

Monday, September 15, 2025

SOP: Importing Contacts with a Tag in Mailchimp

Section: Email Marketing

Last Updated: September 2025

Owner: Claire Gilbert

Platform: Mailchimp

Purpose: To guide team members through the process of importing contacts into Mailchimp with a tag, ensuring accurate segmentation for targeted communications.

Mailchimp Training Hub (external link): [How To Use Mailchimp 101](#)

Step-by-Step Instructions

1. Prepare Your File

- Save your contact list as a **CSV Delimited File**
- Required fields:
 - Email Address (required)
 - First Name (recommended)
 - Last Name (recommended)
 - Optional: Phone, Tags, etc.
- Clean your file before upload:
 - Remove blank rows, duplicates, or incomplete records

• Subscription Permission Reminder:

Subscribed email contacts being imported into Mailchimp **don't go through the signup process.** You must verify that you have **permission to market to them.**

• Troubleshooting Tip:

Some European spreadsheets use **semicolons** instead of commas. Mailchimp will not accept these—**convert to commas** before importing.

2. Begin the Import Process

- Log in to the **Mailchimp Master Account**
- Go to **Audience** → *Grapevine Parks and Rec*
- Click **Add Contacts** → **Import Contacts**
- Choose **Upload File**
- Select your CSV file

3. Organize Existing Contacts

- If importing contacts who already exist:
 - ☐ Check **“Update any existing contacts”**

This replaces audience field information with the data in your file.

Blank fields in your file will overwrite and erase existing contact data.

You can only update **subscribed or non-subscribed** contacts.

Existing **marketing status** (Subscribed/Unsubscribed) will not change during this import.

Mailchimp will **not import duplicate, bounced, or unsubscribed** addresses already in your audience.

4. Tag Contacts During Import

- Mailchimp will prompt you to map columns
- When prompted to **tag contacts**:
 - Select existing tag(s) or create new ones
 - You can apply **multiple tags** at once

Tag Strategy Tip:

- Use **long-term tags** like “Active Adults” without dates for recurring audiences
- Use **seasonal tags** like “Tennis Camp 2025” for one-time events
- Combine tags like:
 - **Tennis Camp 2025**
 - **Tennis**
 - **Camp**

This allows flexible re-targeting next year for similar themes (e.g., all "tennis" or "camp" interest).

5. Review Field Mapping

- Match each CSV column to the correct Mailchimp field
- ⚠ Columns left unmatched will **not be imported**

6. Set Subscription Status

- New contacts only — set **Email Marketing Status** to:
 - **Subscribed**
- Existing contacts' status **will not be updated**

Mailchimp only allows **one marketing status per import**

Do not import **unsubscribed** or **cleaned** contacts unless directed by Claire

7. Review Summary & Complete Import

- Confirm:
 - ☐ Number of contacts added/updated
 - ☐ Tag(s) correctly applied
 - ☐ Field mapping complete
 - ☐ No error messages
- Click **Import**

Mailchimp will send you a **confirmation email** when the import is complete

Example Summary:

1 contact will be updated or added to your “Grapevine Parks and Recreation” audience.

Imported from: File upload
Email marketing status: Subscribed
Update existing contacts: Yes
Group(s): None
Tagged: Active Adults, Tennis, Camp

8. Verify the Import

- Go to **Audience** → **Tags**
- Select your tag(s) and confirm contacts were added

Helpful Links & Resources

- [How To Use Mailchimp 101](#)
- [Import Contacts to Mailchimp](#)
- Your steps today can be found under the “**Imports**” **article** in Mailchimp’s help center.
 1. These links include **step-by-step visuals**, searchable topics, and best practices for using Tags, Automations, Campaigns, and more.
- For automation questions or tagging strategies, contact **Claire Gilbert**