

# THE BLUEPRINT TO GETTING **THE MOST**

(PROFIT, INTELLIGENCE & MORE)

# FROM YOUR **INFUSIONSOFT** TAGS



**SEGMETRICS**

# Getting the Most From Infusionsoft

You don't need to be talked into using Infusionsoft for your marketing automation. You already use it, which is why you're here.

But are you using Infusionsoft to its full potential?

Infusionsoft is a very powerful tool out of the box. Without tons of setup, you can begin sending broadcasts emails to your list, sell your products, process subscription payments and, most importantly, put your leads through automated marketing funnels.

However, in order to get the most bang for your buck -- and truly reap the rewards of automated marketing -- you need to invest significant time and thought into how you tag your leads.

We at SegMetrics know from plenty of experience that a smart tagging system can generate game-changing spikes in revenue and lead values. We've helped customers go from \$0 to six-figure automated marketing funnels with a good tagging system. We've also helped them identify highly profitable lead using the powerful analytics that tagging provides.

But implementing a comprehensive tagging system can be overwhelming for novice and experienced Infusionsoft users alike. Who do you tag? What tag do you give them? When? OR WHAT'S A TAG!?!?

If you're hyperventilating right now, find a paper bag, breathe into it and relax. Because we're about to show you how Tags can make your business smarter, more efficient and more profitable.

Here we go ...

# What's the point of Tags?

Great question. We're glad you asked.

There are two key reasons for tagging people: 1) To build a lead database in order to generate actionable analytics and 2) To serve highly relevant marketing to your leads based on who they are.

**To speak broadly, Tags are what let you define who your different leads are and what they've done.** For example, if someone signs up for a webinar, you tag them. If someone was referred to you by an affiliate, you tag them. If someone has bought more than one product from you, you tag them. You get the idea -- for every action or behavior that is critical to your business, you should apply a corresponding Tag.

**This tagging process creates an extremely valuable asset -- a lead database.** Each time you apply a Tag you add a datapoint to your database, and this helps you better define who your leads are.

Think of this lead database as the knowledge center that will inform all of your future marketing. The more smart, relevant information you add to it, the more actionable analytics you will be able to generate, and the smarter and more relevant your subsequent marketing will be.

Once you have begun to identify who your individual leads are, you can start to break them into different segments of people with shared traits. Now you can market to each of those segments differently, delivering them content that is custom-fit to who they are.

**This is where Tags make you money**, because serving content that is specific to who each lead is -- what they have done, what they like, what they've purchased -- is the most powerful marketing tactic available to you and the most surefire way to increase your Lead Values.

# The Tags Every Smart Marketer Needs

Here are some of the critical Tags that we have used for our clients. We have divided them into the Tag Categories and Tag Names we suggest using to build your own actionable database and profitable automated campaigns.



## Category: **Customers**

### 📌 **All Customers** customer

Apply this Tag to all of your leads who have purchased one of your products. This Tag will be extremely helpful for analyzing the value of all of your customers. It also will be critical for creating Advanced Segments and offering your existing customers special promotions and cross-sells

### 📌 **Repeat Customers** customer-repeat

Now we're finding value! Tag all customers who have made 2+ purchases. These will be your most valuable leads. By analyzing their common traits you can begin to develop a formula for the Lead Sources you should target

### 📌 **Per Product** customer-{product}

For each individual product you sell you should have a corresponding Tag that has the name of the Product. This lets you Segment your buyers of your \$29 e-book separately from buyers of your \$2,000 information product

### 📌 **Delinquent Cards** customer-delinquent

Tag people who are delinquent on their payments. Your Customer Service team will thank you for this.

### 📌 **New customers** customer-new

Apply this Tag to all leads who have made their first purchase within the past 30 days. You may decide that you want to give extra-special customer service to your new buyers in order to win their trust -- this Tag will be critical for that.

**IMPORTANT: You will need to also set up the automation of having this Tag removed after 30 days**

### 📌 **Refunds** customer-refund

It happens -- some people will refund your products. It's important to track them in order to weed out problem customers who routinely buy your products and refund them, or to automate a sequence whereby you poll these customers about why they refunded. This data can be invaluable for improving your product and its positioning



## Category: **Lead Sources**



### **Paid Leads**

paid - {source} - {campaign}

Crucial for all companies with a Paid Traffic strategy. Tag leads when they opt in to your list or buy something from an ad campaign. Example: “Paid Lead - Facebook Ads - Sales Page Retargeting”. (This will require some critical dev work. We'll help during your free 30-minute consultation.)



### **Referrals**

referral - {source name}

Do you have referral sources that aren't affiliates that send you a bunch of leads? Start tracking the impact that those referral sources have. For example, if you have a ton of Google Organic Traffic, start tagging them with “Referral Source - Google Organic”. (We know the dev part of this can be tricky. That's why we're offering a free consultation to help you set this up correctly.)



### **Affiliates**

affiliate - {affiliate name}

Each time a lead opts in to your list from one of your affiliates, give them a Tag with that affiliate's name. For instance, if we at SegMetrics were your affiliate and sent you a lead you would tag them as “Affiliate - SegMetrics”



## Category: **Content Leads**



### **Lead Magnets**

{lead magnet name}

A Lead Magnet is a free informational snippet given to readers in exchange for their email address. It can be a PDF download, a video or entry into an email sequence of free content. Lead Magnets are essentially for list-building, that's why it's important to track which Lead Magnets people opt in for. Example: We would tag opt ins to our ICON 2015 Free Blueprint as exactly that: “ICON 2015 Free Blueprint”



### **Webinars**

{webinar name} - {webinar date}

Webinars can be critical to generating new leads and converting them to sale. Make sure to set up detailed tracking so that you can measure their list-building and sales value. Example: “Webinar with SegMetrics Dudes: How To Use Tags To Do Awesome Things - April 2015”



## 📌 **Evergreen Funnels** evergreen - {funnel name}

Every time you enter someone into an automated (or “Evergreen”) sales sequence, make note of it. This will not only help you better your automation in the Campaign Builder, it will also help you monetize each of your automated funnels and track which products your leads have been pitched. For example, tag all leads who have been through your funnel pitching your “Become A Chess Master” product with “Evergreen Funnel -- Become A Chess Master Sales Funnel”

## 📌 **Down Sells** downsell - {funnel name}

By the same token, every time you pitch people who DIDN'T buy one of your products previously, make note of when you deliver these people a down-sell sequence

## 📌 **Cross Sells** crosssell - {funnel name}

Oh, so you're a sophisticated marketer who has automated the pitching of products to people who have already purchased other products? Bravo.

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Ready to Supercharge  
Your Sales With Your New Tags?

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# How To Supercharge Your Sales

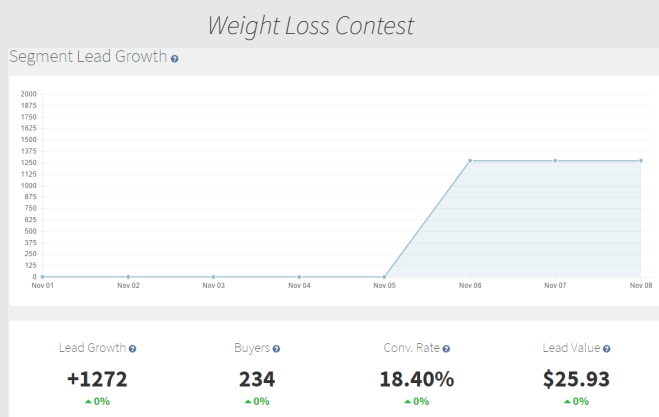
Now that you're tagging your leads and customers properly, you can begin understanding them. We'll use one of our SegMetrics customers -- DrAxe.com, a leading health blog -- to show you a couple ways to do this.



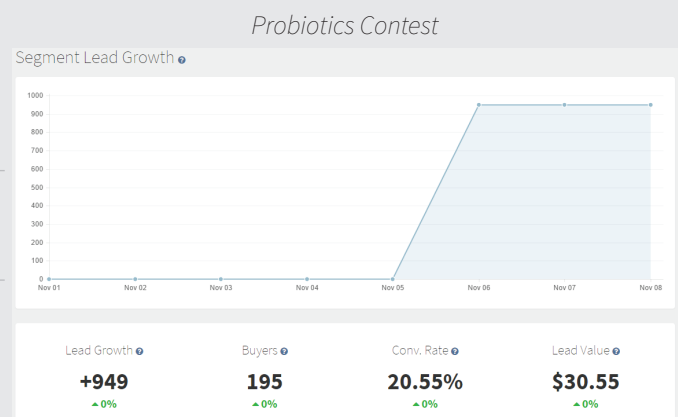
## Part I: Analytics

In November 2014, DrAxe.com ran two Facebook contests to generate leads. The first FB contest gave away a product offering related to probiotics. The second delivered a product offering related to weight loss.

Using SegMetrics, we see that the **Weight Loss Contest generated 34% more leads but the Probiotics Contest generated an 18% higher Lead Value!**



34% more leads, but less value!



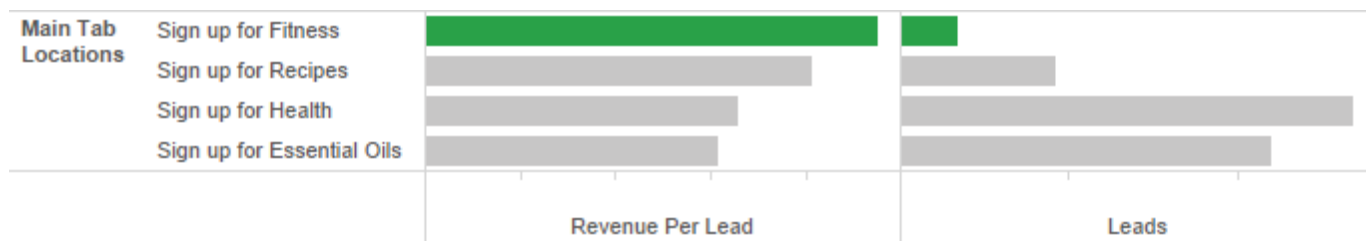
Lower leads, but 18% higher value!

This means that overall the Weight Loss Contest has generated 14% more total revenue, which is the end-goal of most online companies. So if Dr Axe wants to raise the bottom line, you'd think they should run another Weight Loss Contest.

But what if they found a Lead Source that is heavily interested in Probiotics? **If they can find more of the higher value leads -- \$30.55 vs. \$25.93 -- they could have their cake and eat it too!**

This is one of the many ways you can use Tags to determine your most valuable marketing assets, both in terms of sales they generate and the quality of leads. See the next page for another:

DrAxe.com also used SegMetrics' advanced consulting services to determine the values of the Lead Magnets on their website. To their surprise, we found that people who signed up for their Fitness Lead Magnet **have been worth 36% more than their average Lead Magnet!**



Interestingly, note that “Fitness” has had the fewest amount of opt-ins but the most profitable leads. This is a clear-cut, actionable finding: DrAxe.com needs to prioritize marketing to fitness enthusiasts to test our acting assumption that Fitness leads are more valuable.

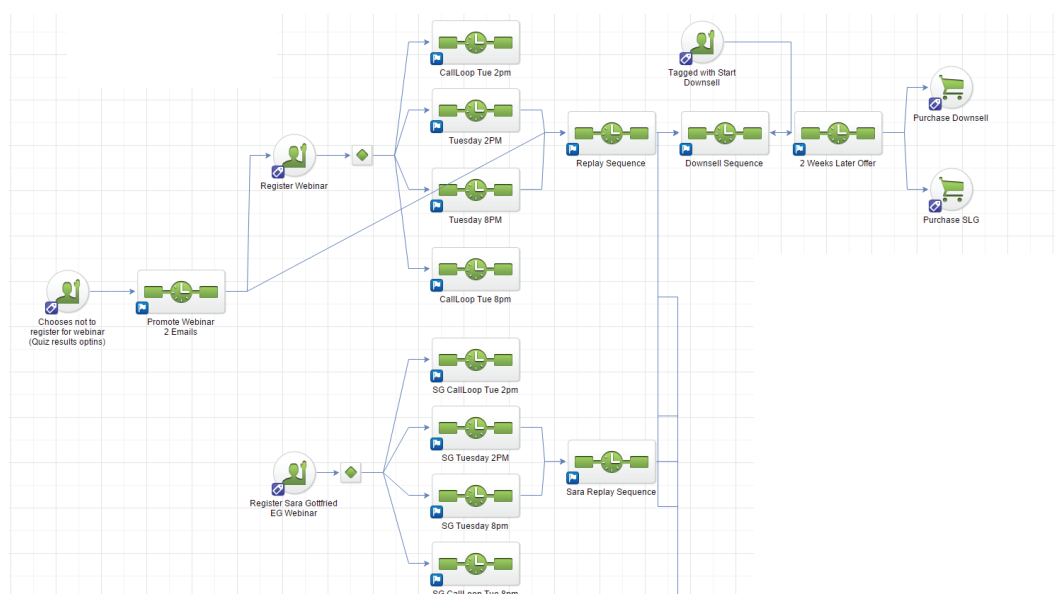


## Part II: Automation & Optimized Messages

Here are some of our favorites ways to use Tags (and their resulting Segments) to create greater automation and highly targeted content:

### 1) Optimized Automation Based on Tags

Here is an Evergreen sequence of another one of our customers. This is super-sophisticated and super-successful stuff:





Note that a lead is put into a different part of an Evergreen Sales Funnel based on the Tag that was applied to them when they opted in. This SegMetrics customer has found that different leads monetize in different ways depending on the content they are served. Accordingly, they have set up **different paths depending on the Tags applied to each Lead**.

Imagine that you found that people with your “Webinar with SegMetrics Dudes: How To Use Tags To Do Awesome Things - April 2015” Tag are worth \$50 per lead when they are put through Funnel 1, but are worth \$100 per lead when put through Funnel 2? How extremely valuable would it be for you to automate putting leads from that Lead Source into Funnel 2? We know -- a lot.

## 2) Retroactive Optimization of Neglected Leads

You can also retroactively apply to Tags to users in order to enter them into an automated sequence. This is a tremendously helpful tactic for when you find a Segment of leads who have NOT been pitched your products. Here's an example of how in Infusionsoft you'd find a Segment that neither owns a product nor has been put through an automated funnel:

The screenshot shows the 'Email Status Search' interface in Infusionsoft. It features a top navigation bar with tabs: Search, General, Address, Phone/Email, Custom Fields, Misc Criteria, and Columns. A dropdown menu on the right indicates 'No options available'. Below the navigation bar, there are three main filter sections:

- Tag Ids:** A dropdown menu set to 'Doesn't have ANY of'. The list of tags includes: PLP Prospect PPC Campaigns -> plp-retargeting, PLP Prospect PPC Campaigns -> plp-scd-fans, Prospect Control -> PLP Webinar 2015-02-02 Replay, Prospect Control -> Start Downsell, Prospect Control -> Trigger SMS Reminder, Prospect Control -> Trigger SMS Reminder [PLP], and Prospect Tags -> Carol Lovett - Live.
- Tags 2:** A dropdown menu set to 'With ANY of these Ta'. The list of tags includes: Affiliate Tags -> Check, Affiliate Tags -> Chris Kresser Lead, Affiliate Tags -> PayPal, Affiliate Tags -> Sean Croxton Lead, Affiliate Tags -> Solving Leaky Gut Affiliate, CC Hacked, and Customer Tags -> Solving Leaky Gut.
- Purchased Products:** A dropdown menu set to 'doesn't contain any'. The list of products includes: Solving Leaky Gut, Solving Leaky Gut: Gluten Sensitivity 60-day Pack (CAN-SHIPPING INCLUDED), Solving Leaky Gut: 60-Day Tough Case Supplement Package (US-SHIPPING INCLUDED), Solving Leaky Gut Masterclass Special, Solving Leaky Gut: Constipation Supplements (US-SHIPPING INCLUDED), Solving Leaky Gut: 60-Day Mild Case Supplement Package (INT-SHIPPING INCLUDED), and Solving Leaky Gut: 60-Day Adrenal Supplement Package (CANADA-SHIPPING INCLUDED).

Once you identify this Segment, you could apply a new Tag to them -- e.g., “Start Evergreen Funnel 1 -- Manual Override” -- that would manually enter them into an Evergreen Sequence. At SegMetrics, we've seen this unlock amazing hidden revenue streams.

### 3) Automation for High Performers

This is one of our favorite tactics. With advanced segmentation you can begin to find your most valuable leads -- and make them even more valuable.

For instance, if you have properly tagged your leads, you could target an automated sequence at only “Facebook Leads who have purchased more than 3 products in the past 60 days”. (Yes, we know this Segment is probably too specific, but you get the point we're making.)

Or maybe you identify a certain Affiliate as being your most profitable Lead Source but notice that 75% of the leads have not attended one of your webinars. You could create a campaign to drive webinar signups that targets only leads from your top affiliate that have not previously been to a webinar.

### 4) Create Content Variations

Create variations of your content, tailored to a specific Lead Source, to drive CRAZY-HIGH conversions.

When you Tag all of your leads based on their Affiliate or Referral Source, you can position your marketing materials to remind your leads that you know who they are and what they're interested in. This makes them feel very loved -- and warms them to the idea of buying.

For instance, if we knew that Lifehacker.com generated a significant number of high-value leads, we could then create an automated sequence that delivers emails that are Lifehacker-branded.

Their Welcome Email could start with ...

“Hey, thanks for reading our article on Lifehacker! Here's something you might want to know...”

... And we could direct them to a Landing Page that says:

“The perfect marketing automation course for Lifehacker readers!”

Trust us, this converts like crazy.



# Find the Lead Values of All Your Tags

(aka, The Most Important Metric For Infusionsoft Users)

As you can see, we put a ton of emphasis on measuring the monetization of leads based on the Tags they have. Lead Value is the Numero Uno metric at SegMetrics.

Want to discover the Lead Values of all of your Infusionsoft Tags? Then sign up for our special offer of Segmetrics available only to Microconf attendees: <http://segmetrics.io/hi/microconf/>. We'll give you instant access to all of your Tag Lead Values, plus a free consultation session to help you set up your Tags for success.

Want to crunch the numbers yourself? Well, okay, we can help you with that too. Here's a guide for calculating Lead Values manually using Infusionsoft CSV exports and Excel functions. Be warned -- this is powerful, but will take a ton of time. We've automated the whole thing through SegMetrics, but we want to show you all the work that goes into it.

Get the Manual Guide to Understanding Your Leads at <http://segmetrics.io/hi/ultimate-leads/>

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Discover Your Lead Value  
14 Day Trial

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<http://segmetrics.io>