Constant Contact

Switching to Constant Contact

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:

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.

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

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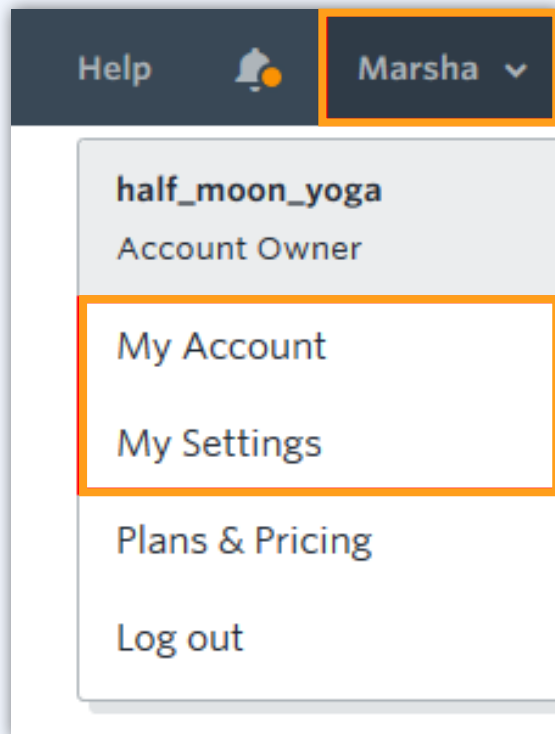
Click the profile name in the upper-right corner and select **My Account** from the drop-down to:

- View billing activity and statements
- Edit your billing and payment information
- Update your profile information
- Manage account users
- Set up email (domain) authentication

[Update Your Account Information](#)

Select **My Settings** from the drop-down to:

- Update your organization information
- Update your default From Name
- Manage your custom fields for contacts
- Enable Confirm Opt-in (or double opt-in)

[Set Up Your Account Settings](#)
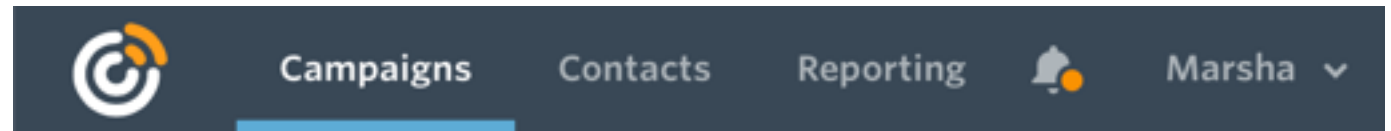
Getting familiar with your account

Campaigns

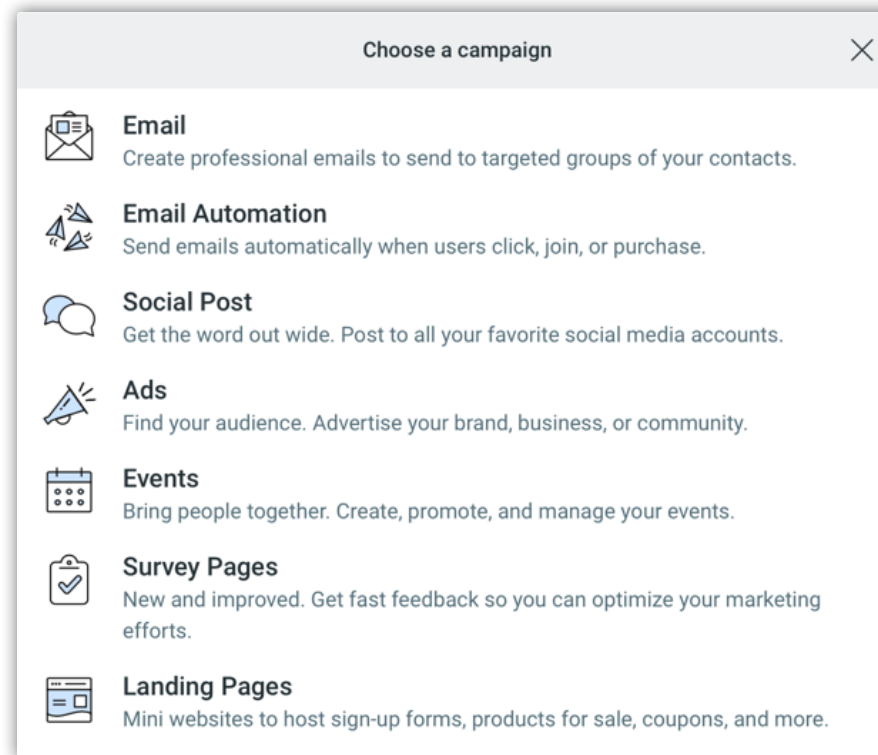You'll find all your campaigns under the **Campaigns** tab.

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.
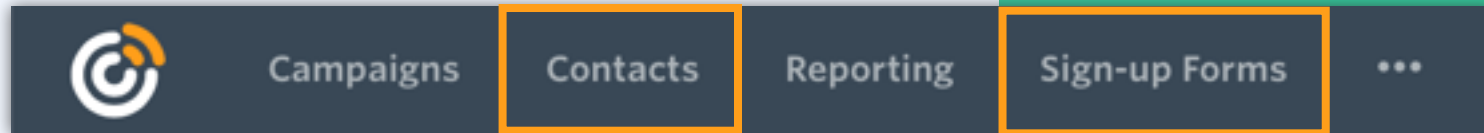

To create a new campaign, simply click **Create** and select a campaign type.

Choose a campaign

Email
Create professional emails to send to targeted groups of your contacts.

Email Automation
Send emails automatically when users click, join, or purchase.

Social Post
Get the word out wide. Post to all your favorite social media accounts.

Ads
Find your audience. Advertise your brand, business, or community.

Events
Bring people together. Create, promote, and manage your events.

Survey Pages
New and improved. Get fast feedback so you can optimize your marketing efforts.

Landing Pages
Mini websites to host sign-up forms, products for sale, coupons, and more.

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
- Use Tags to Segment and Target [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 <u>contact Support</u>!

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:

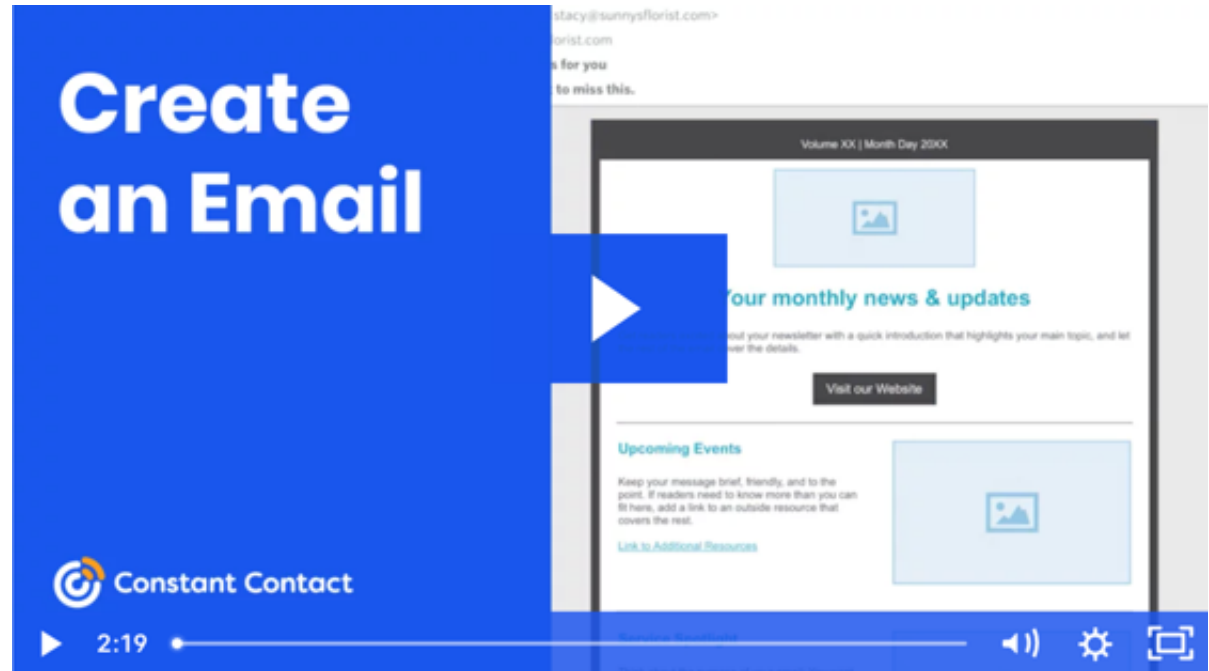- Methods for Adding Contacts to Your Constant Contact Account

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!

- [Create an Email Using the Branded Template Builder](#)
- [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.

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

- Help Overview: Constant Contact Sign-up Forms

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

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

Articles

- [Make a Great-Looking Email](#)
- [Improve Your Email Open Rates](#)
- [Types of Automated Emails](#)
- [Using Social Media with Constant Contact](#)

Video tutorials

- [Getting Started with Constant Contact](#)
- [Manage Your Contacts and Lists](#)
- [Grow Your Contact List](#)
- [Dragging and Dropping Blocks in Your Email](#)

Visit our [Knowledge Base](#) for more how-to articles, tutorials, and guides.

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