Campaign Monitor

Your Guide to Getting Started With Campaign Monitor

We know that a new email platform can be a lot to take on. This checklist will guide you through the most important steps and best practices in your first few months with us.

Unfamiliar with a term or feature? Have a question to ask? **Find us in the help center.**

Looking for training videos, guides, and marketing resources? **Learn from thousands of articles on our site.**

Interested in diving deeper into features? **Watch our how-to videos.**

Make the most out of this checklist: Click on any of the to-do items to see a help article with more info.

Before your first campaign

Set up your account.

Review your plan type and how your billing works.

Add people to your account and set user permissions.

Add collaborators to your account and set what they can access (eg. campaign reports).

Migrate existing email addresses and data.

Exclude previous unsubscribes and bounces by updating your suppression list.

Create custom fields to capture subscriber data and power segmentation and personalization.

Understand list management best practices and import your subscribers.

Maintain just a few lists and use segments whenever possible.

Sync any current signup forms to your new lists in Campaign Monitor.

Before your first campaign

Prepare your sending domain.

○ Review what counts as permission to send.

○ Be ready for our approvals team, by keeping 1) previous campaign reports, and 2) a quick description of how subscribers join your list. | Our team periodically checks in with customers to maintain high delivery rates across all accounts.

○ Improve delivery rates by authenticating your sending domain.

○ Warm up your domain to improve deliverability with small sends to engaged subscribers. | Consider sending your initial campaigns to people who signed up recently, or opened and clicked previous campaigns.

Send your first campaign.

○ Create an email using the drag-and-drop builder, or import your own HTML.

○ Preview your email using our design and spam test to see what it will look like in different inboxes. | Unlimited and Premier monthly plan customers only.

○ Connect and sync your other apps and CRM platform to power segmentation and personalization.

First month

Grow your subscriber list.

○ Grow your list using signup forms.

○ Explore email trends using Insights to improve your results.

Set up an automated email journey
(e.g. welcome email series, birthday email).

Month 3-6

Optimize email engagement.

○ Personalize your subject lines and email content using custom fields and personalization tags.

○ Determine the best subject lines and content using A/B testing.

○ Send targeted campaigns using segments.

○ Improve content relevance using dynamic content.

○ Update subscriber information and improve relevance using a preference center.

○ Improve open rates using timezone sending and/or send time optimization. | Unlimited and Premier monthly plan customers only.

6+ months

Maintain high open and click rates

○ Segment inactive subscribers and send a re-engagement campaign.

○ Trigger automated email journeys based on preset engagement segments. | Premier monthly plan customers only.

○ Clean your lists by periodically removing inactive subscribers.