

White Paper: Salesforce MailChimp Integration

Purpose: To explain 3 ways to integrate Mail Chimp with your Salesforce



MailChimp for Salesforce

Do-it-yourself email marketing

★★★★☆ (72)

Listed on the AppExchange here:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B3byfEAB>

Price: Free (possible cost for help in integrating)

Prerequisites: Any edition of Salesforce, you will need an active MailChimp Account

Implementation Level: Moderate to high, if you have conflicting data in Salesforce/MailChimp - Easy to Moderate, if you have never had a MailChimp Account

PRIMARY CONSIDERATION BEFORE STARTING

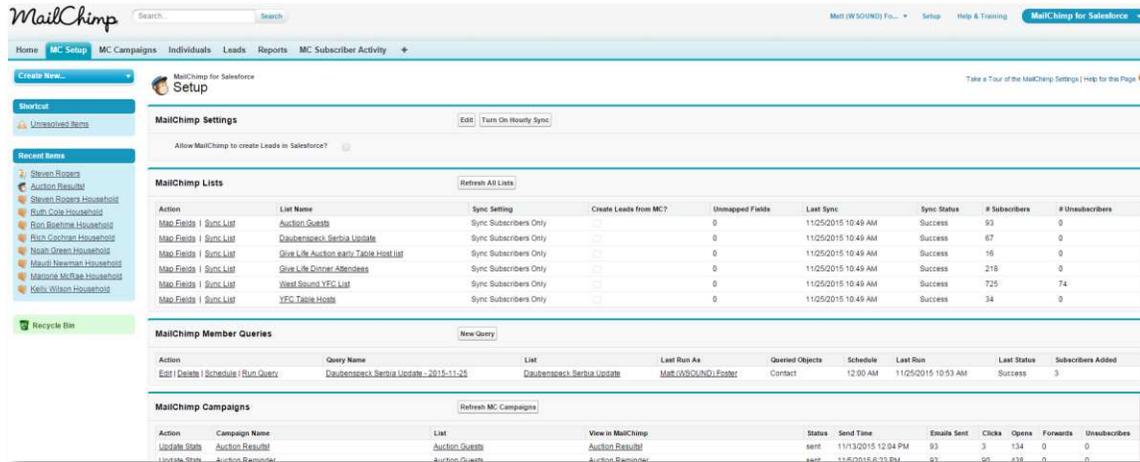
Data Cleanup (if you have an existing MailChimp Account)

Where are my email more clean/up-to-date – MailChimp or Salesforce?

Are my lists better segmented in Salesforce or MailChimp?

For best results, it is recommended to work on cleaning up your data in Salesforce (emails and segmentations) before you integrate MailChimp.

Please note: These recommended steps are for your protection. Follow one of these 3 steps to prevent duplicates and minimize resource expenses to your chapter (time and \$).



Choose one of these 3 ways to do it right:

1. Start with a new MailChimp Account

If you are starting with a fresh MailChimp account with no subscribers in MailChimp, the process is very straight forward.

Watch this video for install, configuration and use instructions: <https://vimeo.com/147482403>

2. Integrate your existing MailChimp Account yourself with Salesforce:

(High level of Salesforce and Microsoft Excel experience required)

1) Extract your data list from Mail Chimp, save as .csv

2) Determine what field from MailChimp you will be mapping to Salesforce

Example – List(MC) to Mailing Interest(SF)

3) Run an update using Dataloader.io (4 times)

Login with Salesforce credentials, choose import, update, individuals(contact).

Upload your mailchimp list

You will run 4 of these processes #1 Run an update first on Email, Map Email Address as Individual ID, lookup via EMAIL

Download your Errors then run on #2Personal Email, then #3Work Email, then #4Altenate Email

You should see results narrow down with every update run.

After these runs, download you last Error file.

Run a report from Salesforce with all your Individuals (include Individual ID), export to csv.

Now combine these two files and perform a Vlookup on common fields to pull in the Individual ID (such as first name and last name) NOTE: be sure to manually compare records for clarity.

After you have run this vlookup, save as and run another update using dataloader.io and map to this ID instead of the email for your Individual ID. You should now have no additional errors.

1. Watch this video for instructions to clean your list: <https://vimeo.com/147485718>

2. Watch this video for install, configuration and use instructions: <https://vimeo.com/147482403>

3. Contact Fostering LLC for a quote for full service setup and training

Estimated Scope of work price range (\$200 - \$500) onetime fee

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