



# BOX OUT

“THE WAY”

QUICK REFERENCE GUIDE

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# THE WAY™

## THE *RIGHT* WAY TO DO INFUSIONSOF

The Way™ is a set of rules and organizational structure that makes Infusions oft EASY!

## THE FOUNDATION TAGS

### THE FOUR TAG COMMANDMENTS:

1

No tag shall ever be created without a category

2

No tag shall ever be created without following a specific naming convention

3

Every tag's name shall declare its function

4

Tag names shall always start with the Category name

These 6 tag categories and the naming convention will keep things neat and tidy:

## TRIGGER

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  
i.e. Trigger - Free Report - Conversion Sequence - Stop  
i.e. Trigger - Weekly Reminders - Loop

**TYPES:** Start, Stop, Loop

## STATUS

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  
i.e. Status - Sales Pipeline - Stage - Contacting  
i.e. Status - Product A Launch - In Promo Sequence  
i.e. Status - VIP Membership - Inactive

**TYPES:** Status, Access, Process

# ACTIVITY

These tags are 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 - DYS Membership - Purchased  
i.e. Activity - DYS Membership - Canceled  
i.e. Activity - Lead Magnets - 7 Steps Report - Downloaded

**TYPES:** Purchased, Downloaded, Registered, Attended, Clicked, Etc.

# PROFILE

These tags are 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

These tags provide trending reports for key metrics in your business. They are managed by a Trend Reporting Campaign.

## **RULES:**

These tags are only for reporting and have no function related to Status, Activity, or anything else.

## **NOMENCLATURE:**

Reporting - Campaign - Sequence/Action - Report Range  
i.e. - Reporting - Club Membership - Signed Up - This Month  
i.e. - Reporting - Club Membership - Signed Up - Last Month  
i.e. - Reporting - Club Membership - Signed Up - 2 Months Ago

# TEMP

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

# KNOW WHERE EVERYTHING IS WITH

The Way™ says to organize your campaigns by stages of the Customer Lifecycle:



1  
Lead Gen

2  
Follow Up  
& Nurture

3  
Offers &  
Conversion

4  
Sales or  
Checkout

Keap/Infusionsoft will let you build your entire business in one campaign or split your business into a thousand campaigns that each do one tiny thing. If you're not careful, it's easy to create a tangled mess of campaigns and a situation where you don't know where anything is.

# GOOD CAMPAIGN ORGANIZATION



Label each campaign with the stage and categorize them by stage and status (Building, Active, or Archived)

## FOR EXAMPLE:

A campaign that offers a free report called "10 Steps To Success" would be called: Stage 1 - 10 Steps To Success

It would also have two categories: Stage 1 and Active (or Building if it hasn't been launched yet, or Archived if it is no longer running)

# SAVE TIME WITH WORKFLOW AUTOMATION

There are TOO MANY ways to automate your workflow in Keap/Infusionsoft. That's why The Way™ tells you to consolidate everything into a handful of internal forms.

## Internal Forms Instead of Note Templates and Tasks...



**Create one internal form for every function of the business:**

- Marketing
- Sales
- Customer Service
- Fulfillment
- Membership Management
- Etc.

With Note Templates and Tasks you create a situation where users have to remember a bazillion different things, what they're called, and what they trigger. If you consolidate all the automations into internal forms, each user just needs to go to their respective internal form and find all the options there.

# THE NUMBERS WILL TELL YOU WHAT YOU SHOULD DO!!!

Your Dashboard is one of your most powerful tools if you set it up correctly. Here are the 5 minimum widgets/reports The Way™ recommends so you can run your business effectively:

## EXECUTIVE DASHBOARD

- Number of Customers
- Revenue
- Leads MTD
- Sales MTD
- Monthly Recurring Revenue

## FINANCIAL DASHBOARD

- Revenue MTD
- Receivables
- Cash Forecast
- Sales Forecast
- Affiliate Payouts Owed

## MARKETING DASHBOARD

- Leads MTD
- Opportunities MTD
- Sales MTD

## CUSTOMER SERVICE

- Total Customers
- Happy Customers
- Upset Customers
- Fulfillment Tasks

## SALES

- Pipeline Stage Reports
- Sales Forecast

## ADMIN

- Hiring Stages
- Affiliate Payouts Owed
- Tasks

For more information on The Way™ go to [boxoutmarketing.com/the-way](https://boxoutmarketing.com/the-way)

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