



UNIT-15

Online Tools For Small Business

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Know about popular free online tools for small business owners
- ✓ Understand basic functions of:
 - Google Docs
 - Canva
 - Trello
 - Survey Monkey
 - MailChimp
- ✓ Select tools that meet or match your business needs
- ✓ Use these tools in your business

Unit 15

Online Tools For Small Business

Google Docs

Online Document Creation

Online document creation is the ability to write, edit and share documents via a web-based application. In other words, rather than using software that creates a document on your computer alone, you log into software that creates and stores your document on a server that can be accessed by anyone to whom you provide the link or give permission.

How can this help your business? Advantages of online document creation include:

Access to the latest word processing software

Ability to easily share the creation and editing processes with multiple users. Email can do this but requires each person to have access to compatible software, check their email, review and change the draft, resave, resend, and repeat. This can be time consuming, especially when sharing between three or more people. This constant resaving and resharing also increases the risk of missing or mixing up edited versions.

Ability to access from multiple devices or locations. If you are travelling and need to use a mobile device, or your computer is charging/unavailable/not working, you can still access and edit your documents.

Freedom from external devices, such as flash drives or CD-ROMs

For these reasons and others, online document creation is becoming a tool of choice for small business.

What reasons might you have to use online document creation for your business?

Google Docs is among the popular applications for online document creation. Google Docs is a word processor and

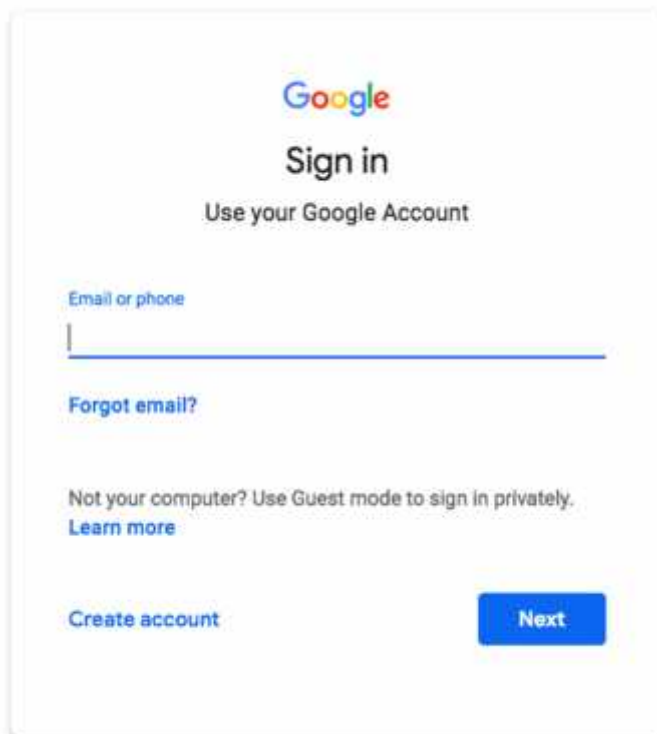
cloud storage system. Have you ever used Google as a search engine or Google Maps to find the nearest restaurant on your vacation? Google Docs is part of that family. Google Docs is free to use for individuals and creates both documents and spreadsheets that are compatible with most common software. There is a business account option with expanded features and a monthly fee. For this lesson, we will focus on the operation of the free service for individual users.

Setting Up an Account

If you have a Gmail account, then you already have account access to Google Docs.

Go to Google Docs: docs.google.com

If you are not already logged in to Google, you will be directed to a log-in box.

A screenshot of the Google sign-in page. At the top is the Google logo, followed by the text "Sign in" and "Use your Google Account". Below this is a text input field labeled "Email or phone" with a blue underline. Underneath the input field is a link "Forgot email?". Further down is the text "Not your computer? Use Guest mode to sign in privately." with a link "Learn more". At the bottom left is a link "Create account" and at the bottom right is a blue button labeled "Next".

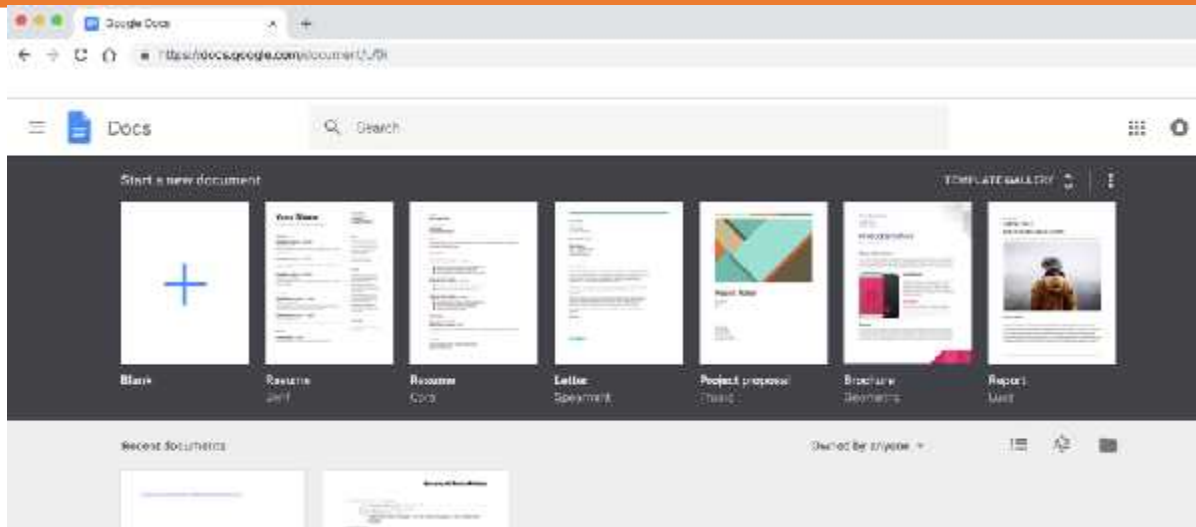
If you do not have a Gmail account, you will need set up a Google account.

Click **Create account** and follow the prompts for name, email address, and password. Your Google account login can then be used for Google Docs and any other Google product, such as Gmail, Maps, YouTube, and other members of the Google family.

If have a Google account, enter your Gmail address and password.

You will then be directed to New Document: docs.google.com/document/

And you are on your way!



Log in or create an account now to Google Docs on your computer or mobile device following the above steps.

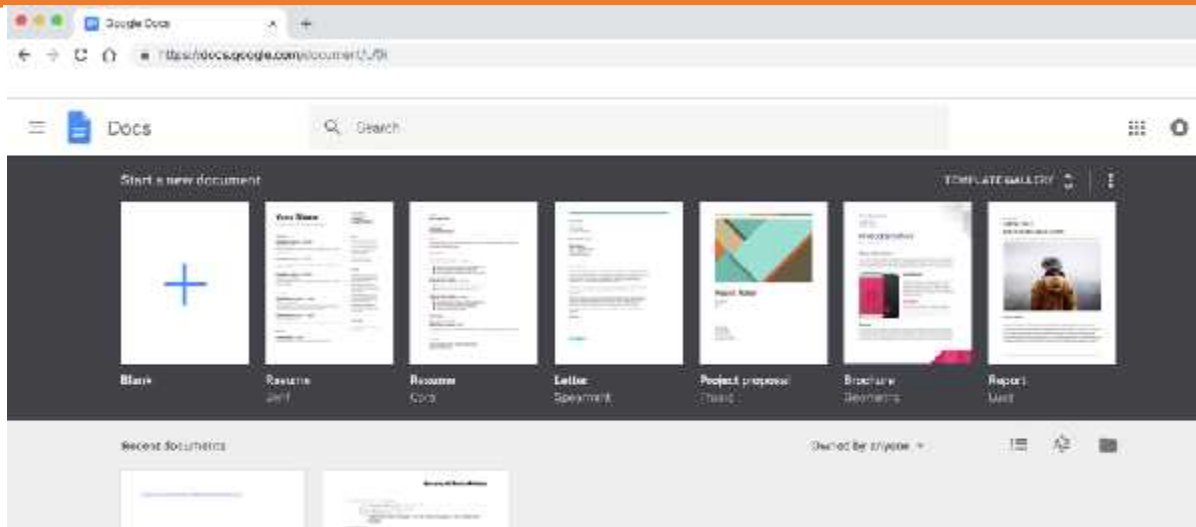
Basic Features

Google Docs resembles most common word processors.

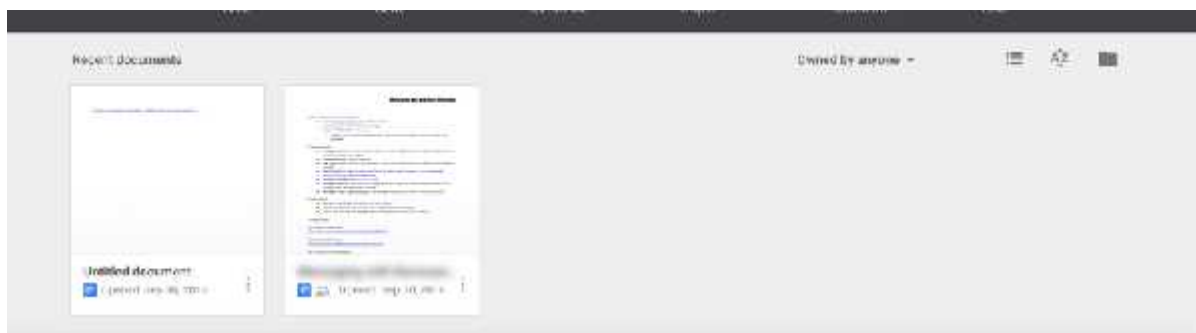
Document Template

Your first screen offers choices for a New Document.

There are template options for commonly used documents: resumes, letters, brochures, and proposals. You may start with a template, which will be set up with layout and font selections. You may also start with a blank document and build your document ‘from scratch’ – choosing all layout options yourself.



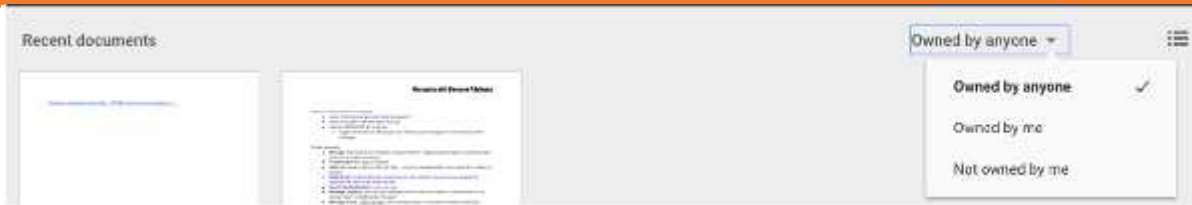
Below the stream of document choices is the Recent Documents section. Created documents will appear here, beginning with the newest one. Look in this section to retrieve documents already under way.



Privacy Setting

To the right of Recent Documents is a small drop-down menu with three options:

- Owned by anyone
- Owned by me
- Not owned by me



Here you can set the privacy of your document.

If you are working on a document but are not yet ready to show anyone, you can set the menu to '**Owned by me**' and only you can see it.

If the document is one you want to share, then set the menu to '**Owned by anyone.**' This enables others to view and edit your document.

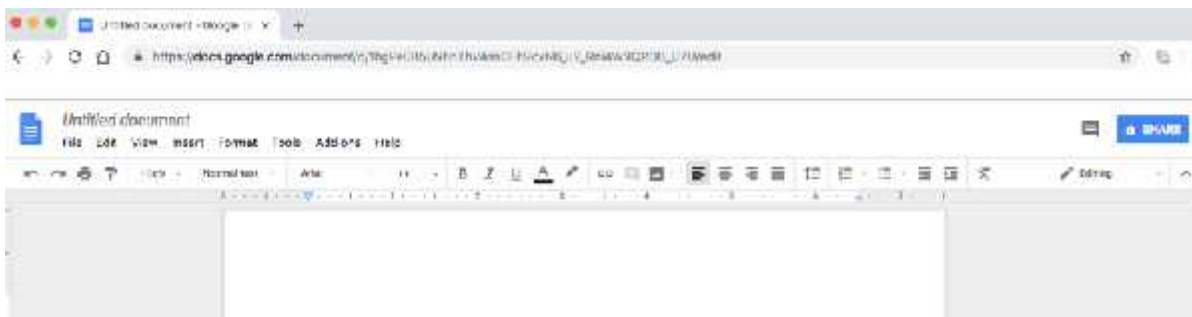
Any file you create is automatically owned by you. If you wish to transfer ownership to someone else, click '**Not owned by me.**' You will still have access to the file, but will be unable to transfer ownership back or delete the file.

Links

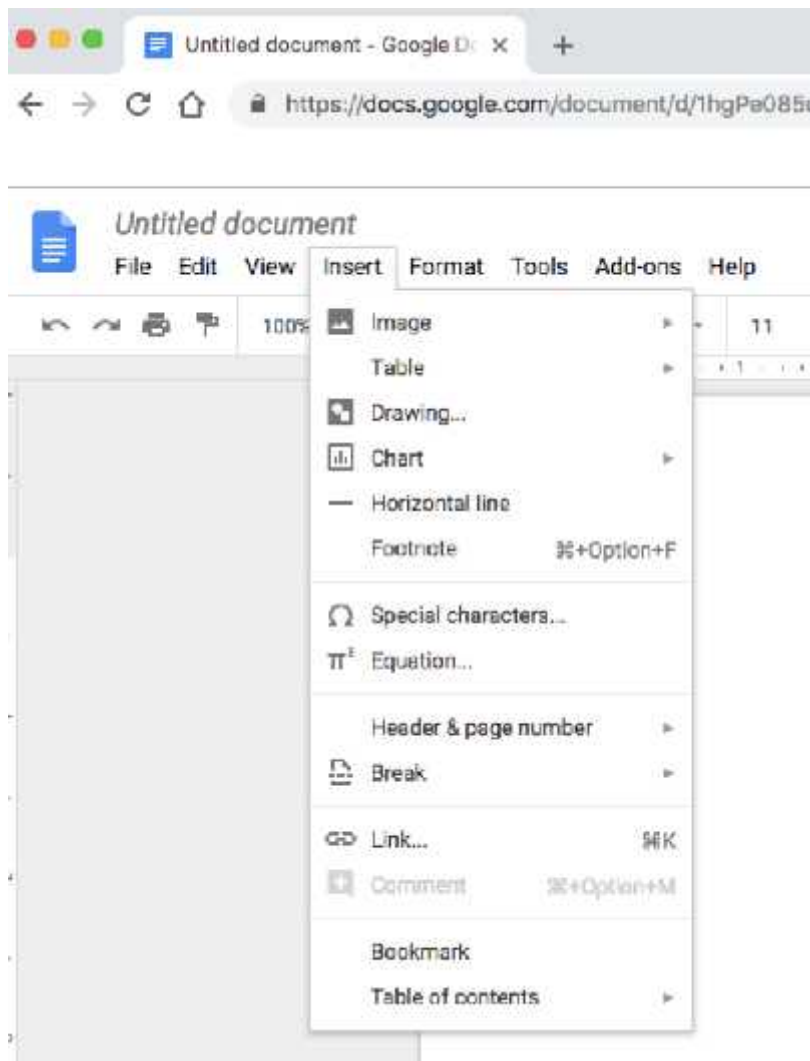
While writing or building your document, you can find and insert links directly into your document from the Google search engine.

To insert a link:

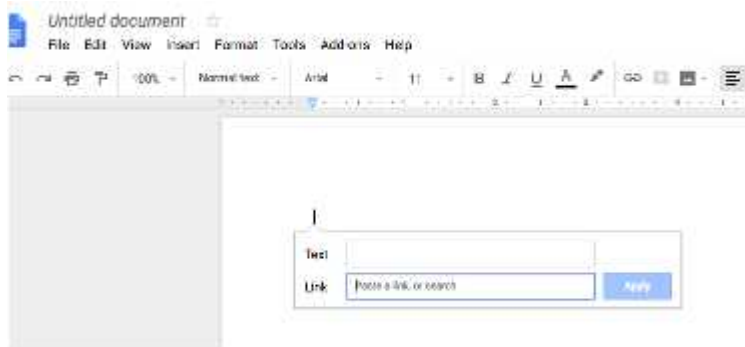
Click on a document.



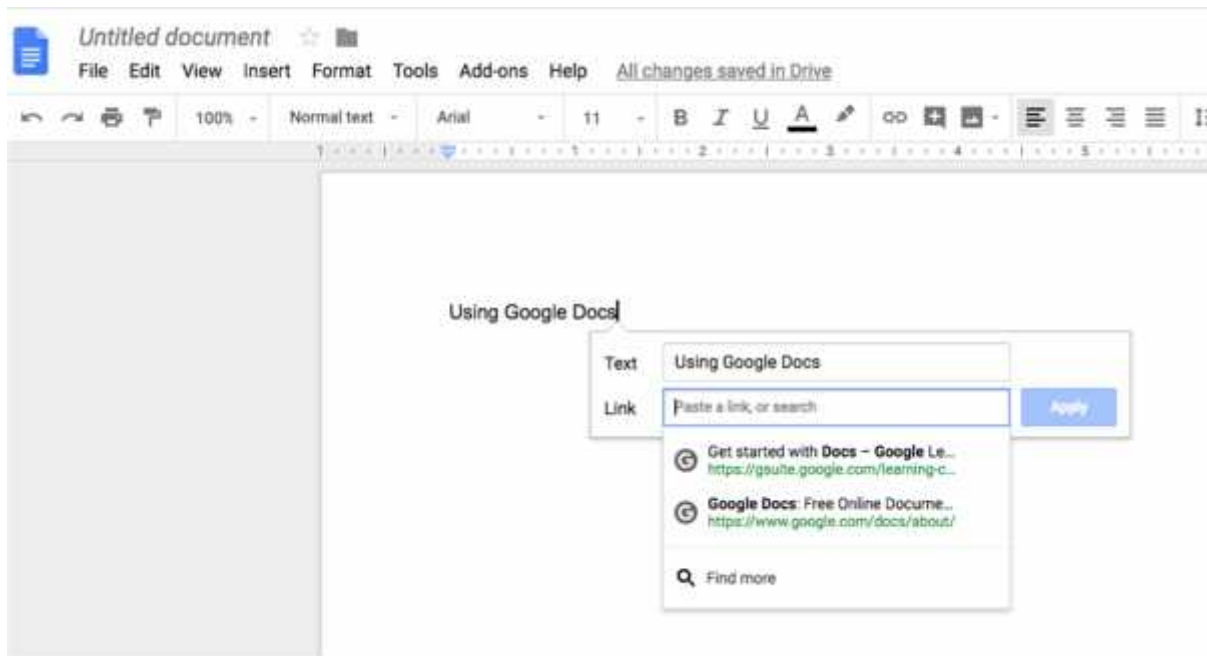
Go to Insert on the menu bar, or right click on the document.



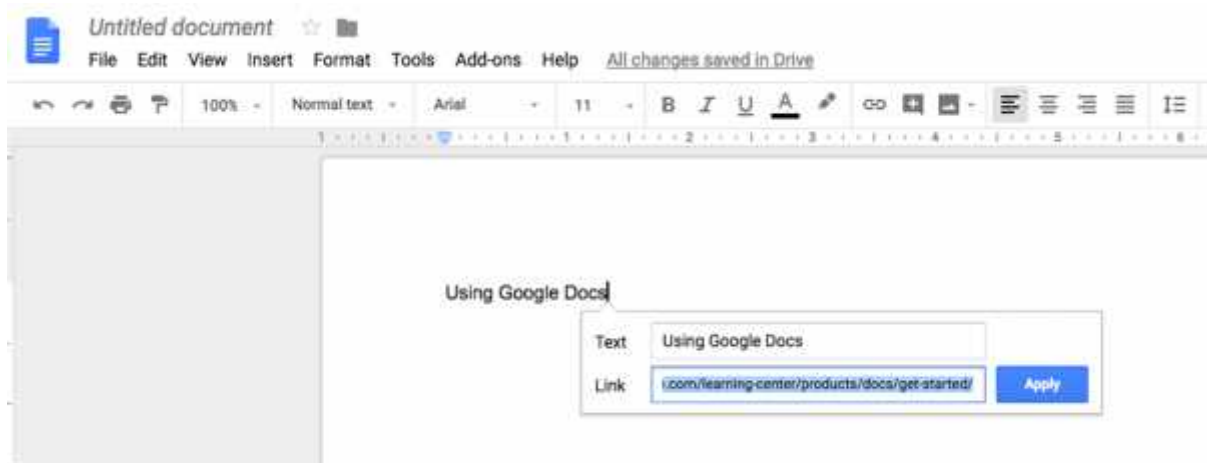
Select 'Link.'



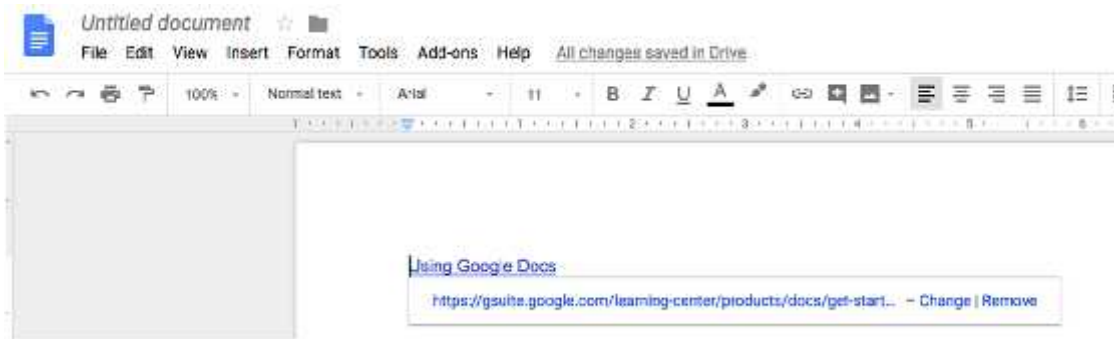
Type in your question or keywords. A list of choices will appear under the Link box.



Choose the link you want.



Click 'Apply.' Your selected text will be highlighted and the link will appear beneath the text, with the option to change or remove the link.



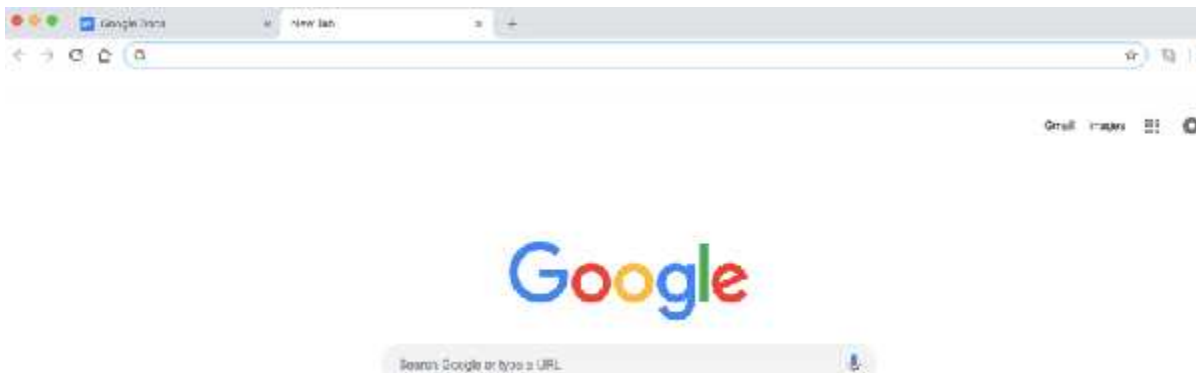
Offline Access

If your internet connection is interrupted, you can keep working in Google Docs and Google Docs will save the work you are doing. When your internet connection is re-established, Google Docs will upload the work you did offline to your account and update your online files.

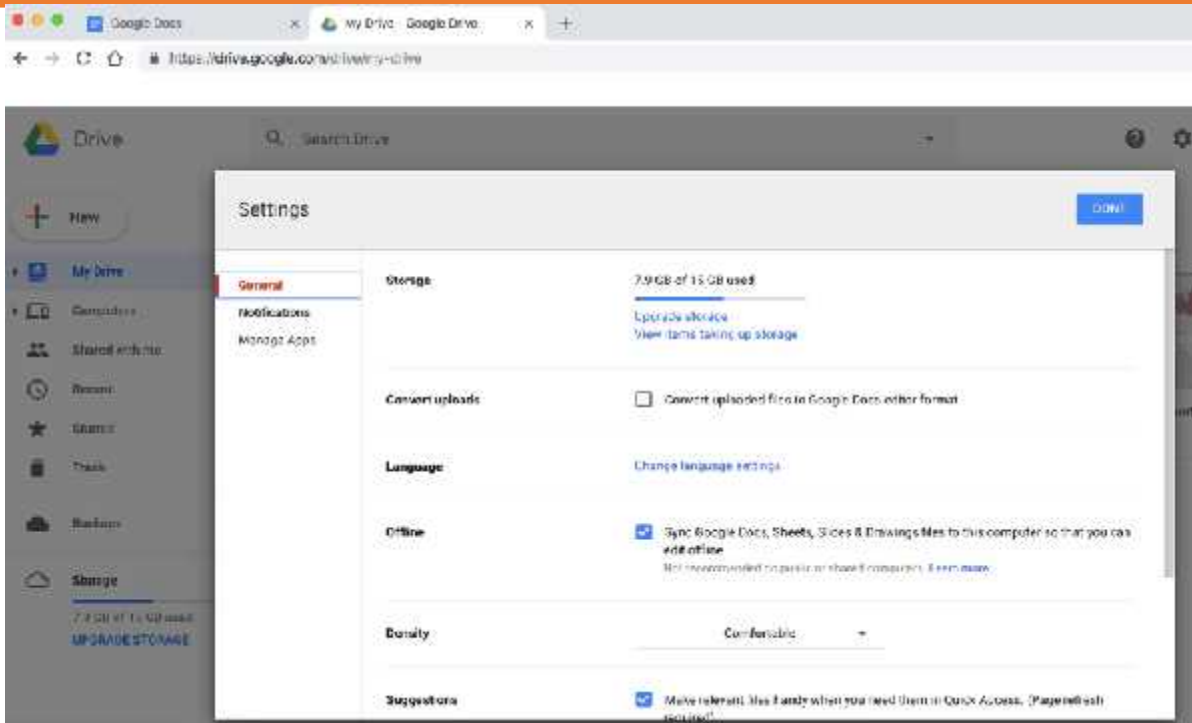
You must be online to set up the Work Offline feature. Be sure to set it up while you have internet access. Once it is set up, you can be online or offline to work in Google Docs.

To set up the work offline feature:

Use Google Chrome as your browser.

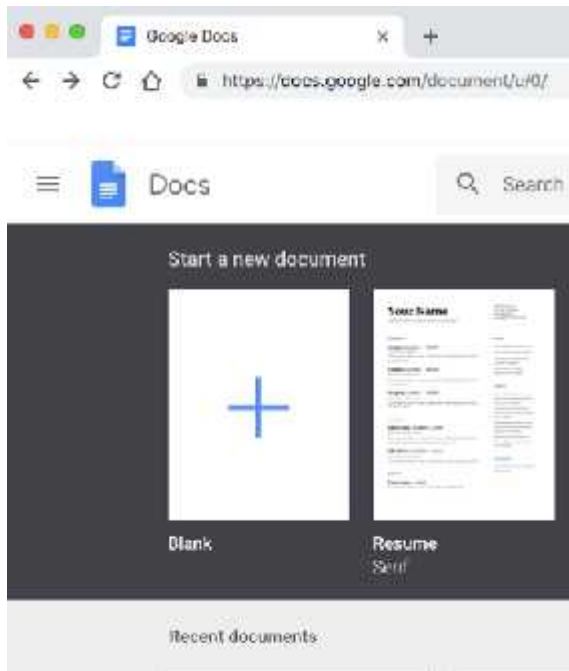


Go to drive.google.com/drive/settings.

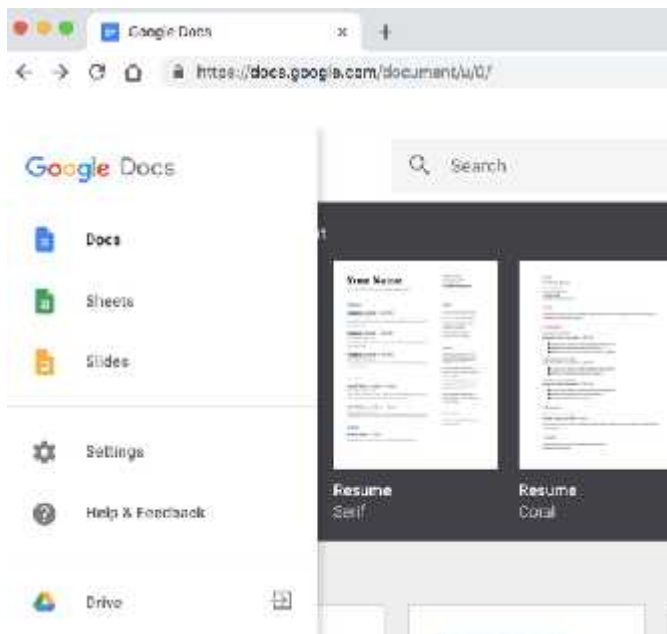


Ensure the Offline option is checked.
(If the Offline option is not available, you may need to install the Google Docs Offline extension.)
Go to the home screen of Google Docs.

Click the Main Menu icon (three horizontal lines) in the far left corner.

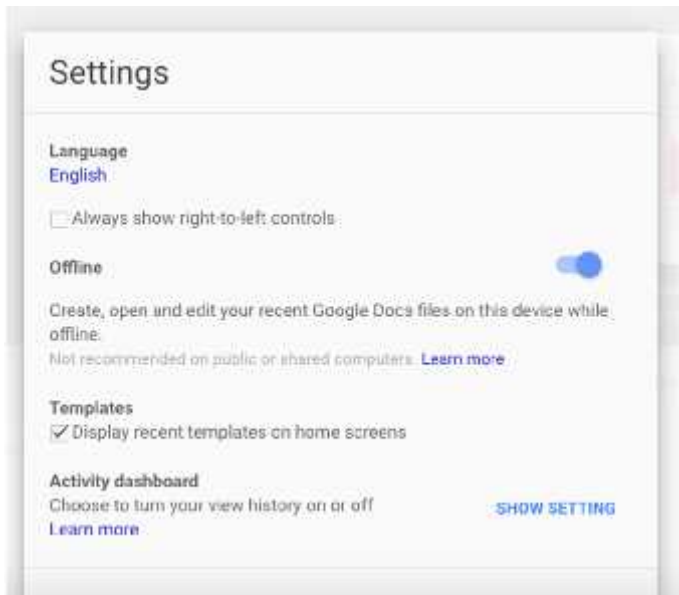


Choose 'Settings.'



Follow the instructions under 'Offline.'

Once set up, you can turn the feature on and off.



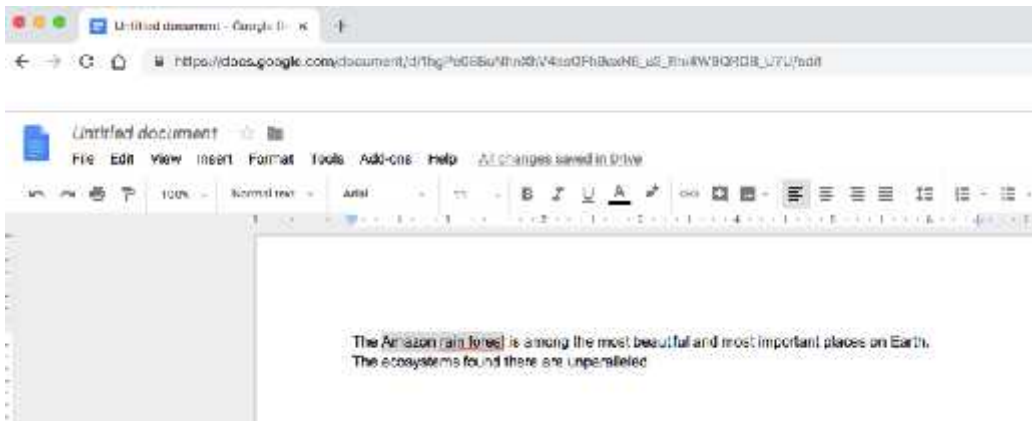
If you are prompted 'to learn more' – click 'to learn more' which will give instructions for your computer, Android or iPhone/iPad devices.

Research

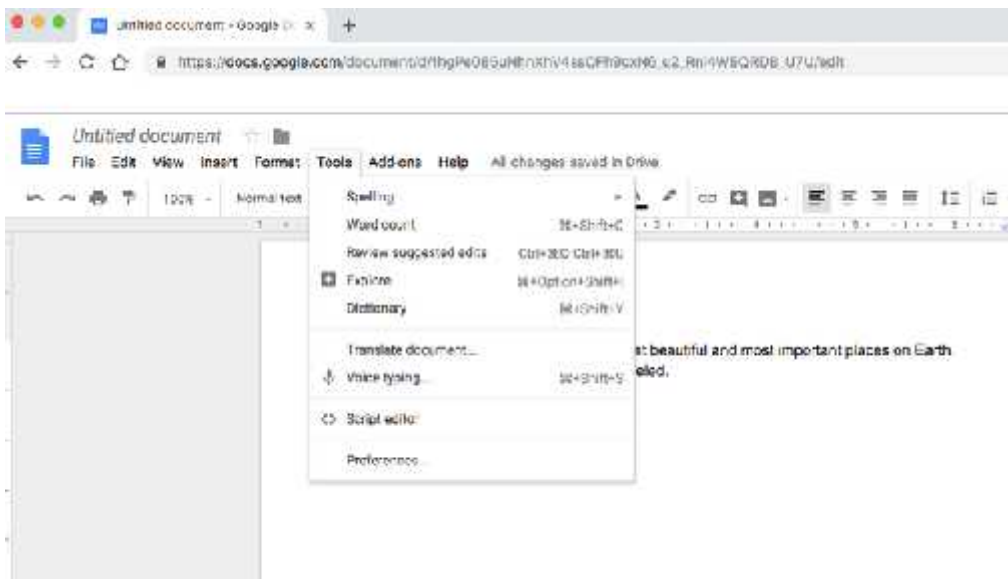
Google Docs includes a research sidebar with a built-in Google search function. You can search the web for images, articles, quotes, statistics, pronunciation and meaning of words — anything you might want to include in your document. Items found can be added to your document with a click.

To use Research:

Highlight a word or phrase in your document:



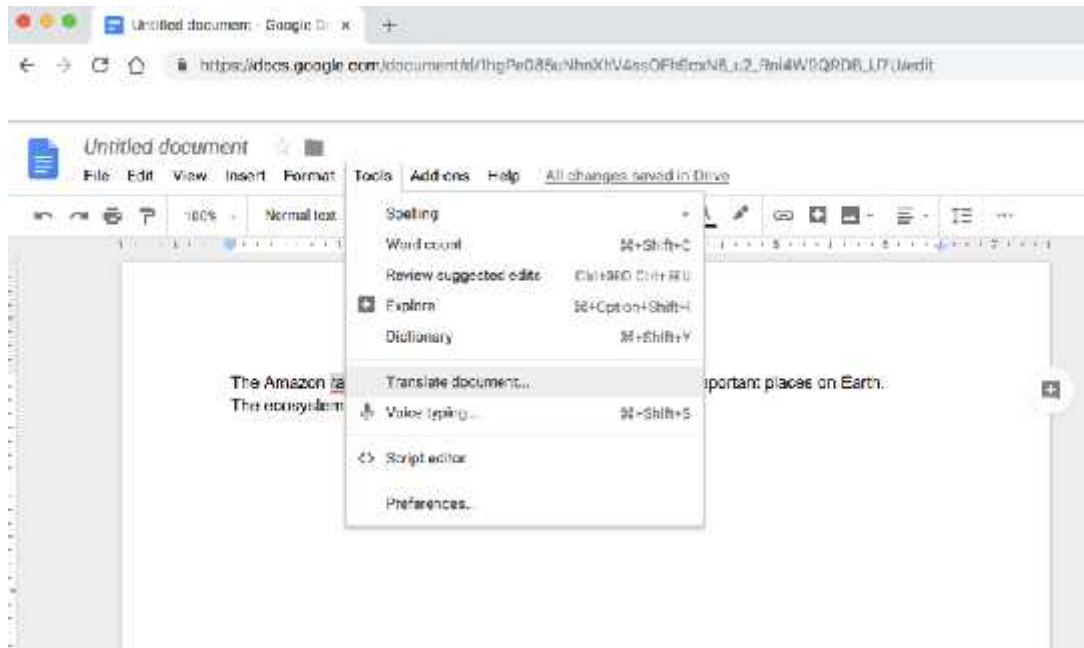
Click on 'Tools' in the menu bar:



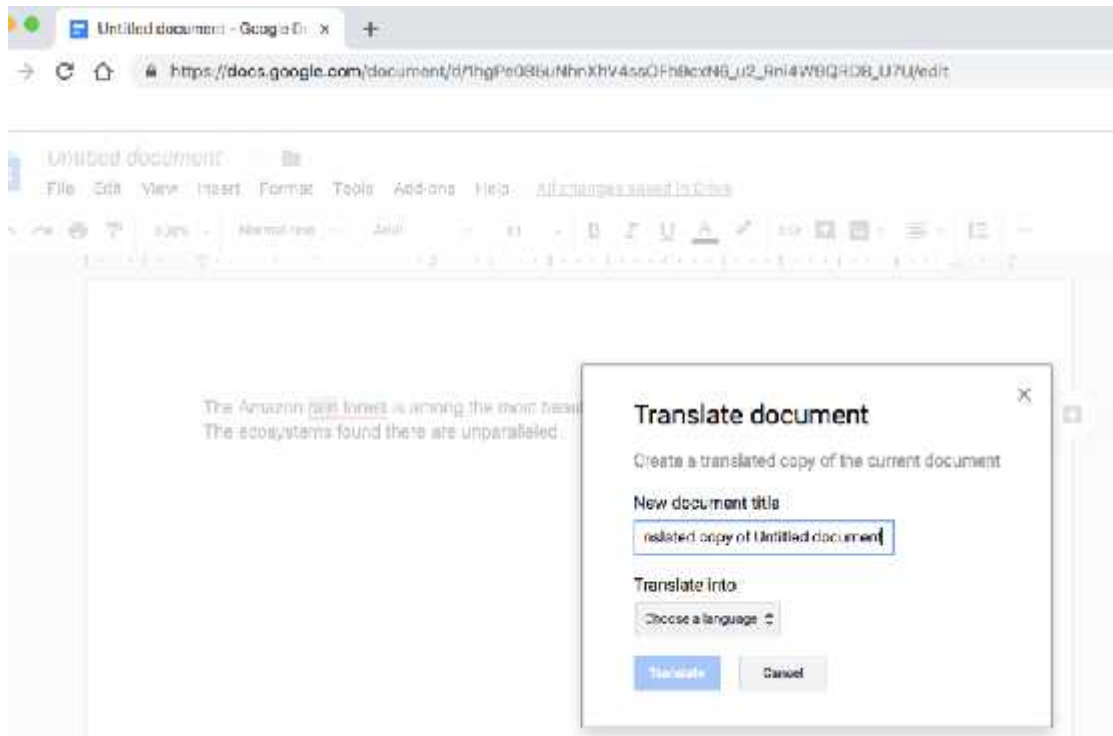
Choose 'Explore' for links to more information. Options will appear in a bar to the right:

You can also translate your document into other languages.

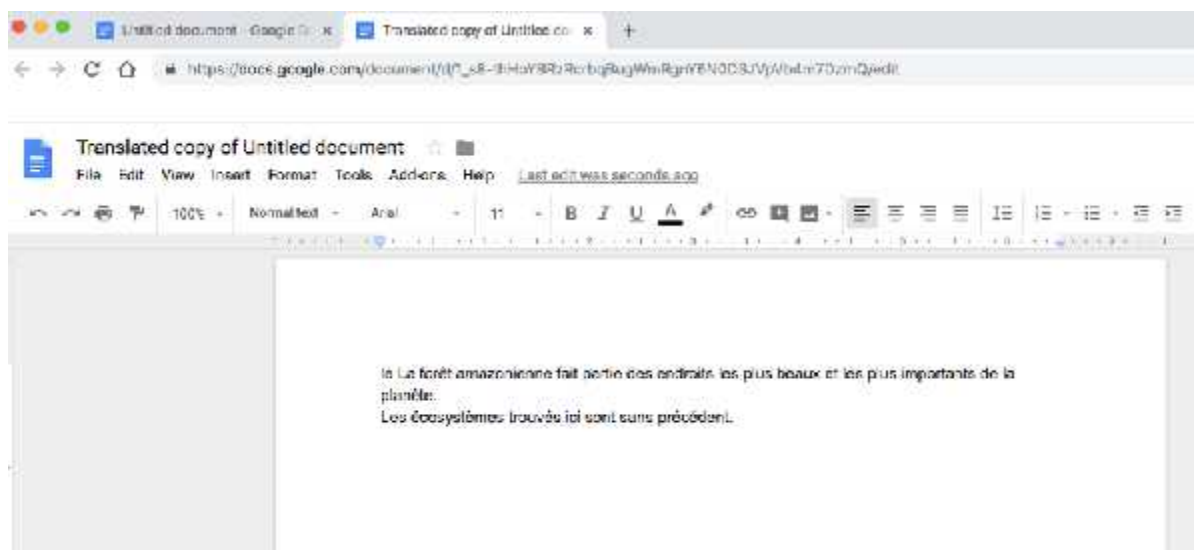
In the Tools menu, choose 'Translate document.'



Name your new document and choose the language into which you want it translated:



Click 'Translate.' Your new document will appear in the language of your choice.



Test Drive

In this section, we will work through the creation and sharing of a document on Google Docs, using some of the basic features discussed in the previous section. At the end of the test drive, you should have:

An active Google account

A document on Google Docs

Experience to consider whether this tool is of use to you in your business

Log into Google Docs on your computer or mobile device.

Choose a New Document – a blank document or template

Create a one-page document: letter, memo, poster — your choice

Format the document with basic functions: font style and size, spacing

Insert two links using the Insert Link search function

Use the dictionary to check the meaning of a word

Share the document online with your instructor, if possible.

What features did you like?

What were the challenges?

Would you use this in your business?

Further Study

There are two ways to learn more about the use and function of Google Docs:

The Help feature in Google Docs

Online sources, such as blogs and forums

Both of these sources can answer specific questions or provide general reviews of basic and advanced operations. As mentioned, Google Docs offers a business version, with expanded features for a monthly fee.

Research this business version and answer the following questions:

What are the basic features of the business version, including price?

What are the differences between the paid business version and the free individual version?

Do you think the business version would be a good investment for your business? Why or why not?

Canva

Online Graphics Creation

Google Docs and similar applications are designed for easy manipulation of words – writing, organizing, and formatting. In these applications, visual creations are possible and easy to make for simple insertions into presentations and brochures. However, in this information age where social media is a major form of communication for small business and visuals gain more attention and response per second than words alone, there is a need for graphics creation with the graphics as the focus in the same way that word processors focus on words.

Online graphics creation follows the same principle as Google Docs and other online document creators, but with the emphasis on graphics products. Rather than outputting letters, proposals and brochures, online graphics creators output Facebook banners, visual Twitter posts and web-friendly graphics, as well as posters and presentations.

Using an online graphics creator can:

- Enable you to create customized high-quality images

- Enable you to create and download images correctly sized for various social media and online applications

- Provide inspiration and ideas for tasks or campaigns

- Increase the visual presence of your business

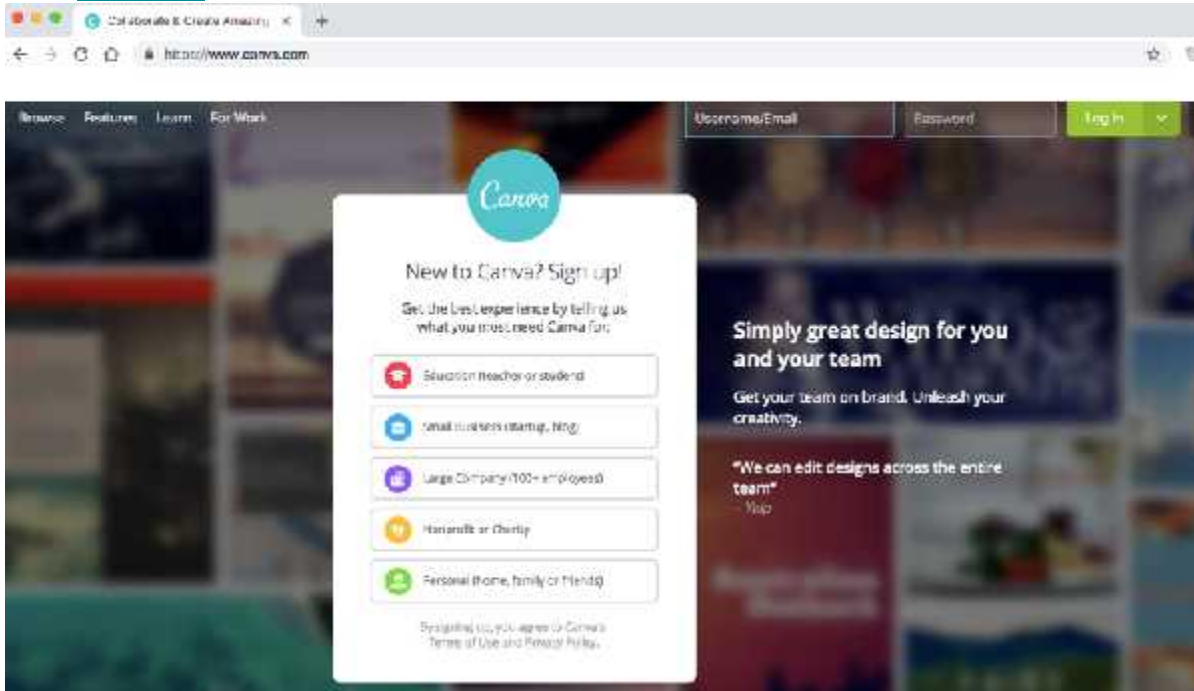
What reasons might you have to use online graphics creation for your business?

Canva is an example of an online graphics creator. Canva is designed for use by both professional graphic designers and ‘the rest of us’ – those who are not designers but have a knowledge of the message they need to share and an eye for what can work. Canva offers templates for both online and print products. Users can choose from thousands of photos, graphics and fonts, or can upload their own photos and graphics, such as a company logo or brand colours. Canva has a basic free service, with options to upgrade to Premium service with expanded features and a monthly or

annual fee.

Setting Up an Account

Go to [canva.com](https://www.canva.com).



Entrepreneurship

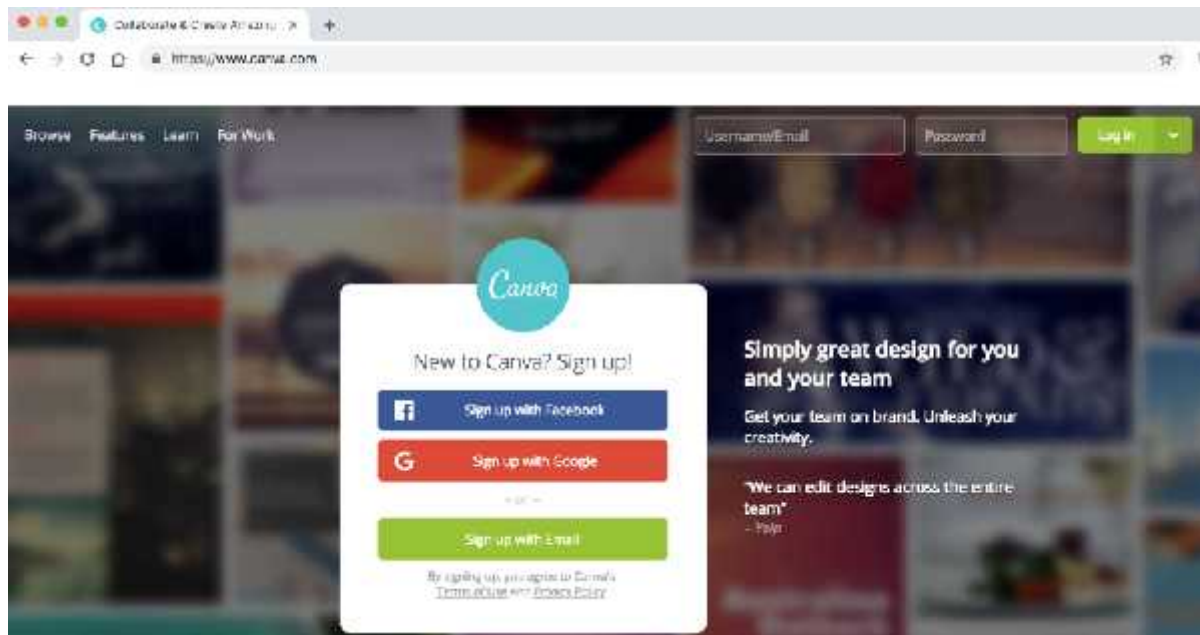
Choose a category for your account.

If you choose Personal, Canva offers three ways to create an account:

Sign Up with Facebook

Sign Up with Google

Sign Up with Email



If you choose any other Category, you have two options to create an account:

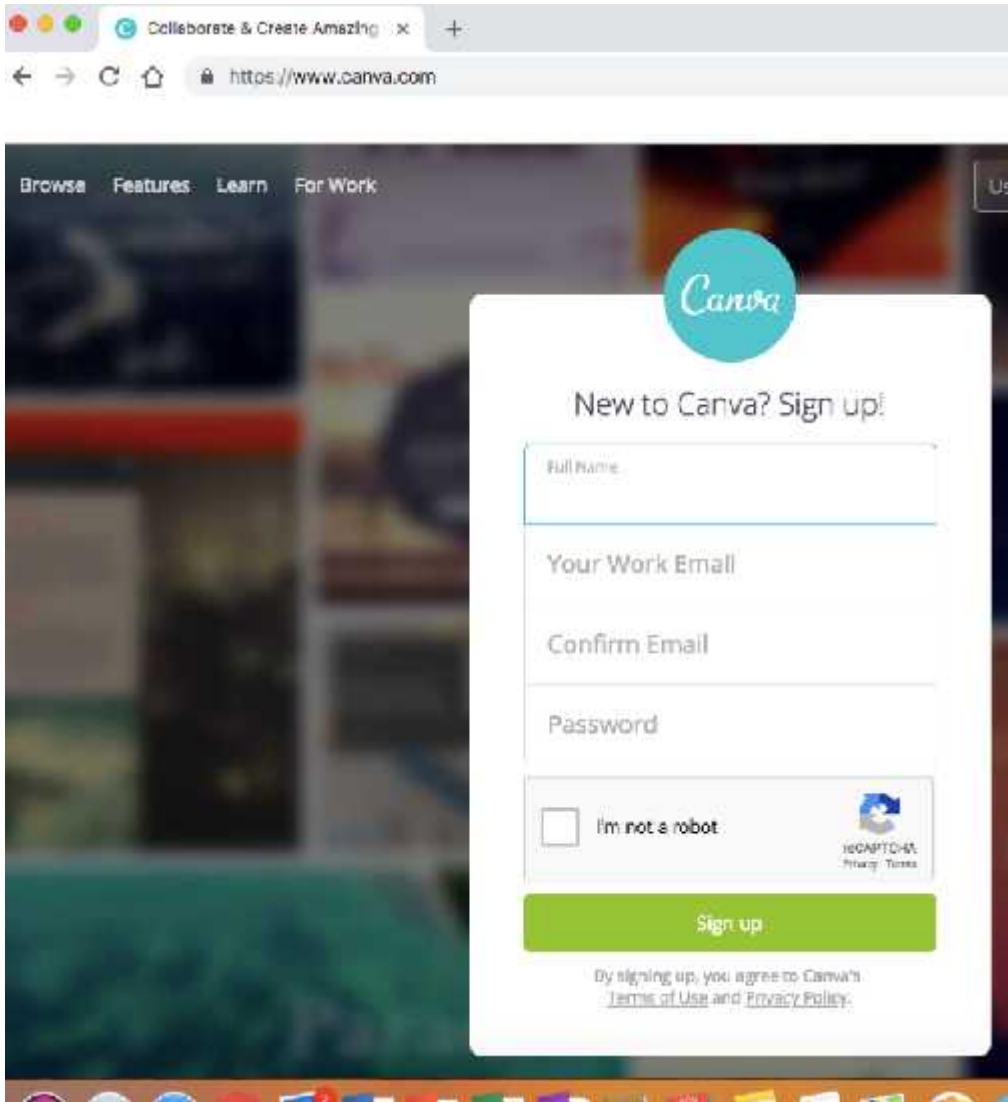
Sign Up with Google

Sign Up with Email



Since Google accounts were required for Lesson One, an easy way is to log in with Google. To use either of these options, you will be asked for permission to share profile information between the platforms. Your Canva projects or presence on Canva will not be shared without your instruction to do so. To Sign Up with Google, click the red button and follow the instructions.

If you prefer to maintain a Canva account separate from your Google account, click the green Sign Up with Email button and follow the instructions.

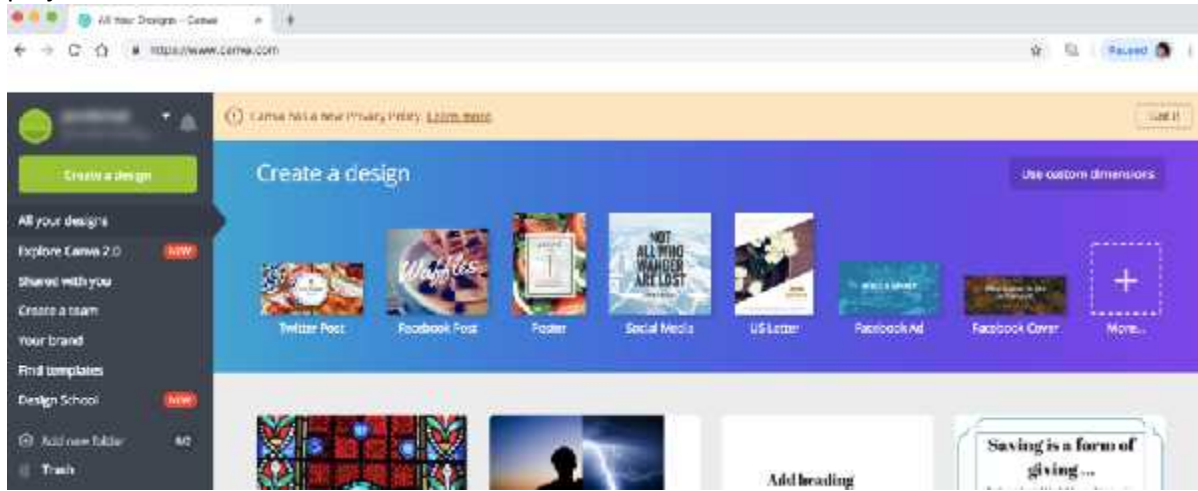


Log in or create an account to Canva now on your computer or mobile device following the above steps.

Basic Features

Creation

After logging in, you are directed to your dashboard. Here is where you begin new projects and all of your previous projects are stored.



Create a Design is your starting point for new creations. Click on your choice to get started. Below the Create a Design stream is the gallery where your creations will be saved. Every creation you build in Canva will be saved here, unless you choose to delete it.

Would any of the Create a Design gallery options be useful for your business? Which ones? Are there options not available that you would use in your business?

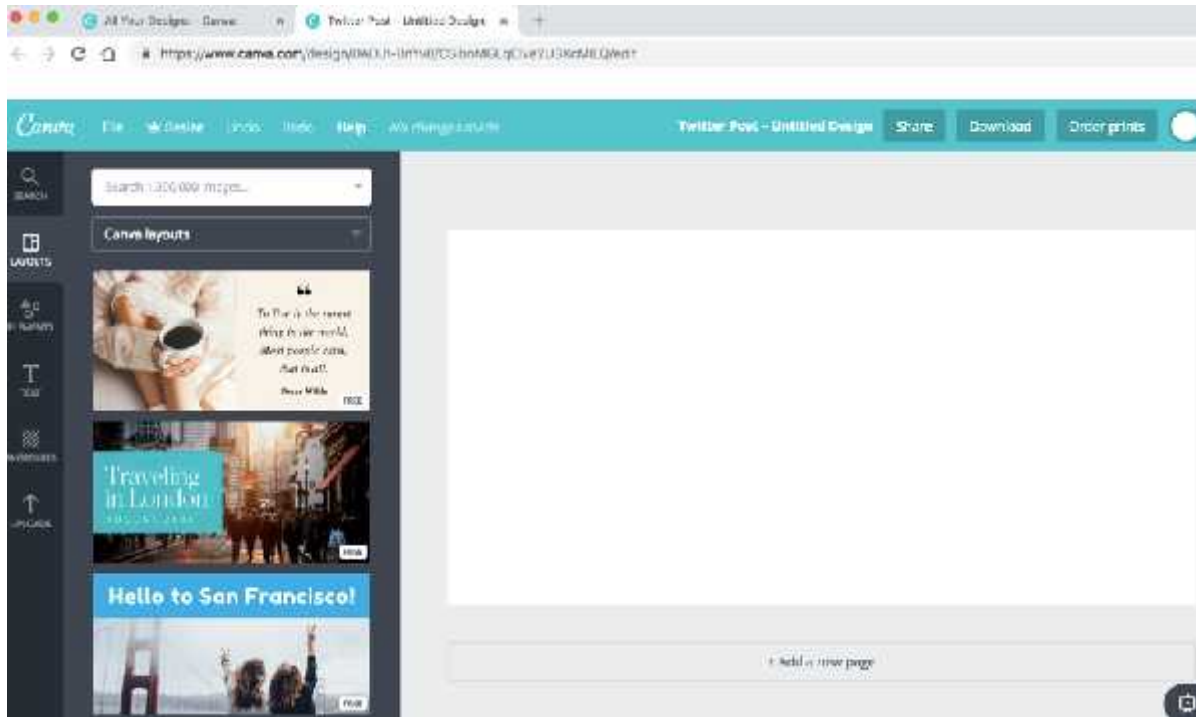
Make a list of three templates that you would like to work on. We will revisit this list later in this lesson.

Editing:

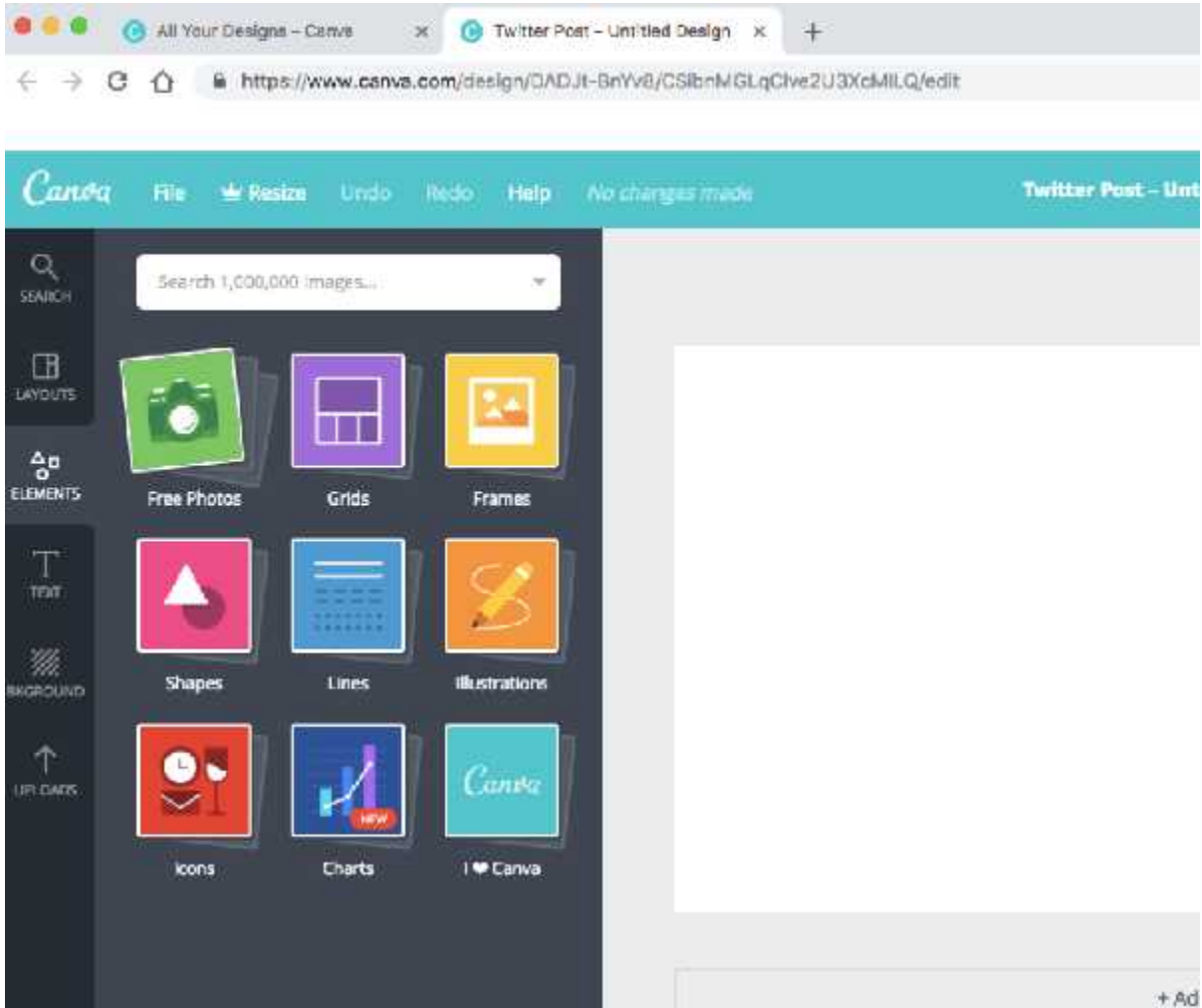
Clicking on a template takes you to the creation page.

Here you have the ability to select:

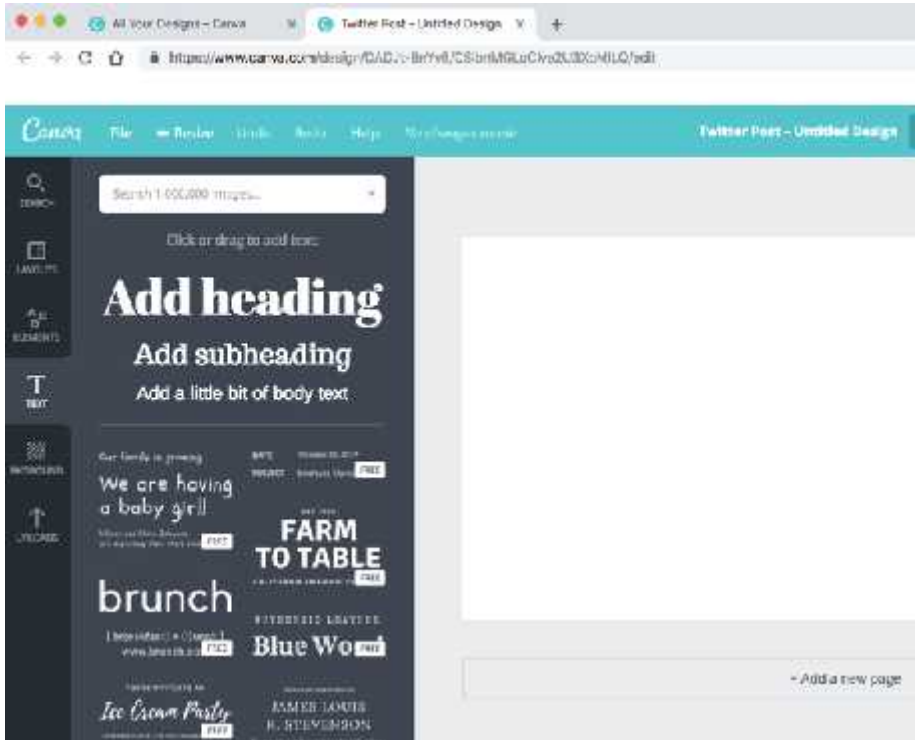
Layouts



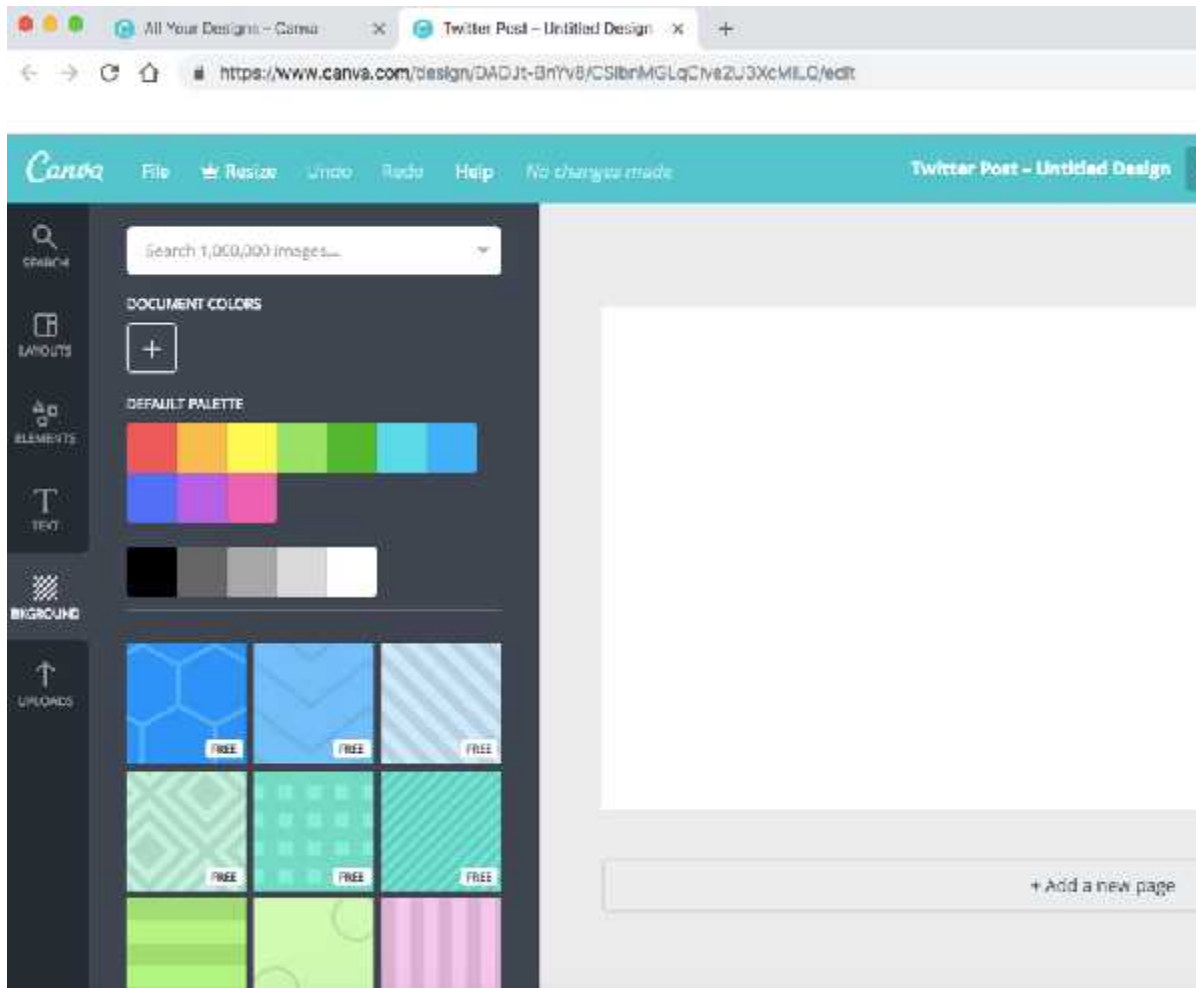
Elements: photos, shapes, lines, charts and theme graphics:



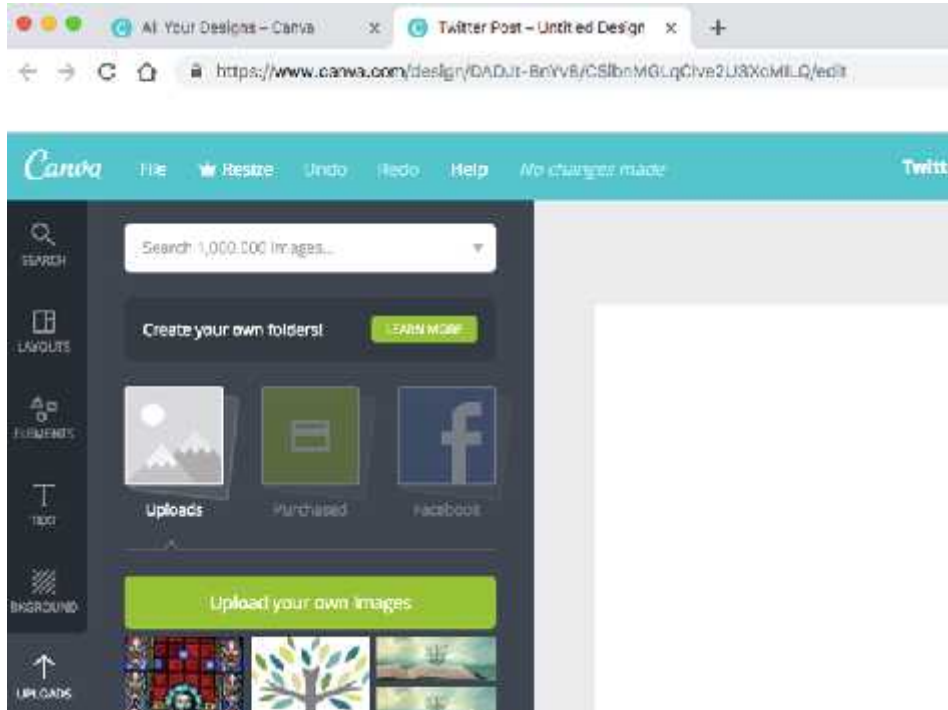
Text, including font style and size:



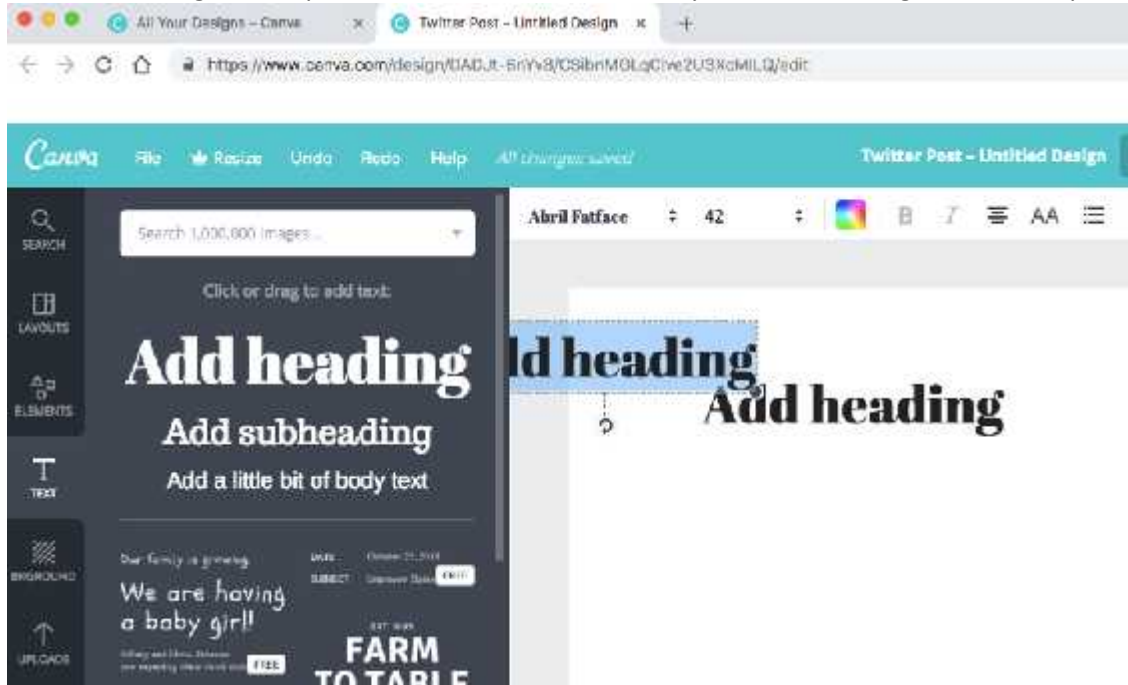
Background color and shading



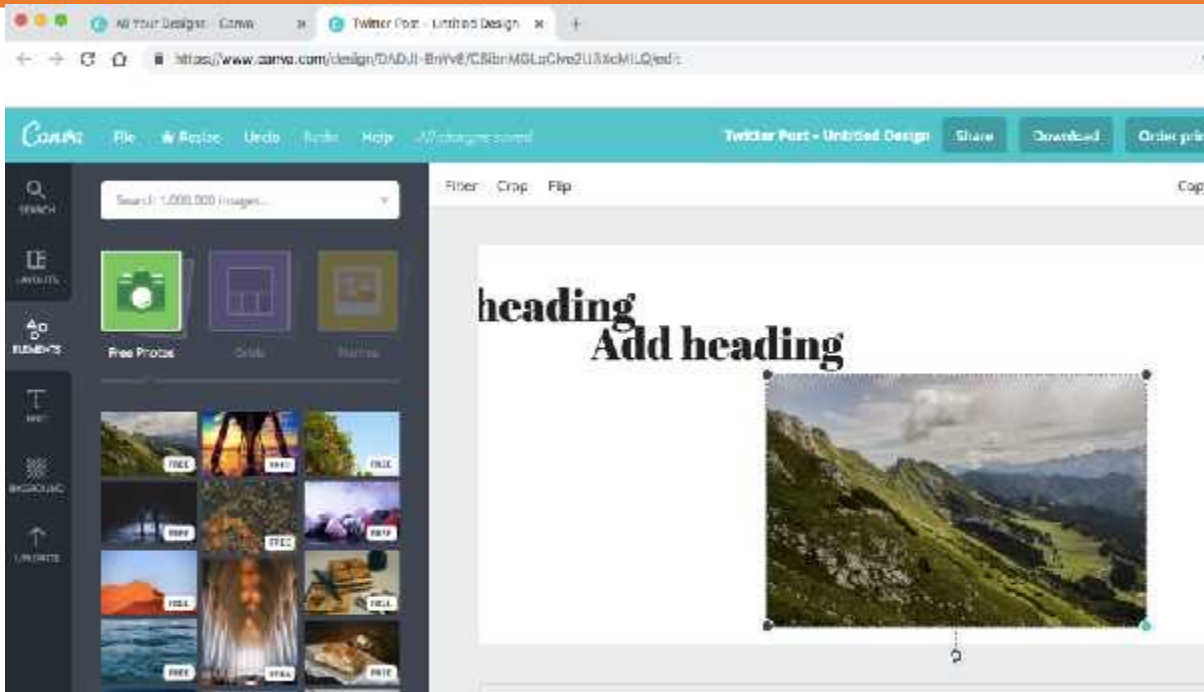
Uploads, giving you the option to import your own photos and graphics:



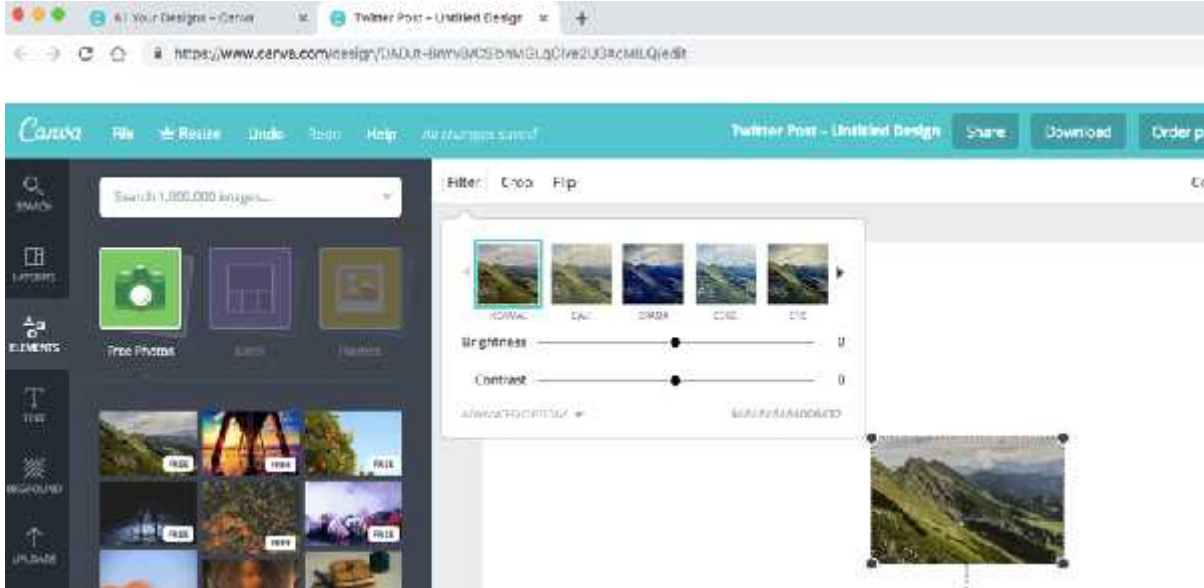
Canva uses 'drag and drop': click and hold on the feature you want and drag it to the template.



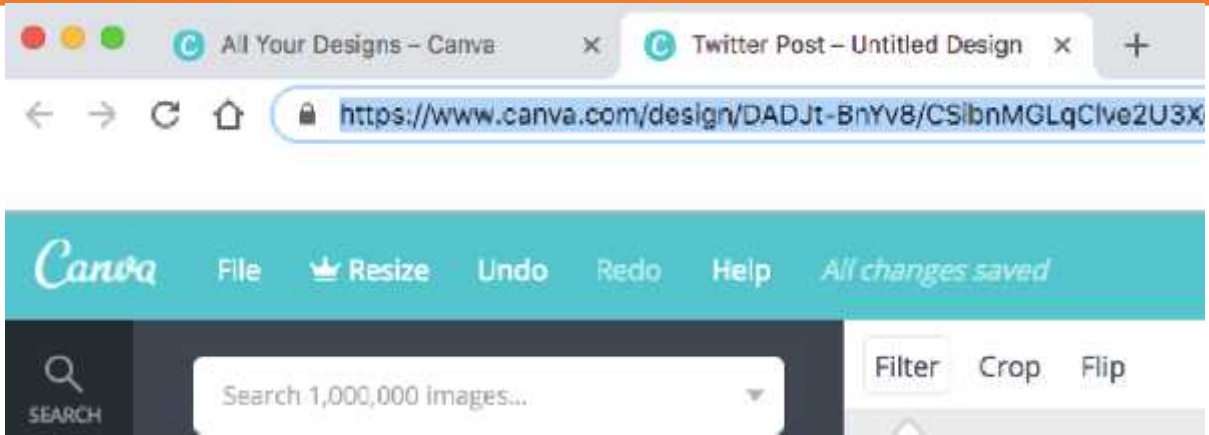
Clicking on the item in the template allows you to move it to where you want; clicking on a corner allows you to enlarge or shrink the item.



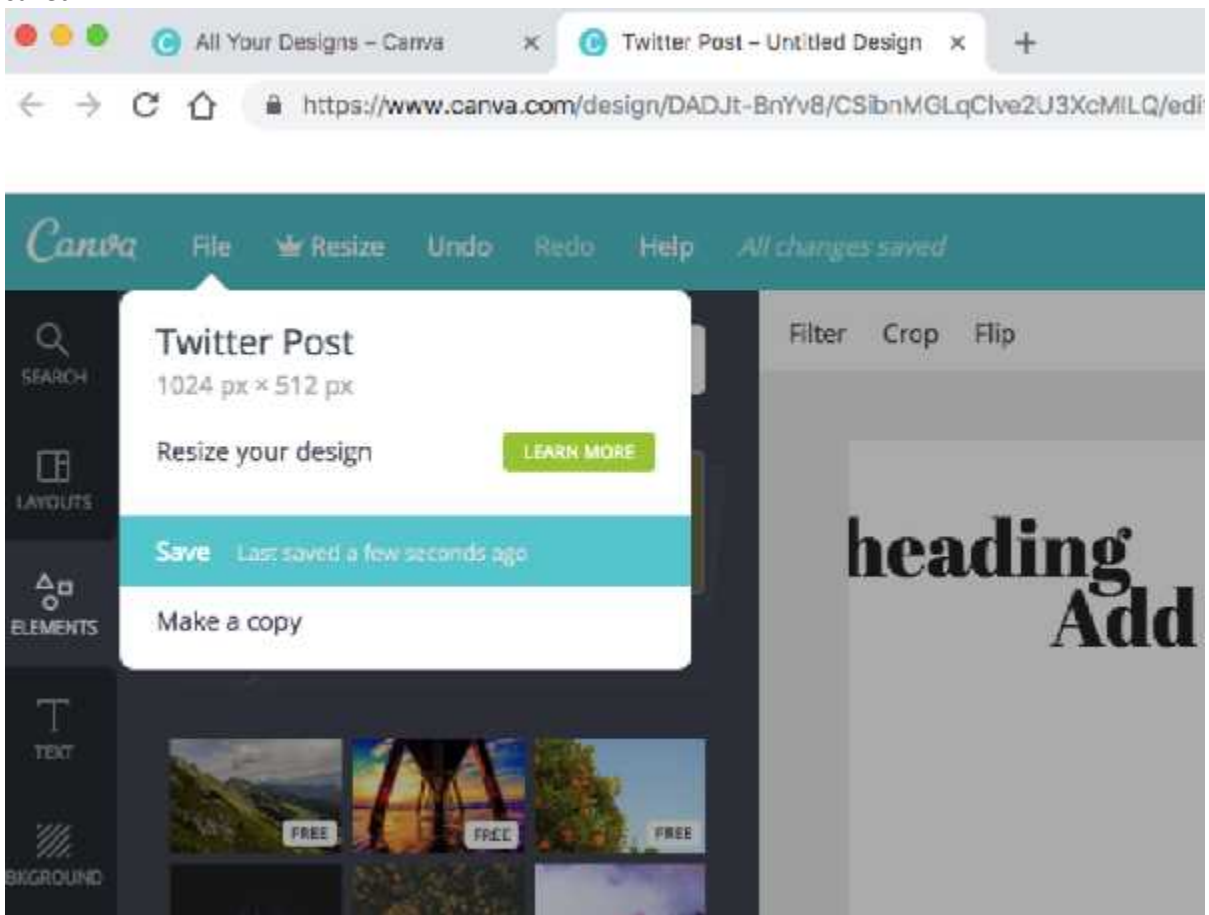
Clicking on the item brings up a menu bar that allows for additional edits: adjusting the transparency of photos or background, layering items, customizing colors, etc.



Canva saves work automatically with each change. To confirm, see the message in the centre of the top menu: *all changes saved*, or *no changes made*, or *saving*.



You can also click 'File' on the top menu. 'Save' will enable you to save again and will tell you when the file was last saved.



Exporting

Canva allows you to share your creation in two ways:

- Download
- Invite sharing

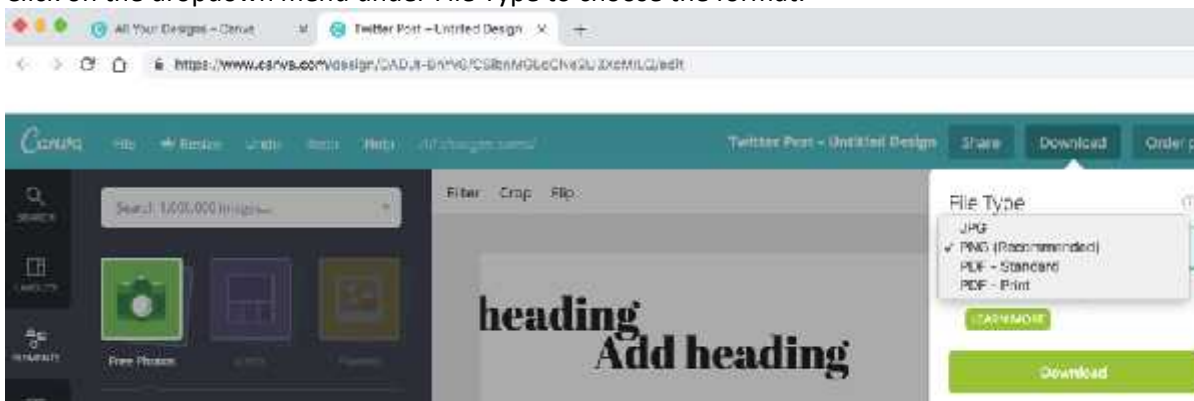
The download feature gives a choice of PDF, JPG and PNG formats. The file will be saved to your computer's Download box.

To Download

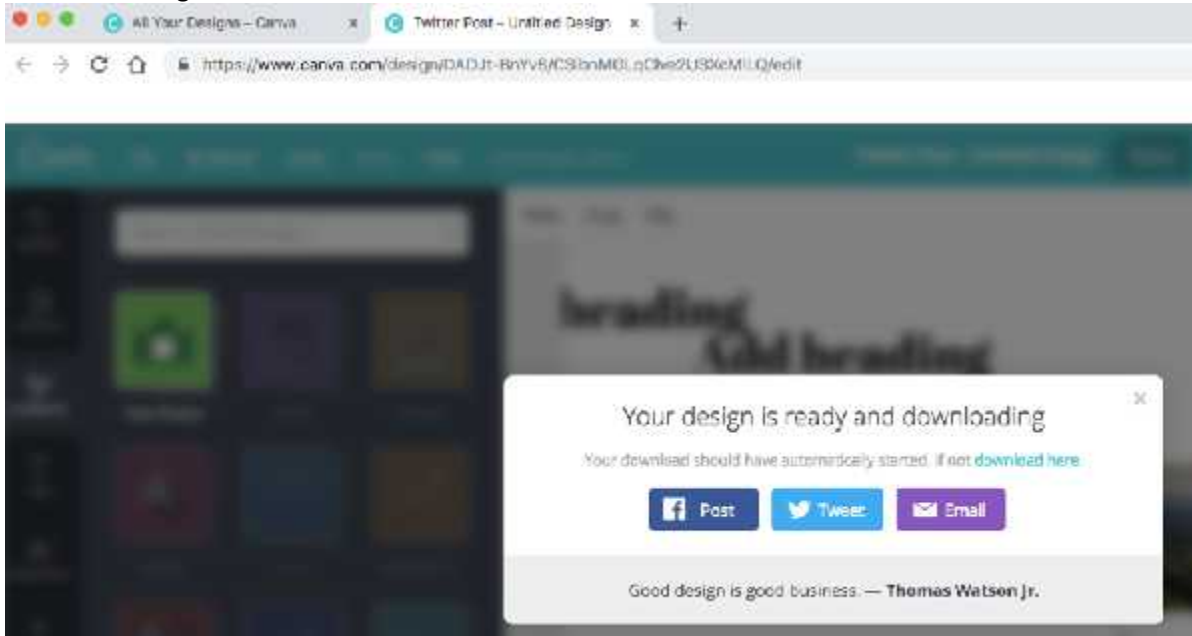
From the creation gallery, click the Download button from the top right of the screen.



Click on the dropdown menu under File Type to choose the format.



Then click the green Download button at the bottom. You will receive a download notification.



To Invite Sharing

Invite Sharing allows you to share your graphic with one or more email addresses.

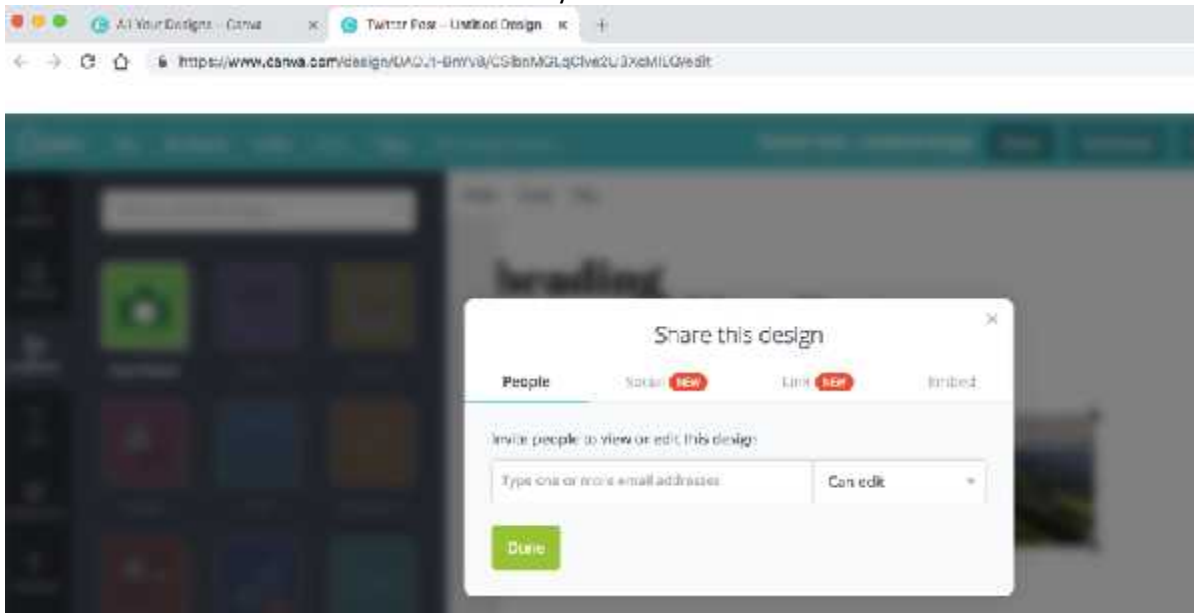
The person or persons with whom you share your graphic can view or edit them, depending on your setting. Only one setting is possible per email list. If you want some to edit and some to view, you must Share each list separately.

To Share Your Graphic

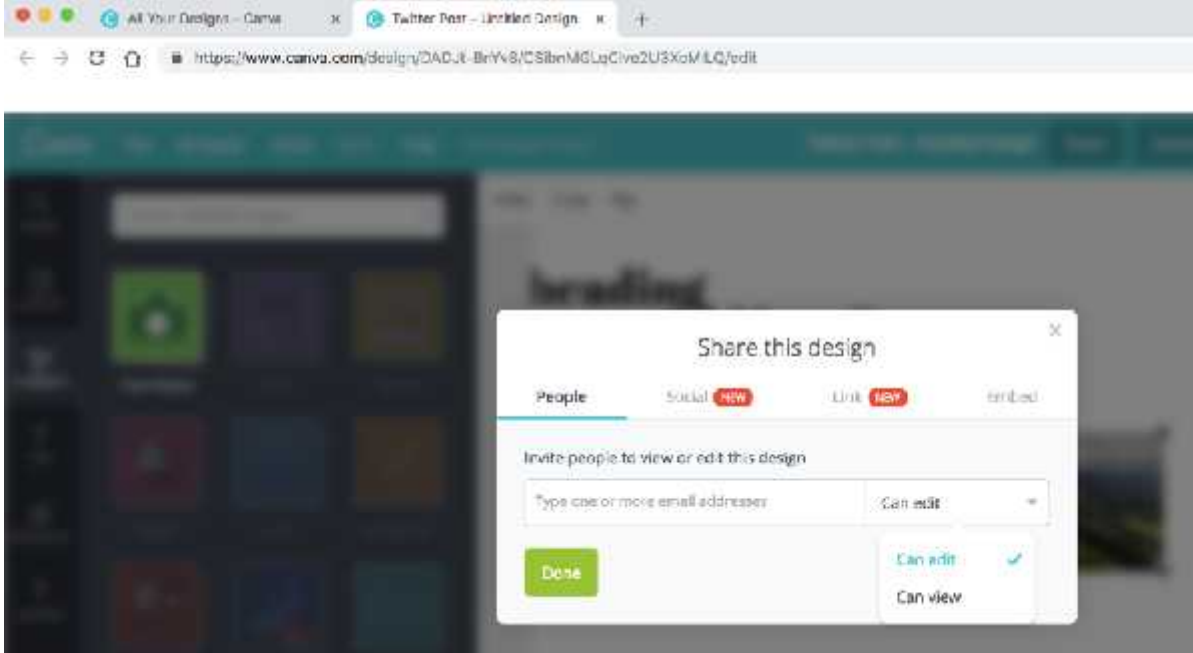
From the creation gallery, click the Share button (next to Download) on the menu on top of the page:



Enter the email or emails of those with whom you want to share:

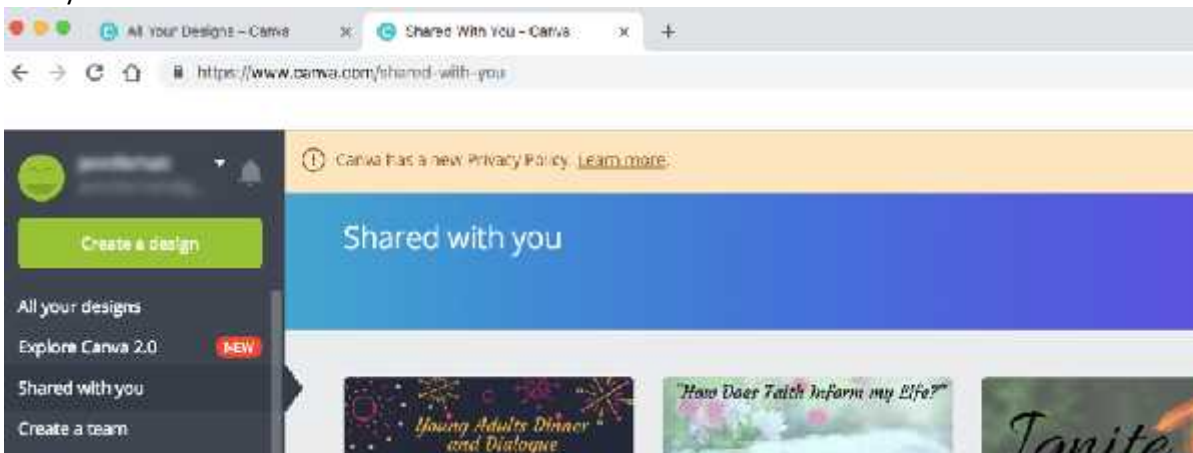


Set to View (so they can see but not change it) or to Edit (so they can make changes):



Click 'Done' and then Share.

Your personal gallery will also save projects from other creators that have been shared with you. To view or edit (depending on their setting), from your dashboard click 'Shared with you' in the left menu bar to see graphics shared with you.



Test Drive

In this section, we will work through the creation and sharing of graphics on Canva, using some of the basic features discussed in the previous section. At the end of the test drive, you should have:

- An active Canva account
- Three graphics in your Canva gallery
- One graphic in your 'Shared with You' gallery

Revisit the list of graphics that you wished to create in Canva previously in this lesson.

Choose a graphic from the template gallery and click on it.

In the creation gallery create a graphic with:

A photo or icon

Two sizes of text

A frame or line

When the creation is complete, return to the home page by clicking 'Canva' in the top left corner of the screen

Check to see the graphic is in your personal gallery.

Repeat the exercise to create a second graphic. This time, once complete, export your graphic to your device, if possible.

Repeat the exercise again with the third graphic. This time, pair up with a partner/student if possible. If you are unable to pair up with a partner, review the activity in detail and make note of the actions required.

Working in pairs, share your documents with each other and make some edits. Confirm that the graphic you create is in your personal gallery, and the graphic you receive and edit is in the 'graphics shared with me' gallery.

Further Study

The best way to learn about Canva is to use it. Create additional graphics. Edit existing graphics. Upload your own graphic elements for use in your creations.

Canva also offers tutorials: <https://www.canva.com/learn/tutorials/>.

Following is a link to 17 Canva tutorials: <https://profitblitz.com/canva-tutorials/>.

As mentioned, Canva offers a Premium option, with expanded features for a monthly or annual fee.

Research this Premium version and answer the following questions.

What are the basic features of the Premium version, including price?

What are the differences between the paid Premium version and the free version?

Do you think the Premium version would be a good investment for your business? Why or why not?

Trello

Online Project Management

Project management is no longer only for mega projects worth hundreds of thousands of dollars. Small projects can also benefit from project management tools.

Types of work you may perform in managing small projects can include:

Performing the tasks of the project: perform the tasks and making adjustments during the process.

Maintaining resources: making sure resources are available when needed and that they are doing the appropriate jobs.

Managing human resources. providing feedback to help staff execute their tasks.

Monitoring deliverables: making sure you are on track to meet the objectives of your project.

Monitoring risks: keeping an eye out for anything that might put your project at risk (budget changes, sick time, weather events, etc.).

An online project management tool such as Trello can help you to:

Get that small project done well, done under budget, and done on time.

Organize and prioritize your projects

Collaborate with team members

Increase productivity

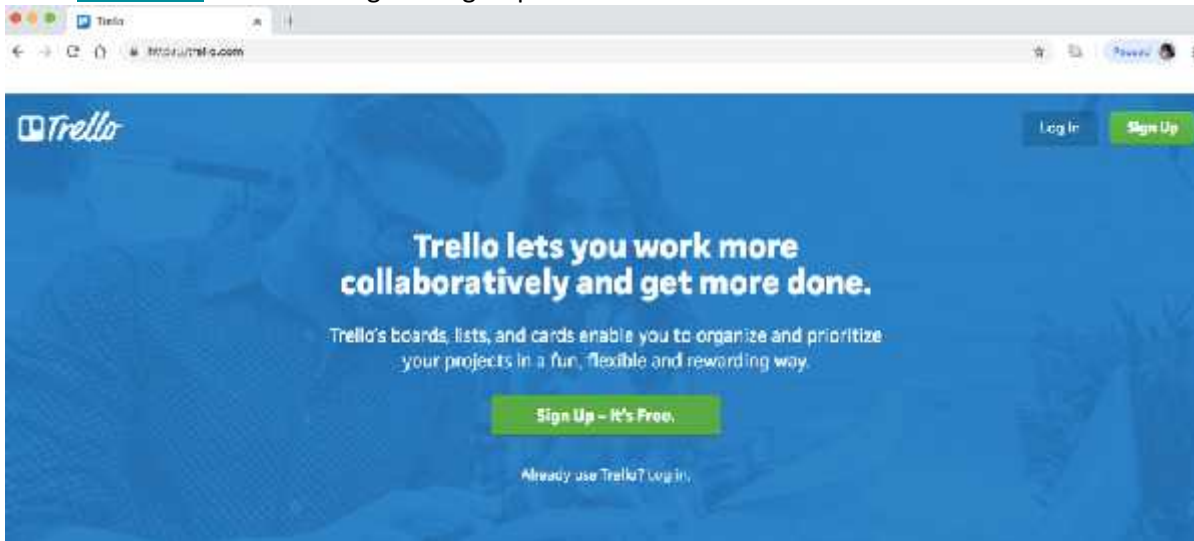
What types of tasks and projects do you currently work through in your business?

Trello is a collaborative tool that can be used for managing tasks or projects of virtually any size. In Trello, you create a board for each project and cards for activities that are like sticky notes. You can add members, checklists, labels, due dates and even attachments. Tasks can be assigned to team members and everyone moves the cards along as they finish their task. You can also choose to have an email sent to you if the card is moved.

Trello is simple and intuitive. It also has a tour to explain everything about using it and also a great blog to see innovative ways that Trello is being used.

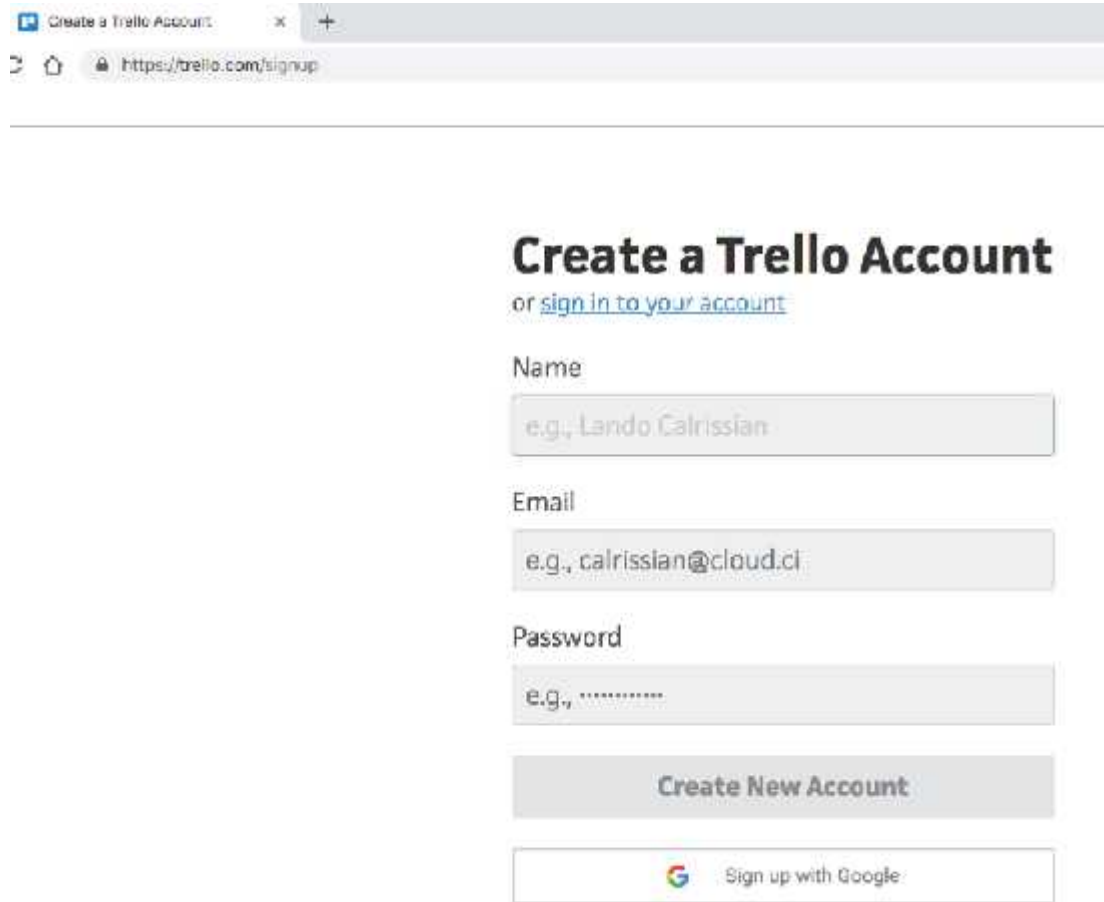
Setting Up an Account

Go to [Trello.com](https://trello.com) and click the green Sign Up button.



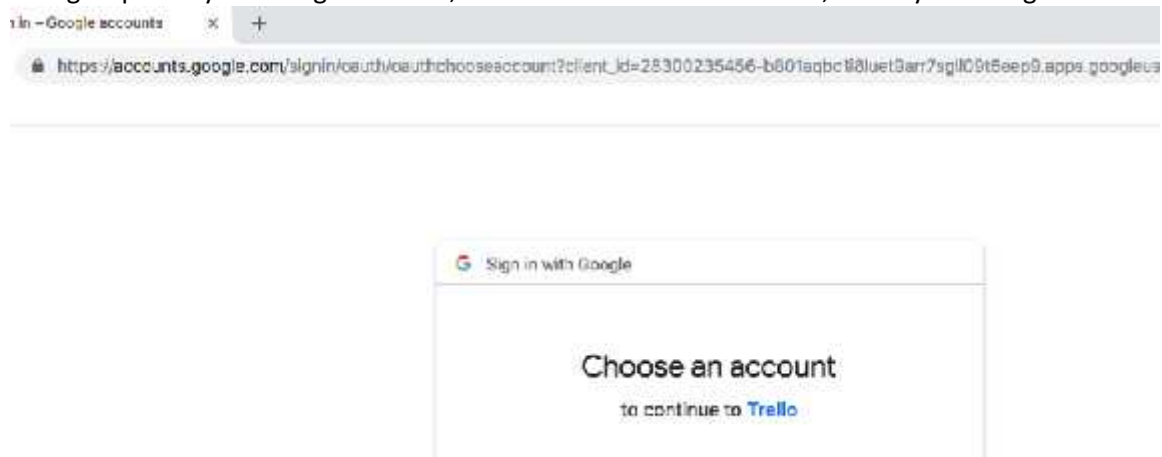
Clicking 'Sign Up' offers two options: Create a new account or Sign Up with your Google Account.

To create an account: fill in the fields and click 'Create New Account.'



The screenshot shows a web browser window with the address bar displaying "https://trello.com/signup". The page title is "Create a Trello Account" and it includes a link to "sign in to your account". The form contains three input fields: "Name" with the placeholder "e.g., Lando Calrissian", "Email" with the placeholder "e.g., calrissian@cloud.cf", and "Password" with the placeholder "e.g.,". Below the fields are two buttons: a grey "Create New Account" button and a white "Sign up with Google" button with the Google logo.

To Sign Up with your Google account, click the button at the bottom, select your Google account and sign in.



The screenshot shows a Google account selection screen. The address bar displays "https://accounts.google.com/signin/oauth/chooseaccount?client_id=25300235456-b601aqbc88luet8arr7sgll05t5eep9.apps.googleusercontent.com". The main content area has a header "Sign in with Google" and a central message: "Choose an account to continue to Trello".

Log in or create an account now to Trello on your computer or mobile device following the above steps.

Basic Features

Trello has many great features, including:

- Drag and drop functionality

- Quick overview on front and back of cards

- Tags, labels and categories for easy organization

- Checklists

- Uploading of files and attachments on cards

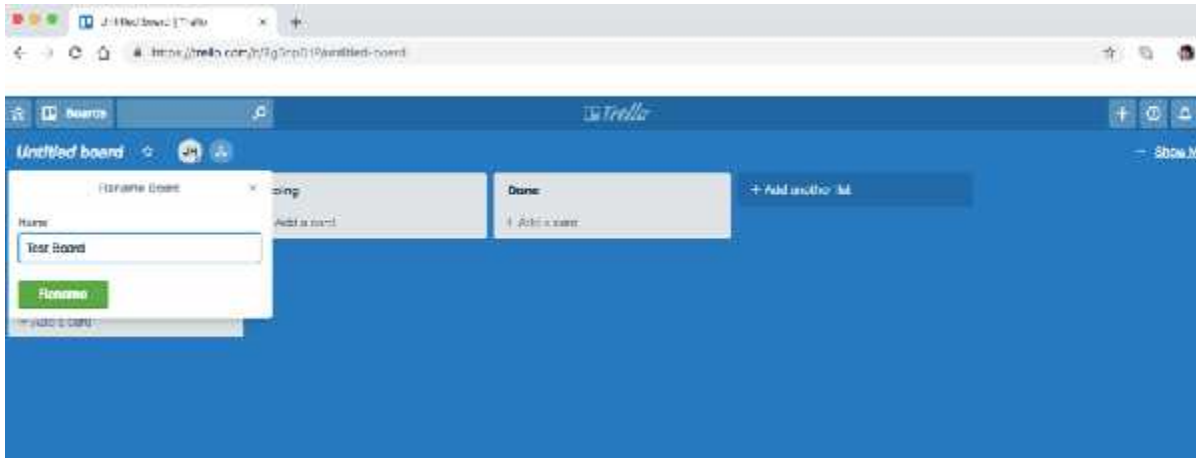
- Deadline reminders, email notifications, activity log and assigning of tasks

Using Trello

Signing up presents you with an untitled project board:



Name your board, or change the name, by clicking on the title at the left. Type in your new title and click 'Rename.'

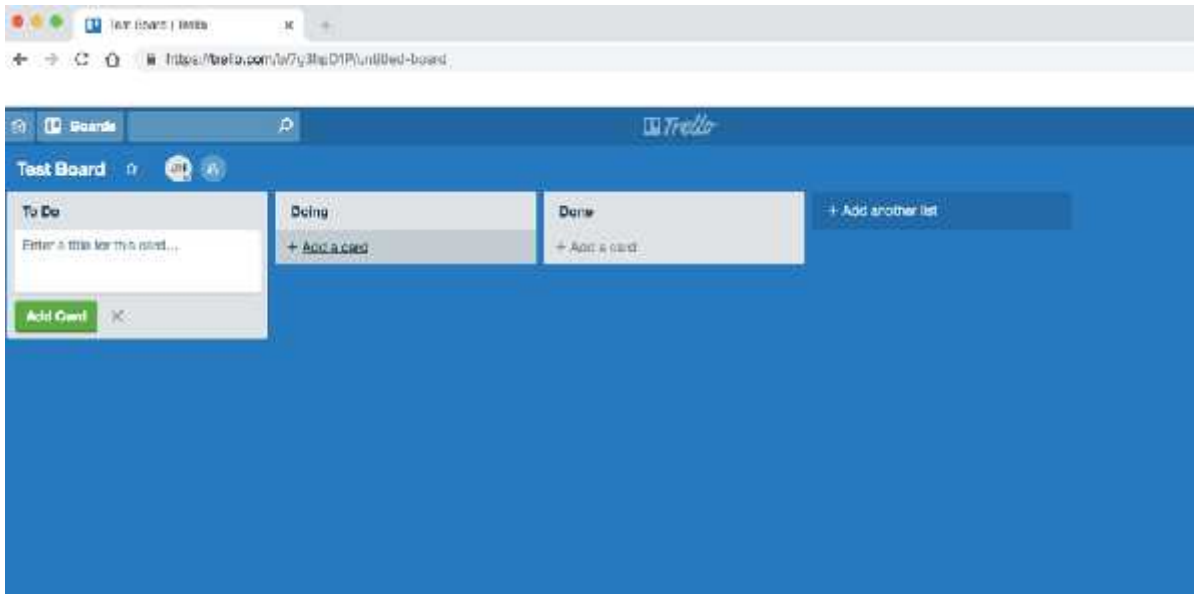


Now add the tasks of your project. Samples given are To Do, Doing and Done.

You can change these by clicking on the titles in each task:



To create a card, click on 'Add a card' at the bottom of each task option:



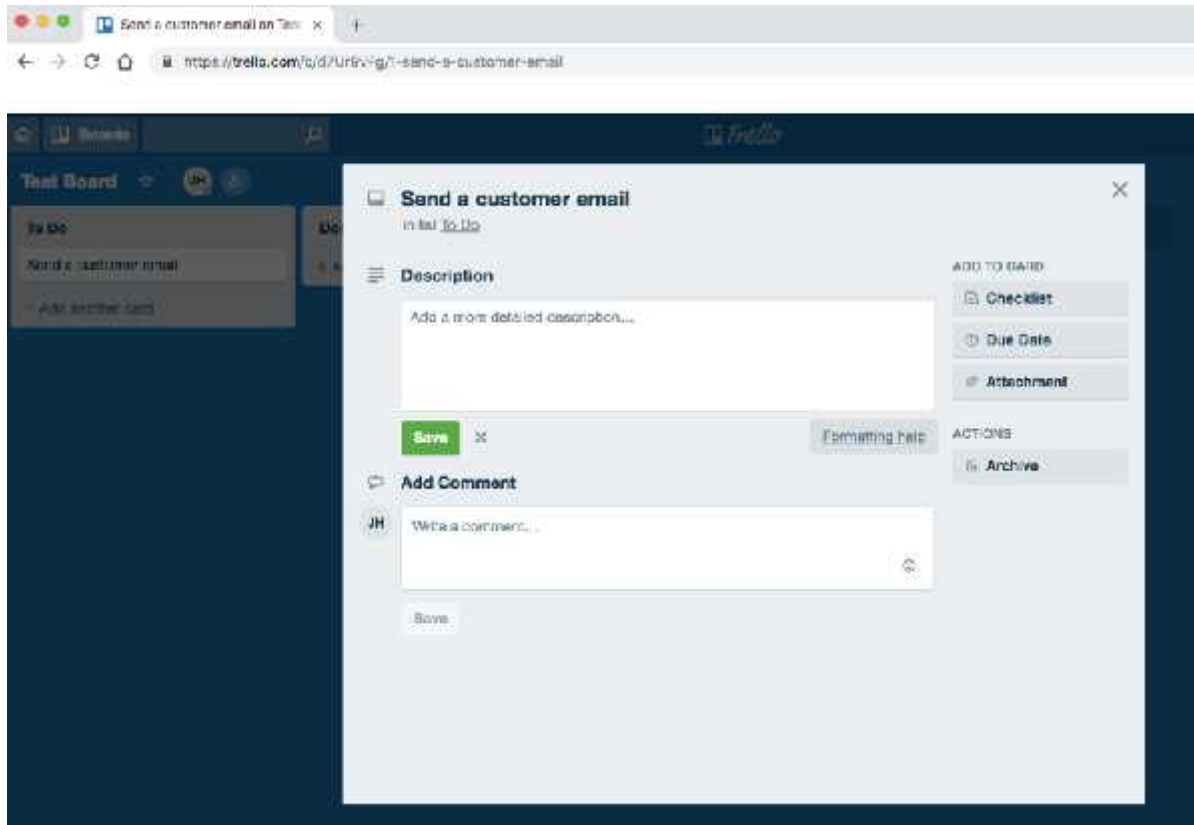
Add a title to the card:



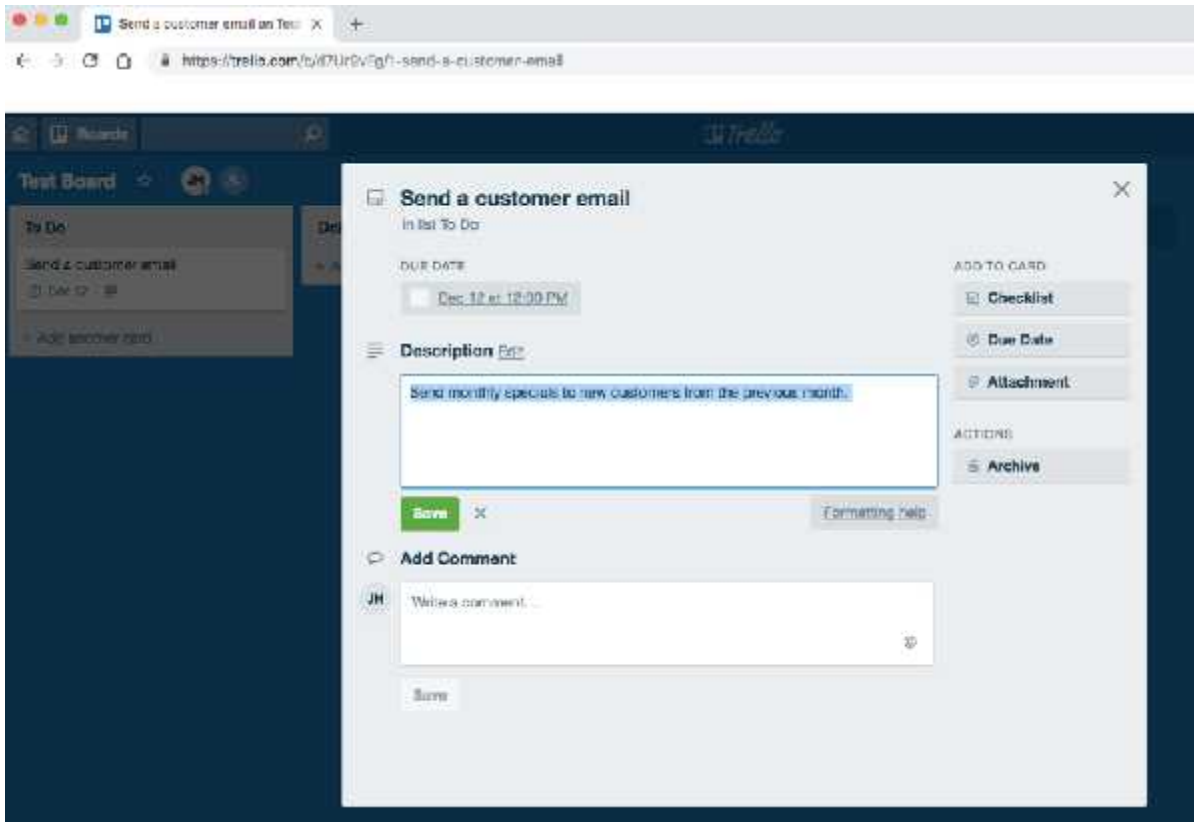
Entrepreneurship

Within the card, you can add a detailed description and notes. You can also add a due date and label.

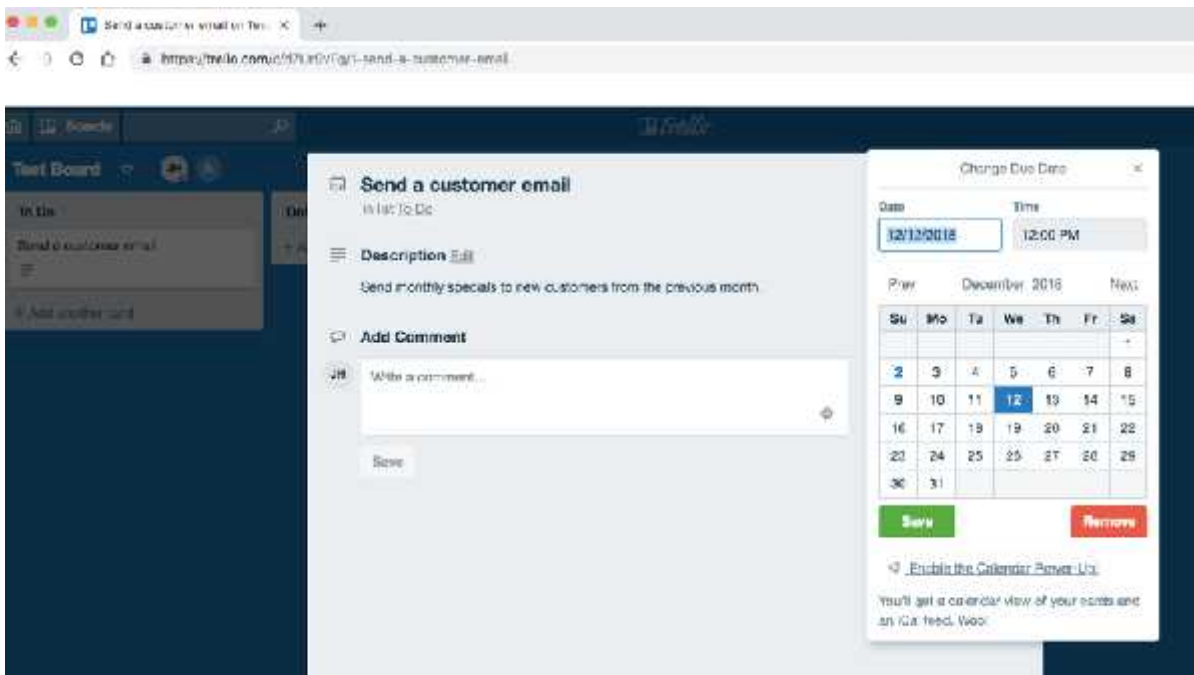
Click on the title of the card for the menu:



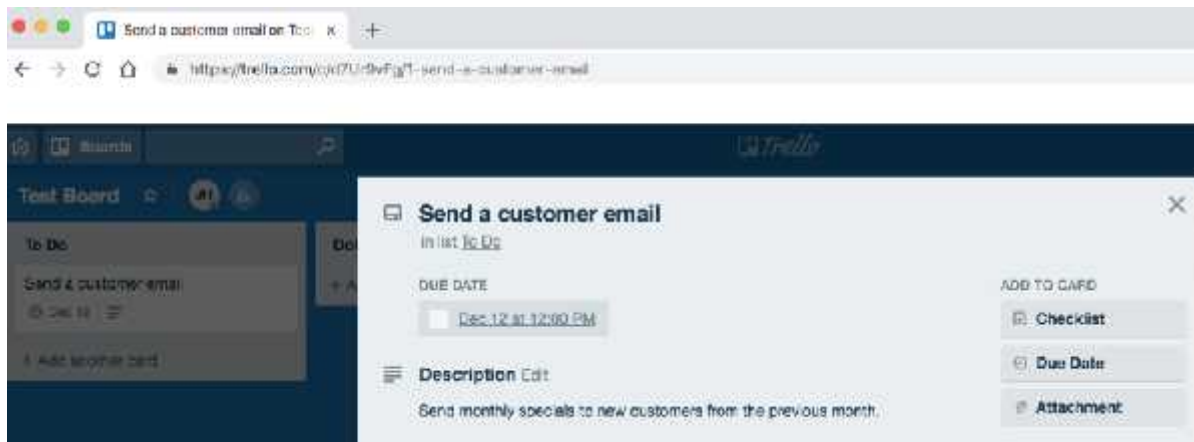
Click in the box under Description to add text:



Click on 'Due Date' to add:



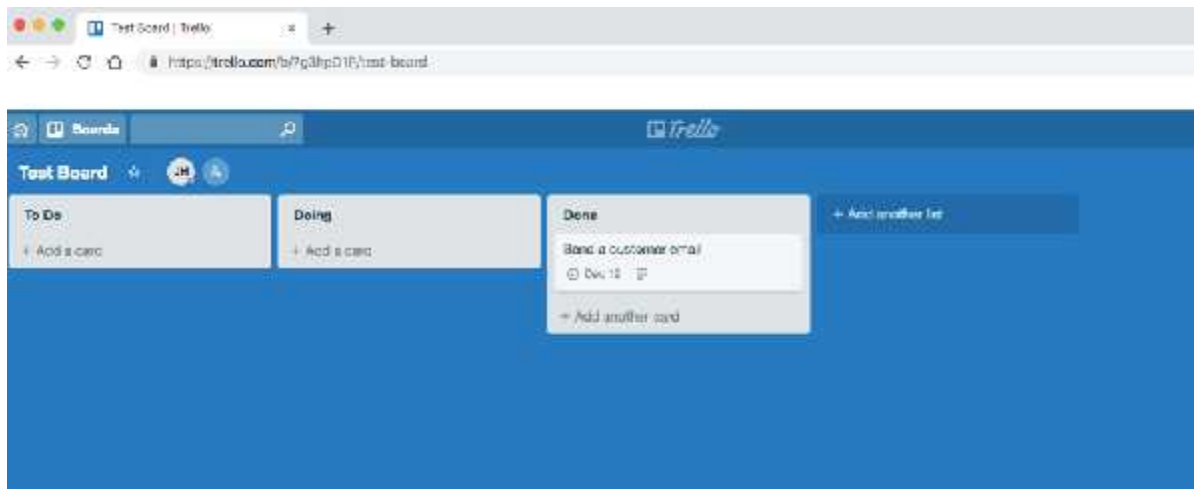
Click on other menu items to add. To change existing items, click 'Edit:'



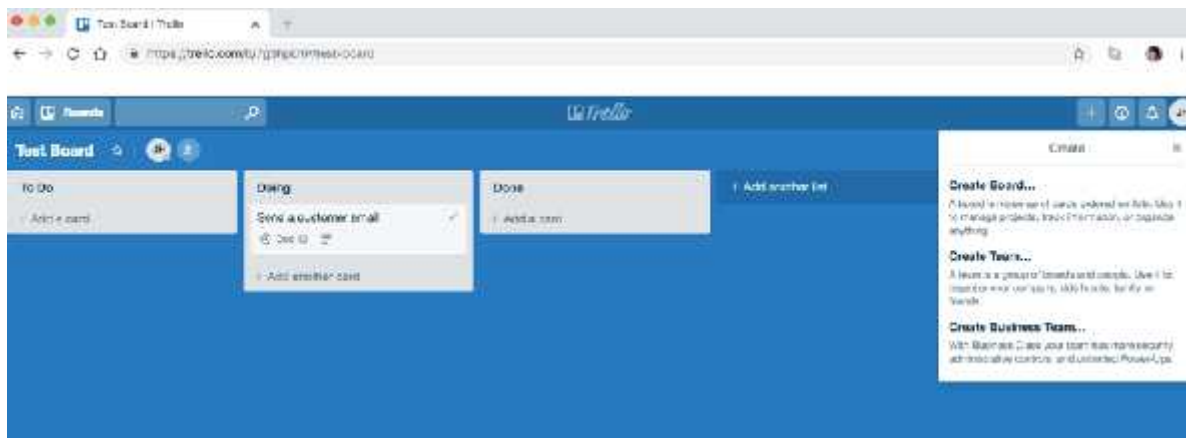
Once the task is assigned, you can move it into Doing by dragging the card:



When the task is completed you can drag it into Done:



You can set up separate boards for each project, and then list, assign and track individual tasks within those projects via the cards. To create a new board, click on the + sign in the top right of the screen:



This menu also allows you to Create a Team or a Business Team.

Creating a Team allows you to add both internal (organizational) and external members to your boards. That way you can share task assignments among coworkers, employees or colleagues outside of your company. You can also allow a customer to monitor your project's progress.

Creating a Business Team is a paid feature.

Test Drive

In this section, we will work through the creation of a project board on Trello, using some of the basic features

discussed in the previous section. At the end of the test drive, you should have:

An active Trello account

A project board with at least three task columns and four cards

Experience to consider whether this tool is of use to them in their business

Draft a project, real or imagined, and include the following:

Project title

Three task areas (To Do, Doing and Done, or other categories they prefer)

Four tasks in this project, with descriptions and due dates for each one

Now, go into your Trello account and:

Create a new board

Create the three task areas

Create four cards, one for each task

Further Study

As mentioned, Trello offers a business version, with expanded features for a monthly fee.

Research this business version and answer the following questions.

What are the basic features of the business version, including price?

What are the differences between the paid business version and the free individual version?

Do you think the business version would be a good investment for your business? Why or why not?

Survey Monkey

Online Data Acquisition

Online data acquisition is gaining the metrics – traffic patterns, preferences and needs, for example – that you need to effectively reach and convert your target audience to paying, or at the very least, loyal customers. These metrics are important because if gathered and used correctly, they save you time and money. Accurate, relevant data allows you to focus efforts and budget on plans and systems that are more likely to deliver the results you want. Instead of throwing a net blindly into the vastness of cyberspace hoping to attract your ideal customer, metrics informs decisions and this allows for the development of focused invitations to individuals or groups that they want to read or hear, and then act upon. Efficiency in marketing and conversion – turning interested customers into paying ones – begins with good data.

What reasons might you have to use online data acquisition for your business?

Survey Monkey is an online survey development tool that enables its users, including small businesses, to develop customized surveys, send them to their target audience, and analyze the data that is collected. The service offers a free option with limited features and distribution that can serve new users and small companies well. Paid packages

are available to add features as needed.

Survey Monkey assists you in acquiring quality data in three ways:

Survey development

Survey distribution

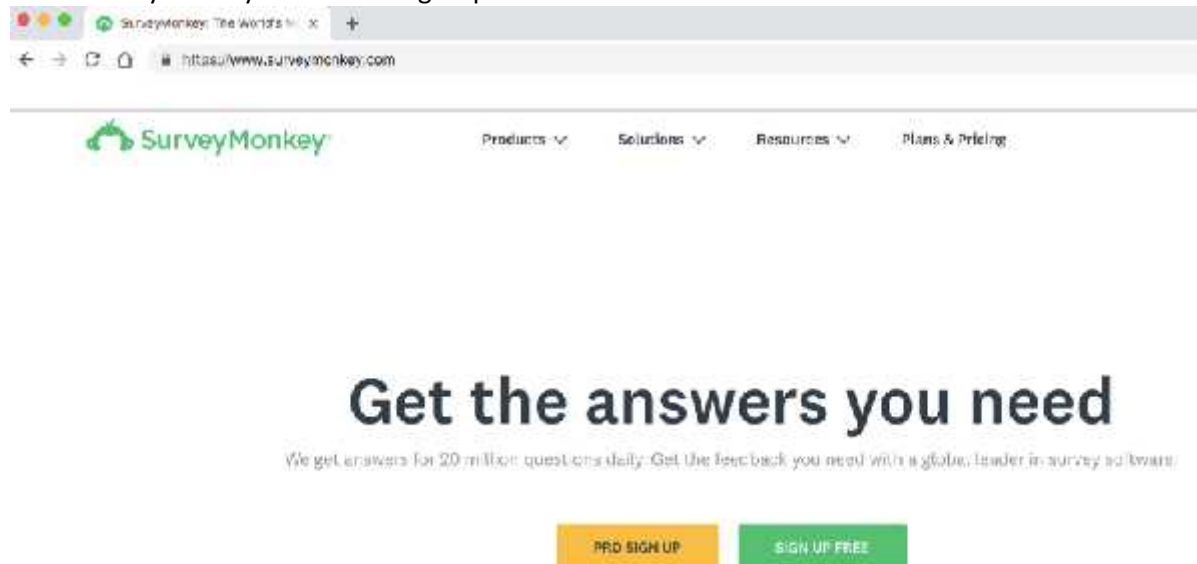
Results recording and analysis

In this section we will briefly review these three main areas.

Survey Monkey also has an extensive library, available for use free of charge, with information and tutorials on everything from writing good questions to understanding the data you receive. Use the search function in Survey Monkey or in Google to find answers to questions, examples of projects, or more detailed information on topics.

Setting Up an Account

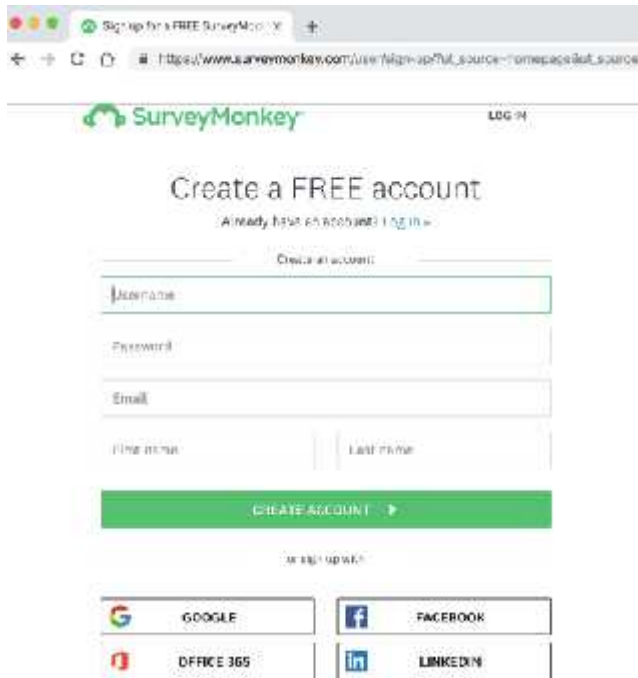
Go to [surveymonkey.com](https://www.surveymonkey.com). Click 'Sign Up Free.'



As with Canva, you can create a separate account or sign up with an existing platform.

SurveyMonkey offers four choices of signup with existing accounts:

1. Google
2. Facebook
3. LinkedIn
4. Office 365

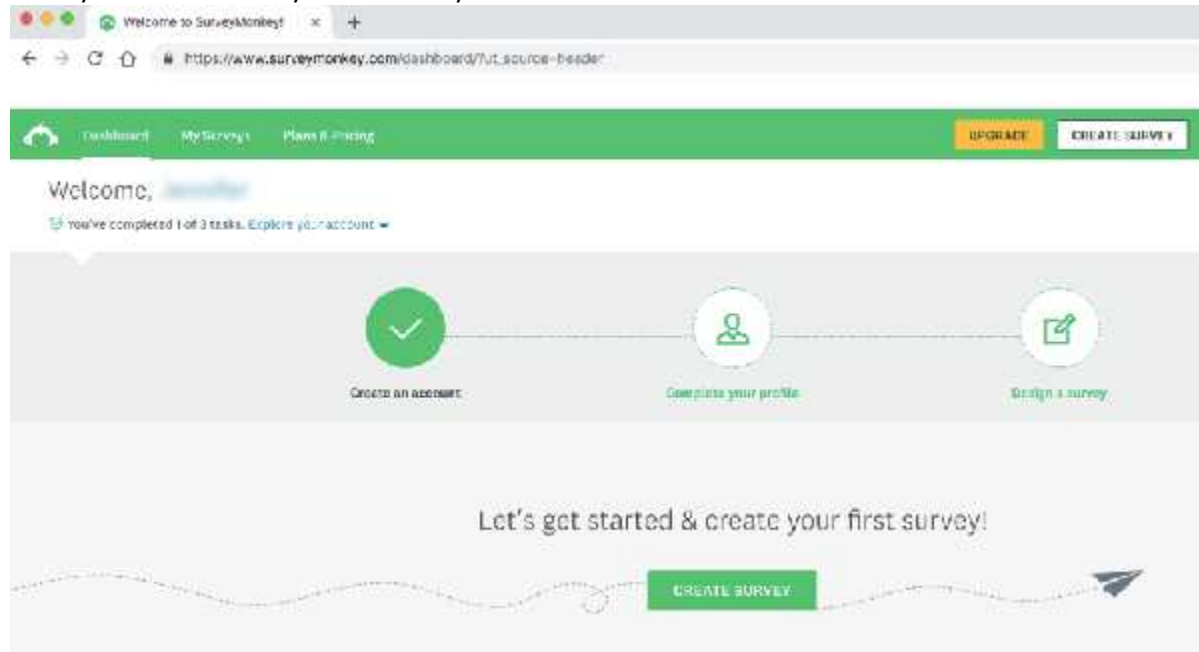


Select your option and fill in the required fields.

Log in or create an account now to SurveyMonkey on your computer or mobile device following the above steps.

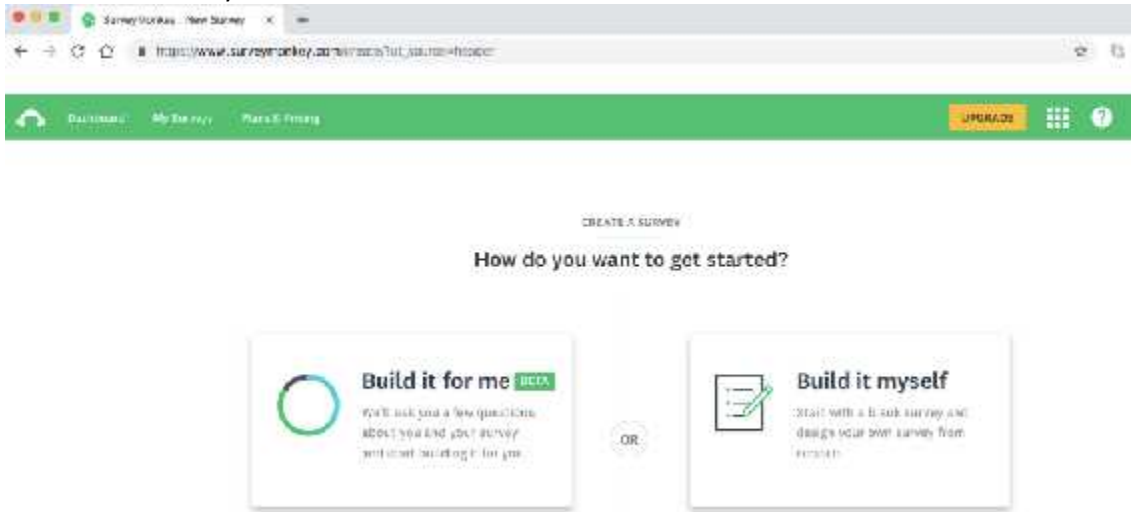
Basic Features

Once you have created your account you have a dashboard.

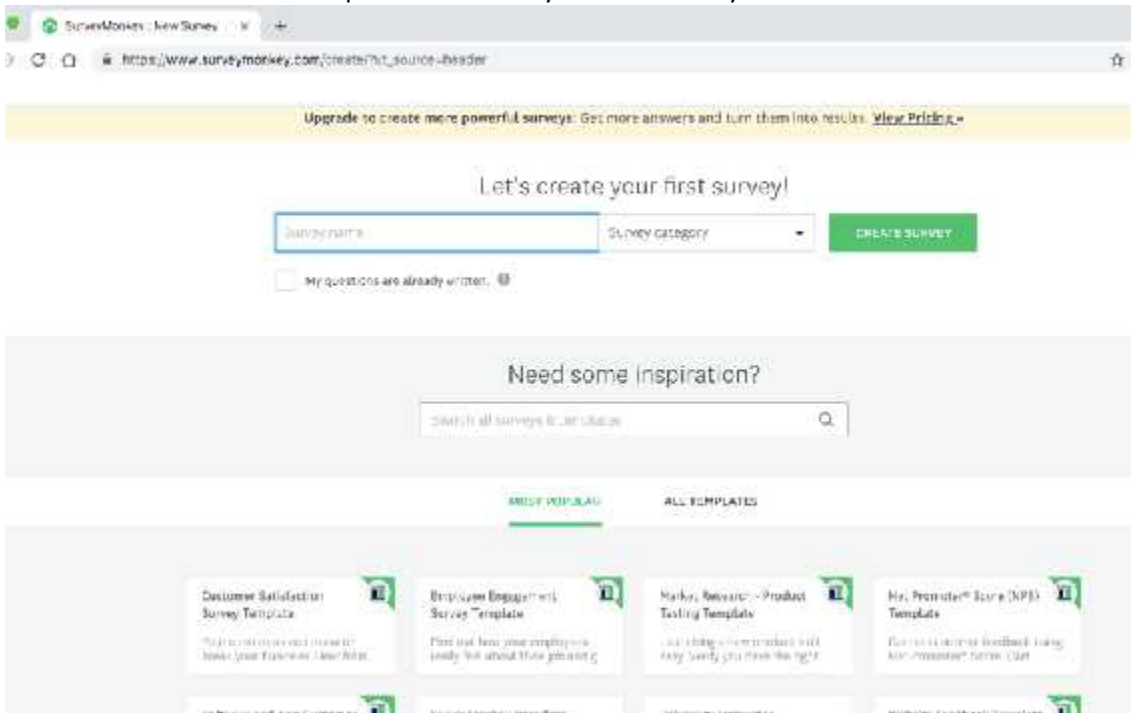


Creating a Survey

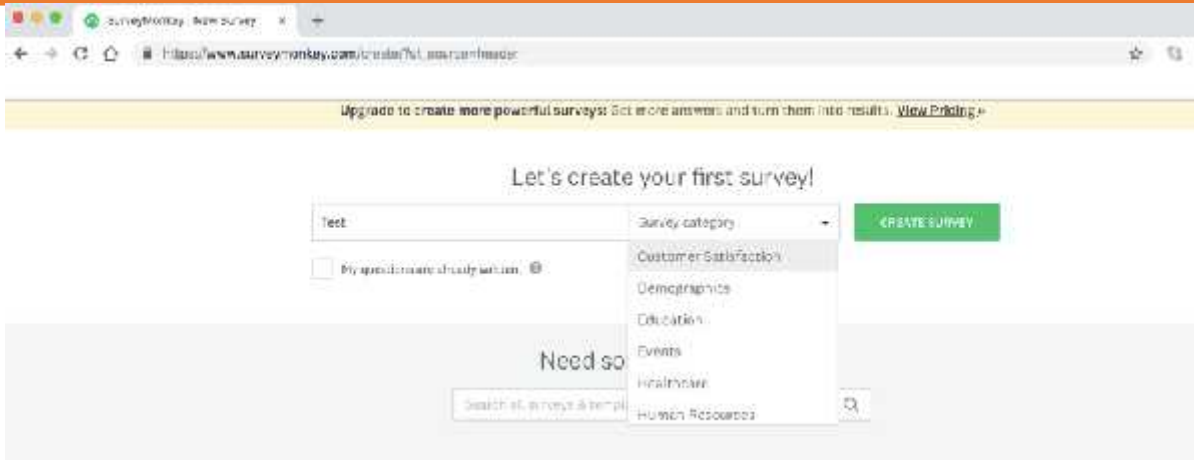
Click 'Create Survey.'
Choose 'Build It Myself.'



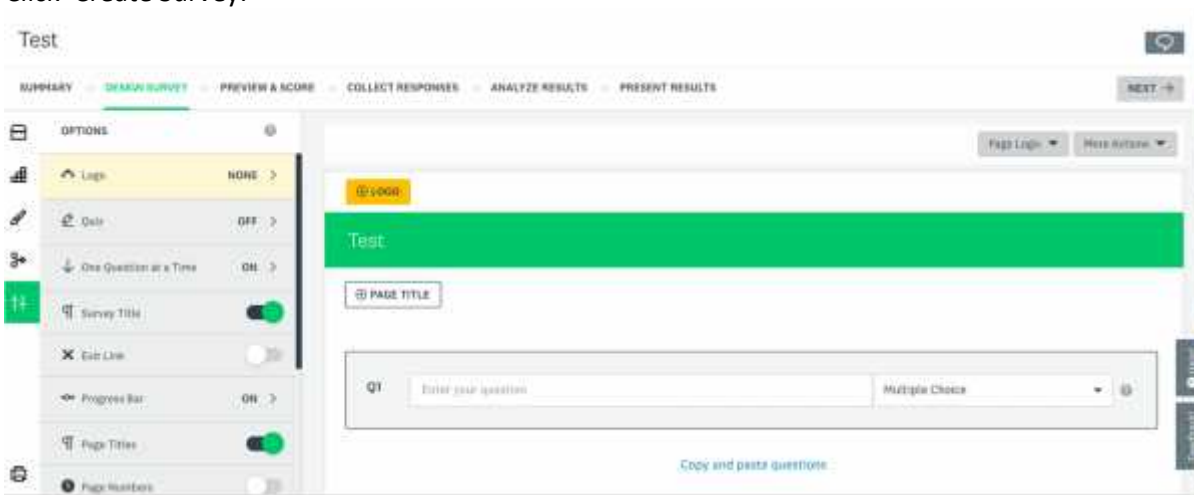
You can choose to use a template or to build your own survey.



To start creating your own survey, fill in a name and choose a category:

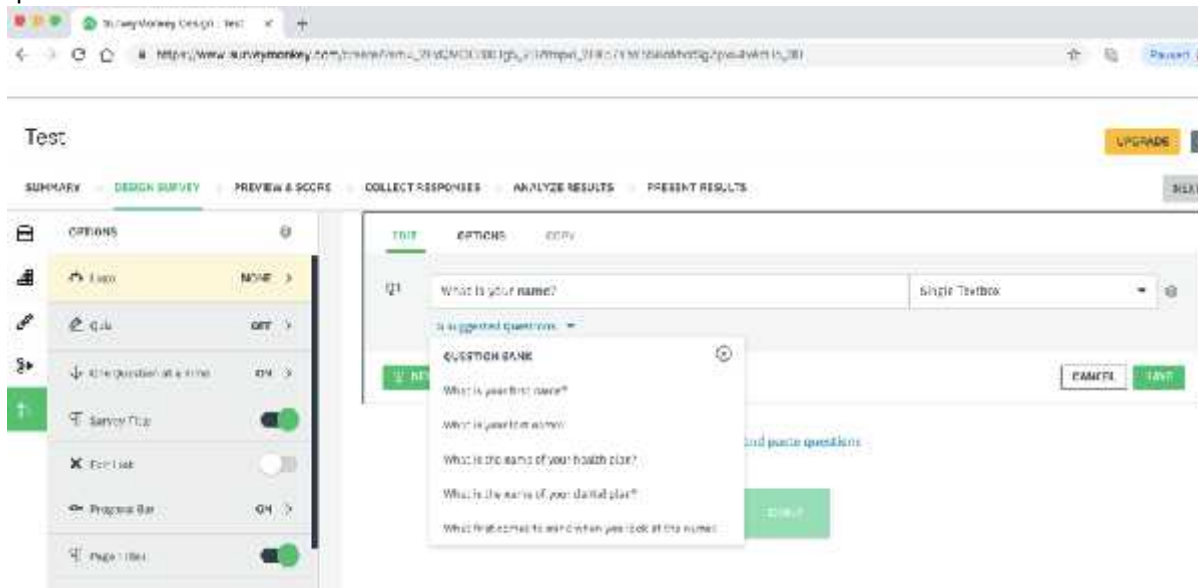


Click 'Create Survey:'

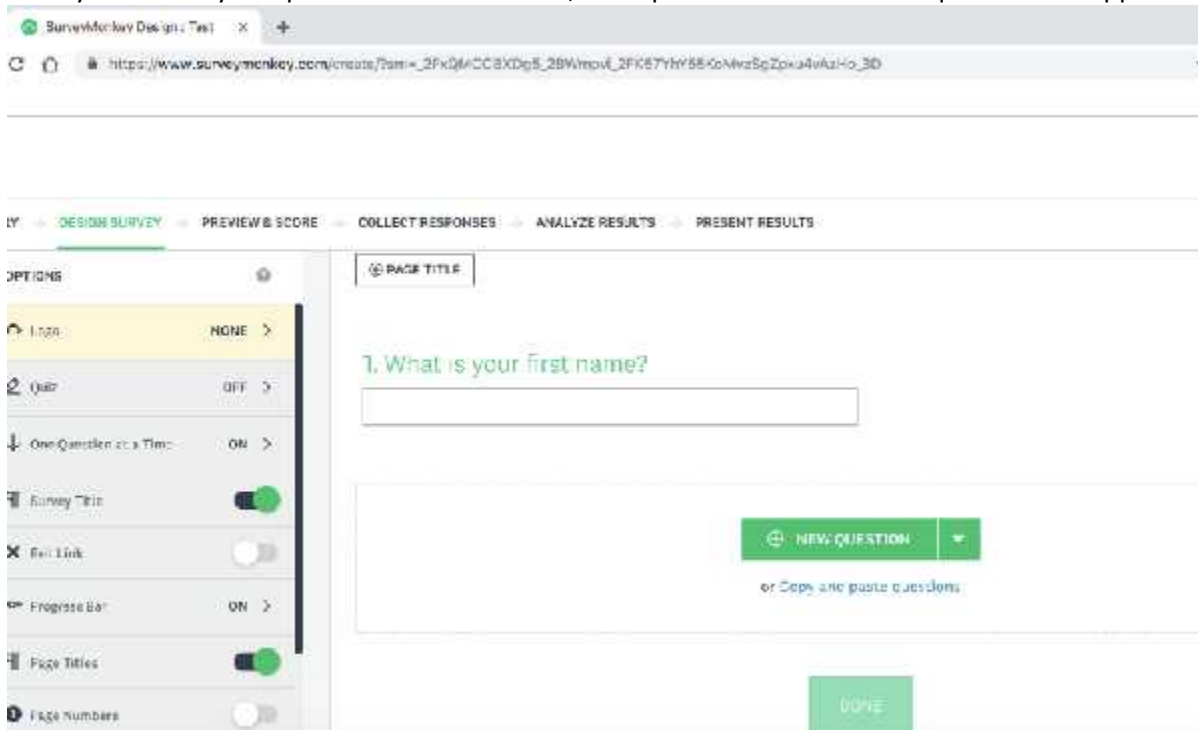


Here you can upload your logo, set your page title, and set options for your survey.

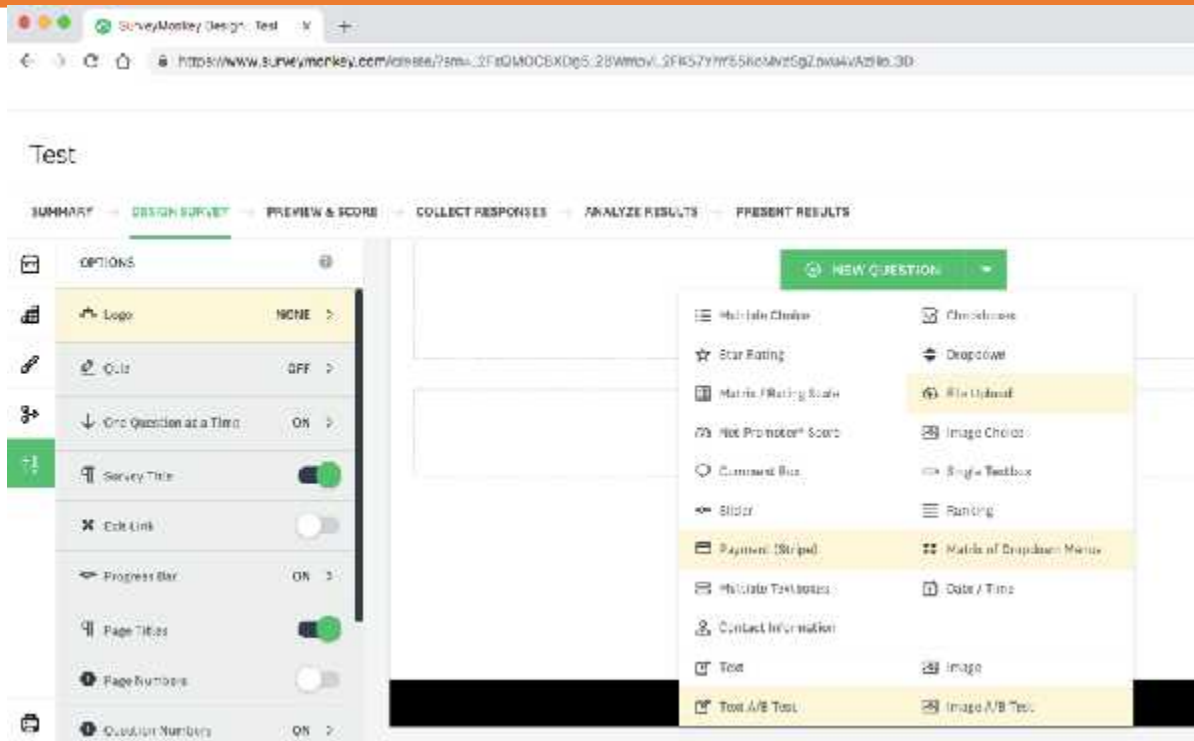
After you enter your question, suggestions will appear underneath from the Question Bank for related or refined questions:



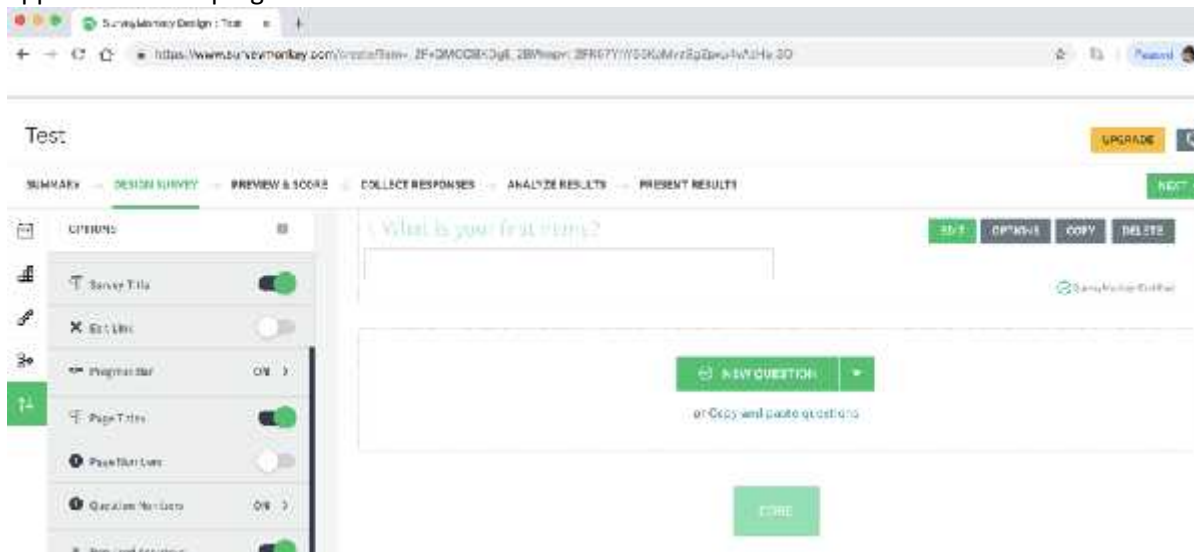
After you choose your question and click 'Done,' the option to enter the next question will appear:



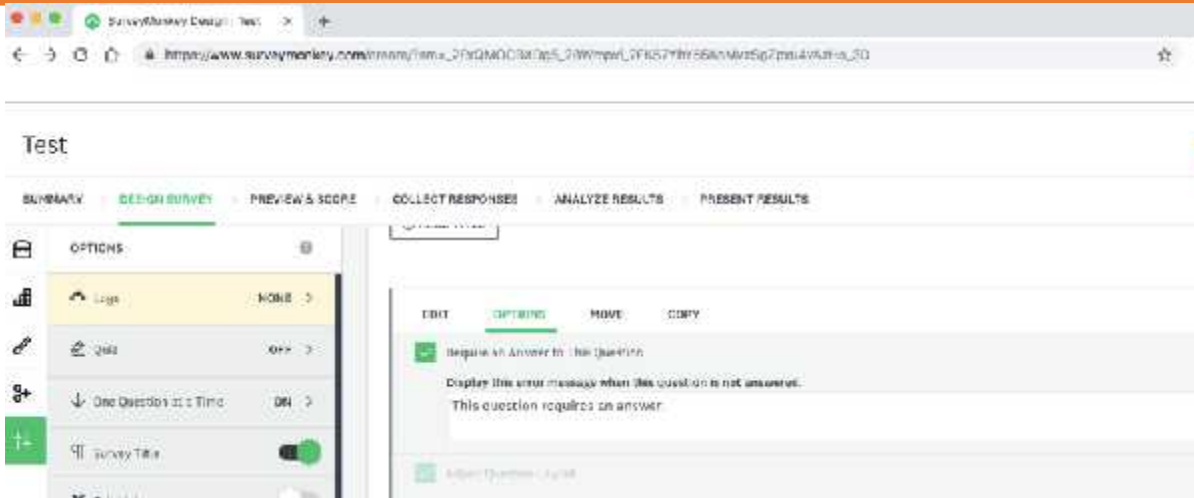
Click on 'New Question' and make a selection from the drop-down menu to continue:



Questions may be made mandatory or optional. To set, scroll over the completed question until the menu bar appears at the top right:



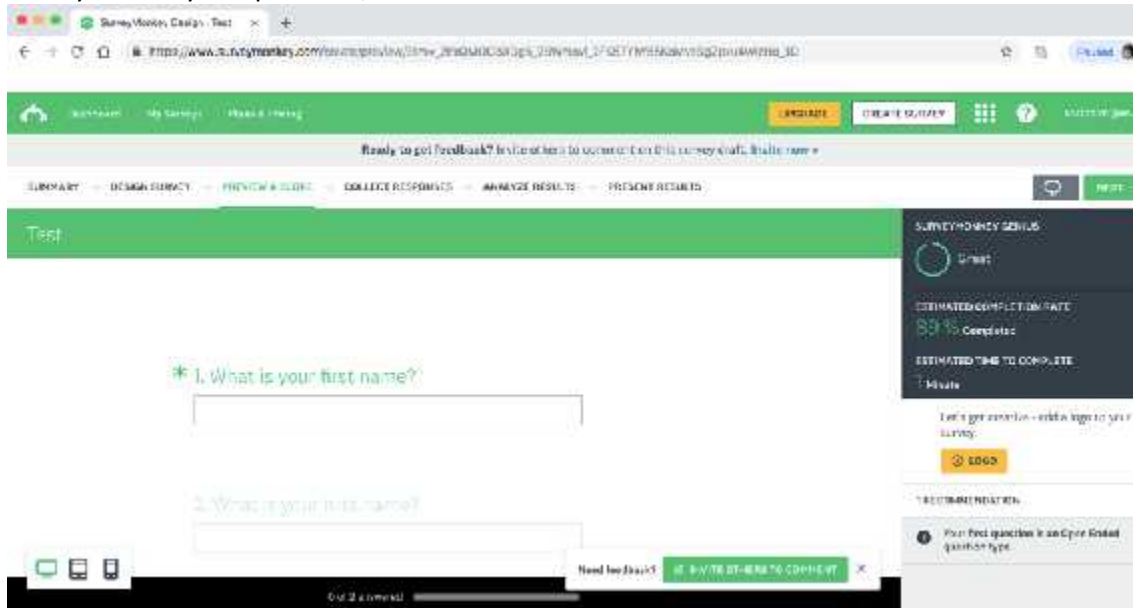
Select 'Options.'
Click the box next to 'Require an Answer to This Question'



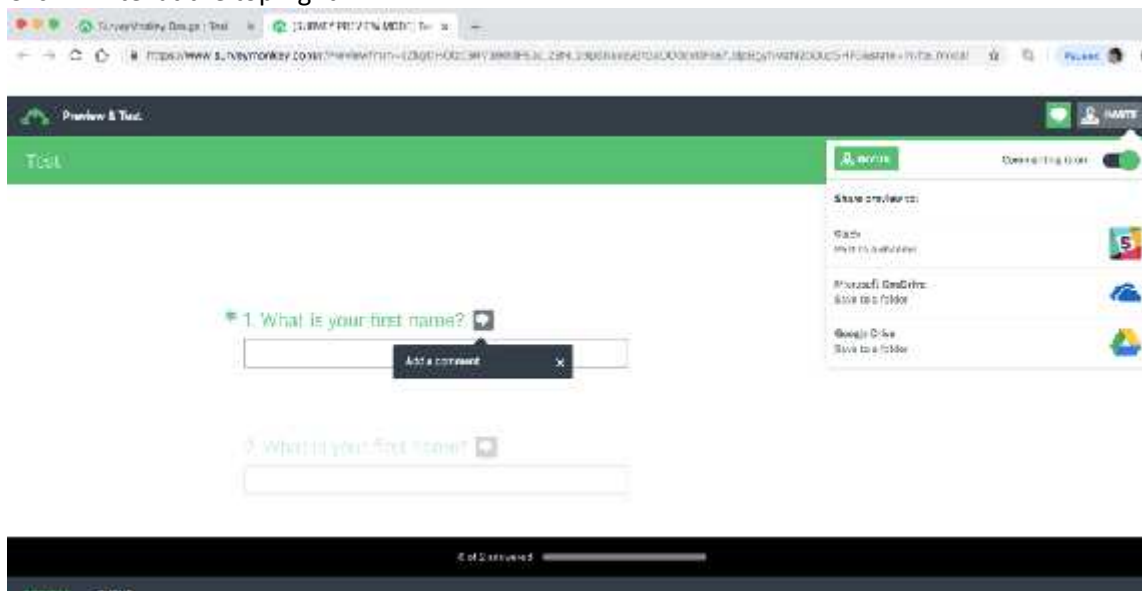
Options vary with question types, such as more than one answer permitted for multiple choice. Click 'Save' at the bottom to save your question and settings.

Preview and Score

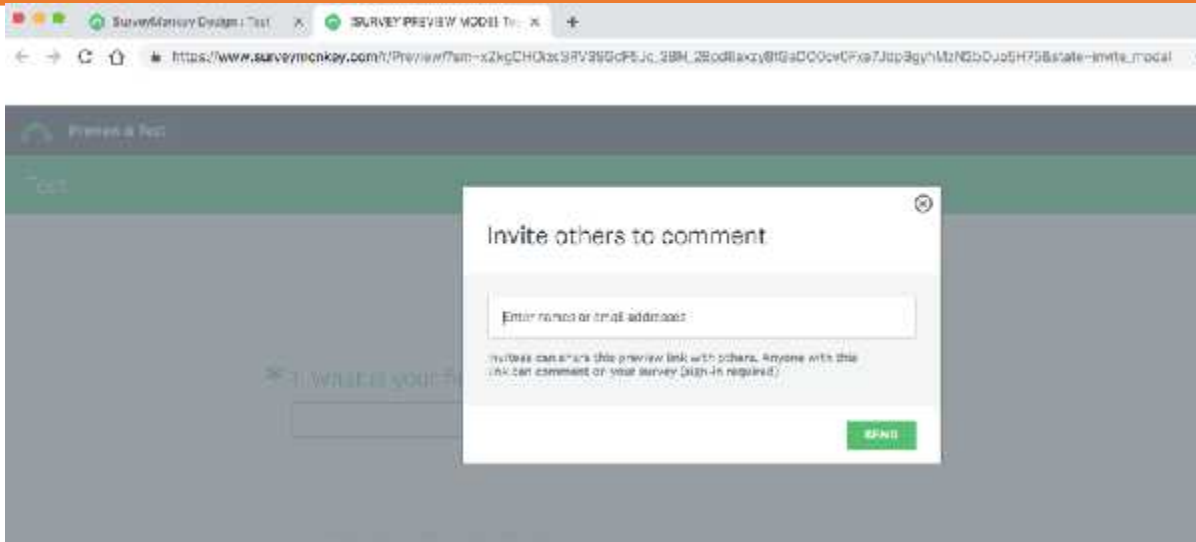
After you save your questions, click 'Next:'



This scores your survey and gives an estimated time of completion. You can also share the survey to a sample audience for their testing and feedback. Click 'Invite' at the top right.

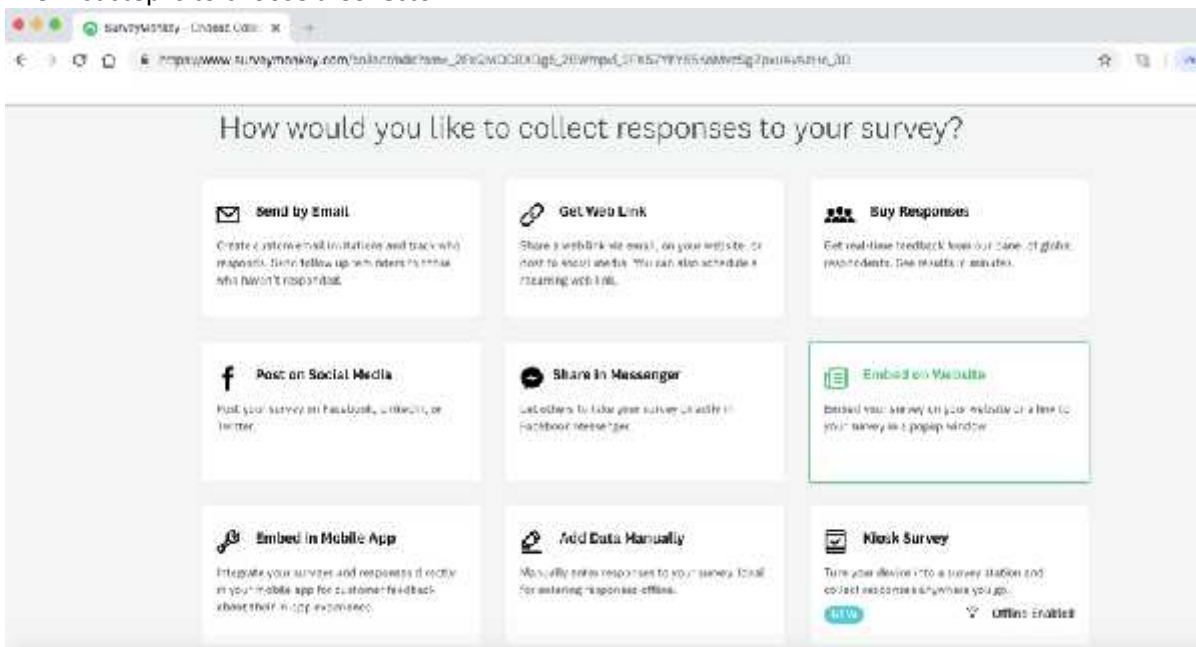


You can choose a platform, or click the green Invite button in the left top of the box to share to specific emails:



Collect Responses

The first step is to choose a Collector.



A Collector is the way you distribute your survey.

Choices include:

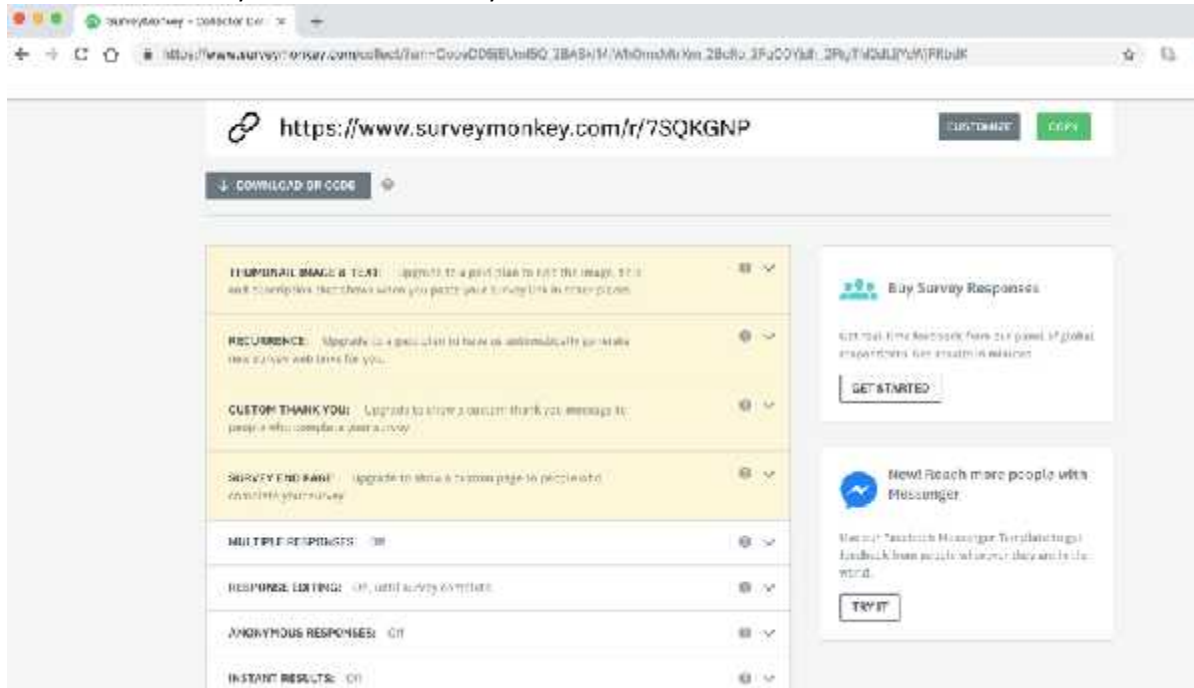
- Web Link

- Email

- Website

- Facebook

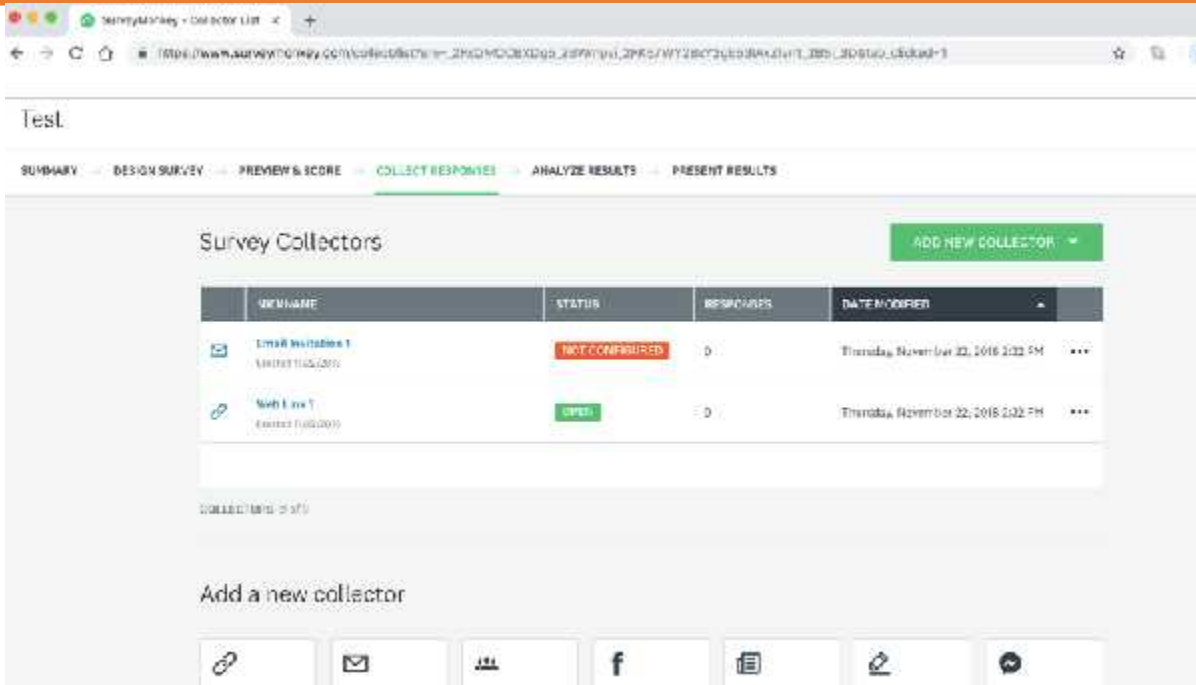
A web link enables you to share manually in email and via social Media.



Then you set how your respondents interact with your survey.
Options include:

- Who can access your survey
- How many times a respondent can take a survey
- What respondents see when they finish their survey

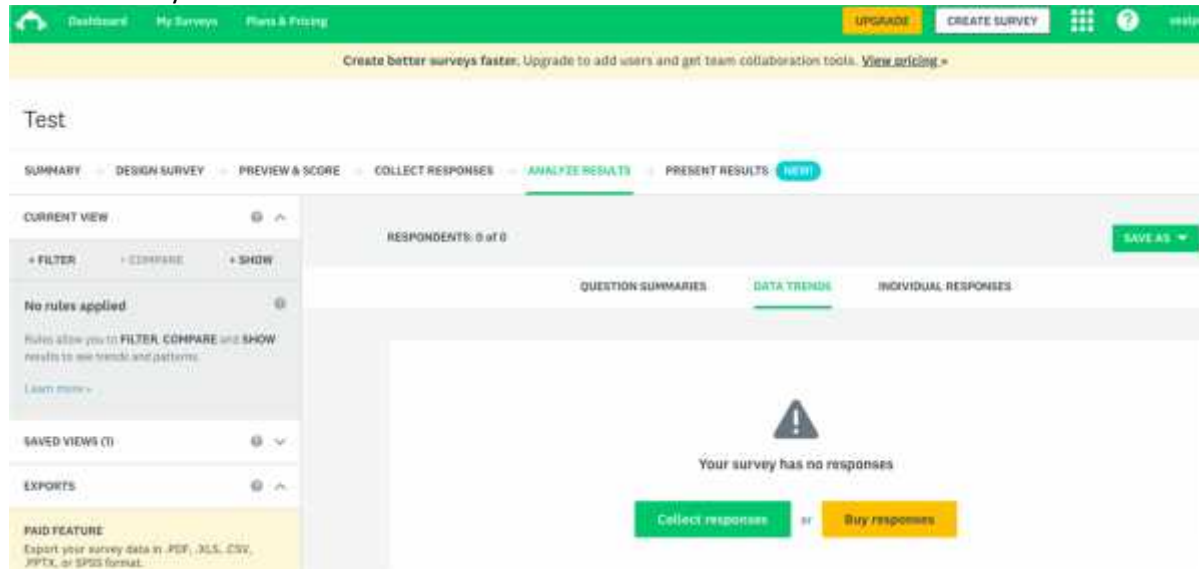
As you add collectors, a list is compiled:



You can add new collectors with the green button at the top or the icons at the bottom of the page.

Analyze your Survey

Click on 'Analyze Results:'



You have three options for viewing your data:

1. Question Summaries

This shows response counts and percentages for all close-ended questions in your survey, a list of responses for open-ended questions, and charts

2. Data Trends

This shows changes in customer response over time, and is particularly useful if you have been using the same survey for an extended period of time. The Data Trends tab shows you how your response data has changed over time.

3. Individual Responses

This allows you to see the responses of each individual user.

Data can be presented in list or chart form. You can customize your charts and display options.

Saving Your Data

Clicking on the Save As button offers three options to export your data:

1. All Summary Data export

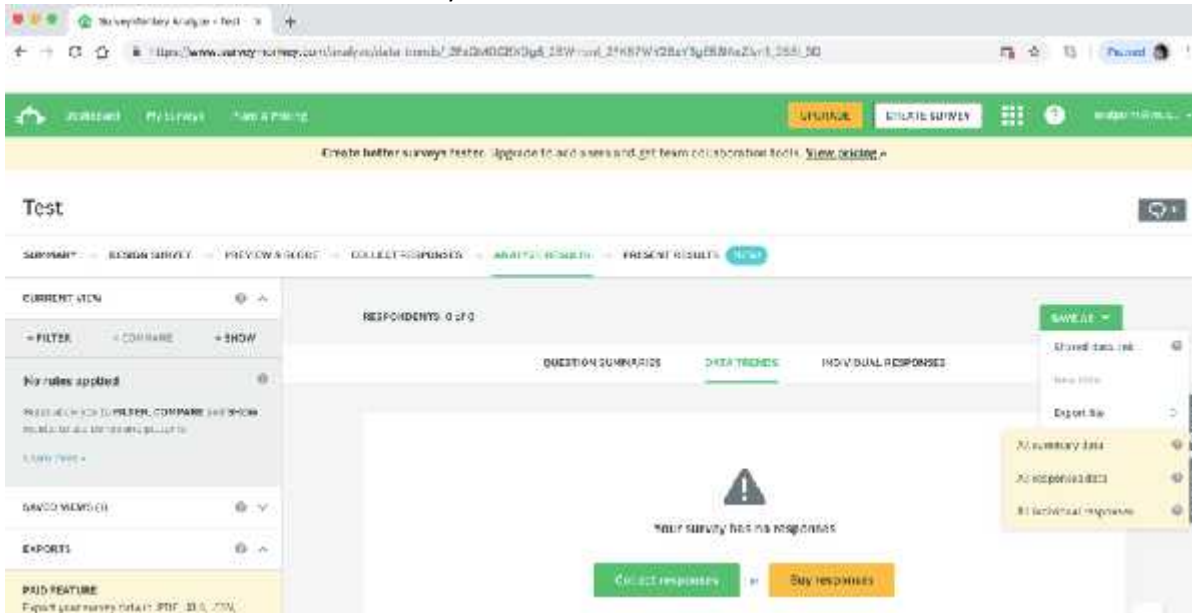
This provides an overview of your survey results.

2. All Responses Data

This shows the responses for each individual user. This raw data can be used by you or your team to complete your own charts or analysis.

3. All Individual Responses

This automatically downloads in PDF format.



The shared data link option at the top of the Save As menu enables you to view data from surveys you administer with other users. You must enable pop-ups to use this.

Test Drive

In this section, we will work through the creation and sharing of a survey in Survey Monkey, using some of the basic features discussed in the previous section.

Pair up with other partners/students if possible so you can participate in each other's surveys. If you are unable to pair up, review the activity in detail and make note of the actions required.

At the end of the test drive, you should have:

- An active Survey Monkey account

- A completed survey with several responses

- Experience to consider whether this tool is of use to you in your business

Select a survey topic. In what aspect of your business would data help with a decision or promotion? Examples could be: Where do your customers spend most of their time on social media? Or, what type of specials and discounts do customers enjoy receiving?

Now:

- Create a new survey

- Customize it where possible with your company brand

- Add a minimum of five questions using at least one close-ended and one open-ended type of question

Share the survey with your test audience – you and other partners/students

When you have created and launched your survey, take the surveys of your peers.
Then, check your collectors for data from your respondents.
Now, export Respondents Data as a chart of your choice.

Further Study

Survey Monkey has a comprehensive online help function for all of its users. Use the search function in Survey Monkey or in Google for answers to specific questions or tutorials to further your knowledge.

SurveyMonkey has a detailed manual on use of its basic and advanced functions:

<http://www.ccccs.org/members/documents/SurveyMonkeyUserManual.pdf>

As mentioned, Survey Monkey offers a Premium option, with expanded features for a monthly or annual fee.

Research this Premium version and answer the following questions.

What are the features of the Premium version, including price?

What are the differences between the paid Premium version and the free individual version?

Do you think the Premium version would be a good investment for your business? Why or why not?

MailChimp

Email Marketing

Email marketing is the direct marketing of the internet age. Instead of your company message or promotional offers being sent to a customer's mailbox, they are sent to a subscriber's inbox. It is fast, inexpensive and direct, which has made email marketing a method of choice for those using internet marketing systems.

The popularity of email marketing, however, creates two challenges for business users:

- Reaching customers through the growing volume of email coming into their inboxes

- Complying with international privacy and marketing regulations governing the distribution of emails and use of email addresses for commercial contact

What reasons might you have to use email marketing for your business?

MailChimp is an email marketing platform with a free option offering limited services to individual and small business users. Paid options are available for customers needing larger limits for volume and frequency of distribution, and for customers wanting more personal tech support and detailed services. Using MailChimp, or any credible email marketing platform, and following its requirements and guidelines ensures your mailings are compliant with current privacy and internet marketing legislation.

How MailChimp Works:

MailChimp provides tools to plan, create, and send emails, and to record and analyze data from your mailouts: number of opens, responses and actions.

As an established email marketing platform, MailChimp offers an extensive library to answer questions and learn more of its service. One resource to get started:

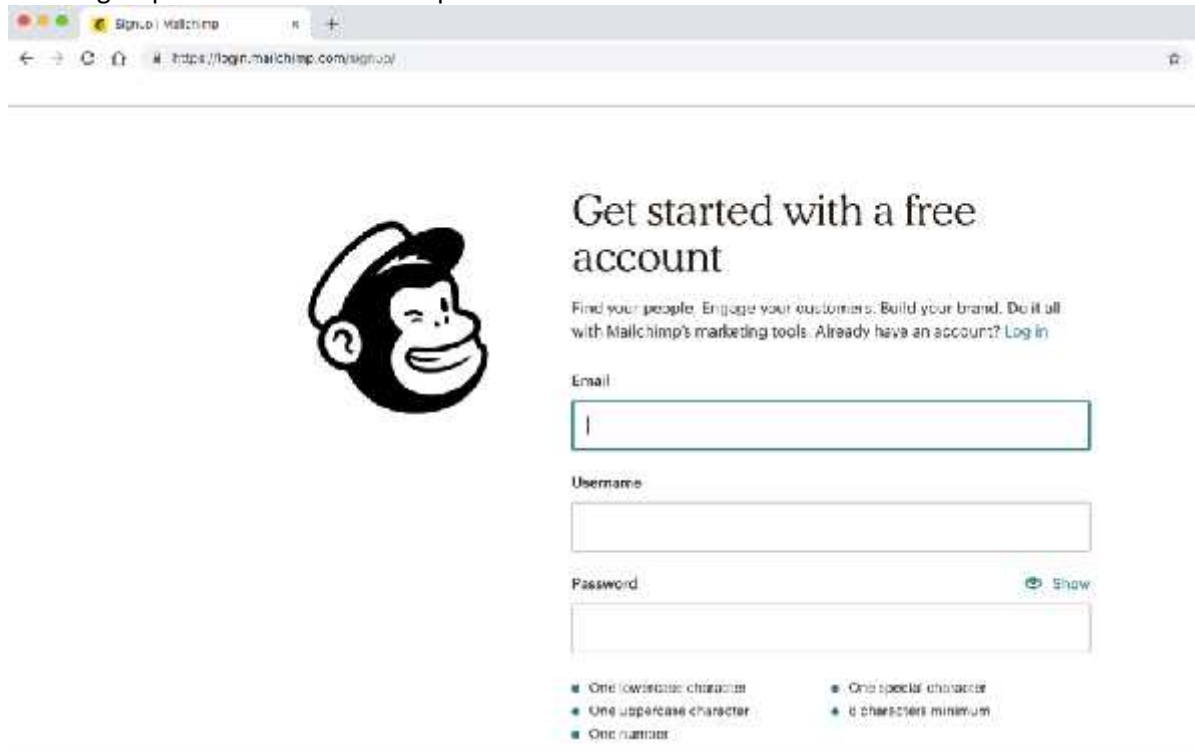
<https://mailchimp.com/resources/guides/email-marketing-field-guide/>

Setting Up an Account

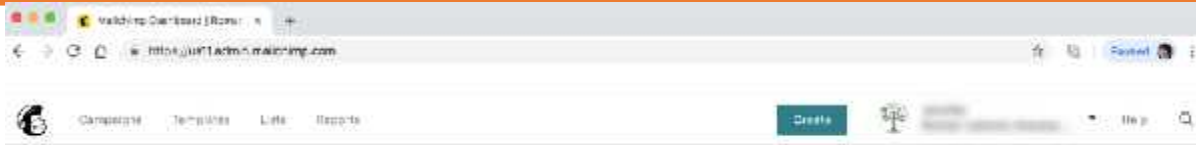
Go to mailchimp.com.



Click 'Sign Up Free' and fill in the required boxes:



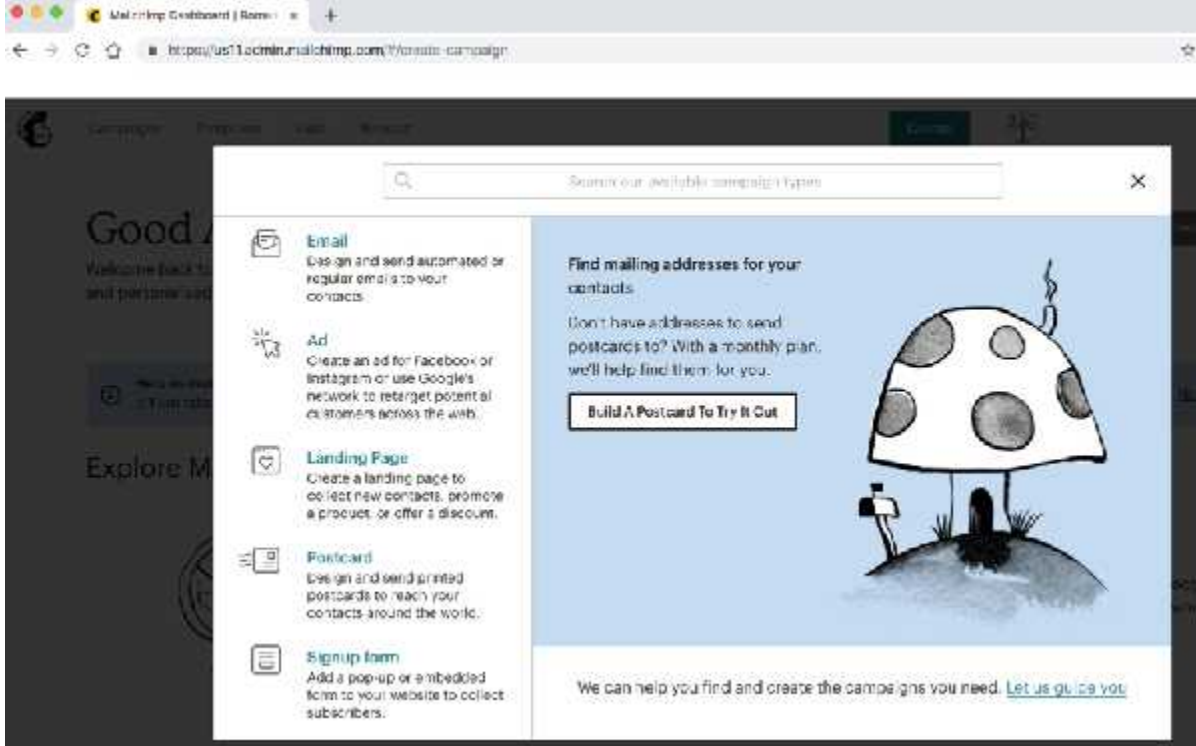
Once your account is created, you will be directed to your dashboard:



Log in or create an account now to MailChimp on your computer or mobile device following the above steps.

Basic Features

To begin a new project, click the Create button at the top of the page:



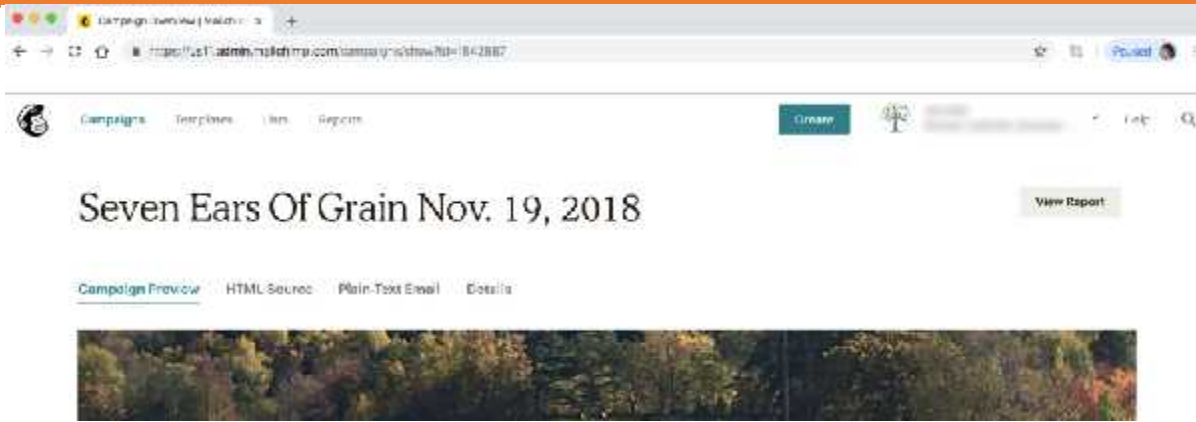
With this menu you can create email mailouts as well as landing pages for promotions and signup forms for your website to build your mailing list.

Campaigns:

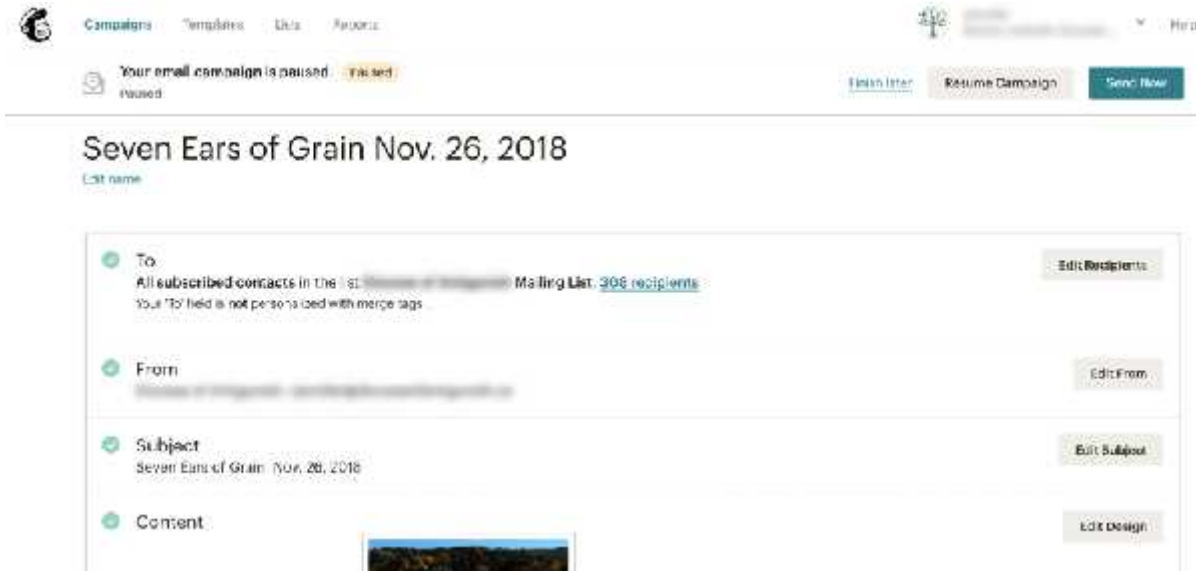
To build a new campaign or edit/review a past campaign, click 'Campaigns' from the top left menu bar:



Clicking on a sent campaign will bring up a copy of the mailout:

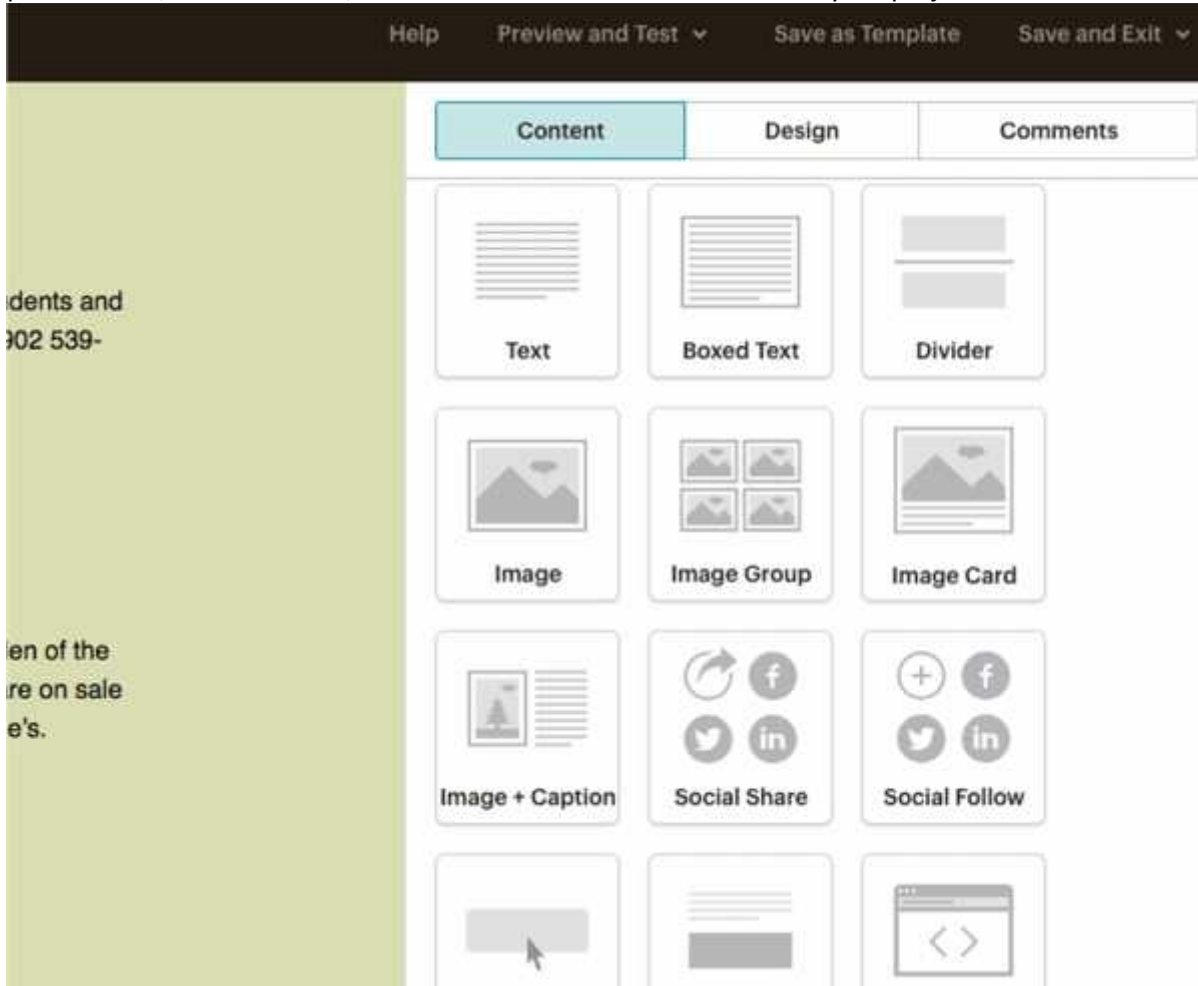


Clicking on a new or draft campaign will allow you to edit the name, email subject line, recipients and content:



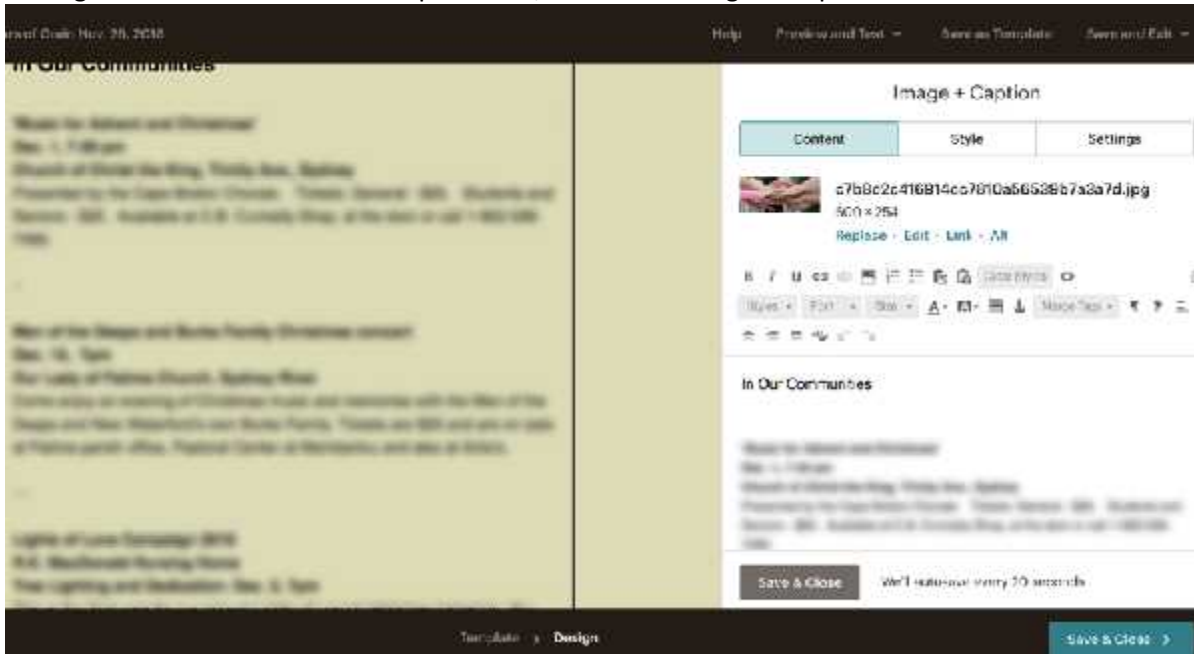
To add or edit text and photos in your email, see Content and click Edit Design.

This page will show your project on the left. On the right is a menu from which you can drag and drop text blocks, photo blocks, action buttons, video links and more to add content to your project.

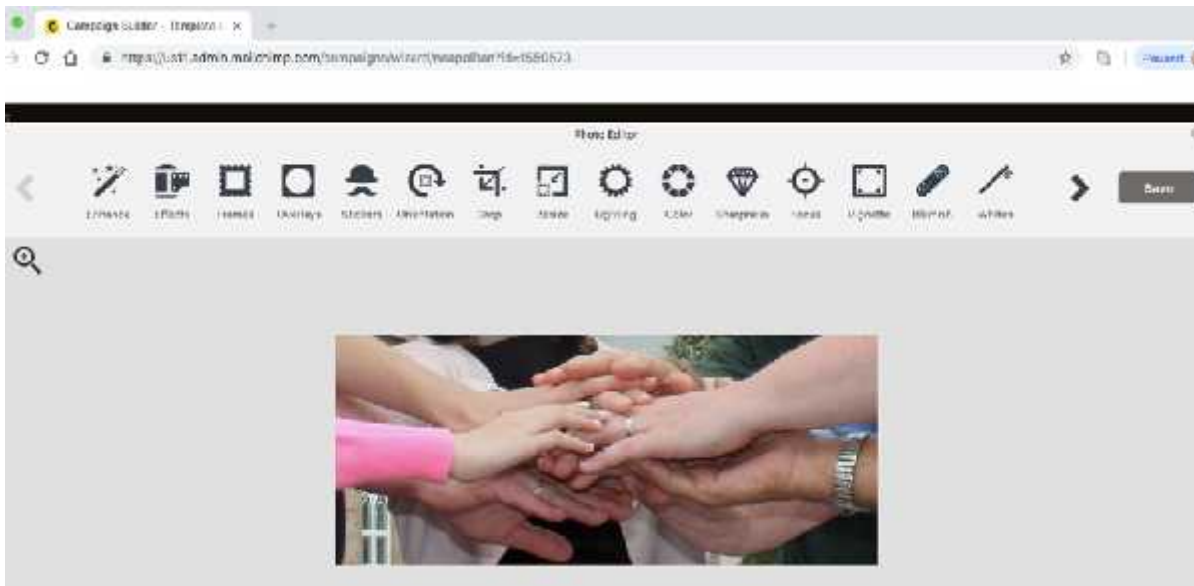


Entrepreneurship

To edit content in your project, click on the block you wish to edit. The selected block will appear on the right. The editing screen functions as a word processor, with tools along the top to format text.



To edit photos, click on the photo. You will be directed to the Photo Editor where you can adjust size, crop, and add effects:



The Preview feature allows you to see how your email will look on both desktop and mobile devices. Click 'Preview and Test' in the menu bar on the top right of the design editing page:

CampaignBuilder - Templates

http://e11admin.makchmp.com/campaigns/azany/aspollair/0-49005738

Seven Feet of Green Nov. 16, 2008

Help Preview and Test Social Campaigns About and Help

Enter preview mode 1

Send a test email 2

Push to mobile 3

Open Link Checker 4

Social Cards 5

Page - Caption

Style Settings

914cc/810ab6539a/a3a/d.jpg

Link All

Link Settings

Link Full Edit

In Our Communities

Click 'Enter preview mode.' You can choose Desktop view:

Campaign Builder - Template x +

← → ↻ 🏠 <https://us11.admin.mailchimp.com/campaigns/wizard/neapolitan?id=1550573#>

Preview mode Seven Ears of Grain Nov. 26, 2018

Desktop Mobile Inbox



In Our Communities

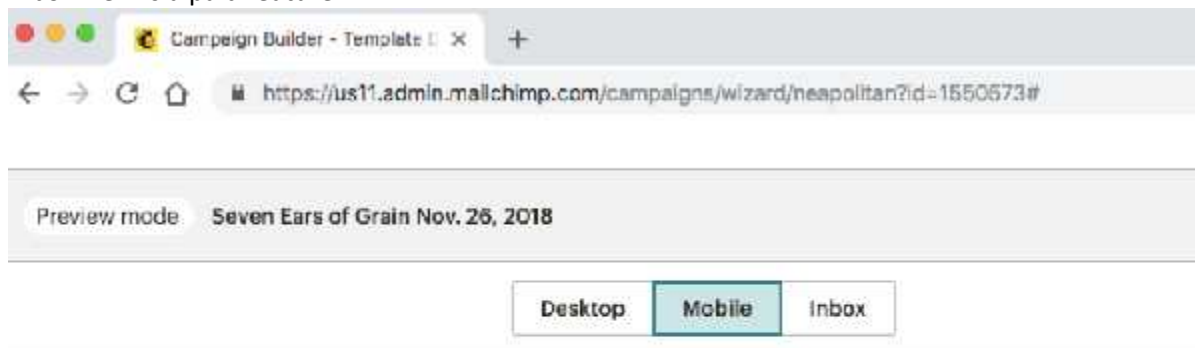
'Music for Advent and Christmas'

Dec. 1, 7:30 pm

Church of Christ the King, Trinity Ave., Sydney

Presented by the Cape Breton Chorus. Tickets: General - \$25. Students and Seniors - \$20. Available at C.B. Curiosity Shop, at the door or call 1-800-530-7466.

Or Mobile view:
Inbox view is a paid feature.



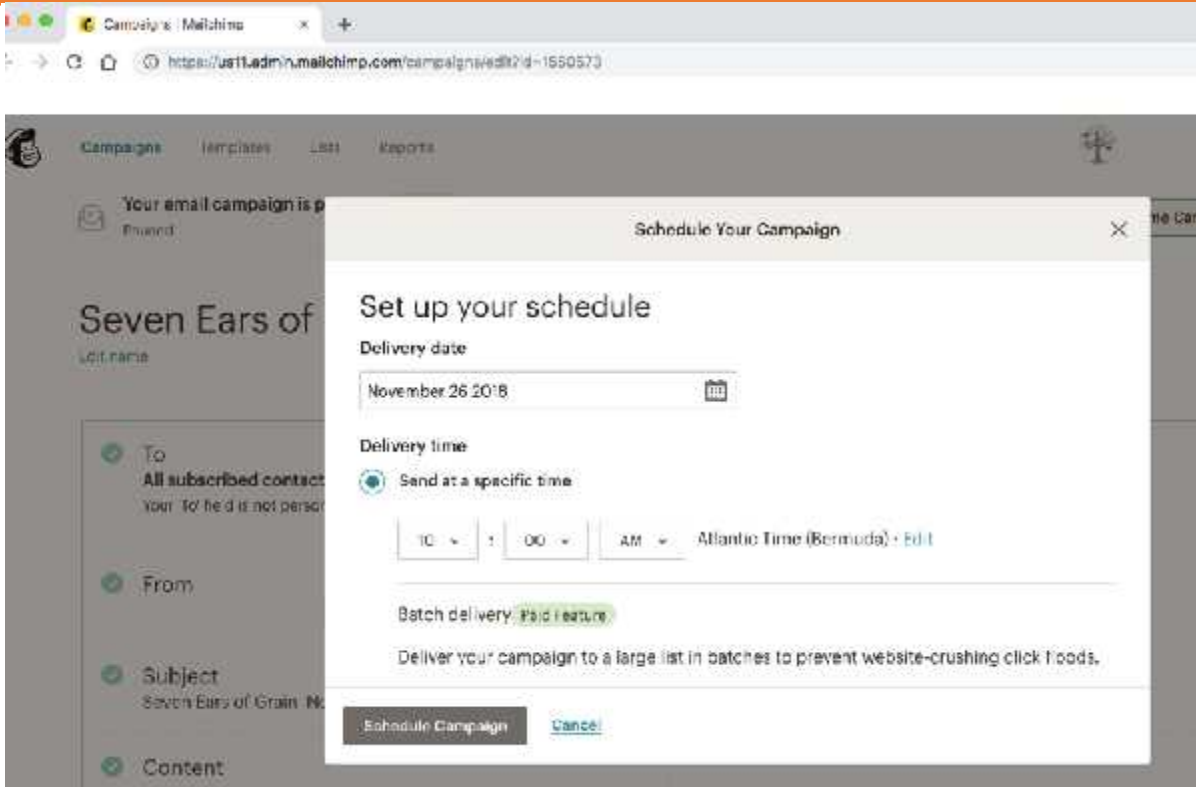
This is an approximation of how your design will appear on mobile. [Learn more](#)

You can then make adjustments based on how the design presents in each format.

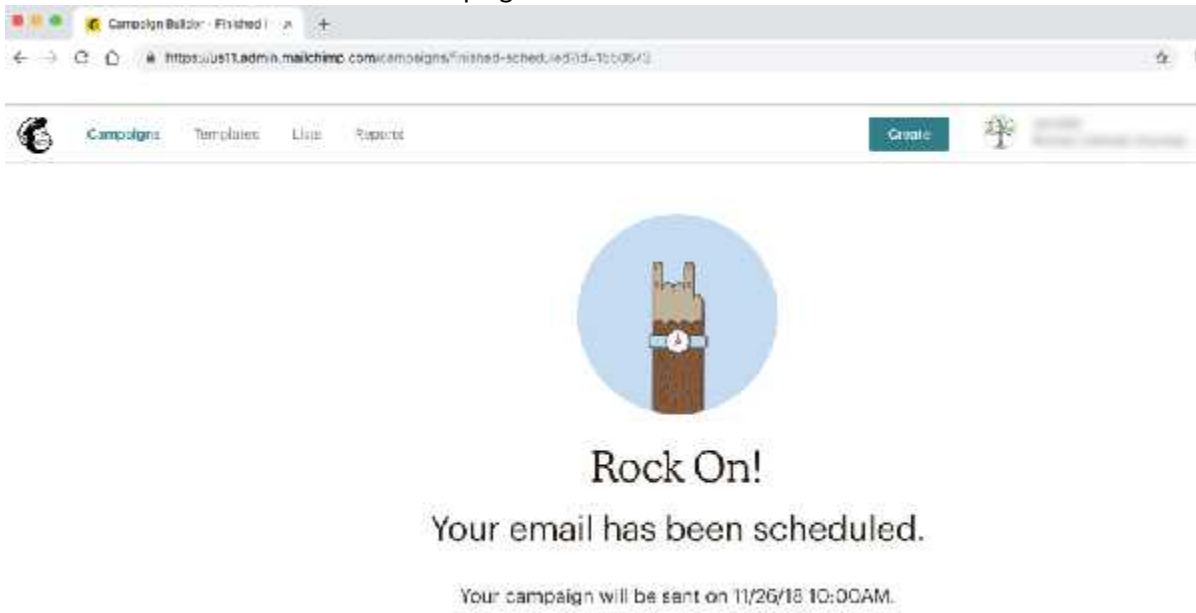
You can also send a test email either to yourself or a collaborator, to see how the email functions in real time. You can then make edits and adjustments before your mass mailout.

When finished adding and editing content, click the Save and Close button at the bottom right. You will be directed back to the Campaign page where you select whether to send your campaign or schedule it for mailout at another time.

To schedule a mailout, click 'Schedule' at the top of the page:



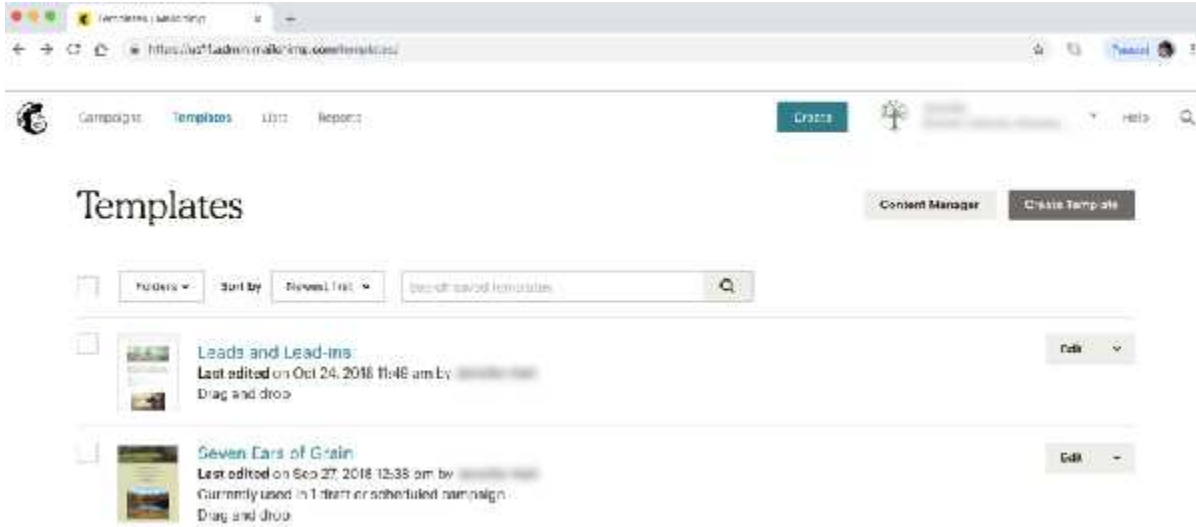
This allows you to send the email at a date and time in the future. This way, emails can circulate while you are away from your computer, on vacation, or at specific times that you determine are best for your clients. Fill in your chosen date and time and click 'Schedule Campaign:'



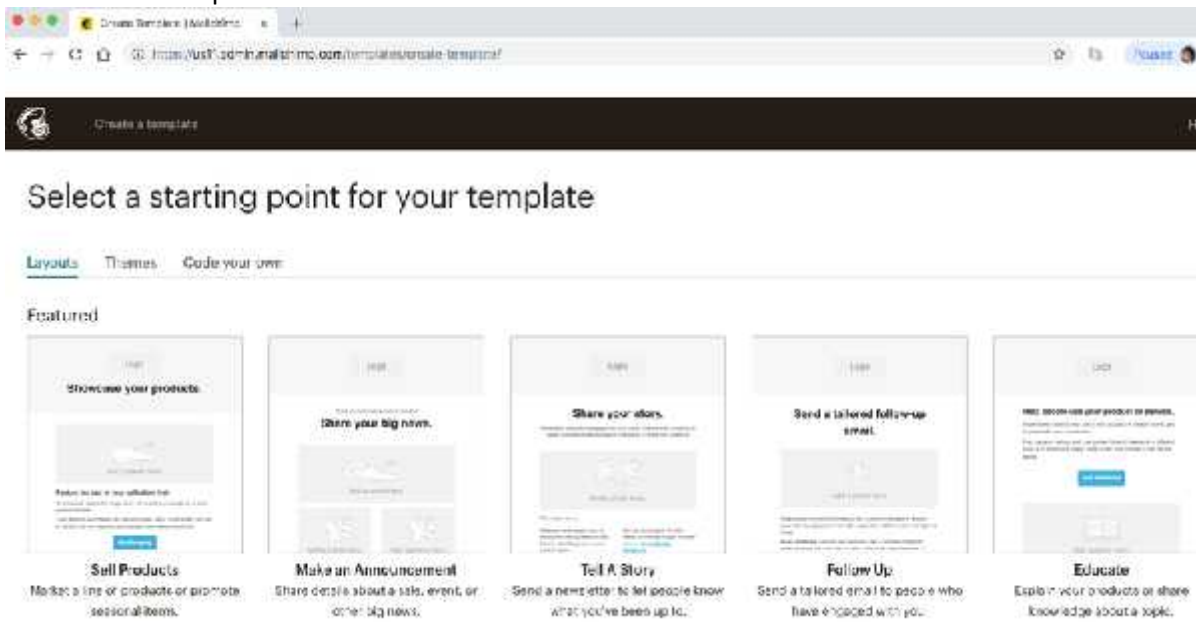
This confirms your email has been scheduled. If you had clicked 'Send' rather than Schedule, you would receive a message saying your email had been sent.

Templates

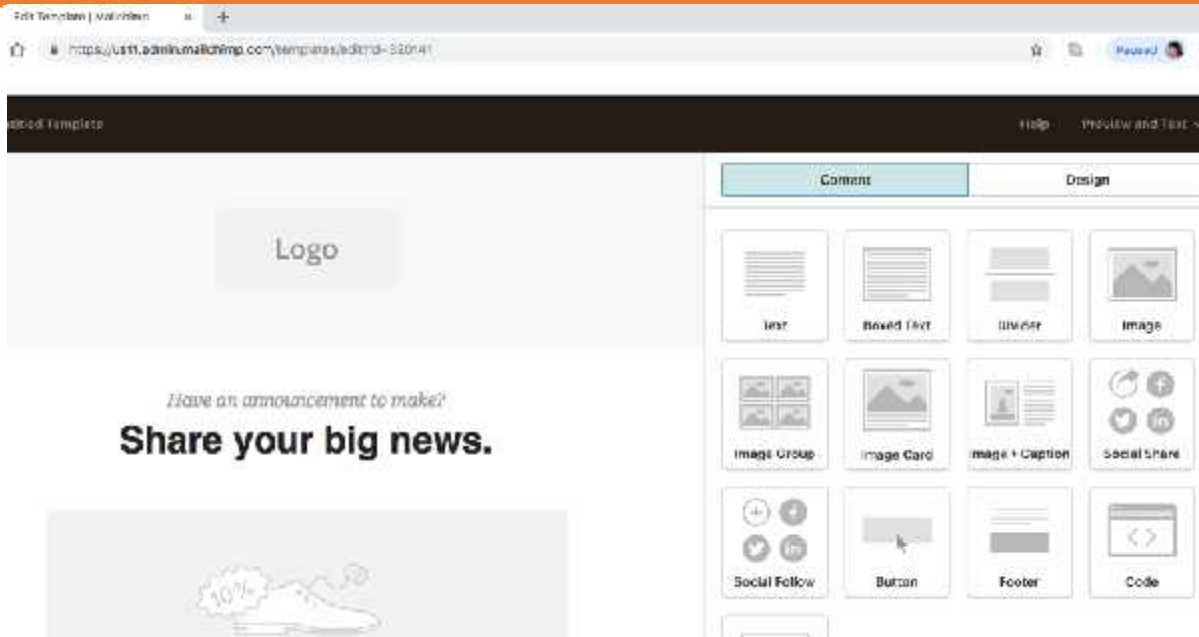
Clicking 'Templates' on the menu bar at the top left brings you to the Templates gallery:



Here your saved Templates will be listed. You can also create new designs. Click 'Create Template:'



Clicking on a design will direct you to the Content editing page. Add and customize as you would in editing an existing campaign:

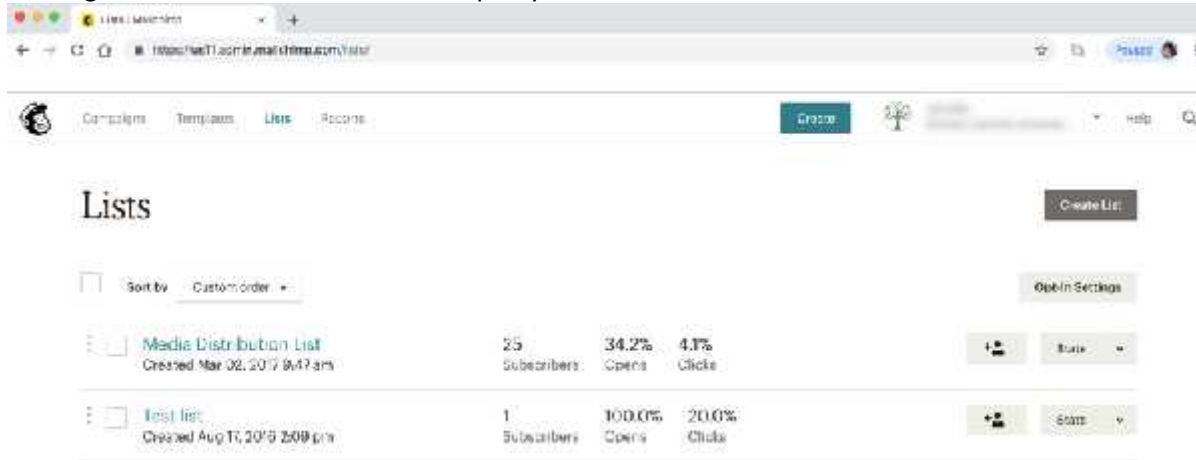


Lists:

MailChimp provides the option of creating several separate lists for different audiences, or a master list that you can segment, enabling you to send emails to segments of the list or the entire list.

A master List is recommended, which keeps your contacts all on one list. You can then create groups and segments within it to target specific members of your audience.

Clicking 'Lists' in the menu bar at the top of your dashboard shows current lists:

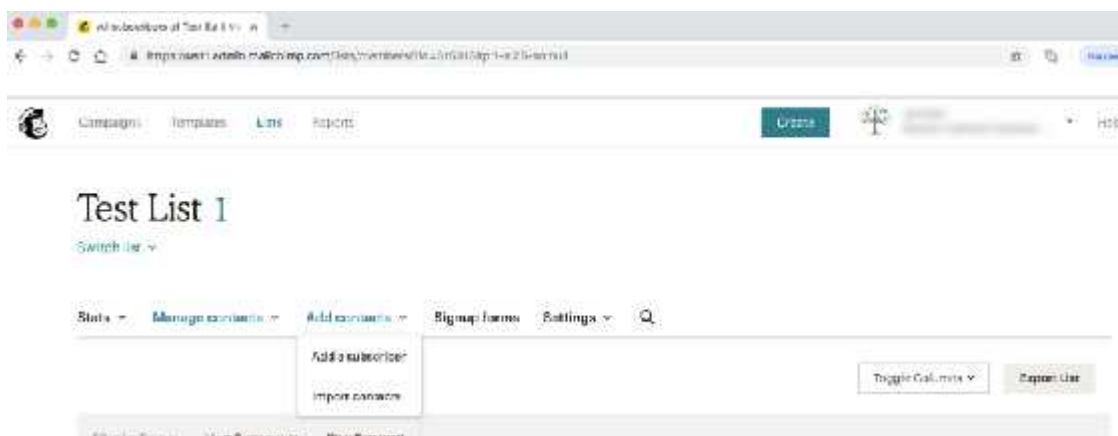


Click 'Create List' to build a new list.

Subscribers can be added in two ways:

1. A signup form that you can embed in your website or share via social media. Signup forms can be customized to collect information ranging from age and gender to interests and subscription preferences. This information can be used to better target your campaigns.
2. You add them, with the permission of the subscriber. Getting people's permission to send them your marketing campaigns not only complies with anti-spam regulations, but it also ensures you are cultivating an audience that is loyal to your brand.

To add a subscriber, click on the desired list, and click on 'Add Contacts.' Choose 'Add a subscriber:'

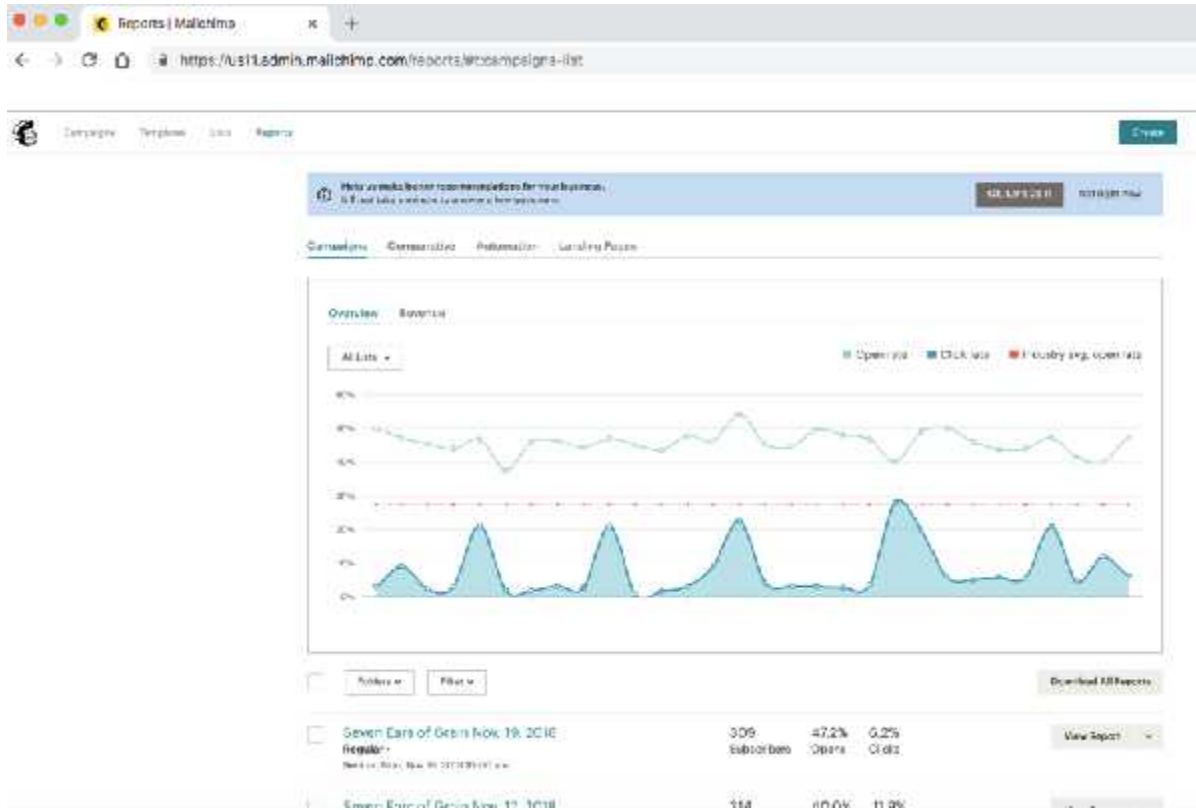


Fill in the required fields. Be sure to check the box confirming you have permission to add this subscriber. Then click 'Subscribe:'

The screenshot shows a web browser window with the address bar displaying <https://us11.admin.mailchimp.com/lists/members/add?id=315013>. The page title is "TEST LIST 1" and the breadcrumb trail is "Campaigns > Templates > Lists > Test list". The main heading is "Add subscriber". A blue banner contains the text: "Want to subscribe more than one person at a time? [Project a list](#)". Below this are three input fields: "Email Address" (containing 'l'), "First Name", and "Last Name". A "Tags" section shows "No tags have been selected" with a "+" button. Two checkboxes are present: the first is unchecked and labeled "This person gives me permission to email them" with a sub-note: "This person will not receive a confirmation email from Mailchimp. Since we're adding this recipient manually, they won't have an opt-in IP address or date in your records, so be sure to save you have permission first. Learn more"; the second is also unchecked and labeled "If this person is already on my list, update their profile". A "Subscribe" button is at the bottom.

Reports:

MailChimp records data with each campaign, including number of people reached, opens, and click-throughs. Also provided are average data sets from various industries and sectors, so you can see how your campaign is doing compared to others from companies of similar size and service.



Test Drive

In this section, we will work through the creation and sharing of a customized email via MailChimp, using some of the basic features discussed in the previous section.

The creation of the email will be an individual exercise, as will be the creation of the email list, using the address of your instructor, as well as those of other participants, if possible. This list will be for the use of this course only and is to be deleted by each participant at the end of the course.

At the end of the test drive, you should have:

An active MailChimp account

A saved template in MailChimp

A mailing list in MailChimp – to be deleted at the end of the course unless participants give expressed consent to allow their emails to remain

A sent campaign

Experience to consider whether this tool is of use to you in your business

Now:

Choose a goal for an email – newsletter, seasonal promotion, etc.

Choose a template

Add content

Check the mailout in preview mode

Send a test email

Create a mailing list

Add your instructor and other participants to the mailing list

Send the campaign

Further Reading:

- ✓ <https://mailchimp.com/resources/guides/common-rookie-mistakes-email-marketers/>
- ✓ <https://mailchimp.com/help/best-practices-for-email-marketing/>
- ✓ <https://mailchimp.com/help/requirements-and-best-practices-for-lists/>
- ✓ <https://lunarlogic.com/blog/mailchimp-best-practices>