INFUSIONSOFT TAGGING SYSTEM

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Introduction

The use of tags is one of the most powerful features of Infusionsoft. Tags are simply labels that can be attached to contacts in order to sort them into meaningful groups by – for example - interests, demographics, or behavior.

Infusionsoft users can apply tags to contact records manually. Often, tags will be applied or removed by campaign automation. As a business grows so does the list of tags in Infusionsoft, often into the hundreds of tags. Without a clear, logic and consistent naming and categorizing of tags it will be impossible to find what you are looking for, and maintaining your automation and contacts will become a nightmare.

We STRONGLY recommend that you use a naming convention that is logical and well structured. We don't claim that the naming convention introduced in this document is the only possible solution or that it is 100% complete - but it is based on years of experience and best practices. You are welcome to adopt what fits your business, to add what's missing for you, and to adjust what doesn't fit your needs.

Get creative and have fun!!

Ground Rules

The "non-negotiable four"

1. Do not ever create a tag without assigning it to a category!
2. Do not ever create a tag without following a consistent, logical naming convention!
3. Name every tag so that its function is immediately clear!
4. Name tags "Left to right = Big to Small" and use international date and time formats!

Name your tags "Left to Right = Big to Small" (always!)

Infusionsoft sorts lists of tags first by category, then alphabetically. In lists of hundreds or thousands of tags it is absolutely essential that they group together correctly and sort in the right order, so that information that belongs together shows up together. That's why we apply the "Left to Right = Big to Small" rule, so from left to right, so we go from "Broad – More specific – Very specific" in as many steps as necessary. Use hyphens to clearly separate out the parts of the tag name, and to increase readability.

Examples:

Good: sorting correctly	Bad: same tags, but sorting incorrectly
Free Report – Dogs – Opted In	Downloaded Cats Report
Free Report – Dogs – Downloaded	Downloaded Report about Dogs
Free Report – Cats – Opted In	Interested in Cats
Free Report – Cats – Downloaded	Interested in Dogs
Interests – Animals – Cats	Opted in for Dogs Report
Interests – Animals – Dogs	Opted in for the Cats Report
Division A – Sales Report – Requested	Delivered Sales Report for Division A
Division A – Sales Report – Delivered	Delivered Sales Report for Division B
Division B – Sales Report – Requested	Requested Sales Report for Division A
Division B – Sales Report – Delivered	Requested Sales Report for Division B

Use international Date and Time formats (always!)

Sometimes (e.g. for live events) it is necessary to include dates or times in tag names.
Date format: **always** international format with all digits "YYYY-MM-DD" (Year – Month – Day)
Time format: **always** international 24h format with all digits: "HH:mm" (Hour:Minute)

Examples:

Good: sorting correctly	Bad: same tags, but sorting incorrectly
Sales Event 2017-04-16	Sales Event 10-3-18
Sales Event 2017-12-03	Sales Event 12-3-17
Sales Event 2018-10-03	Sales Event 4-16-17
Mentorship Group 2017-05	Mentorship Group Dec 17
Mentorship Group 2017-12	Mentorship Group May 17
Sales Event 2017-12-03 - 09:00 – Registered	Sales Event 2017-12-03 - 6pm – Registered
Sales Event 2017-12-03 - 18:00 – Registered	Sales Event 2017-12-03 - 9am – Registered

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Best Practice Tag Categories

PROFILE

- Profile tags document a contact's demographics and psychographics.

- Profile tags define who a contact IS, regardless of activity. Therefore, profile tags are permanent.

- **Type Examples**: Demographics, Location, Interests, Psychographics, Pains, Desires, etc.

- Examples:
  010 Profile -> Demographics – Gender – Male
  010 Profile -> Demographics – Gender – Female
  010 Profile -> Demographics – Age – 70-80
  010 Profile -> Location – City – Denver
  010 Profile -> Location – Country – Denmark
  010 Profile -> Interest – Activity – Skydiving
  010 Profile -> Interest – Colors – Purple

HISTORY

- **History tags document the actions and steps that a contact has taken in the past. They tell a story of a contact's journey.**

- History tags carry information about which steps or actions a contact has taken or been through in the past, therefore, they are *permanent*.

- **Type Examples**: Clicked, Purchased, Form Submitted, Downloaded, etc.

- **Examples**:
  020 History -> Customer Wow Campaign – Survey – Link to Survey - Clicked
  020 History -> Refer a Friend Campaign – Referral Form - Clicked
  020 History -> Refer a Friend Campaign – Referral Form - Submitted
  020 History -> Free Gift Campaign – Free Report - Downloaded

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STATUS

- Status tags indicate the (temporary) status of a contact within a process or campaign or a lifecycle.

- Status tags are assigned to and removed from contacts as they progress on their journey through a process or lifecycle (mostly by automation), therefore they are *temporary*.

- **Type Examples**: In Sequence, Path, Active, Inactive, etc.

- **Examples**:
  030 Status -> Sales Pipeline – Nurture Sequence – In Sequence

COMMUNICATION

- Communication tags are used to indicate a contact's communication preferences (e.g. opted in or out for specific campaigns, newsletter subscriptions etc.).

- Communication preference tags need to be applied by a user or by automation as a contact's preferences change, therefore they are *temporary*.

- **Type Examples**: Newsletters, Areas of interest, Opted out of specific information (rather than opting out completely)

- **Examples**:
  040 Communication -> Easy Money Newsletter – Subscribed
  040 Communication -> Easy Money Newsletter – Opted Out
  040 Communication -> SMS – Opted Out
  040 Communication -> SMS – Invalid Number

EVENTS

- If you are running lots of events, and you have many tags associated with your events, it can be useful to create a dedicated category for events, or even several categories for your different types of events - otherwise your "History" category will get very full.

- Examples:
  050 Events -> Preview – 2017-09-22 – 18:30 – Dallas – Registered
  050 Events -> Webinar – Find Your Soulmate – 2017-07-15 – Registered
  050 Events -> Webinar – Find Your Soulmate – 2017-07-15 – Attended

- According to your needs you may create as many categories or sub-categories as are useful - for example:
  050 Events – Live
  052 Events – Tours
  052 Events – Webinars

MEMBERSHIP

- If you're offering many services or products as memberships you may want to create this category to keep track of your members e.g. if they are active, canceled or suspended.
- **Examples:**
  060 Membership -> Success Club – Active Member
  060 Membership -> VIP Training – Past Member

- Alternatively this can be created as a sub-category of the "Status" category by beginning every tag name with the word "Membership".
  030 Status -> Membership – Success Club – Active Member
  030 Status -> Membership – VIP Training – Past Member
  030 Status -> Sales Tour – Event Reminders – Split Test – In Path A
  030 Status -> Membership – Gold Membership – Active

BILLING

- If you have several products, subscription plans, membership sites and the like, it can be useful to create a dedicated category for those tags to track payments that were successful, unsuccessful, declined, or credit cards that failed, are invalid or about to expire.
- Examples:
  070 Billing -> Credit Card – Expired
  070 Billing -> Refund – Processed
- Alternatively this can be created as a sub-category of the "Status" category by beginning every tag name with the word "Billing".
  030 Status -> Billing – Credit Card – Expired
  030 Status -> Billing – Refund – Processed

USER TO-DOS

- **User to-do tags are being used to indicate a specific to-do for an Infusionsoft user or Admin.** This is sometimes more practical and faster than assigning tasks or using fulfillment lists. A saved search over specific User Todo tags can be placed on an admin's dashboard and their job is to get the list to 0.

- Per definition to-do tags are *temporary* and need to be removed by the user, once the task has been completed.

- Examples:
  080 User ToDo -> Customer Retention – Send Gift Basket
  080 User ToDo -> Lead Intake – New Contact – Complete Profile Data

- **Alternative Category Name**: Operations, Admin

TRIGGER

- **Trigger tags are being used to trigger internal or 3rd party automation processes.**

- Trigger tags **must be removed immediately** (automatically, by the triggered process) after the triggered action has been initiated. This is necessary so that the same action can be triggered again at a later point in time. Tags that store temporary information (e.g. for a decision is a process) must be removed after they are no longer required.

- **Type Examples**: START, STOP, LOOP

- **Naming**: Campaign – Sequence – TYPE
  It is **very important** to recognize trigger tags at a first glance - that's why this is the only use case where we recommend using upper case for the trigger type (see examples).

- **Examples**:
  100 TRIGGER -> Webinar – Invite Sequence – START
  100 TRIGGER -> Long Term Nurture – Email Delivery Sequence – STOP

TEMP

- **Temp tags are being used for temporary purposes**, e.g. to temporarily remember a specific group of contacts until executing some action on them, or for complex, multi-step searches.

- Temp tags should be deleted, either in regular intervals or directly after use.

- **Naming**: Broad – More specific – Very specific

"ZZZ OBSOLETE"

Use the "Obsolete" category to retire tags that are no longer (frequently) needed, instead of deleting them (you may still need that information some day). Prepending the letter "Z" moves this category and all associated tags to the very end of all tag lists and our of your sight.

ZZZ Obsolete   Safety-catch-all for tags that are no longer needed (instead of deleting them right away we just take them out of the list of active tags)

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Summary

Here is a complete list of the categories as described above. By prepending numbers to your category names you can sort them in the way that's most useful for your purposes.

010 Profile	Demographics and psychographics. Profile tags are permanent
020 History	Actions and steps a contact has taken in the past. Permanent.
030 Status	Temporary status of a contact within a process. Temporary.
040 Communication	Communication preferences (subscribed, unsubscribed, interest in certain communication. Semi-permanent, can change.
050 Events	Indicate that a contact is signed up for or has attended certain events
060 Membership	Tags indicating membership levels and programs
070 Billing	Tags indicating billing related status or issues
080 User Todo	Indicate a ToDo for a user or admin. ToDo tags are temporary and need to be removed once the todo has been completed.
100 TRIGGER	Trigger internal or 3rd party automation processes. Must be removed immediately after the triggered action has been initiated
110 Temp	For temporary purposes (maintenance, sorting), created and on a per-need basis. Delete after use.

Campaign Categories and Naming Convention

Apply the same principles as for your tags also to your campaign names.

Here are some ideas and recommendation for useful campaign categories:
1. **Marketing** – marketing and promotional
2. **Nurture** – Long term nurture and newsletters
3. **Sales** – selling products and courses
4. **Fulfillment** – delivery of products and courses
5. **Billing** – billing related automation
6. **Rapport** – customer wow campaigns, surveys, social media, testimonials
7. **Admin** – internal forms for admins and related automation
8. **System** – background and system automation
9. **Z - Obsolete** – burial ground for retired campaigns

Design your campaign names like tag names – from left to right = big to small.
Begin the Campaign name with the category name.

Examples:
Marketing – Website Opt-In Forms
Marketing - Lead Magnet to Prospect
Marketing – Long-Term Nurture to Opt In
Marketing - Webinar to Purchase
Sales - Prospect to Close
Fulfillment - Purchased to Delivered