

The Box Out Marketing Tagging System

Tags are one of the most powerful features in Infusionsoft. But because Infusionsoft doesn't enforce any particular system of tagging or any naming conventions, tags become confusing, disorganized, and chaotic very quickly. The key to leveraging tags successfully is to define rules and enforce them constantly. Rules define when & how tags are created, organized, and archived as well as how tags are named.

The Four Tag Commandments:

- No tag shall ever be created without a category
- No tag shall ever be created without following a specific naming convention
- Every tag's name shall declare its function
- Tag names shall always start with the Category name

Tag Naming Convention:

❖ Trigger

- Description
 - These tags are used to trigger actions in Infusionsoft or 3rd party systems. They are temporary and must be removed after being applied.
- Rules
 - Must be immediately removed after the trigger action has been completed.
- Nomenclature
 - Trigger - Campaign – Sequence – Trigger
 - i.e.: Trigger - Free Report – Conversion Sequence - Start
- Types
 - Start
 - Stop
 - Loop

❖ Status

- Description
 - These tags are used to denote the status of a contact or where a contact is in a process
- Rules
 - Usually only one status tag is used at a time per campaign or process. Status tags by definition are temporary.
- Nomenclature

- Status - Campaign - Status, Status - Process - Status, Status - Contact Group - Department - Status
- i.e. Status - Sales Pipeline - Stage - Contacting
- i.e. Status - Product A Launch - In Promo Sequence
- i.e. Status - VIP Clients - Finance - Decline (0-10 Days)
- i.e. Status - VIP Clients - Finance - Decline (11-30 Days)
- i.e. Status - VIP Membership - Reporting
- i.e. Status - VIP Membership - Inactive
- i.e. Status - VIP Membership - Access
- Types
 - Status
 - Access
 - Process

❖ Activity

- Description
 - Used to document what the person has done or actions the person has taken
- Rules
 - Activity tags are permanent. Activity tags can be consolidated and “archived” after a period of time.
- Nomenclature
 - Activity - Campaign - Specifics - Action
 - Activity - Product - Action
 - i.e. Activity - Weekly Webinar – Sales & Marketing – 14 Sep 2015 – Registered
 - i.e. Activity - Weekly Webinar – Sales & Marketing – 14 Sep 2015 – Attended
 - i.e. Activity - DYS Membership – Purchased
 - i.e. Activity - DYS Membership – Cancelled
 - i.e. Activity - Lead Magnets - 7 Steps Report – Downloaded
- Types
 - Purchased
 - Downloaded
 - Registered
 - Attended
 - Clicked
 - Etc.

❖ Profile

- Description
 - Used to document demographics & psychographics of the prospect/client
- Rules

- Profile tags are permanent. Profile tags define who a contact is regardless of activity.
- Nomenclature
 - Profile – Category – Detail
 - i.e. Profile – Age – 18-24 yrs old
- Types
 - Demographic
 - Psychographic
 - Interests
 - Pains
 - Desires

❖ Reporting

- Description
 - Much of your core reporting can be generated from saved searches on Status and Activity tags. There are times when you will set up tag *solely* for the purpose of reporting. Those tags will go in the Reporting category.
 - For a good example of these types of tags, see the Hack called [Trending Reports in Infusionsoft](#) in the 2014 12 Hacks of Christmas series.
- Rules
 - These tags are only for reporting and have no function related to Status, Activity, or anything else.
- Nomenclature
 - Reporting - Campaign - Sequence/Action/Measurement - Report Type
 - i.e. - Reporting - DYS Club Membership - Signed Up - Today
 - i.e. - Reporting - DYS Club Membership - Signed Up - This Week
 - i.e. - Reporting - DYS Club Membership - Signed Up - Last Week
 - i.e. - Reporting - DYS Club Membership - Signed Up - This Month
 - i.e. - Reporting - DYS Club Membership - Signed Up - Last Month

❖ ..Temp

- Description
 - Temp tags are used only for temporary purposes like searching specific lists
- Rules
 - Temp tags are deleted on a regular basis in order to not cause confusion or slowness of the system
- Nomenclature
 - Temp - Broad - More Specific - Very Specific
 - Nomenclature isn't as important here since these tags only exist for a short time and a specific purpose
- Types
 - Short term searches

❖ Memberships (Optional)

- Description
 - If you're running a membership site, it's a good idea to keep your membership tags in a category called Memberships
- Rules
 - Use four different tag names for the different status related to your memberships: active, PAYF, SUSP, CANC.
- Nomenclature
 - ie. Double Your Sales Club (for active members)
 - ie. Double Your Sales ClubPAYF (for members whose payment has failed)
 - ie. Double Your Sales ClubCANC (for members who have cancelled)
 - ie. Double Your Sales ClubSUSP (for members whose accounts have been suspended)
- Types
 - Active
 - PAYF
 - SUSP
 - CANC

❖ Email Subscription (Optional)

- Description
 - If you're using our Email Subscription Manager tool, you'll need a tag category specific to your email subscriptions.
- Rules
 - These tags are only used with the Email Subscription Manager tool and for pulling lists of people subscribed to your different emails.
- Nomenclature
 - Name the tags with names that will make sense to your prospects/clients/etc. They will see names in a list of checkboxes they can subscribe and unsubscribe from.
 - ie. Email Subscription - Weekly Newsletter
 - ie. Email Subscription - Special Offers
 - ie. Email Subscription - Monthly Digest
 - ie. Email Subscription - Industry News

Subcategories:

As you build out your tags, you may find that you need “subcategories” to stay more organized. Infusionsoft does not allow for subcategories. So, you can create them by prepending your tag names with the subcategory name. Here are some examples and their uses:

❖ Billing Status

- Description
 - Although billing statuses can be related to a specific product (i.e. a subscription), if you're running a multiple subscription programs or selling many different products on payment plans, you may want to create a subcategory called "Billing Status".
- Rules
 - These tags live within the Status category but are prepended with "Billing Status".
- Nomenclature
 - ie. Billing Status - Credit Card - Valid (applied after a successful payment)
 - ie. Billing Status - Credit Card - About To Expire (applied from billing trigger)
 - ie. Billing Status - Credit Card - Failed (applied after failed payment)

❖ Access

- Description
 - When running a membership site, you want to protect content from people who shouldn't be able to see it and grant access to people who should be able to see it. A subcategory called "Access" will help keep these tags separate and organized from your other tags.
- Rules
 - Access tags live within the "Status" category but are prepended with "Access".
- Nomenclature
 - Access - Membership - Item - Access (or Blocked)
 - Access - Course - Lesson - Access (or Blocked)
 - ie. Access - DYS Club - Downloads - Access
- Types
 - Access
 - Blocked

Cleaning Up Your Tags:

If you've been using Infusionsoft for a while and your tags are not organized as well as they should be, you'll need to go through a cleaning/organizing process. It's a bit of a pain. But don't worry, there's a method to the madness. Follow these steps:

1. **Create Standard Categories.** Create the 6 standard categories above
2. **Sort Your Existing Tags.** Go through your existing tags and determine which ones can be easily sorted into those 6 categories. Edit them and move them into the appropriate

category and rename them according to the convention as you do so. Some tags will have been erroneously created with multiple functions. If you're not sure if a tag triggers a goal and also is being used for reporting purposes, or decision diamond purposes, or some other purpose, then leave those alone while you sort the rest.

3. **Determine Where Tags Are Being Applied.** Once you're done sorting all the tags you can sort, you'll need to figure out which tags need to be replaced with multiple tags. To do so, edit each tag and click the link that says [This Tag may be applied by...0 Sequences, 0 Emails, 0 Forms](#). That will let you know where the tag may be applied. It does not tell you where the tag may be used to achieve a goal.
4. **Determine Which Goals Tags Achieve.** If you suspect a tag may be used to achieve a goal, open up a test contact and apply the tag (make sure the contact doesn't already have the tag). Then go immediately to the "Recent Campaign History" for that contact and see which Campaign Goal(s) are triggered.
5. **Create Tags For Every Function.** Once you've identified the tags functions, create additional tags for every function and replace them in your campaigns.

Tagging Best Practices:

- If you run a similar activity on a regular basis, and a set of tags is created each time, you may consider "archiving" those tags after a period of time. For example, if you run a weekly webinar, each week you will have a tag for the people who registered, attended, watched the replay, etc. It may be important within a short amount of time to know who was in each of those groups. But 6 months to 1 year later, it probably doesn't matter. So, those tags can be consolidated and archived into on generic activity tag each. Instead of having the specifics for the exact topic and week, a tag like "Weekly Webinar - Lead Generation - 9 Sep 2015 - Registered" could be archived as "Weekly Webinar - 2015 - Registered" and all 2015 registered tags could be deleted and those people tagged with the generic tag.
- When creating tags as part of a campaign or a process where many tags need to be created, use a comma separated list to create more than one at a time.
- Often tags are created in pairs or even in a group of three. An activity tag is often paired with some kind of "result" tag. For example, when someone purchases a membership, they get a "Purchased" tag. But they also get an "Access" tag for the membership site. And they might also get a "Status" tag as a "New Member". Don't hesitate to use multiples. Each of these tags has a purpose. Trying to combine them into one tag will cause problems down the road.