EFG's Infusionsoft Tag Category Logic

The system below organizes tags by function with additional organization available for the unique needs of the business.

Step 1: Place a number in front of your tag categories to indicate the type of category it is. The following is an example of the most common inclusions and the corresponding number.

0 - Need to Know
1 - New Lead/Prospect
2 - Lead/Prospect Sequence Action (I've also seen this labeled as "Behavior"
3 - Conversion (Customer/Client)
4 – Content Access (Memberium/Customer Hub/ iMember 360, etc)
5 - Customer Service
6 - List Segment or Split Testing
7 - Accounting/Admin
8 - Affiliate/JV
9 - TEMP/Trigger Tags

0 Not every business needs this category but it is quite handy if a decision rests on a detail that you'd like to be able to see immediately in a contact's tags.

1, 2 and 3 tags are needed for every business as no matter what a business does, the first step in a contacts journey is to become a "lead" (aka: enter the system), the next is to take meaningful action (highly variable but always present) and the third is the point at which they convert.

4 We are big on membership sites and for more than just continuity programs – we use them for every level of delivery from free content to program to continuity. 4 tags in our system are always the keys that unlock the content.

5, 6, 7 and 8 – what these tags are varies with the business but mine look like this about 80% of the time.

9 – This category helps me to keep my contact records clean of tags that are only temporary. 9 tags come should come off almost as quickly as they go on.

Step 2: Decide if you need another layer for your numeric system. For example: List segments or verticals could be designated as follows: X.1 tags could be tags for women and X.2 tags could be tags for men. OR you could

assign a unique X.1 or X.2, etc. for different products or programs if that is the way the business sorts rather than via vertical. It simply depend how granular you want to get and what the client needs to see to get the best information from the tags.

You could even add another layer: 1.34 for example. The tag categories will continue to sort in numeric order. However, my advice is don't get too crazy with too many numeric layers! Be super clear on what should be handled at the Tag Category level versus what can be better handled in the Tag Name.