

Getting Started with the Constant Contact Toolkit

Based on our work with over 500,000 small businesses and nonprofits we know what works. Our goal is to get you on your path to success — without you ever having to spend more than a couple hours a week on your marketing activities with Constant Contact. Don't worry — our coaches are here to help if you need it. We're looking forward to sharing in your success.

This guide will set you on a path to:

- **Stay top-of-mind and build relationships with new and existing customers**
- **Get customers to come back and do business with you again and again**
- **Encourage current customers to tell their friends/connections about your business so you reach new customers**

Every step of the way you'll be able to evaluate your success and make smarter choices moving forward. If at any point you get stuck or could use advice about what to do next, our coaches are here to help. Just give us a call and we'll get you moving in the right direction.

Campaigns are the perfect way to stay connected to your audience and drive new and repeat business.

Wondering how often you should send a campaign? At the very least we recommend sending a campaign once a month. This allows you to stay top-of-mind with your contacts. Anything less frequent and you run the risk of people forgetting about you. Frequency also depends on the nature of your organization. Our coaches can help you figure out what's best for you.

Consider newsletters and announcements the foundation of your marketing which you can build on with other campaigns such as events, offers and promotions, and surveys.

Let's get started!

Week 1

1. UPLOAD YOUR CONTACTS — TIME: UNDER AN HOUR

Before you send out your first email newsletter campaign you'll want to upload your entire contact list into Constant Contact. This way you can easily communicate with everyone who matters to your organization. If you have any key lists of special customers, or different groups, you can segment them into different lists or tag them so you can identify them later.

Note: You'll need to make sure you have permission for the contacts you plan to email. This means that they've specifically requested to get your emails by opting in directly or by verbal request. Do not use purchased, rented or appended lists. Get more details, [Who You Can and Can't Email](#).

Helpful resources:

- [How to add contacts to your account](#)
- [How to import or upload a file of contact email addresses](#)

2. GET YOUR ACCOUNT INFORMATION SET — TIME: UNDER AN HOUR

Go to the "settings" section of your account and enter your organization's address and logo. Then make sure the from name / email address are the ones you want to use. You can also add other email addresses you may want to send from and make other customizations to your account.

3. CHOOSE A TEMPLATE AND SEND YOUR FIRST NEWSLETTER — TIME: 1 - 2 HOURS

Your first newsletter should reach out to everyone on your list. You should let them know what to expect going forward in terms of frequency and content. Make sure to brand it so your customers recognize it's from you by adding your logo, colors and your web and social links. When you've got it all set up, you can then use this layout as your newsletter template going forward to keep your brand consistent.

The Essential and Ultimate Packages include a Campaign Design, where our custom services team creates a newsletter template that matches your website. [Set up this service now](#), if you haven't already.

This is a good time to say "thank you" to the people you already have a relationship with. You might even consider including a special offer just for them.

Helpful resources:

- [Preview and send a test email](#)
- [Schedule and send an email](#)

Week 2

1. REVIEW YOUR RESULTS WITH A COACH — TIME: 30 MINUTES

After you send your first newsletter you'll want to review your results with a coach. Your coach can give you insights into how your results compare to others in your industry and offer suggestions to get even better results the next time you send.

2. MAKE IT EASY FOR NEW CONTACTS TO JOIN YOUR LIST! — TIME: 30 – 90 MINUTES

You'll want to make sure that everyone you come in contact with can easily sign up to receive your emails. Constant Contact makes it easy to put a sign-up form on your website and on your Facebook Page. We also have tools that allow you to add emails addresses at your organization or on the go. There are tools that make it easy for your contacts to add themselves to your list using their mobile phones as well.

[Log in to set up your sign-up tools.](#)

Helpful resources:

- [How to add a sign-up form to your Facebook Page](#)
- [How to build a contact list with Constant Contact](#)
- [5 ways you can get people to join your contact list](#)

3. SET UP A WELCOME LETTER — TIME: 30 – 45 MINUTES

How will you let new contacts know about what they can expect to receive from you? It's simple, set up a welcome letter. When someone new joins your list they'll receive the welcome letter automatically. This letter should be similar to the first newsletter you sent letting your contacts know what to expect. Again, you may include a special gift like a coupon or download as a "thank you" for subscribing.

[Log in to set up your welcome letter.](#)

Now that you've set up the basics and sent your first campaign, what's next?

You'll need to put a plan into place to use your newsletter and other campaigns to help you reach your marketing goals. So let's see how you can drive new and repeat business while continuing to build relationships with your audience.

Week 5 - 7

1. GET FEEDBACK FROM YOUR CONTACTS WITH A SURVEY — TIME: 1 HOUR

Now that you've sent your first newsletter, it's a great time to ask your contacts for feedback about your newsletter and your business using a survey. This way you'll know what to talk about going forward in your regular newsletter communications. A survey can also help you figure out what types of offers and promotions your contacts will respond to.

Helpful resources:

- [8 tips for writing effective survey questions](#)
- [How to edit a survey](#)
- [How to view your survey results](#)

2. SEGMENT YOUR CONTACTS INTO DIFFERENT LISTS — TIME: 1 TO 2 HOURS

In some cases you'll want to send content and offers to all of your contacts, but other times you won't. It's time to use what you know from your survey and create lists of people who are looking for different things from you. It's a great idea to have lists of contacts by where they came from (e.g., in-store sign up or online or social), by what they want to hear from you (e.g., newsletters, offers or events), or by your relationship with them (e.g., customers, non-customers).

Helpful resources:

- [All of your contacts are not the same \(and why their differences matter\)](#)

Week 8

1. RUN A CAMPAIGN TO GROW YOUR LIST — TIME: 1 TO 2 HOURS

You've sent your first newsletter and you've gotten insight into what you can talk about moving forward. Now it's time to actively grow your list by running a special campaign. Think about using an event, a coupon or deal, a downloadable guide, or running a sweepstakes to entice people to sign up for your list and spread the word about your business. Promote your campaign in all the places people interact with you — at your location, by email, and on your social networks.

The key is to create a healthy mix of content and promotion. A general rule of thumb is to offer 80 percent content that adds value for your customers and make an offer 20 percent of the time. When you focus on adding value, customers are more likely to act on your offer.

Helpful resources:

- [How to turn Facebook fans into paying customers](#)
- [How to create the perfect offer](#)
- [What to offer when running a local deal](#)

Week 9 - 10

1. EXAMINE YOUR RESULTS — TIME: 30 MINUTES

It's important to take a step back and examine the results of your list building campaign. Are the results what you expected? Did your promotion schedule work? Was your offer compelling enough? A coach can help you understand what worked well and what didn't in your campaign to grow your list.

2. BUILD OUT A REGULAR CALENDAR OF ACTIVITIES — TIME: 1 TO 2 HOURS

At this point you've sent your first newsletter, gotten feedback, and run a special campaign to grow your contact list. Now it's time to think about the right frequency for sending your campaigns and what they might be. You'll want to be realistic about how much you can handle and how often your contacts want to hear from you. Even great content can drive people away if it comes too often. Our coaches can help you create a calendar of activities.

Use the following campaign frequency as a guide and adjust based on the needs of your organization and your audience: Send a newsletter once a month; send a survey one or two times a year; run an event once per quarter; offer a promotion one or two times per quarter.

Helpful resources:

- [20 places to find content for your marketing campaigns](#)
- [Spend less time, get better results with this lazy newsletter approach](#)
- [5 rules to create great content for your newsletter, blog, and social media](#)

Week 11

1. SEND YOUR NEXT CAMPAIGN — TIME: 1 TO 2 HOURS

You have a plan and it's time to get into the marketing groove by sending out your next campaign. Your goals and what's coming up next for your organization will help you determine whether it's a newsletter, a special offer, an event, or some combination of the above. The good news is the more you create campaigns the easier it will get. And the better you get at understanding your contacts the more likely they'll be to help spread the word about your business.

Helpful resources:

- [Why you should market to your best customer first \(and your next customer second\)](#)
- [5 easy steps to get more guests to your next event](#)
- [How to use exclusive content to grow your Facebook Page](#)

Now you're on your way! Always stick to your schedule It's easy to lose track of your marketing campaigns as you do the rest of your job but you'll want to keep a regular schedule so people know what to expect from you and when. Block time each week/month to get your campaign out the door. You'll be happy you did! Remember, we'll be here to help during your trial and for as long as you're a customer we're always here to help!