Table of Contents

[**Staff India Email Marketing with Mailerlite** 2](#_Toc119078087)

[1. Mailerlite interface 3](#_Toc119078088)

[2. Subscribers: 4](#_Toc119078089)

[3. Templates: 5](#_Toc119078090)

[4. Convert Mailchimp Automation to Visio Blueprint 6](#_Toc119078091)

[5. Convert Visio Blueprint into Mailerlite Automation 7](#_Toc119078092)

[6. Mailerlite Automation Useful tricks 9](#_Toc119078093)

# **Staff India Email Marketing with Mailerlite**

Hello Guys. You all are familiar with email marketing. You have personal/professional email address. You receive many promotional/ Newsletter emails from different companies every day. All companies use different tools to send automated emails to people who they think might be interested in their company or product.

Email sending tools allow the companies to add thousands of email addresses to their subscriber list with few clicks, send different emails to different subscriber lists, send schedule emails to all its subscribers at the same time and so on. Its an essential tool now a days.

We used a tool called **“mailchimp”** in the past to send promotional/newsletter emails. But we decided to use a different tool now called **“Mailerlite”.**

This documentation contains all the necessary information and step by step process to how to use this tool properly and effectively.

1. Mailerlite interface :

Please check the Video link below. This link will help you to get familiar with Mailerlite interface, Functionality of different options, options that you need to use etc.

<https://drive.google.com/file/d/1ArfRzRh5ngAkrZGVUwg_qe1VeIrxqmtc/view?usp=sharing>

**Key Points:**

* Login with credentials, then choose Mailerlite
* You will mostly work with 3 options – Subscribers, Automations and Templates.
1. Subscribers:

Please check the Video link below. This link will help you understand what is a Subscriber, What is groups, How to add subscribers and add them to specific groups etc.

<https://drive.google.com/file/d/1Asg4SRmLG0fyLYBUVKuIZo7a-jNvX0iK/view?usp=sharing>

**Key Points:**

* Each subscriber must belong to a group
* When you add subscribers to Mailerlite make sure you choose appropriate group.
* After adding subscribers from CSV/Excel sheet to Mailerlite, make sure you match all columns to “Belongs to” field.
* After Import is done, check group subscriber list is updated properly.
* Make sure you do not add more than 100 subscribers/per day.
1. Templates:

Please check the Video link below. This link will help you understand what is a Template, how to create, replicate templates etc.

<https://drive.google.com/file/d/1Asg4SRmLG0fyLYBUVKuIZo7a-jNvX0iK/view?usp=sharing>

**Key Points:**

* You do not need to create a template as templates are already created
* You just have to Duplicate the main template and then rename it.
1. Convert Mailchimp Automation to Visio Blueprint :

As I said earlier, in the past we used “Mailchimp” to send promotional emails. All our emails are still in Mailchimp. So we need to bring all the emails from Mailchimp to Mailerlite. In Mailchimp all our emails are configured in sequences with some conditions and time frame which is called Automation. So we need to replicate Mailchimp Automation in Mailerlite Automation. In order to do that 1st we have to create a blueprint of Mailchimp automation in Microsoft Visio.

Please check the Video link below. This video will show you how to convert Mailchimp automation into Visio blueprint.

<https://drive.google.com/file/d/1AuNMogmHCo-fWpAoZvmdaC4BsMOPTZAE/view?usp=sharing>

**Key Points:**

* Login to Mailchimp and go to Automations>All Journeys>Classic Automations
* Copy contents off each mails in the automation and put it on separate Word files.
* Make sure you copy “Subject” of each mail and put it on the word file.
* Create a new Visio file, click on more shapes and chose flowcharts>basic shapes.
* Go to Design and choose appropriate design as shown in the video
* Name each shape same as Mailchimp mail name.
* Attach a word file that you created before to a shape as shown in the video.
* Use Connectors to connect each shape.
* Put Tags on Connectors according to mailchimp Trigger as shown in the video.
* Once the Blue print is complete you will send it to Rob.
* Rob will check the contents of the mails, will make necessary modifications and send back to you.
* The file Rob will send to you will be the Master copy of the blueprint. You will follow the Master copy going forward.
1. Convert Visio Blueprint into Mailerlite Automation :

The last step is to convert the Visio blueprint into Automation in Mailerlite. As I said, the Blueprint you have created in the last step, you will send it to Rob. Rob will make necessary adjustments in Blueprint and send it back to you and that copy will be the Master copy which you will follow to make Automations in Mailerlite.

Please check the Video links below. These videos will show you how to convert Visio blueprint into Mailerlite Automation.

<https://drive.google.com/file/d/1EayEOiFzkdugCi83ITwgNGe7t8w_OD0v/view?usp=sharing>

<https://drive.google.com/file/d/1ElI4NK86alHPhMeG-Y7-1tk373Fy8IuS/view?usp=sharing>

**Key Points:**

* Main objective of this whole document is to replicate Mailchimp automation in to Mailerlite Automation.
* In future we will add more automations in Mailerlite.
* You will use the master blueprint(that you will receive from Rob) to create Mailerlite automation.
* Make sure the name of the automation is same as the name of blue print. This way it will be easier to track everything.
* 1st step on automation is set the Trigger. Make sure the trigger is set from appropriate Subscriber group/groups.
* Next step is to add and create email and add contents to the email. Make sure **“Name”** of the email is same as blueprint process title, **“Subject”** should be copied from word file, design the email properly as shown in details in the video and finally make sure **“Track opens with an invisible beacon embedded in your email”** option is selected.
* I have showed some tricks in the video to how to copy texts, insert images and videos, how to add blocks, how to duplicate a text box and use up/down button to move the box etc. Follow the tips to make the process faster and accurate.
* Next step is to add **“Time Delay”**. Follow the blueprint and add appropriate time delay.
* Once you completed the automation, do not run/enable it. You will inform Rob or me and we will recheck and then after you receive confirmation from us then you will run the automation.
1. Mailerlite Automation Useful tricks :

In this Video you will find some useful tips and tricks related to Automation. How can duplicate an automation and use the same automation again and again. Which will save you a lots of time.

<https://drive.google.com/file/d/1EmeznzzjAT25NbSBIvTOu-MVGXhN37XQ/view?usp=sharing>