



Step-by-Step Guide

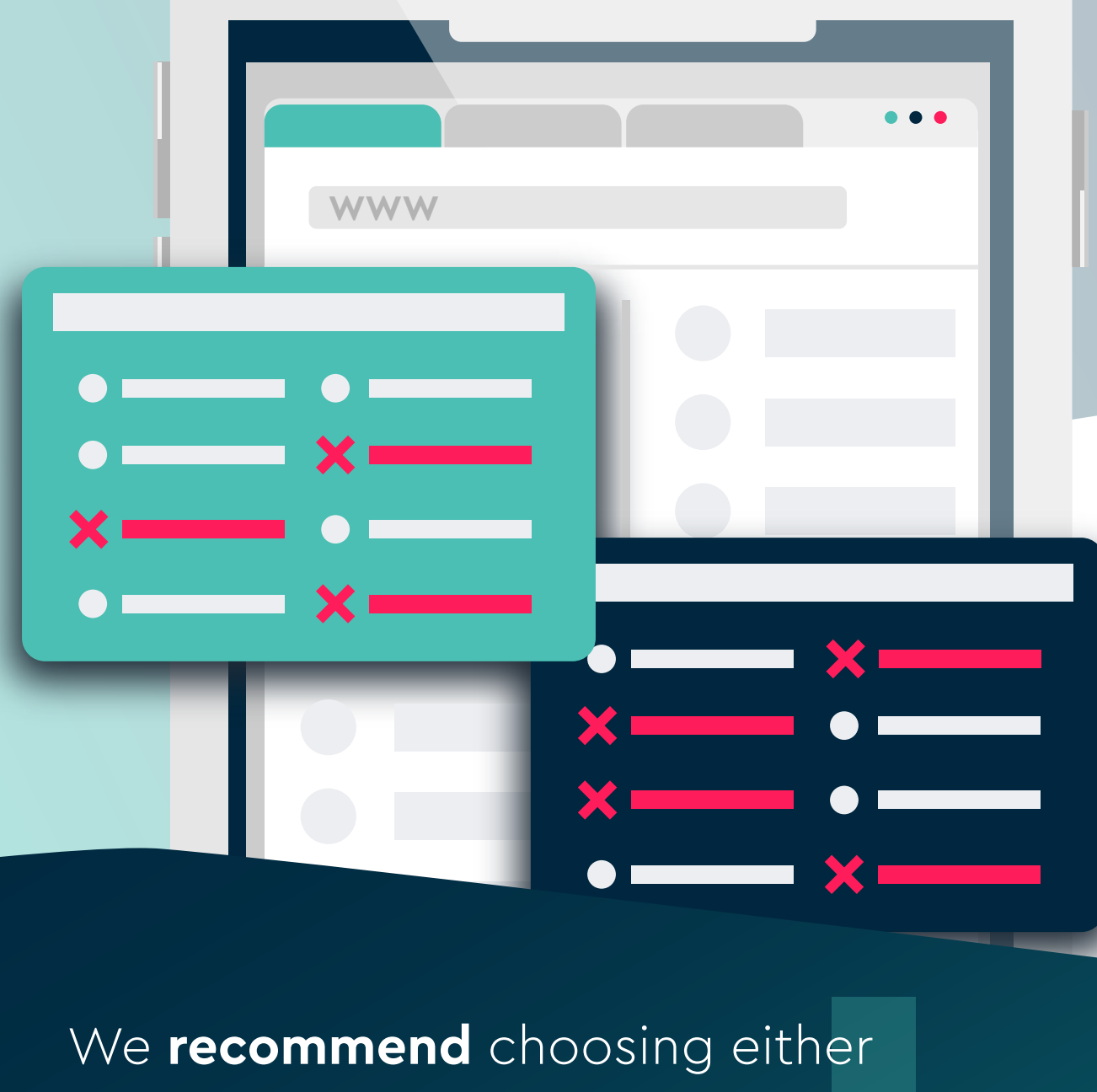
How to Setup an Email Marketing Service Provider for Your Business

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Choosing a solution that fits your needs

There are a wide variety of Email Marketing Service Providers (ESPs) to choose from but they all vary in:

- Pricing
- Functionality
- Customizability
- Ease-of-Use



We **recommend** choosing either Mailchimp or Sendgrid as your ESP

Mailchimp is more expensive but has more features depending on which package you choose. Features include:

- Custom HTML Templates
- List Sementation
- Dynamic Email Automation
- A/B Testing

Sendgrid is more affordable and has a lot of the same features as Mailchimp but they aren't as robust. Features include:

- Custom HTML Templates
- List Sementation
- Simple Email Automation
- A/B Testing

Keep in mind that both of these ESPs are good options it just depends on what exactly you're looking for and how much you're willing to spend. Each of these platforms have a **FREE** option so you can test them both and see which one you like best.

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Creating your ESP account and starting the setup process

Creating your account is simple. Just like with any other platform you choose which package you'd like to use, provide some basic information, add payment information, and now you have an account.



Setting up your ESP for use. These are required steps!

When it comes to setup, there are a few things you're required to do in order to have a functional platform to send your emails from. We'll cover each of these steps in more detail below!

- Authenticating your Sender Domain
- Creating Sender Identities
- Creating Unsubscribe Groups

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Authenticating your sender domain within your ESP

This means that you're allowing the ESP to send emails from your company's website domain. For example; for us to send email from marketing@squatchmarketing.com we have to authenticate squatchmarketing.com within the ESP first.



Authenticating your Sender Domain Step-by-Step

FIRST

You need the login for your websites DNS (Domain Name System)

This is usually located with the same company you are hosting your website through. For example: GoDaddy, Bluehost, Host Gator, etc.

SECOND

Locate the section within your ESP that tells you how to authenticate or verify your domain

Mailchimp: In the top bar, navigate to Website > Domains and then you'll receive a list of CNAMEs to add to your DNS

Sendgrid: On the left side bar, navigate to Settings > Sender Authentication and click Authenticate Your Domain. Once you do this you'll receive a list of CNAMEs to add to your DNS

THIRD

Add the values given to you by your ESP into your DNS (Usually CNAMEs)

Once you login to your web hosting provider and navigate to your DNS you'll need to click "edit" and then you should see a few different record options.

RECORDS:

- A
- MX
- SRV
- CNAME
- TXT

Depending on which ESP you're using, you'll add fields to either the CNAME, TXT, or both.

Click "Add New Record" under the indicated field provided by your ESP. Copy the information provided by your ESP and paste it in the record. Repeat this step until you have added all of the information provided by your ESP.

You'll have to wait between 24 and 48 hours (usually only takes a few minutes) before verifying that you added the records correctly within your ESP. There should be a button that says "verify". Once you click verify and it confirms you did it correctly, this step is complete!

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Creating Your Sender Profiles or "From" Addresses

A sender profile is referring to the "From" name that will appear in the inbox of your email recipients. This will often include the name of your company and then an email you'd like to be associated with your marketing department. For Squatch Marketing we use the sender name "**Squatch Marketing**" and the "From" email address of "marketing@squatchmarketing.com".



Setting up a sender profile is simple and you can **create multiple senders** once your domain is authenticated.

Within Mailchimp, you'll choose who the sender is during the email creation phase. There will be a section to type in the sender name, and the senders email address. It's pretty straight forward.

Within Sendgrid, you'll setup senders by navigating to the Marketing tab > Senders. Once you are there you will be able to create a new sender. This includes the From name and the From email address.

A cool feature with Sendgrid is when you are setting up senders you can setup **custom reply emails**.

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Creating Unsubscribe Groups

Unsubscribe groups allow your readers to pick and choose which emails they would like to receive from you.



Unsubscribe groups/links **are required** for compliance with the **CAN-SPAM Act**.

Within Mailchimp, the unsubscribe groups are created automatically and will unsubscribe your leads from the audience they are associated with if they click the unsubscribe button. You don't have to do anything additional but make sure there is a functioning unsubscribe button within your email. (you won't be able to send the email if there isn't)

Within Sendgrid, you can setup your own unsubscribe groups by navigating to Marketing > Unsubscribe groups. Once there, you can create new groups. You should create groups based on what type of emails you send. For example: Squatch Marketing uses Blog Unsubscribes, Promotion Email Unsubscribes, and Customer Email Unsubscribes.

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You're all setup and ready to start building email campaigns!

Once you have completed all of these steps you're ESP should be ready to roll and you can start building your first email campaign! We'll cover how to create effective email campaigns from start to finish in another post coming soon. If you'd like to continue to learn more about email marketing tips & tricks, [subscribe to our newsletter](#) on our blog! For help building your email campaigns visit:

squatchmarketing.com/request

