The Ultimate Marketing Blueprint:

Building Optimized Tagging Strategies

SEGMETRICS

Optimizing Your Marketing Through Tagging

As a whole, your CRM is an extremely powerful sales and marketing automation tool. Even though it has likely already helped you make some improvements, are you using all the tools at your disposal to get the information that will allow your business to rise to its full potential?

In order to get the most bang for your buck - and truly reap the rewards of automated marketing - you need to set your tags up in a way that maximizes the potential value of leads.

The SegMetrics team draws on our experience as creators of smart-tagging systems proven to generate game-changing spikes in revenue and lead values. We've helped customers go from $0 to six-figure automated marketing funnels with a combination of expert reporting and solid tagging strategies. We'll show you exactly how to find your most profitable leads using the powerful analytics that tagging can provide.

Implementing a comprehensive tagging system can be overwhelming for novice and experienced marketers alike. Who do you tag? What information should you track?

There's more than one approach to developing your tagging strategy. We stand by this one and want to show you how Tags can make your business smarter, more efficient and more profitable.

Here we go …

Unlock the Power of Tagging

There are two key reasons for tagging people:

1. To build a lead database in order to generate actionable analytics
2. To serve highly relevant marketing to your leads based on who they are and how they have interacted with your brand.

Tags let you define different groups of leads by what they've done. For example, if someone signs up for a webinar, give them a tag. If someone was referred to you by an affiliate, tag them to show it. If someone has bought more than one product from you, tag 'em. You get the idea - for every lead action or behavior, it's critical to your business that you apply a corresponding Tag.

By tagging your leads' interactions, you're generating an extremely valuable asset - a database. Each time you apply a Tag you add a datapoint to your database, and over time this helps you learn what makes your audience tick.

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

Once you identify individual leads with shared traits, you can start to group them into different segments. You'll be able to market to each of those segments very differently, delivering them content that is custom-fit to their personalities.

This is where Tags can really skyrocket Lead Value and start making you money. Drawing on the actionable analytics from your database and tailoring content to each lead based on what you know about them - 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 Tags that have proven most essential for our clients, grouped by Categories. We've also provided examples of the tag-naming format you can use to build your actionable database and profitable automated campaigns.

There are three main categories of tags that you should have in your tagging strategy, and we'll walk you through the best way to think about and set these up.

Customer Tags
Tags that help you track people who become customers, and how they interact with your products (refunds, delinquencies, etc)

Touch Point Tags
These are tags that monitor what people do while they're a lead. They help you understand which marketing efforts both bring you the most leads, and make you the most money.

Campaign Tags
These tags help track leads as they go through each of your marketing funnels. They track when people enter and leave the funnel, as well as how they interact with the various *touch points* in your marketing funnel.

Tag Category: Customers

All Customers

customer

Apply this Tag to every lead who has purchased one of your products. This Tag will be extremely helpful for analyzing the value of all of your customers, and is critical for strategies like 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 Tags

customer-{product}

For each individual product you sell, create a corresponding Tag with the product's name. The buyers of your $29 e-book will probably differ from buyers your $2,000 information product - with product tags you can find out exactly why that is. This is also the tag that will kick off any content delivery campaigns you have for customers.

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.

Tag Category: Touch Points

Optin Magnets & PDFs

optin - {magnet name}

An Optin Magnet is a free informational snippet given to readers in exchange for their email address. It can be a PDF download, webinar, quiz, or entry into an email sequence of free content. Optin Magnets are essentially for list-building, that's why it's important to track which Optin Magnets people opt in for. Example: We would tag opt ins to this Ultimate Tagging Blueprint as exactly that: "Optin - Ultimate Tagging Blueprint"

Live & Evergreen Webinars

webinar - {name} - {date}

Webinars can be critical to generating new leads and converting them to a sale. In fact, in recent years webinars have become so popular that people build their entire nurture sequences around them. Because there are a number of actions that people can take during a webinar, it's best to have a series of tags for each webinar that you're going to put on.

This tagging structure works equally well for live or evergreen (pre-recorded) webinars. The first thing you will need to do is to choose the **tag name** for the webinar. This is usually a shortened version of the webinar name, along with the date of the webinar (if it's live). Some good tag names would be "earn more today v3" for an evergreen webinar, or "earn more today 2018-07-23" for a live webinar.

Then, using the tag name, create the following tags:

- **webinar - {tag name} - registered**: This is applied to all contacts who register for the webinar.
- **webinar - {tag name} - request sms**: This is applied to contacts who request to be notified by SMS before the webinar starts.
- **webinar - {tag name} - attended**: Applied to all contacts who attend the webinar.
- **webinar - {tag name} - completed**: Applied to all contacts who stayed until the end of the webinar.
- **webinar - {tag name} - purchased**: Applied to all contacts who purchased *from the webinar itself*

Following this tag format will allow you to easily see a breakdown of how much each step of webinar funnel was worth.

Sales Calls

call-{name}-{action}

As products go further and further upscale, it becomes more and more viable to do in-person sales calls as part of the nurture sequence. Tracking these sales calls through tags is similar to the webinar tracking, in that you will choose a **tag name** for the sales sequence, and then apply a number of tags based on user's actions through the sequence.

The **tag name** is usually the name of the sales call campaign. We'll go over creating effective campaign tagging in the next section.

Using the tag name, create the following tags:

- **call - {tag name} - requested**: This is applied to all contacts who register for the sales call.
- **call - {tag name} - attended**: Applied to people who attend the sales call
- **call - {tag name} - missed**: Applied If the person missed the call, or was a no-show
- **call - {tag name} - good fit**: If the candidate looks to be a good fit for the program
- **call - {tag name} - bad fit**: If the candidate isn't right for the program

You'll notice that we don't have a *purchased* tag in the calls, as we assume that if they are going to purchase, they do so on the call, and then have the *customer* tag applied to them.

Split Testing

split-{test name}-A

Split testing (also referred to as A/B testing) is a way to optimize the conversion rate of aspects of your funnel. You can use split testing to test different optin pages, email content, or even price points.

In order to run a split test in your campaign, set up a fork (or decision diamond) in your campaign that randomly sends people down 2 (or more different paths). Then tag contacts who go down each path, and see which performs better.

Using split-testing for campaigns is incredibly important, as most split-testing software only looks at the **immediate result** of the test -- whether someone bought right now or not. However, in direct marketing it is often **more** important to look at users in the long term (30, 90, 180 days) to see how lead values increase over time.

Tag Category: Campaigns

Now it's time to put it all together.

We've hinted at campaign tagging previously, and to be honest, it's probably the most important tagging strategy that you'll want to implement in your marketing.

Following the strategy below lets you understand where people are coming into your marketing, what they've experienced, and finally what causes them to purchase. And it does this in a way that will let you track the effectiveness of your campaigns days, months, even years after your contacts have gone through them.

And it gets even better with SegMetrics tag reporting.

SegMetrics allows you to pull "Campaign Reports" that break down contacts by tag prefix. So if you use a consistent naming structure for your campaign tags, you can easily see how each step of your funnel affects your lead value, and sales revenue.

Here's an example of how the report looks:

Name	Leads	Customers	Conv Rate	Revenue	Lead Value
seq - 30-Day Nurture Sequence: Start	5,792	97	1.67%	$9,991	$1.72
seq - 30-Day Nurture Sequence: Completed	3,038	97	3.19%	$9,991	$3.29
seq - 30-Day Nurture Sequence: Active	2,754	0	0%	$0	$0
seq - 30-Day Nurture Sequence: Download PDF	2,985	46	1.54%	$4,738	$1.59
seq - 30-Day Nurture Sequence: Webinar - Register	2,618	51	1.95%	$5,253	$2.01
seq - 30-Day Nurture Sequence: Webinar - Attend	1,617	51	3.15%	$5,253	$3.24
seq - 30-Day Nurture Sequence: Purchase	97	97	100%	$9,991	$103

As we can see, it's profitable to get people to attend the webinar.

For each campaign, there are 6 tags that are **required** to track people through the funnel, and then a number of **optional** tags that you can use to track the various **touch points** as people go through the campaign.

Required Tags

- **seq- {campaign name}: Start**: Applied to all contacts who go through the funnel. This tag will be the main tag we look at when judging the lead-generation ability of the funnel.
- **seq - {campaign name}: Completed**: Applied to everyone at the end of the funnel (whether they purchase or not). This tag will be the main tag we look at when judging the profitability of a funnel, as anyone with this tag will have completed the funnel.
- **seq - {campaign name}: Active**: Shows people who are currently in the funnel. It should be removed at the end of the funnel.
- **In active campaign:** This tag signifies whether a lead is currently going through one of your funnels, and often used to remove people from other funnels or newsletters while they are going through a funnel. *It should be removed at the end of the funnel.*
- **seq - {campaign name}: Purchase**: If the contact purchases from this funnel, tag them to delineate from purchases they might have made through other places on the site.
- **seq - {campaign name}: Origin**: This tag is applied only if this is the first campaign that the contact goes through. It's set to show which campaigns bring in the most people, and are the most effective at long-term conversions

Optional Tags

In addition to the 6 required tags above, it's recommended that you use campaign-specific versions of the Lead Source tags above to measure the effectiveness of various touch points throughout your funnel.

Some examples of these might be:

- **seq - {campaign name}: Download PDF**
- **seq - {campaign name}: Webinar - Register**
- **seq - {campaign name}: Reply Email**
- **seq - {campaign name}: Completed Survey**
- **seq - {campaign name}: Downsell - {product name}**
- **seq - {campaign name}: Upsell - {product name}**

Building a Product Orbit

This next concept can be a bit tricky - but once you wrap your head around it, every time a lead completes one of your funnels, you'll be able to automatically send them through another one. The goal of this category is to constantly be putting new content and information in front of your contacts without burdening them with multiple offers at the same time.

Send to Orbit

send to: orbit

Once you create and implement these tags, you'll need to create a new campaign known as the Campaign Orbit. Apply the send to orbit tag whenever a lead completes or purchases from a funnel, and also make it the tag goal that initiates the Orbit campaign. Within this campaign, you can set up a decision-diamond system that checks a lead's tags and determines which funnels they have already gone through, and which one they will go through next.

Send to Campaign

send to: {campaign}

Once leads go through the system you set up in your Orbit campaign, this tag will be the one that kicks off the next funnel. Remember to also attach it as a goal that initiates the corresponding campaign.

It sounds complicated, but the whole process happens like this:

- A lead enters Funnel A. They receive **in active campaign** and **seq - Funnel A: active**
- The lead completes Funnel A with a purchase. **in active campaign** and **seq - Funnel A: active** are removed, and **seq - Funnel A: completed** and **send to: orbit** get applied
- The lead enters the Campaign Orbit. We use an if/then (or decision diamond) to check that this lead 1) does NOT currently have the **in active campaign** tag, and 2) has **seq - Funnel A: completed**. Therefore, it knows to send the lead to Funnel B next.
- After a timed delay, the Campaign Orbit applies **send to: Funnel B**, and the lead automatically begins the new funnel (and the whole process over again)

If you're not quite sure how to set up the necessary logic in your Campaign Orbit, let us know during your free 30-minute consultation and we'll break it down.

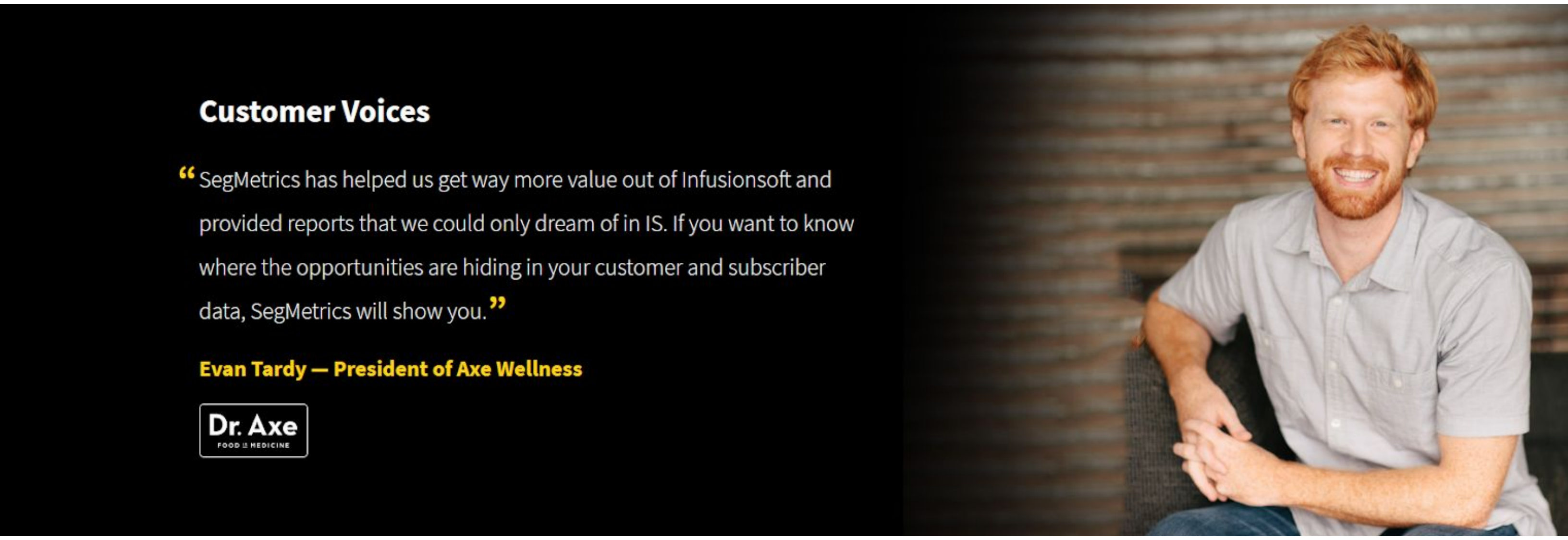
Ready to Optimize Your Sales Funnels With Your New Tags?

Let's see how a professional does it!

Case Study: Optimized Marketing Funnels

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.



In November, DrAxe.com ran two Facebook contests to generate leads. The first Facebook 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!

Weight Loss Contest | *Probiotics Contest*

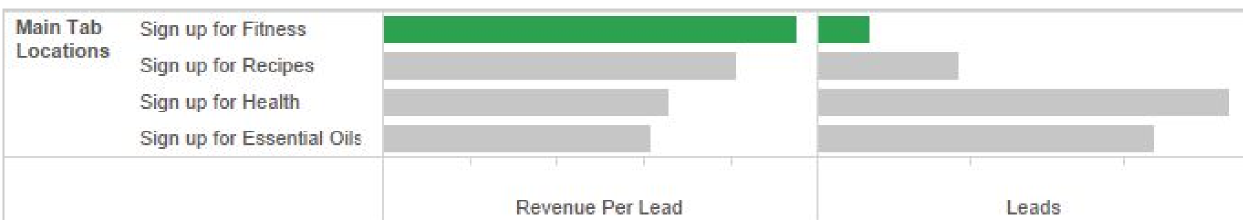
34% more leads, but less value! | *Lower leads, but 18% higher value!*

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.

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.

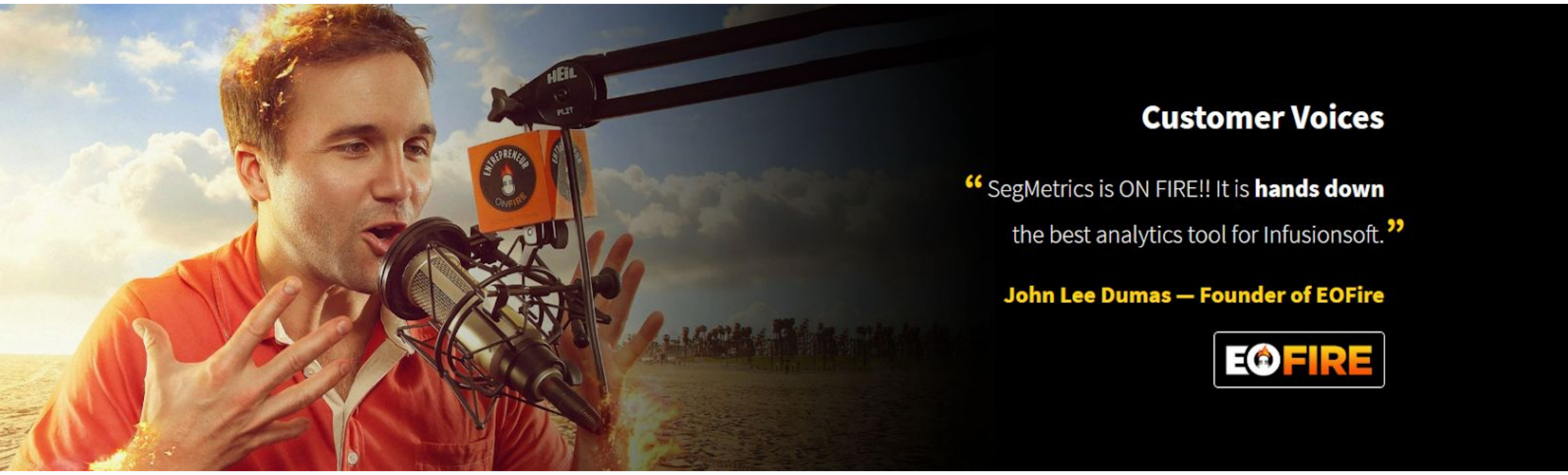
Optimization Cookbook:
Your Recipes for Success

Now that you've built your tagging strategy, and have seen how tagging can increase sales and conversion for your funnels, it's time to share some of our favorite optimization strategies for your marketing funnels.

Do you have any tips and tricks that you've seen kick some major marketing chops?

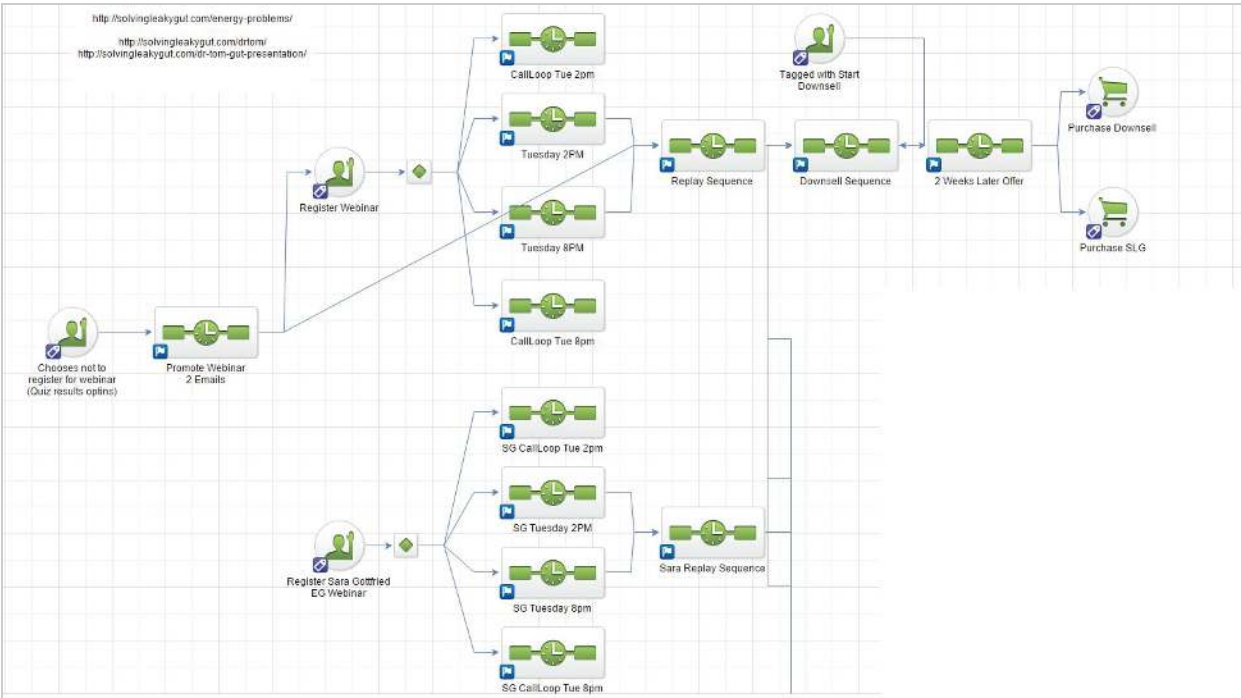
Send us a line at keithandcharlie@segmetrics.io -- we'd love to feature them, and give you a shoutout as well!

Now, read on, and check out some of the highest performing funnel setups we've seen!



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:



(This campaign is built in Infusionsoft, but you can do it in any CRM)

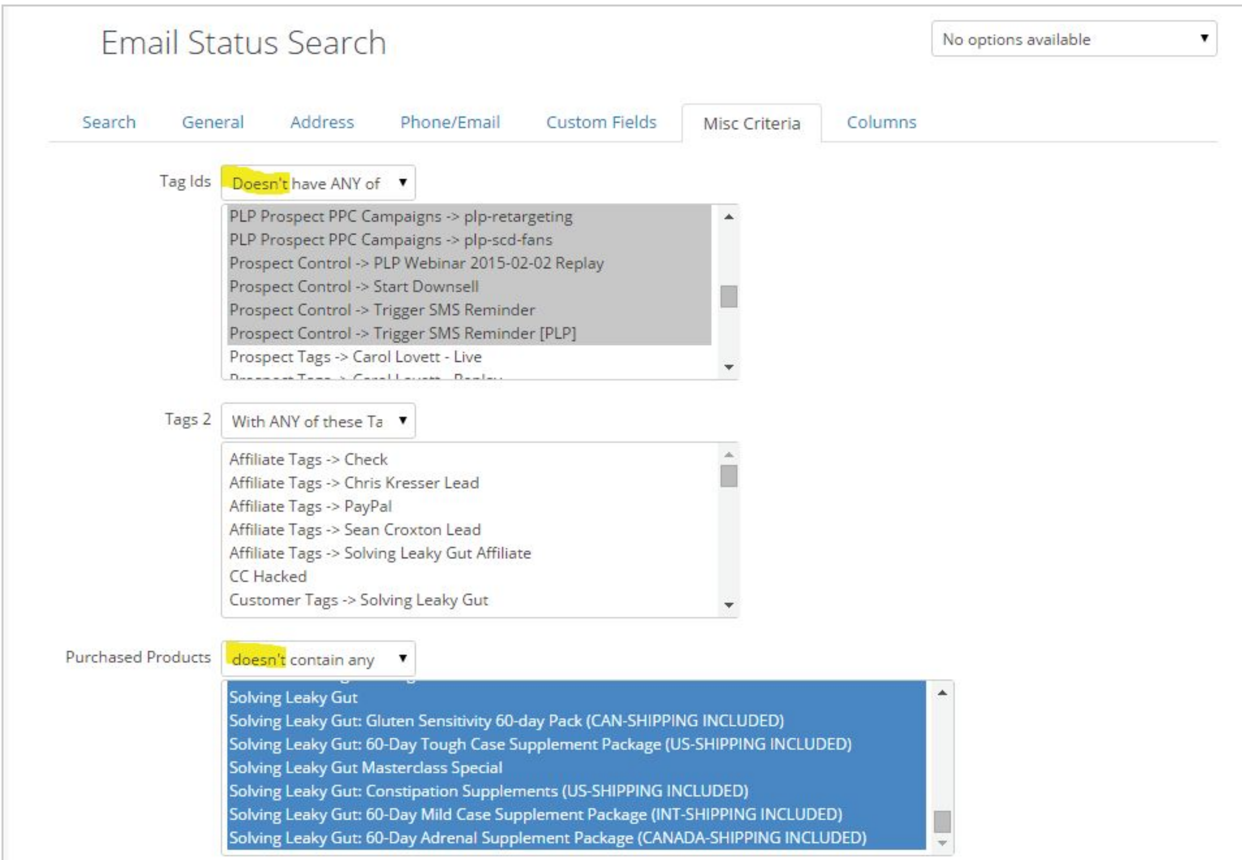
Note that a lead is put into a different part of an Evergreen Sales Funnel based on the Tag that was applied to them when they opted in. This SegMetrics customer has found that different leads monetize in different ways depending on the content they are served. Accordingly, they have set up **different 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” 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 you'd find a Segment that neither owns a product nor has been put through an automated funnel:



(This search is done in Infusionsoft, but you can do it in any CRM that supports purchases)

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 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.

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.

Next Steps

Stop Wasting Your Marketing Dollars

Get 100% clarity on where your leads come from,
how they act, and how much your marketing is really worth.

Start Your 14-Day Free Trial

SegMetrics.io/signup/