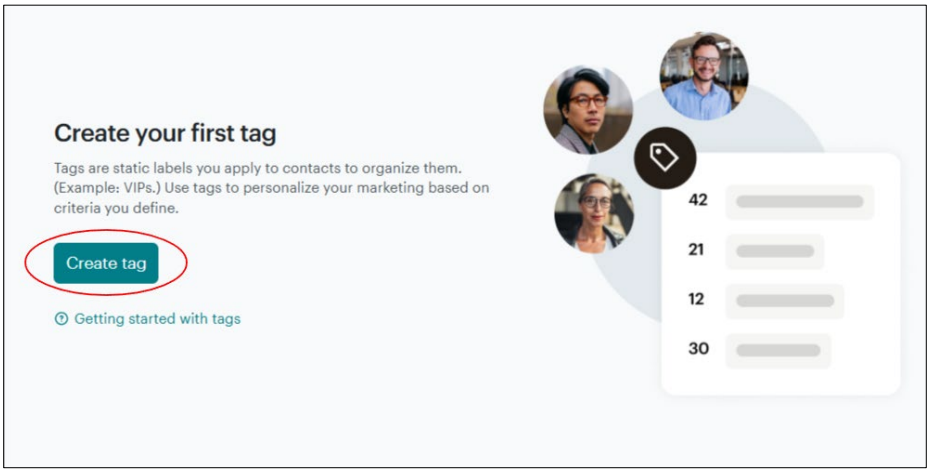
Tags are labels you create to help organize your contacts. You'll want to tag everyone who opts in into your challenge, so you can send them all of the challenge related content and updates.

1. On the left sidebar, click on **Audience,** and once it expands, click on **Tags**.

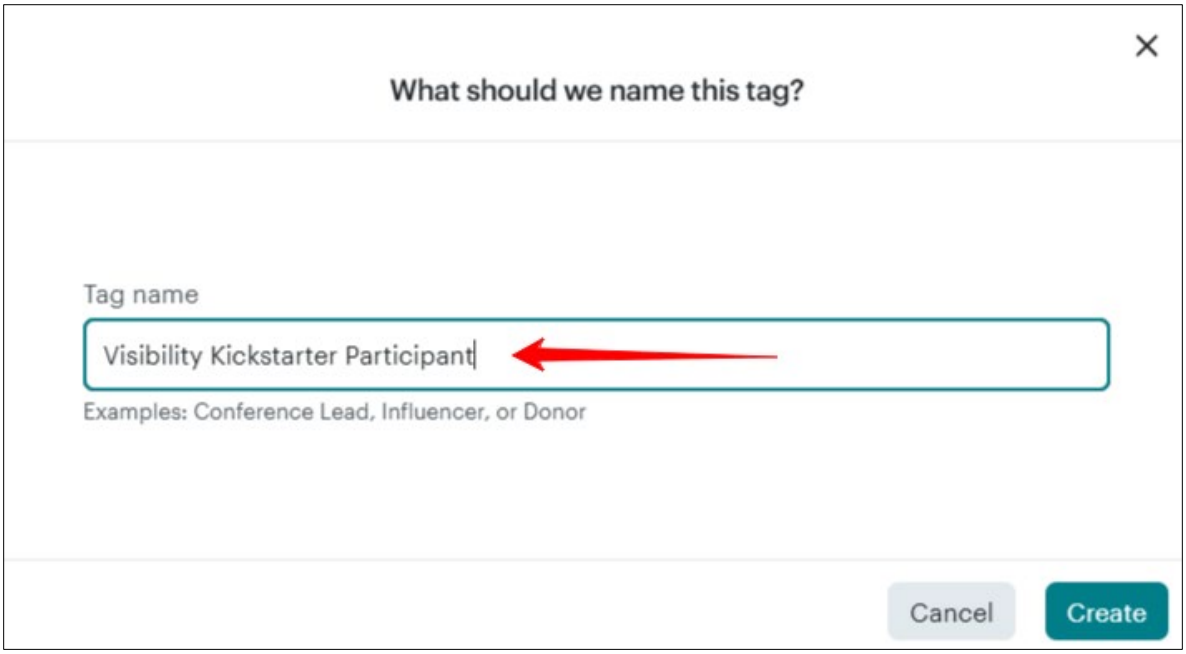


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2. Click on **Create Tag**.



3. In the window that opens up, enter the **name of the tag** (i.e. Your challenge name + "participant". You might also want to add the month and year.) Click **Create** when done.

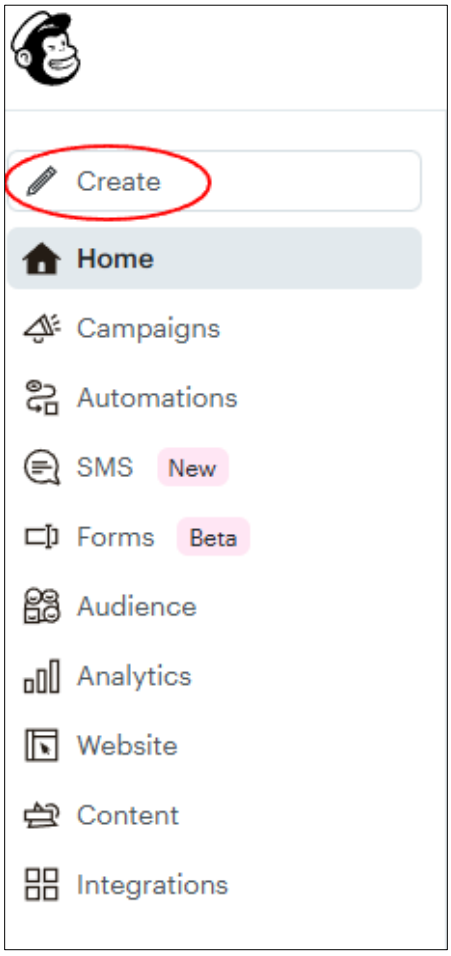


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STEP 3: Create a Thank You Page

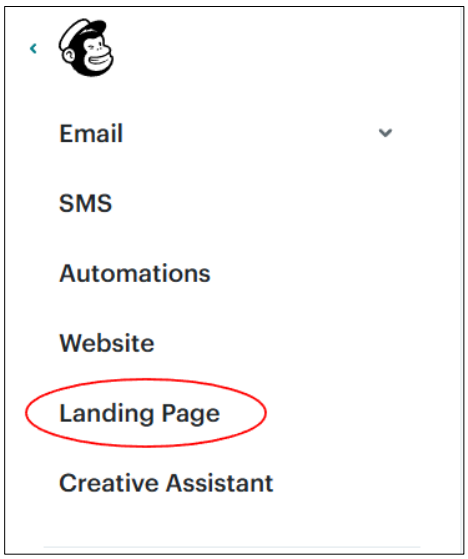
4. Log in to your **MailChimp** account.

5. Click on the **Create** button above the left sidebar

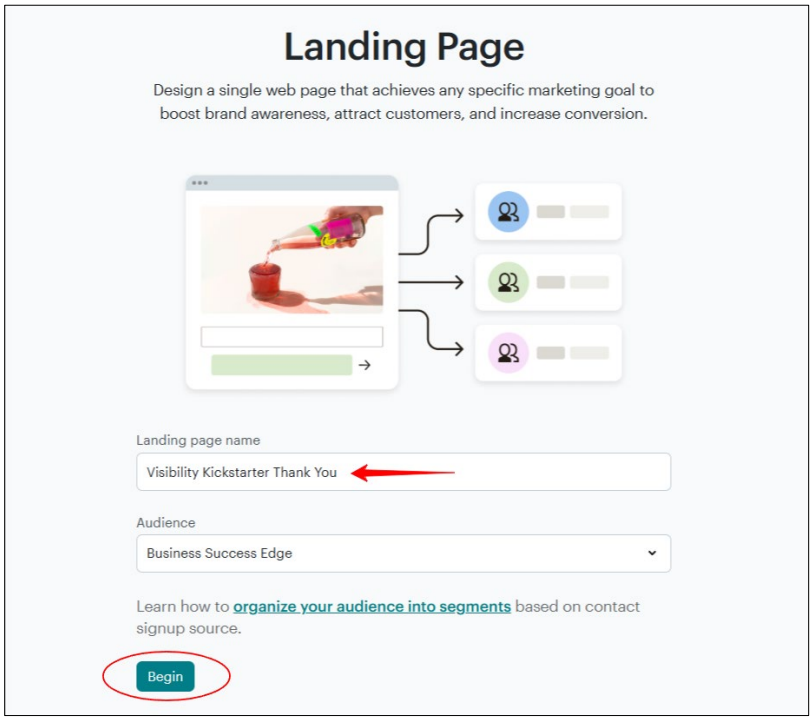


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3. Click on the **Landing Page** tab on the next page.

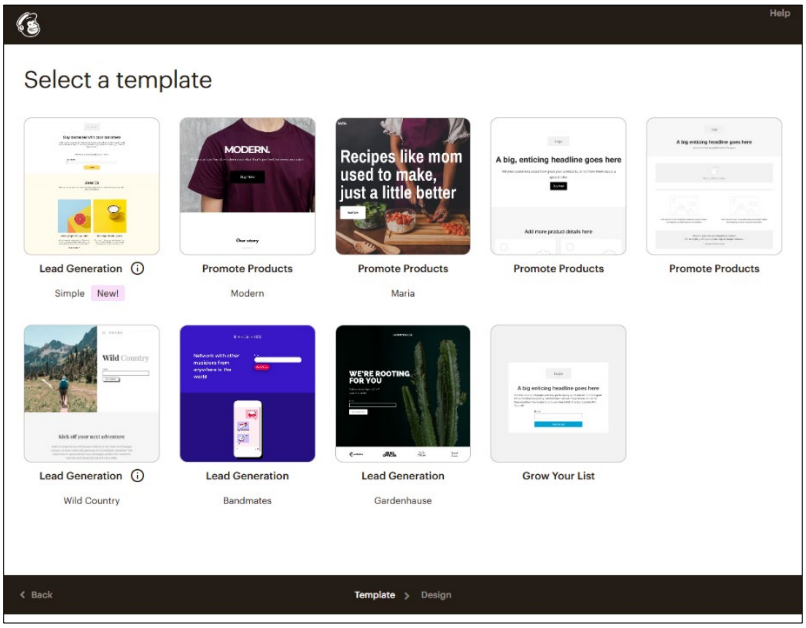


4. On the center screen, enter a name for the **Thank You** page (i.e. Name of your challenge + Thank You). Then, click **Begin** to start designing.

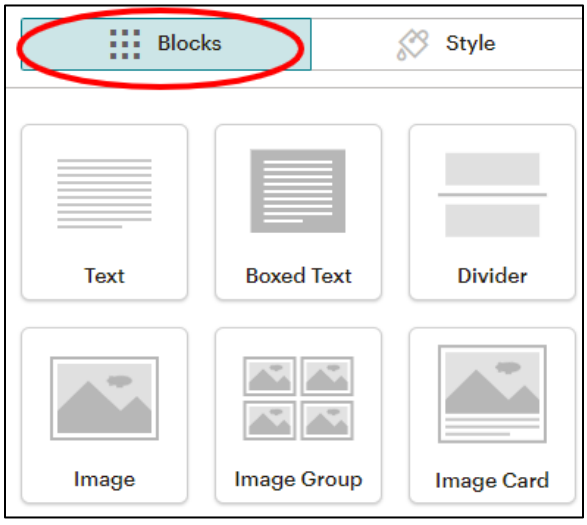


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5. Next, select a template you want to use for your Thank You page. All layouts are fully customizable, and elements can be added or removed. You might want to start with the first template, named “Simple.”

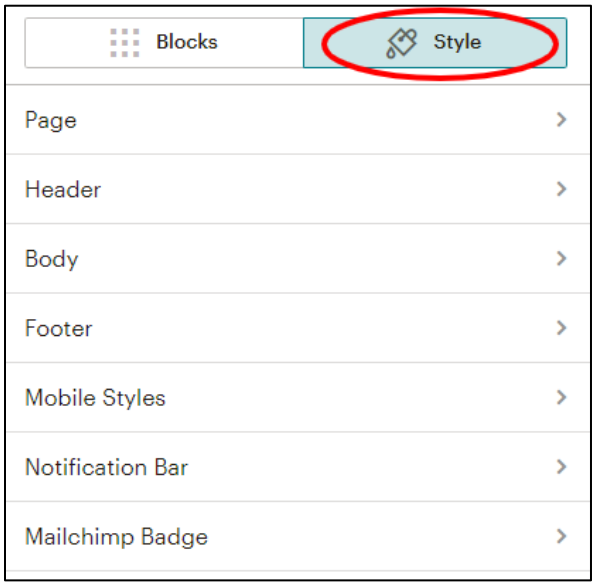


6. Customize your Challenge **Thank You** page**:**
    a. The right-side bar has two tabs, **Blocks** and **Style**. The **Block** tab allows you to create new elements by dragging and dropping items onto your page.



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

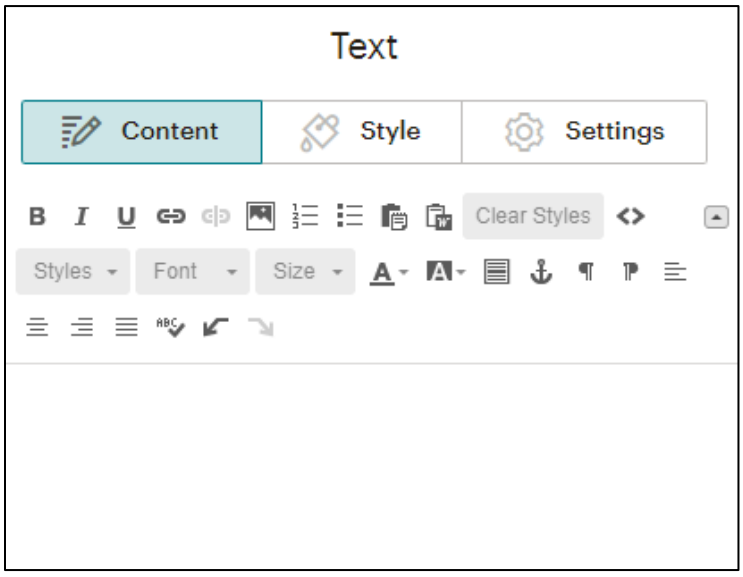


c. Every element on the page can be moved, edited, duplicated, or deleted. Hover over the element you want to change and the different options will appear (hovering over the buttons tells you which button does what).

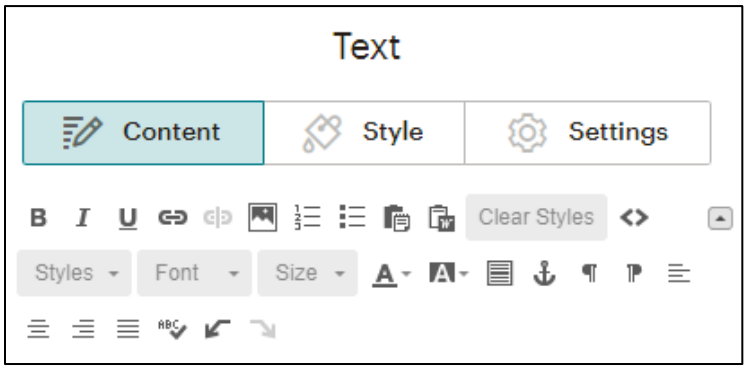


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d. When you click the **Edit Button**, the editor will show up on the right side of the screen. For text, button, and form elements, there will be options for **Content**, **Style**, and **Settings**. Image elements will only have **Content** and **Settings**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

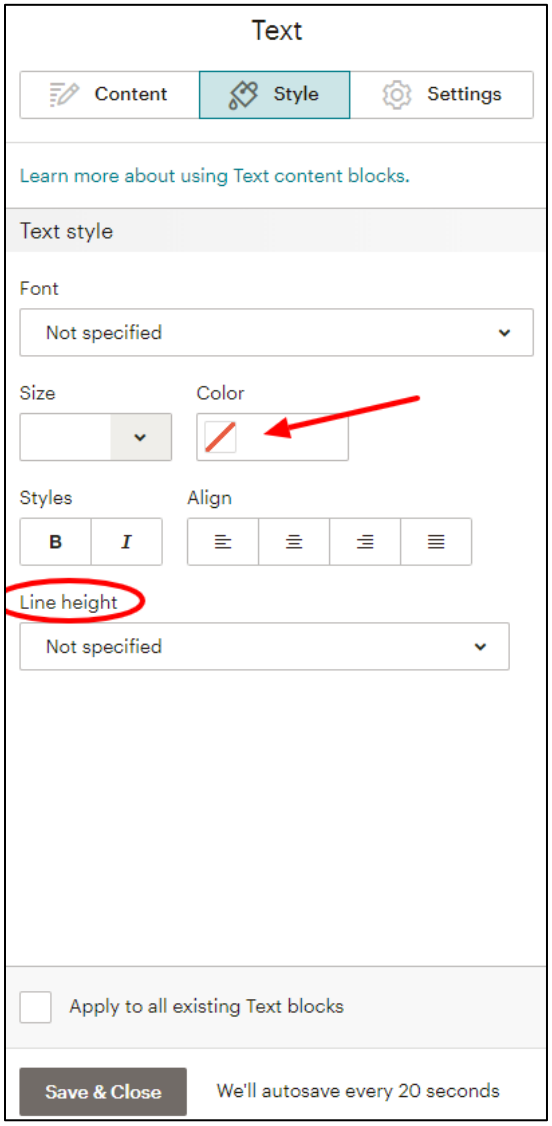


e. Use the **Content** tab to edit the content (text, images, etc.) and some styles (text color, highlight, alignment, font, etc.).



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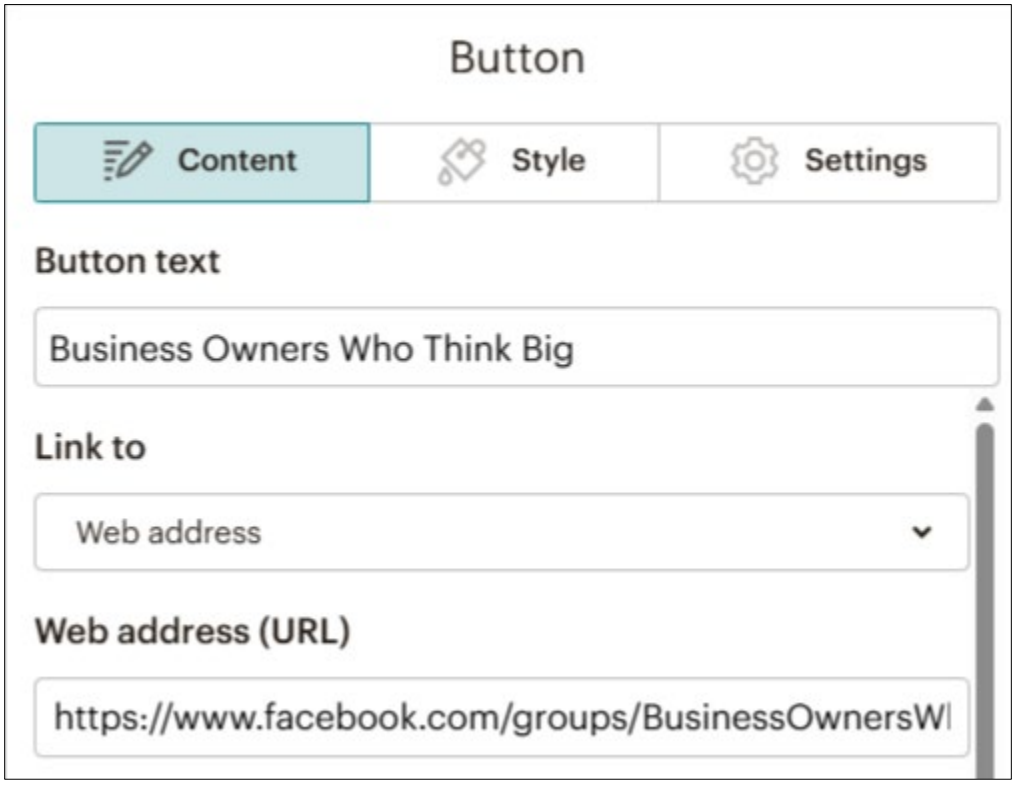
f. Use the **Style** tab to customize colors and line height.



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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:

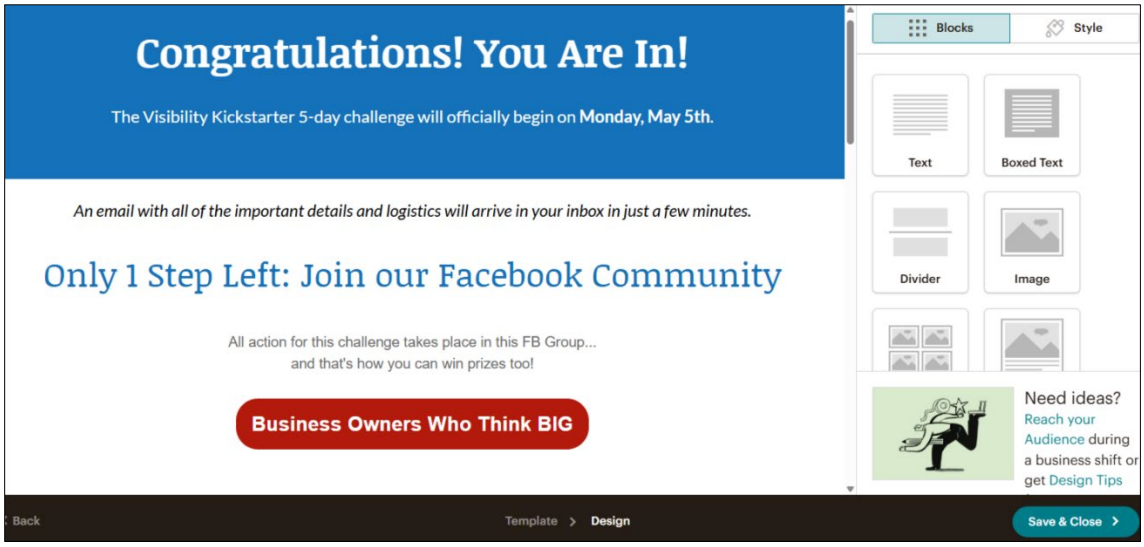
1) Invite people to join your FB group.
2) Send people to your shopping cart/PayPal to pay for the recordings.



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7. Since this is your Thank You Page, make sure to **delete the opt-in form** that might appear on the landing page (we will add it to your Opt-In page) and any other unnecessary elements.

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



8. Click **Preview** on the top of your page to see what the page looks like and to test your button.



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

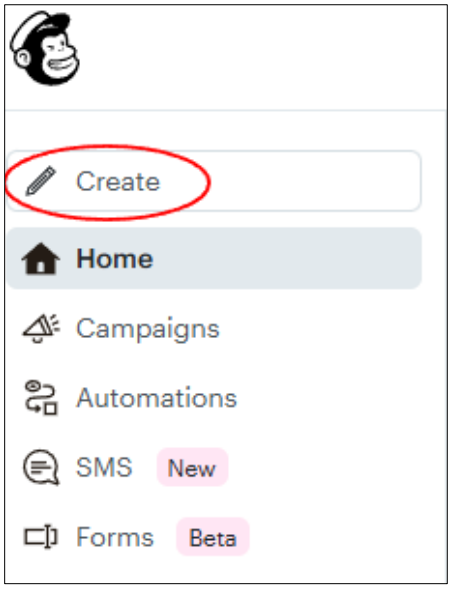
10. On the next page, click **Publish** to make the Thank You page live.



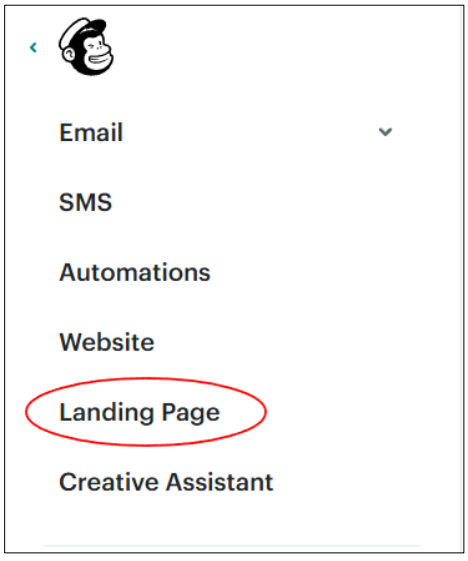
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STEP 4: Create an Opt-In Page

1. Click on the **Create** button above the left sidebar

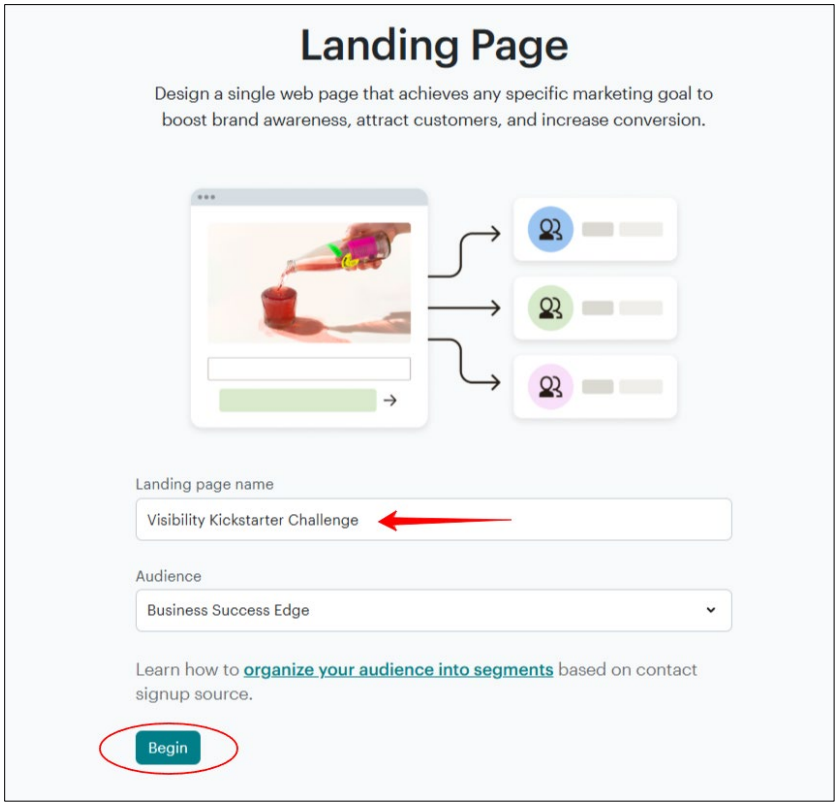


2. Click on the **Landing Page** tab on the next page.



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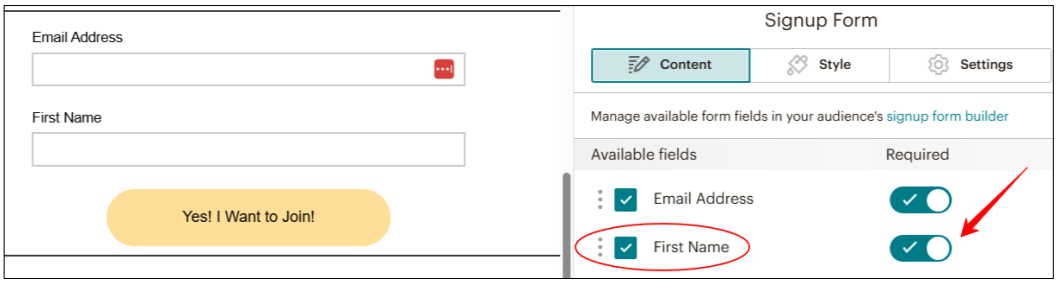
3. On the center screen, enter a name for the **Opt-In Page** (name of your challenge). Then, click **Begin** to start designing.



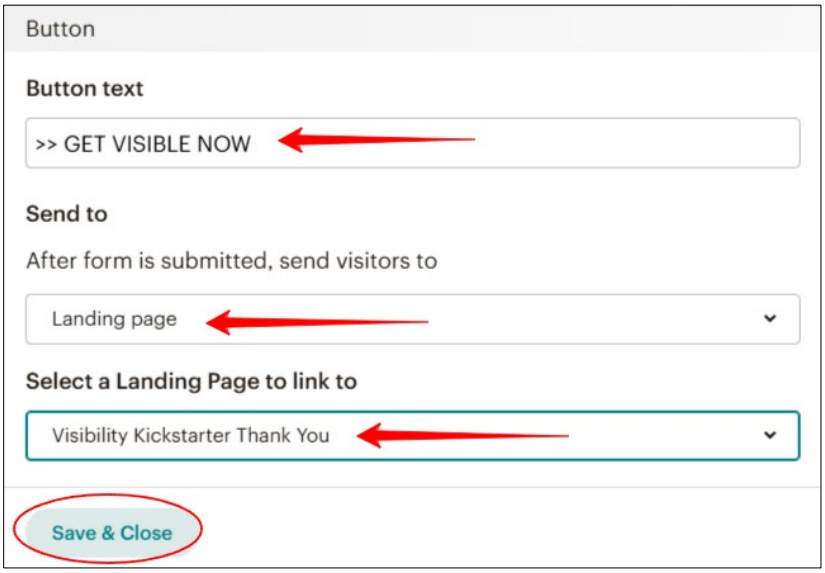
4. Choose a template and customize your Challenge **Opt-In Page**. Use the same instructions to design this page as you did for your **Thank You Page**.

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5. Make sure to **add/edit the Signup Form** to your Opt-In page. When editing the **Signup Form**, under the Content tab check the box next to "**First Name**" and change it to **Required.**

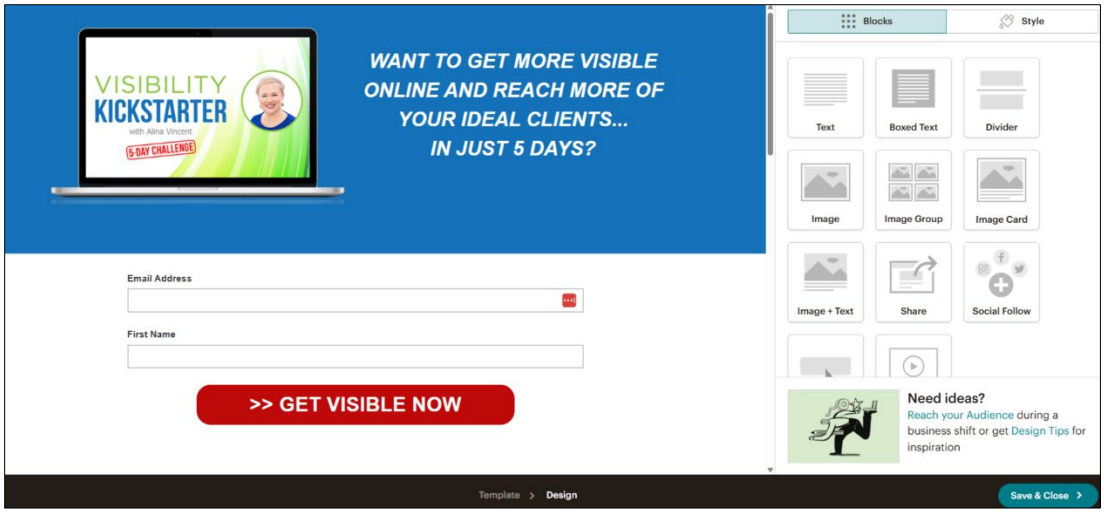


6. **VERY IMPORTANT: Connect the Signup Form to your Thank You Page.** Scroll down on the sidebar and change the "**Send to**" dropdown to "**Landing page**." Then, select the Thank You page you just created from the drop-down list. You can also edit your button text here. Make sure to click **Save &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

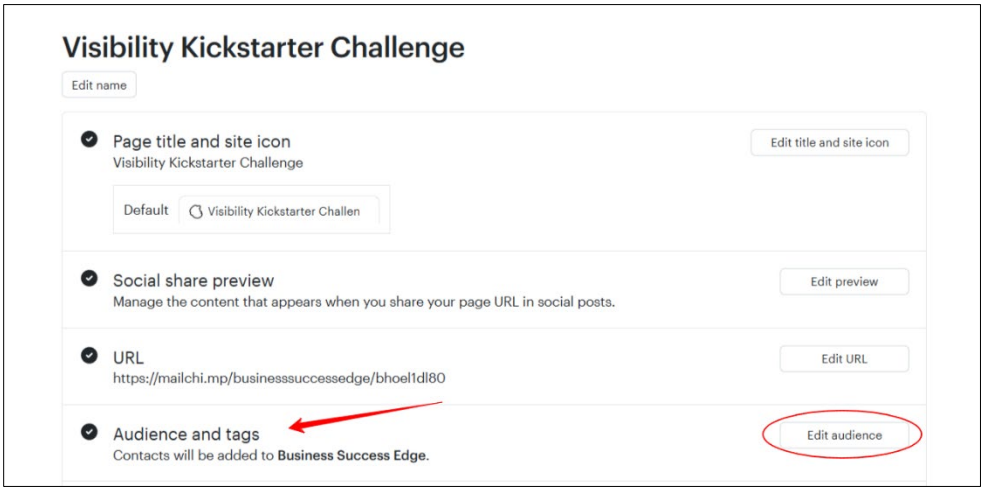


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7. Once you are done designing your page, click **Save & Close** (in the bottom right-hand corner).
   Here is a quick example of what a simple challenge opt-in page could look like:

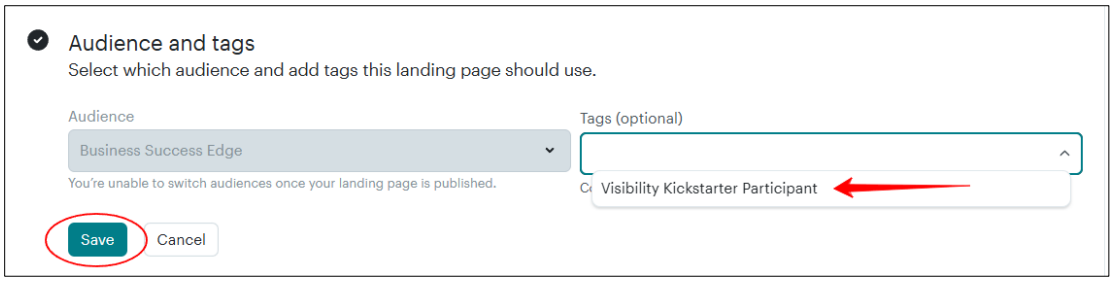


8. On the next page, scroll down to the Audience and Tags section, and click on Edit Audience.



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9. Choose the tag you created for your challenge in **STEP 2,** and click **Save**.



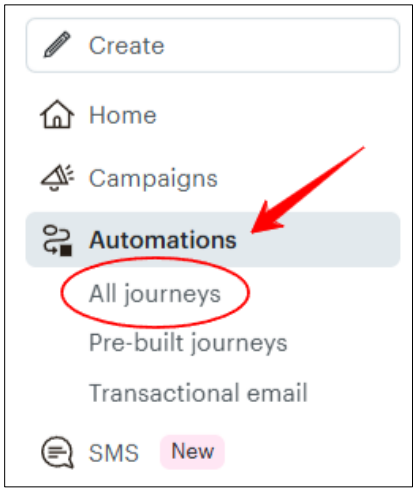
10. Optional: Click **Edit URL** to customize the URL for your Opt-In Page. This is the link you'll be sharing everywhere.

11. Click **Publish** on the top of the page to make it live.



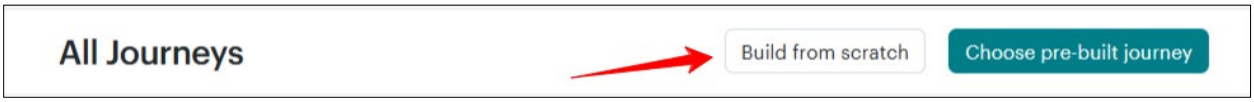
STEP 5: Set up an Automated Welcome Email (Autoresponder)

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

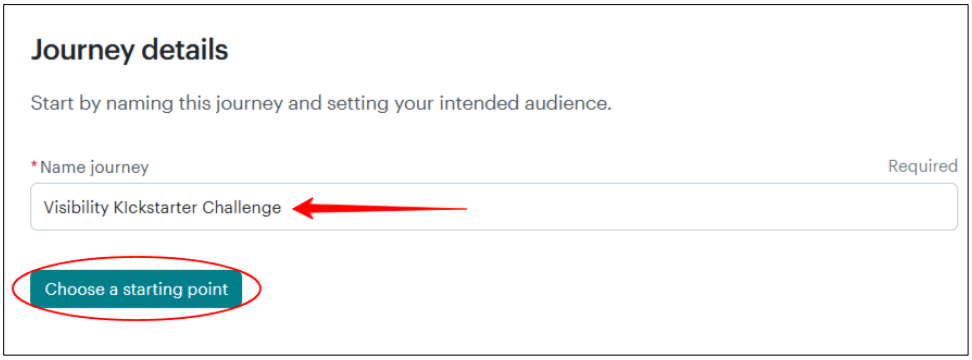


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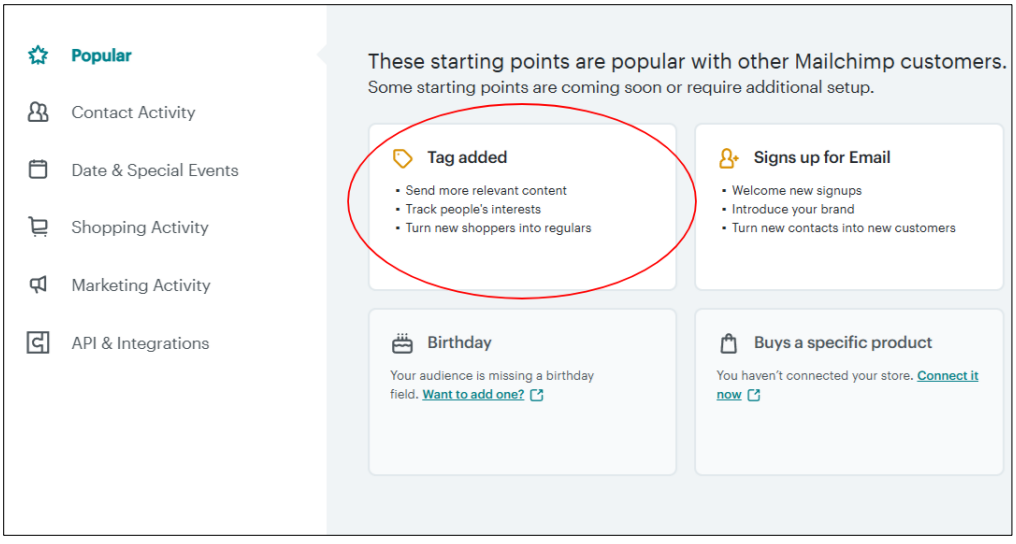
2. On the All Journeys page, click **Build from scratch** the top right corner of the page.



3. On the Journey Details page, **name** your journey with the name of your challenge (you might want to add a month and year). Click **Choose a Starting Point** when done.

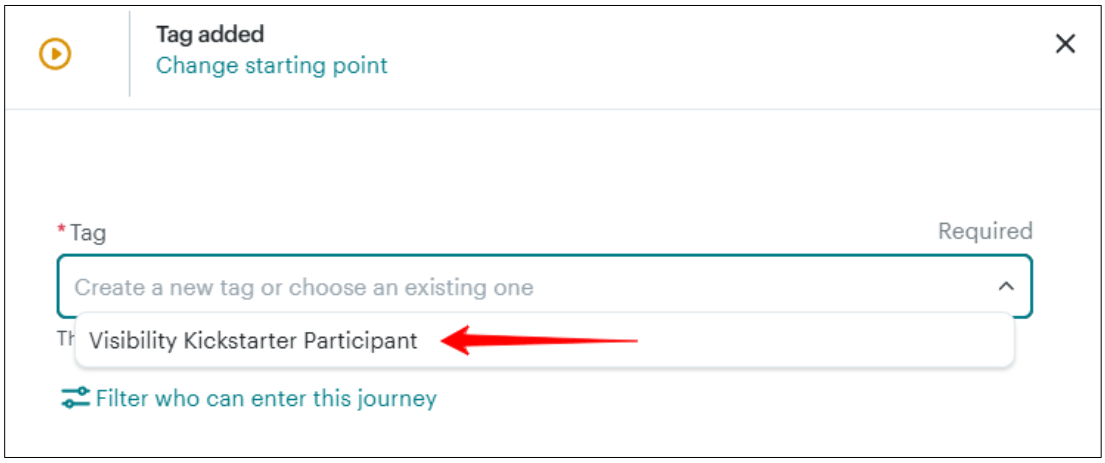


4. On the pop up, choose **Tag Added** as a **Starting Point** for your automation.



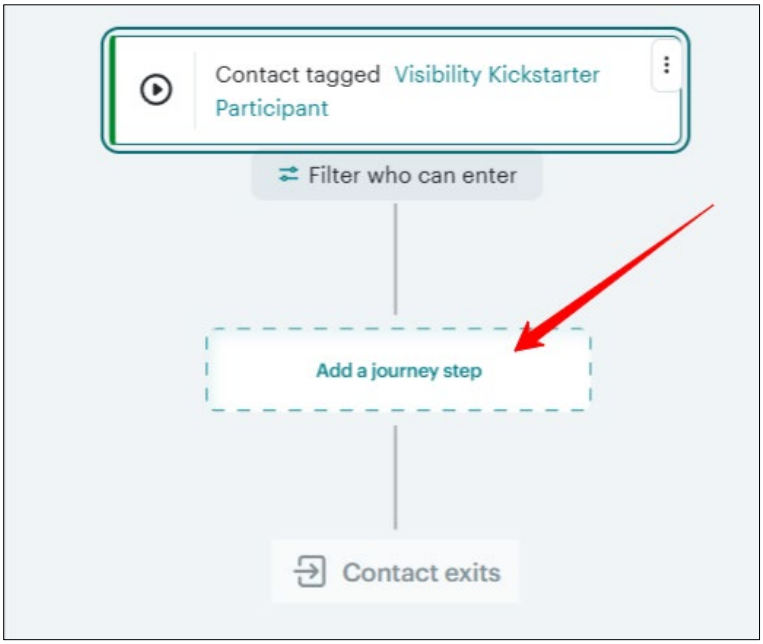
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5. On the next page, **choose the tag** you created for your challenge in STEP 2.



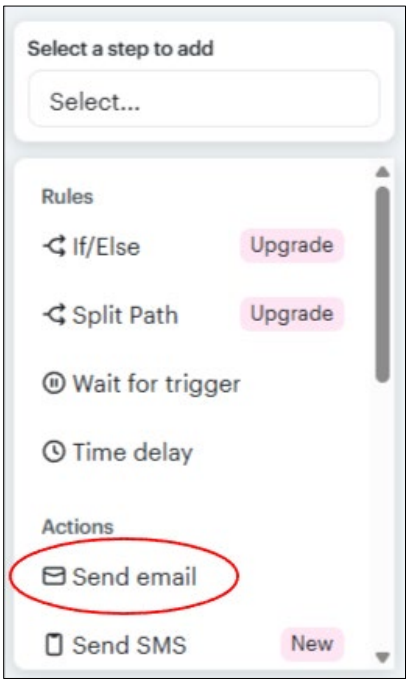
6. Click **Save Starting Point** at the bottom of the popup.

7. Next, click on the **Add a Journey Step.**

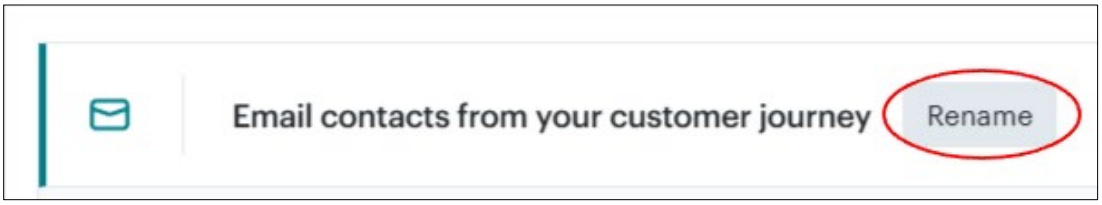


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8. On the pop up, select the option to **Send email** under the **Actions** category.



9. On the next screen, click **Rename** to change the name of your automated email (only you will see this).

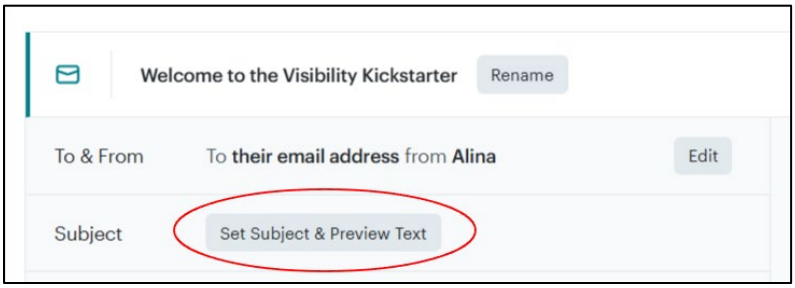


10. Change the name of your email automation to “Welcome Email” and then click **Save**.

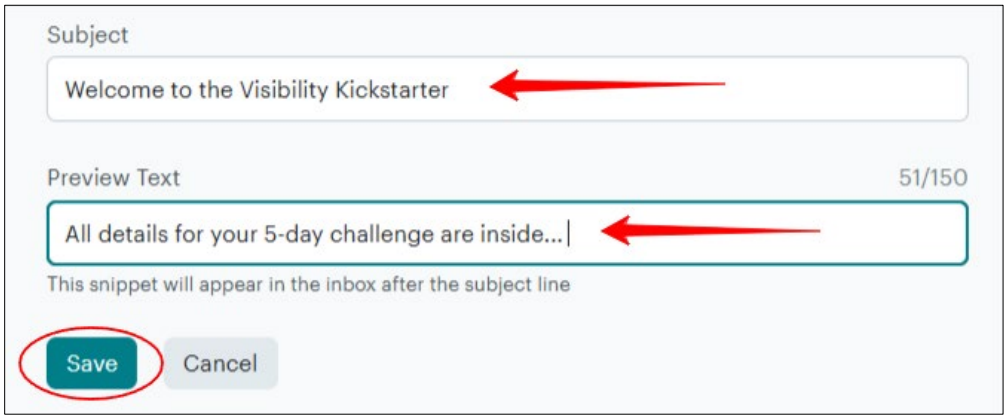


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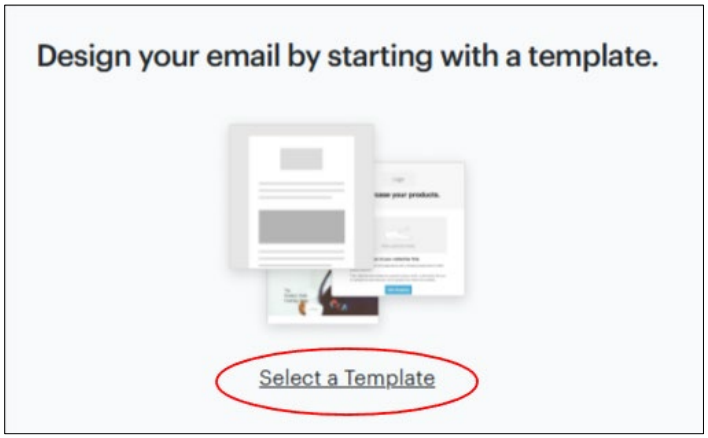
11. Click **Set Subject & Preview Text** next to Subject.



12. Enter your **Email subject** and **Preview text** (this is what your participants will receive) and then click **Save.**

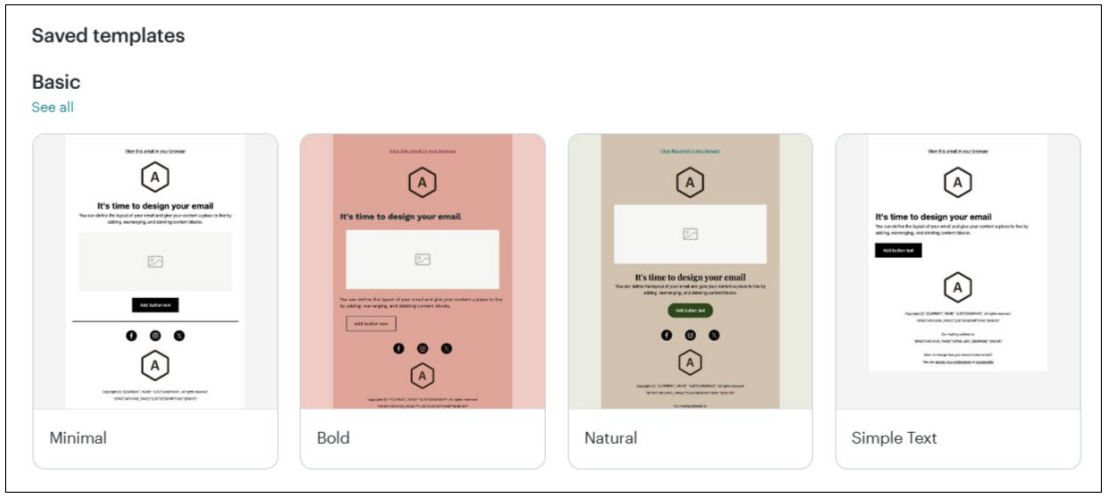


13. The next step is to design the actual welcome email. Click on **Select a Template**.

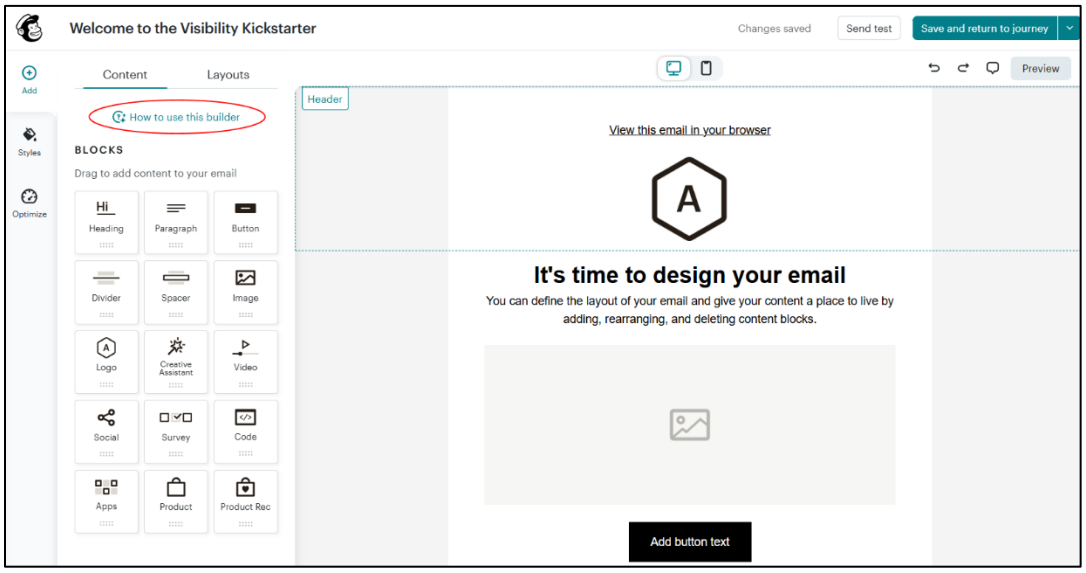


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14. On the next page, click on a template you'd like to use for your welcome email. Choose any template you want based on your personal preference.



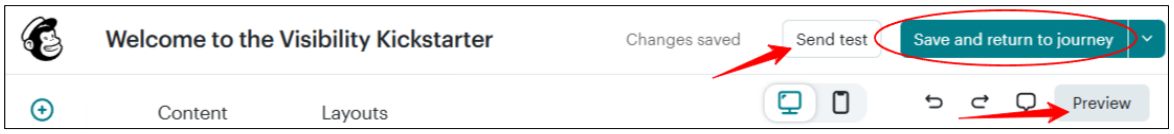
15. Customize your email using click and drag options and add your copy for the Welcome to the Challenge email. If you need help with this step – click on the **How To Use This Builder** tutorial link.



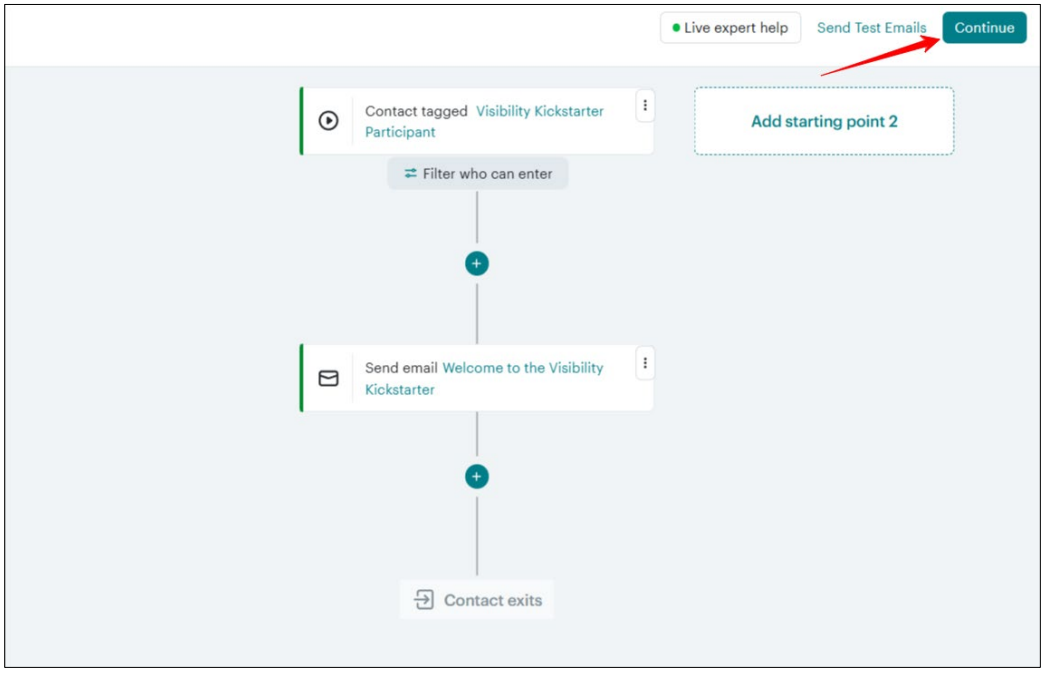
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16. Once you are done designing your email, make sure to **Preview** it. In addition, **Send Test** to yourself to make sure everything looks right and all of the links are working,

    Once you are done - click **Save and Return to Journey** at the top of the page.

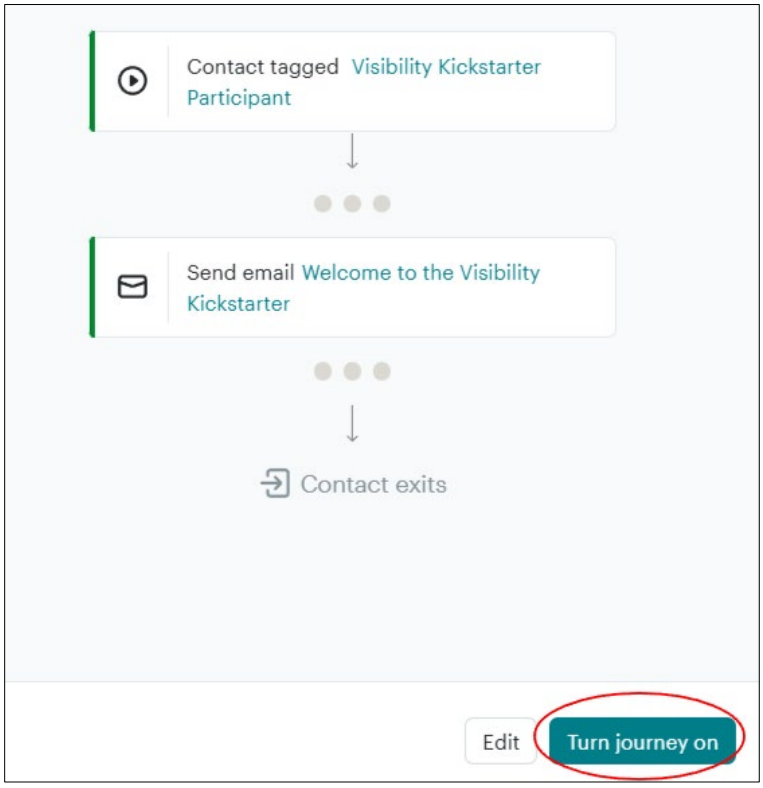


17. On the next screen, click **Continue**.



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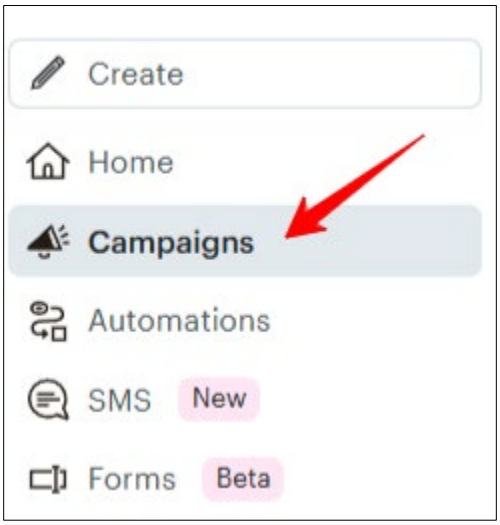
23. Next, click **Turn Journey On** in the bottom right-hand corner. Don't miss this step!!!



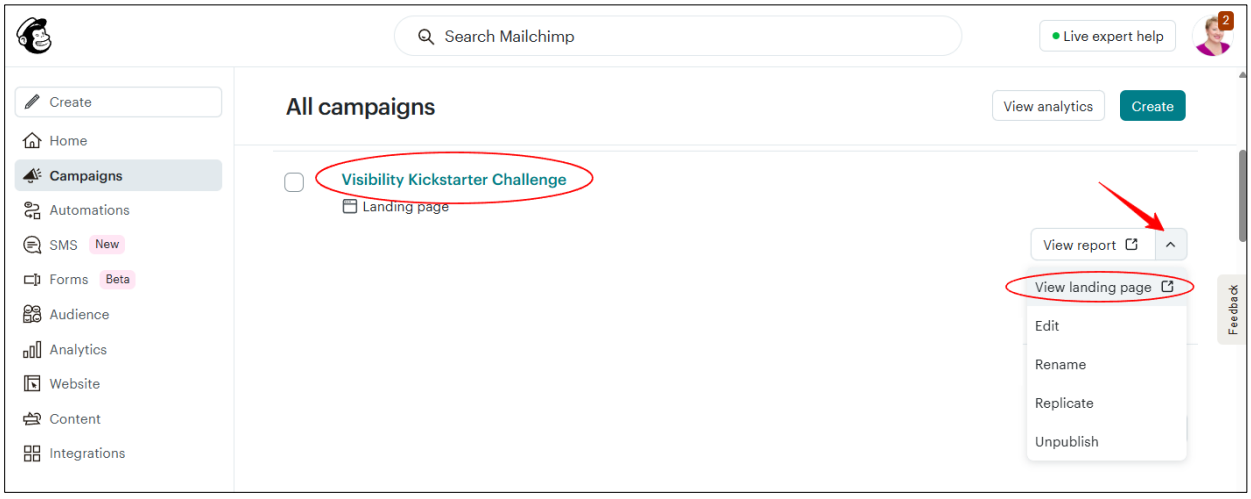
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STEP 6: Test Your Opt-In Page

1. Click on **Campaigns**



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



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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 your Welcome email within minutes.

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