WITH AMANDA RICHARDS MONDAY NOVEMBER 30, 2020

Daily Bite Size Training

Topic: Data Tags

Purpose of Tags

- Customize your email templates
- Customize your communication on a large scale
- Each Tag is a referenced data field with two sets of curly brackets

Example:

{{Name}} for Client or Prospect name

{{PolicyType}} for Policy Type (home insurance or

auto insurance)

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	{{Scheduler}}	

How to Add a Tag

- 1. Go to Engagement & click Email Template Builder
- 2. Drag & drop a Structure
- 3. Drag & drop the Block named 'Text'
- 4. Place the cursor in the desired spot within the body of the text
- 5. At the top click Merge Tags select the tag from the drop down menu
- 6. The tag will appear

In Email Template Builder





How to Add a Tag

- 1. Place the cursor in the desired spot within the body of the email template
- 2. On the left select the tag you
 - wish to use
- 3. Tag will appear

In Email Campaign, Bulk Text, & Single Contact Drip



Add Tags to Subject Line

Personalization is known to increase open rates

Works well when combined with targeted automation: such as birthday deals and post-subscription follow-ups

Click on the Subject field in your email
 Click the Tag from the section on the right

Stage 1						
Send*	Immediately		~	From* Se	elect Sender Email Address	
Template	Select Template		•	Send To Mys	Add Unsubscribe Link	
Subject*	{{Full Name}}			Signature	Select a Signature	
Sequence*			~	Reply-To 🗖	Email Address	
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Send Save As Draft	
Tags	1
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State Agent Name Agent Email Agent Phone Agency Name	
Agency Address Agency Phone Agency Email Client Portal Link App Link	
Scheduler Referral Name	

THANK YOU!

To learn more please visit <u>Knowledge base</u>

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