FINANCIAL ADVISORS
Business Development Service

Lists and Tags

Overview Document

Introduction

Keeping your contacts well-organized will save you time and make it easier for you to leverage all Active Campaign's features to create the best marketing and sales processes possible.

Putting some thought into how you want to organize your contacts will help you create the best structure from the beginning so you don't have to invest time into re-organizing your list later if it becomes a problem. This document will cover some of your options and give you some things to think about as you decide on how you'll manage your contacts.

Remember, there isn't a one size fits all solution and no one approach is objectively better than any other. As long as your contact list feels organized to you and makes sense to you, you are doing it right.

Lists

Grouping your contacts into separate lists is a logical way to organise them – think of a list as being like a folder on your computer. You can create as many lists as you like to store and manage your contacts, and a contact can be a member of one or many lists. Keep in mind that every contact must be a member of at least one list - a contact cannot receive any email communication if they do not belong to at least one list.

Lists are used for organisational purposes, but also perform an important role in relation to the legal and regulatory aspects of email communication. Whenever a list is created the following information must be provided:

- List Name – a simple name so that we you can identify what the list contains.
- Sender Address – your physical office address. This is a legal requirement.
- Website URL – the address of the website to which this email relates, usually your main business website. This is a legal requirement.
- 'Why are you emailing them' message – a simple message explaining to the contact why they received the email. This helps prevent contacts unsubscribing from important emails and is also a legal requirement.

Examples of lists you might want to set up could include some or all the following:

- Clients

- Prospects
- KiwiSaver Clients
- Review Meeting Clients
- Investment Clients
- Health Insurance Clients
- Dormant Clients

A key advantage of using multiple lists is that it enables a contact to choose which types of email communication they want to receive. Imagine if you only had one list to put all your contacts into – if the contact decides they no longer wish to receive the emails you send them and chooses to unsubscribe, you will no longer be able to send them any emails as they are no longer a member of any lists.

By creating multiple lists a contact can unsubscribe from one type of email whilst still receiving others – so for example a client could decide they no long wish to receive emails related to investments, but will still receive their review meeting reminders and KiwiSaver info.

As a general rule of thumb, we recommend having as many lists as you need, but as few as you can get away with. Remember that you can add, remove, edit and update your lists at any time.

Tags

Tags are a fast, flexible way to indicate the status of a contact or indicate they are part of a group. Think of a tag as being like a sub-folder on your computer, underneath the main 'Lists' or folders described above.

There is no limit to the number of tags you can have, and each contact in your database can have as many tags as you need. Unlike Lists, contacts do not need to have any tags, and tags perform no legal or regulatory functions.

Tags can be used to identify contacts, organise them into groups, indicate their status or their interests and hobbies, etc.

Examples of tags we have seen used include *new client, dormant client, golfer, referral, BNI member, dog owner, Ford fan, Holden fan*, etc.

Tags allow much more specific targeting of emails, especially when used in conjunction with Lists as described above.

As an example – imagine you're taking part in an upcoming golf tournament at your local club. You could send an email to all contacts in your 'Clients' and 'Prospects' Lists, but it would be much more powerful and relevant to only send the email to those contacts in your Clients and Prospects Lists who have been tagged as Golfers.

Over time we'll encourage you to use as many tags as possible – you can't have too many – and remember that you don't need to think of them all at the outset – it is very easy to continually add and update your tags as required.