



# Switching to Constant Contact

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Welcome to Constant Contact, the #1 in email marketing for small businesses,\* with over 20 years of experience helping small businesses, nonprofits, and individuals succeed.

\*as ranked by Website Magazine

# This guide will help you transition from your old marketing platform and get up and running in your Constant Contact account right away.

Constant Contact's online marketing platform is more than just email marketing. With Constant Contact, you can drive powerful results through beautiful emails, effective sign-up tools, digital advertising, and more.



## Here's what we'll go over:

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# 01

## Constant Contact features

These are just some of the amazing features you can take advantage of in your Constant Contact account!

### Support & pricing

- Free, live marketing advice and support
- [Prepay](#) and [nonprofit discounts](#)
- Unlimited email sends
- Unsubscribed and duplicate contacts don't count towards your billing

### Email

- Hundreds of customizable, mobile-responsive [email templates](#)
- Create, edit, and send emails [from your desktop or mobile device](#)
- [RSVPs](#), [Polls](#), [Surveys](#), [Coupons](#), [Donations](#), [Dynamic Content](#), and more
- Trigger-based [Automated Email Series](#), automated [Welcome Emails](#), and recurring [Birthday and Anniversary Emails](#)
- Easy-to-understand, real-time [reporting](#)

### Contacts & list-growth

- [List-building tools](#), including landing pages, pop-up forms, and more
- [Segmentation](#) by contact details, email engagement, click habits, purchase activity, and more
- [Integrations](#) with Eventbrite, Shopify, MINDBODY, Salesforce, and more

### Digital marketing tools

- [Facebook](#), [Instagram](#), and [Google ads](#) to grow your business
- [Social media posting](#), monitoring, and analytics
- Free [website builder](#) and [online store](#)
- Free [LogoMaker](#) to create a professional, custom logo for your business
- [SEO tools](#) to help you get found by potential customers

# 02

## Getting familiar with your account

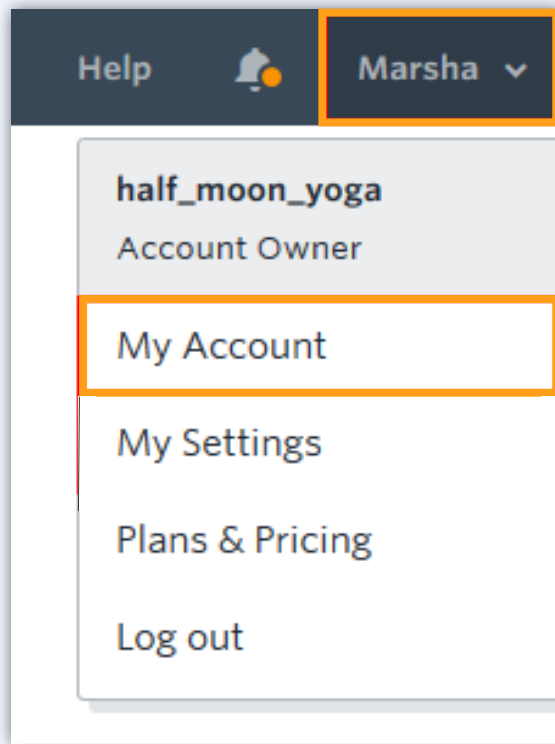
To help you with the transition to Constant Contact, we've outlined some of the differences you'll encounter if you're switching from Mailchimp.

<b>Mailchimp</b>	<b>Constant Contact</b>
<p>In Mailchimp, your total collection of contacts was your <b>Audience</b>.</p>	<p>In Constant Contact, your audience is simply known as your <b>Contacts</b>.</p>
<p>In Mailchimp, <b>Groups</b> are used to sort your contacts based on their interests and preferences.</p>	<p>In Constant Contact, you use <b>Lists</b> to group your contacts however makes sense for your organization.</p>
<p><b>Merge Tags</b> were how you added personalized details in your emails, such as a contact's name or information from your account.</p> <p>To insert dynamic content into your email and show unique content to subscribers with different profiles, you would use <b>Conditional Merge Tag Blocks</b>.</p>	<p>To add personalized details in a Constant Contact email, you select <b>Insert &gt; Contact Details</b> or <b>Account Details</b>. <a href="#">Learn more.</a></p> <p>To show or hide content based on a specific contact detail, you can turn any block into a dynamic content block by clicking the <b>lightning bolt symbol</b>. <a href="#">Learn more.</a></p>
<p>In Mailchimp, an <b>Embedded Form</b> is a sign-up form that lives on any page of your website.</p>	<p>In Constant Contact, we call these embeddable forms <b>Inline Sign-up Forms</b>.</p>

# Getting familiar with your account

## Account settings

Once you log into your account, there are a few areas you'll want to become familiar with to get up and running.



Click the profile name in the upper-right corner and select **My Account** from the drop-down to:

- Update your profile information
- Add or update your organization details
- Update your default “From” email address
- Manage your account password and security
- Add and manage account users
- View billing activity and statements
- Edit your billing and payment information
- Manage your custom contact fields
- Enable Confirm Opt-in (or double opt-in)
- Set up email (domain) authentication
- And more

[Manage your account settings](#)

# Getting familiar with your account

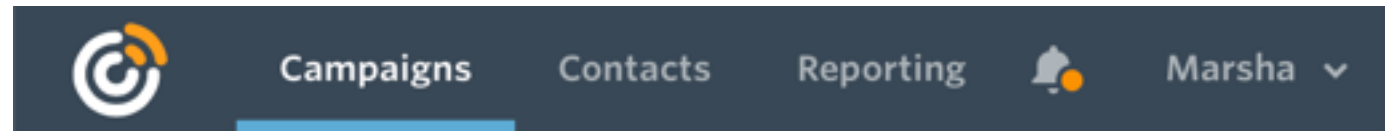
## Campaigns

You'll find all your campaigns under the **Campaigns** tab.

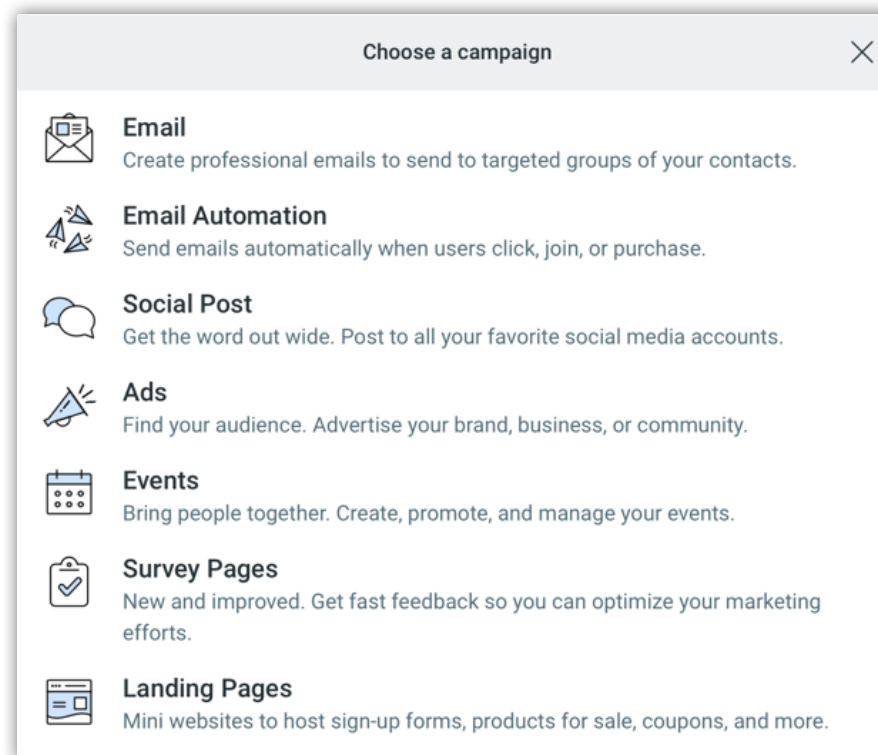
Campaigns can be standard or automated emails, social posts, ads, events, surveys, or landing pages.

On the **Campaigns** tab, you'll see the details for each campaign you've created, including some reporting stats.

Click the name of the campaign or the hyperlinked reporting numbers to see more details.

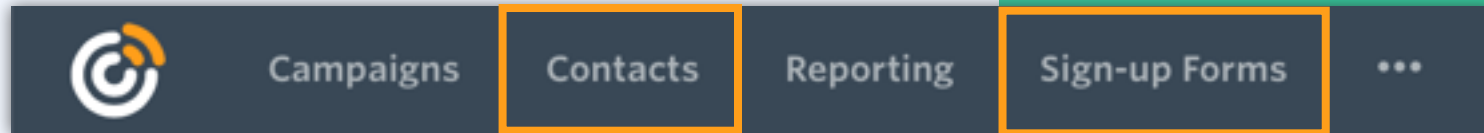


To create a new campaign, simply click **Create** and select a campaign type.



# Getting familiar with your account

## Contacts & sign-up forms



You'll find and manage your contacts, lists, and segments under the **Contacts** tab.

A **General Interest** email list is automatically created in your account for contacts to be added to, but you can create as many lists as you want to divide your audience.

**Tags** are like labels for your contacts, which can be used to create sub-groups of your lists. You can further divide your contacts by creating custom **segments** based on specific criteria, such as their engagement with your emails.

Campaigns can be sent to multiple lists or to a single segment, and you can choose to exclude or exclusively send to contacts with a specific tag.

Check out the below help resources to learn more:

- [Create and manage contact lists](#)
- [Create and manage tags \[Video\]](#)
- [Create custom segments of your contacts](#)

The **Sign-up Forms** tab is where you'll find all our list-growth tools, including inline and pop-up sign-up forms, landing pages, and Facebook Lead Ads.

When creating your sign-up forms, you can choose which contact details you want to collect from subscribers, such as their name, birthday, state, and more, as well as which email lists they want to be on.

If you want to collect additional information about your contacts, you can create custom fields in your Settings. [See how.](#)

# 03

## Importing your contacts

Now that you're familiar with your account, it's time to add your contacts!



**Need help?**

If you want some help importing your contacts, feel free to [contact Support!](#)

Whether you need to import your contacts from another email marketing platform, e-commerce platform, business software, or personal email account, we've got you covered:

- [Mailchimp](#)
- [Nutshell](#)
- [Google](#)
- [Microsoft Outlook](#)
- [Eventbrite](#)
- [File or Spreadsheet](#)

### Don't see your program or option here?

Check out the different ways you can add your contacts to Constant Contact:

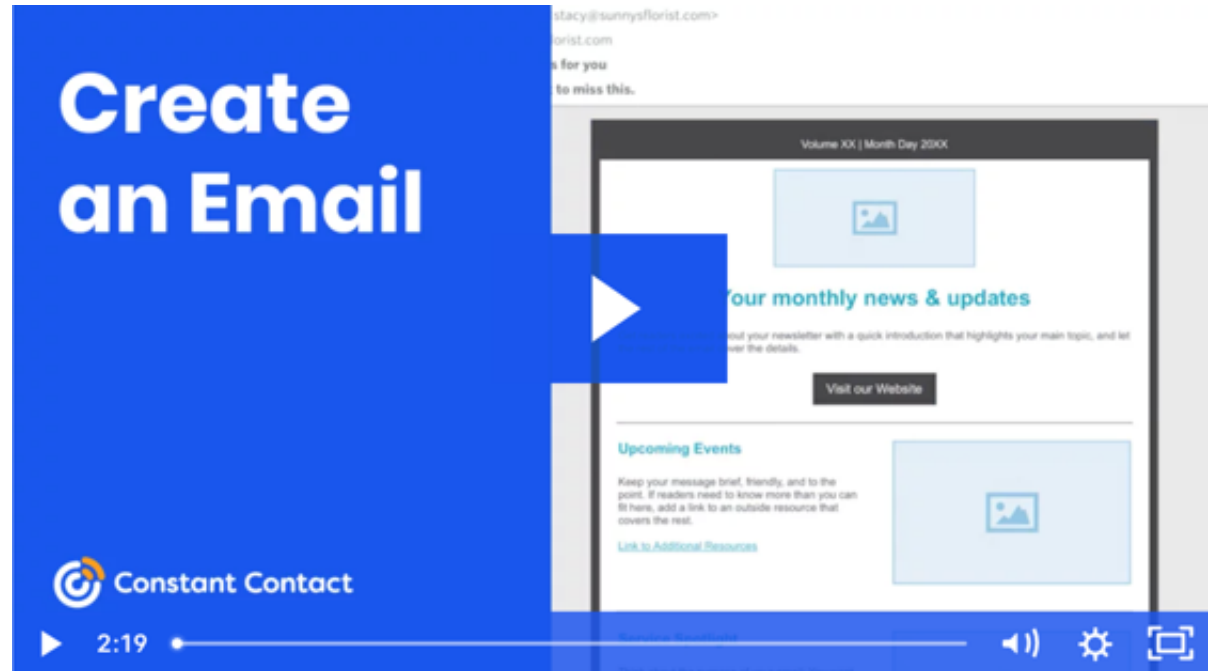
- [Methods for adding contacts to your Constant Contact account](#)

# 04

## Creating your first Constant Contact email

With your contacts added, let's create your first email!

Our email editor is packed full of amazing features and user-friendly functionality. Simply pick a template, customize the design, and add your content.



We have all the resources you need to help get your first email out the door!

- [Add, arrange, or delete blocks in your email template](#)
- [Optimize the subject line of an email](#)
- [Send a test version of your email](#)
- [Schedule and send your email](#)

# 05

## Setting up a sign-up form

To continue growing your contact list, you'll want to set up a sign-up form.

With Constant Contact, you have a few different options for sign-up forms.



### Did you know?

You can create multiple sign-up forms and customize the content for specific audiences!

## Create a pop-up sign-up form

A [pop-up sign-up form](#) will visibly pop up on your website after a designated amount of time or when someone goes to leave.

## Create an inline sign-up form

An [inline sign-up form](#) can be embedded on different pages of your website with a little HTML code.

## Create a lead generation landing page

A [lead generation landing page](#) is a page that you can create to share a little more about your business with your contacts, as well as collect new sign-ups. You can share the URL on your social media pages or wherever you communicate with your contacts.

## More ways to grow your list

- [Grow your contact list from a website, social media, or in-person](#)

## Next steps

- [Set up a Welcome Email](#) to automatically send to your new sign-ups.
- [Segment your contacts](#) to send more targeted emails.
- [Check your reporting](#) and see how you can improve your email performance.

# More resources

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Check out these additional resources to get up and running in your Constant Contact account!

## Articles

- [Make a great-looking email](#)
- [Improve your click-through rates](#)
- [Types of automated emails](#)
- [Using social media with Constant Contact](#)

## Video tutorials

- [Getting started with Constant Contact](#)
- [Manage your account settings](#)
- [Manage your contacts and lists](#)
- [Grow your contact list](#)
- [Working with blocks in the email editor](#)

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