



SOP for Account Setup and Configuration in Mailchimp

Procedure:

1. Creating a Mailchimp Account

- Step 1: Go to the Mailchimp website (mailchimp.com) and click on the "Sign Up Free" button.
- Step 2: Enter your email, desired username, and password. Mailchimp requires a strong password for security purposes.
- Step 3: Check your email for a confirmation message from Mailchimp. Click the link within the email to verify your email address and activate your account.

2. Setting Up Your Account

- Step 1: After email verification, log in to your Mailchimp account. You will be prompted to enter additional information, including your name and business details (e.g., business name, website, physical address). This information is essential for compliance with anti-spam regulations.
- Step 2: Answer questions about your business and email marketing goals. These answers help Mailchimp tailor the user experience to your needs.
- Step 3: Set up your first audience (email list). You can import an existing list of contacts or start a new list. Ensure you have permission to email the contacts you add in compliance with Mailchimp's Terms of Use and privacy laws.

3. Configuring Essential Settings

- Email Preferences:
 - Navigate to your account settings by clicking on your profile name at the bottom left corner, then select "Account."
 - Under the "Settings" tab, choose "Details" to set your time zone, default email address, and other preferences.
- Audience Settings and Defaults:
 - Go to the "Audience" tab and select your audience. Click on "Manage Audience" > "Settings" to configure audience defaults, such as the from email address, from name,

and reminder for how people joined your list. Setting these correctly is crucial for maintaining trust and ensuring high open rates.

- Notification Settings:

- In the "Account" settings, select "Notifications" to choose the types of alerts you want to receive, such as daily summaries, performance suggestions, or real-time notifications about subscriber activities.
 - API Keys (if integrating with other services):
- If you plan to integrate Mailchimp with your website or another platform, generate an API key under "Account" > "Extras" > "API keys." Follow the prompts to create a new key.

4. Familiarizing Yourself with the Dashboard

- Step 1: Explore the Mailchimp dashboard to locate where to create campaigns, view reports, manage contacts, and access other features.
- Step 2: Visit the "Campaigns" tab to get an overview of how to start your first email campaign. Mailchimp offers various campaign types, including email, ads, landing pages, and more.
- Step 3: Review the "Content Studio" to see where you can manage and store images, documents, and other files for your campaigns.

Safety/Compliance Considerations: Ensure all collected data is in compliance with GDPR and other relevant data protection regulations. Use double opt-in settings for your audience to improve email deliverability and compliance.