



## Get More Out of MandateMail

So, you're an expert with MandateMail but want to know how to do a little bit more with your email broadcasting program? We're here to help. Here are instructions for getting the most out of MandateMail's advanced features.

### Create Custom Signup Forms

You have at least one signup form already (we created it for you when we set up your account), but did you know that you can create additional signup forms? You can also associate a new signup form with a particular group so it's easy to start building a specific sort of list – perhaps endorsers, or petition signers, or an affiliation group. Here's how:

- Click on the audience tab and scroll all the way to the bottom to the Signup Forms section. Click on "Create a New Signup"
- Give your new signup form a name – this is for internal use only.
- Look for the button that says "add or remove groups". Here you can select which group or groups to add subscribers to – marking the "add" checkbox will add new subscribers to a group. If you wish to give your subscribers options so that they may choose which group to be added to, you can do so by marking the "display" checkbox for multiple groups. We recommend marking the "add" box for at least one group so that your new subscribers don't go into limbo – where they're in your audience but not in a group. Do this first as it causes the rest of the page to reload and you'll lose any changes that you haven't saved yet.
- If you'd like to add an image to the top of your signup form, click the "your image here" icon and select or upload an image.
- Enter your own text in the text box – this will appear at the top of your signup form, so it's a good place to tell your subscribers what they're signing up for and, if you're requiring any fields, you might explain why you need them.
- Your signup form fields appear below. All of your member record fields will be displayed. Mark the checkbox for "hide" to prevent a field from being shown on your signup form. If you want to require a field, mark the checkbox for "require".
- Click Save in the top right.
- Next, click on the "Thank You" tab to customize the message that is displayed on screen after the form is submitted. We suggest including a link back to your website.
- Next, click on the "Confirm it" tab to customize the email message that is delivered to new subscribers. If an existing subscriber signs up again using this signup form, they'll receive a standard message that confirms that they've changed a setting on their subscription.

When you're done creating your signup form, click back on the "Audience" icon and scroll back down to the signup forms section. You should see your new signup form listed. Click on the options icon to the right of your form. From here you can:

- Preview your form: This link lets you preview the form you created and make any changes.
- Delete your form: The option to delete your form.
- Change when it's used: You can assign a specific signup form based on the stationery you use. So if you send an email out using a custom, volunteer-focused stationery, you might want to use a custom, volunteer-focused signup form.
- Add to your site: This option opens a window which presents you with several options for including this signup form on your website. The basic way is to link directly to the form but you can also embed it in your site using an iFrame.

## Collect More info about your Subscribers

The more information you have about your subscribers, the more you can tailor and customize your communications with them. And one specific use for a custom signup form is to collect more data on your subscribers. Here's how to do it:

- Create a signup form to ask for additional demographic data on your subscribers. If you need to add custom fields to your database, please let us know and we will create them for you.
- Search your audience to find the subscribers for whom you don't have any data beyond their email address (or a similar query that works for you). Save this search so you can use it later.
- Create a new email that states your case for why you need and what you'll do with this extra information. Depending on how vital this information is to you, you might even consider offering an incentive. Don't forget to link to the signup form you just created.
- When you get to the send process, select the signup form you just created as the signup form for this email.
- When selecting the audience to send to, use the saved search you created previously so you only send the message to a select group of your subscribers.

## Create an Automatic Welcome Message

When a new subscriber joins your list, she automatically gets an email confirming her subscription. But wouldn't it be awesome if she also got a personal email from your candidate or executive director welcoming her to the list? It's easy to set that up! Here's how:

- Create a new mailing.
- Include the welcome message you want new subscribers to receive, including any important links to your website, blog, Facebook page, etc.
- Click "Send". Complete Step 1 as you would normally do.
- On Step 2, click "Triggers" on the left.
- Click "Create a Trigger"
- In the window that opens, click "Create" next to the first option, "signs up..."
- On the next screen, you'll select which signup forms to apply this trigger to. If you select all of them, then no matter how someone signs up for your list, they'll get this automated welcome message. (This may not be appropriate for certain signup forms, like a volunteer signup form, for example).

- In the “Send this email to them” section, chose when you want the email sent. You can schedule it from a few hours to a few weeks after they sign up.
- Name this trigger event so you’ll know what it is later.
- Hit Save!
- On the Send Step 2 screen, click “Continue” and finish the sending process. You’re done!

You can use this process to set up a welcome email for a specific signup form, or a series of welcome emails. For example, you could set up a welcome email from your main spokesperson one day after signup and a fundraising appeal from the same person two days later.

And welcome messages aren’t the only use for Trigger events:

- You can set up a trigger event based on a date in a user record. For example, you might send birthday greetings – or a time-delayed thank-you for a contribution.
- You can also set up a trigger event based on clicks on links in previous emails. For example, if you sent an informational email about a position on health care policy, you might send a follow-up email (set up using trigger events) to those of your subscribers who clicked on the link to your position paper asking them to get more involved.

## Test! Test! Test!

Once you’ve gotten the hang of sending regular emails to your subscribers, you may want to start testing various aspects of your emails --- from subject lines, text length, or graphics/illustrations. The easiest way to do that is to randomly split your audience into two groups so that you can send one version to Group A and one version to Group B. Here’s how we suggest doing that:

- First, select the segment of your audience that should receive the message in the first place (whether that’s your whole list, or a select group of volunteers, or some other subset).
- Export that entire group to an Excel file.
- Open that file in Excel.
- Create a new column with the header “Random”. In the first cell in the column, type this formula:  
=rand()  
That formula will randomly chose a value between 0 and 1 for the cell’s value.
- Copy the formula in the first cell so that it fills every cell in that column, for as many rows as you have data. An easy way to do that is to select the entire column, click on the Edit menu, then click on Fill, and then choose Down.
- Now you should have a new column of data and each subscriber should have a randomly assigned between 0 and 1.
- Before saving your file, copy the entire column and then click “Paste Special” from the Edit menu, and choose “Values” from the top section of options, and click Ok. This changes the data in that column from formulas (which won’t work in MandateMail) to values. Now save your file.
- In MandateMail, you’ll need to add a new field. From the Audiences tab, click on “Manage Fields” in the upper right. Add a new text field called Random.
- Now you’re ready to import your Excel file. Make sure you match the Random column in your Excel file with the new field Random in MandateMail.
- When your import is complete, you can set up a search based on the member record field called “Random”. Create one saved search where Random < .5 (essentially, this is

group "A"). Create another saved search where any of the following are true: Random > .5, Random is empty, Random = .5 (this is basically, not "A" or group "B").

- Now, set up two campaigns, where the only difference is the item you want to test. Set up one to send to the first saved search that you created. Set up the other campaign to send to the second saved search you created.
- Several hours after your mailings have gone out, you can begin to look at your results and compare which test performed better.

Note: These instructions allow you to create a 50% split of a group. If you prefer to split your list into 10% groups, for example, you can use the same steps and just change your saved searches. If you save a search for Random < .1, you'll get a random 10%.

With testing, you can learn things about your audience including whether personalization performs well, about what sending times work best, etc. If you have a large list, you can even do a test on a small group (say 10-20%) of your list before sending the better-performing version to your full list.

## Have Questions?

As always, please contact us at any time if you have any questions about MandateMail! Meaghan Lamarre can be reached at [meaghan@mandatemedia.com](mailto:meaghan@mandatemedia.com) or 401-225-3543.