

White Paper: Salesforce MailChimp Integration

Purpose: To explain the benefits of and how MailChimp for Salesforce works.



MailChimp for Salesforce

Do-it-yourself email marketing

★★★★☆ (72)

Listed on the AppExchange here:

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

Price: Free

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.

BENEFITS

1. Maintain one(1) database (Salesforce)

No need to keep multiple data lists for your CRM and Email Marketing, Simply update Salesforce and Salesforce will send data to MailChimp for the most accurate email lists. You can manage your Lists, Interests and Segments all from Salesforce.

The screenshot shows the MailChimp interface for a 'Test Subscriber'. It is divided into three main sections: Lists, Interests, and Segments.

- Lists:** A table with columns for list name and subscription status.

List Name	Subscription Status
Children of Royalty	Subscribed / Unsubscribe
Codescience Contacts	Subscribed / Unsubscribe
Data Type Retesting	Not Subscribed / Subscribe
disco	Not Subscribed / Subscribe
Funk is back!	Not Subscribed / Subscribe
Metadata Sync Testing	Not Subscribed / Subscribe
Mountain Adventures	Not Subscribed / Subscribe
Testing 1, 2, 3	Not Subscribed / Subscribe
- Interests:** A list of interest categories with checkboxes.

Interest	Selected
Royalty	<input type="checkbox"/>
Princesses	<input checked="" type="checkbox"/>
Kings	<input checked="" type="checkbox"/>
Queens	<input type="checkbox"/>
Princes	<input type="checkbox"/>
- Segments:** A list of segments with checkboxes.

Segment	Selected
Crown	<input type="checkbox"/>
Test Test	<input type="checkbox"/>
Tiara	<input checked="" type="checkbox"/>
Wand	<input checked="" type="checkbox"/>

2. Create and Maintain Email Campaigns in Salesforce

You can set up MailChimp Campaigns and track important stats right in Salesforce.

The screenshot shows the Salesforce interface for a MailChimp Campaign named 'Timewarp Funky'. It includes a 'Campaign Detail' section and a 'Campaign Stats' section.

MC Campaign Detail

MC Campaign Title	Timewarp Funky	Content Type	template
MailChimp ID	6defeccc14	Create Time	3/18/2013 8:30 PM
Subject	Incoming! Timewarp funk	Send Time	3/19/2013 9:30 PM
From Name	The funk is certainly back	Status	sent
From Email	funkysender@mikewitherspoon.com		
To Name	* FNAME *		
Archive URL	http://eepurl.com/wwURv		
Segmented Text	No segment used		
Type	regular		

▼ Campaign Stats

Emails Sent	7	Unique Likes	0
Clicks	0	Recipient Likes	0
Unique Clicks	0	Facebook Likes	0
Last Click		Opens	0
Users Who Clicked	0	Unique Opens	0
Campaign Share Report	Timewarp Funky	Last Open	
		Forwards	0
		Forwards Opens	0

3. Custom Map Email Merge Fields

You can map fields from Salesforce contact records right to MailChimp. This allows you to enter dynamic content in your mass emails.

Such as “Hello (First.Name), thank you for volunteering with (Volunteer.area).”

MailChimp List
Mountain Adventures

Field Mappings [Save] [Cancel]

MailChimp field	Salesforce Contact field	Salesforce Lead field
Email Address	← Email (default)	Email (default)
First Name	← First Name (default)	First Name (default)
Last Name	← Last Name (default)	Last Name (default)
Highest Mountain Climbed	← --None--	--None--
Number of Adventures	← --None--	--None--

Add a new list field? [--Select Field Type--] [Field is required] [Add Field]

[Save] [Cancel]

4. Take Real Life Action on Digital Action Stats

Wouldn't you like to know who is interested in your organization? Now you can. Based on Number of opens, clicks or forwards, you can make a more advanced contact campaign with these stats right in Salesforce.

MailChimp Campaigns [Refresh]

Action	Campaign Name	List	View in MailChimp	Status	Send Time	Emails Sent	Clicks	Opens	Forwards	Unsubscribes
Update State	RSS Campaign		RSS Campaign	paused		0				
Update State	Testing 1, 2, 3 (copy 02)		Testing 1, 2, 3 (copy 02)	save		0				
Update State	Posts from *IRSSFEED.TITLE* for *IRSSFEED.DATE*		Posts from *IRSSFEED.TITLE* for *IRSSFEED.DATE*	save		0				
Update State	Testing 1, 2, 3 (copy 01)		Testing 1, 2, 3 (copy 01)	sent	3/19/2013 2:44 PM	4	0	0	0	0