

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

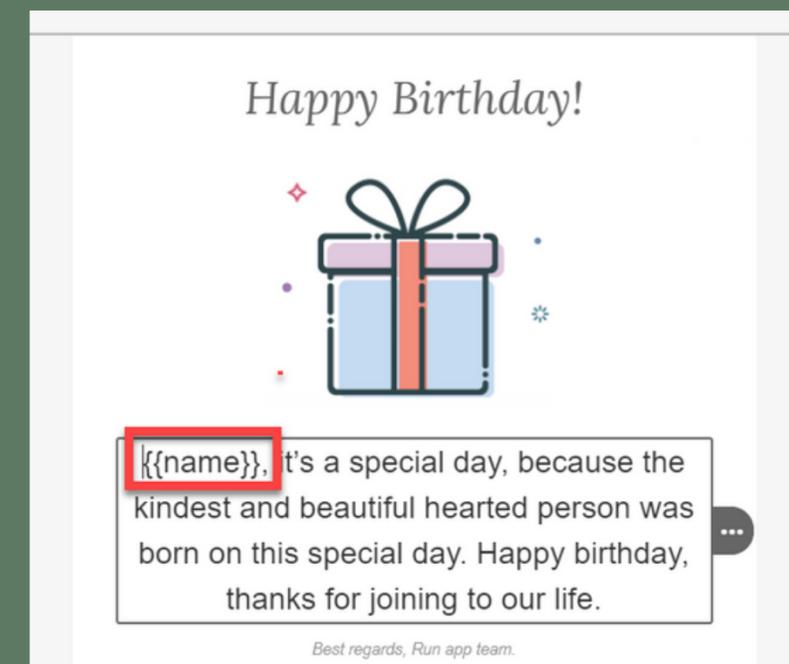
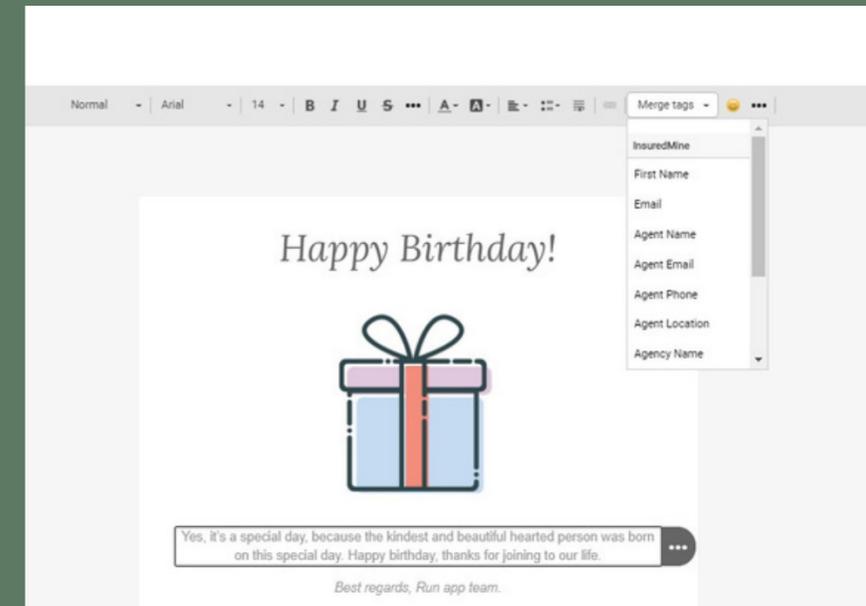
{{PolicyType}} for Policy Type (*home insurance or auto insurance*)

{{firstname}}
{{name}}
{{lastname}}
{{email}}
{{dob}}
{{address}}
{{city}}
{{state}}
{{agent_name}}
{{agent_email}}
{{agent_phone}}
{{agent_location}}
{{agency_name}}
{{agency_address}}
{{agency_phone}}
{{agency_email}}
{{signup}}
{{download}}
{{take_survey}}
{{Signature}}
{{Referral Name}}
{{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

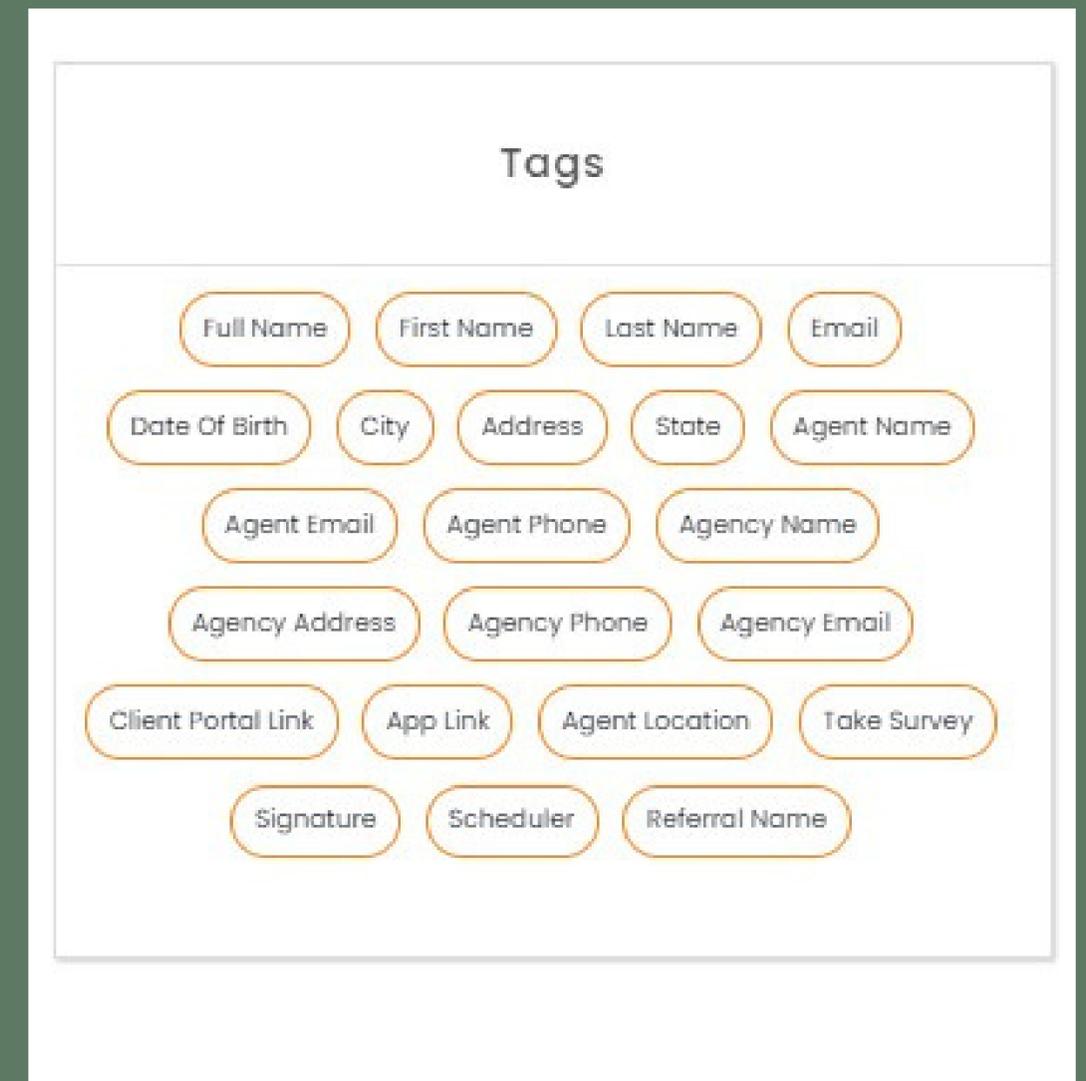
In Email Template Builder



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

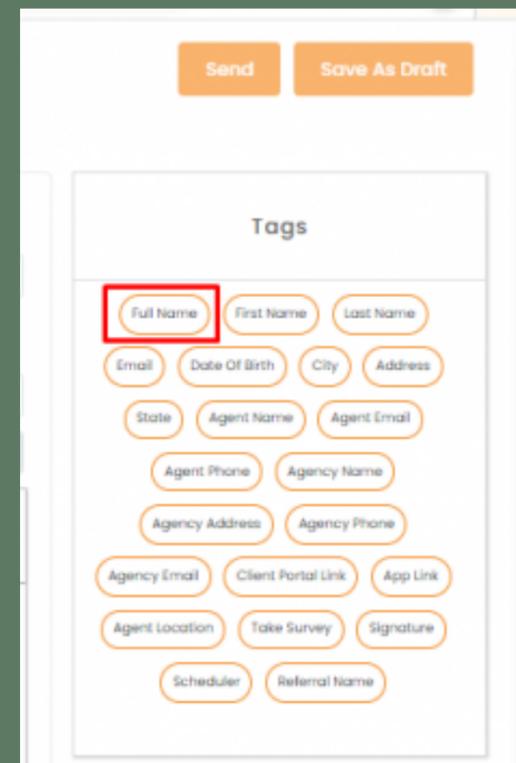
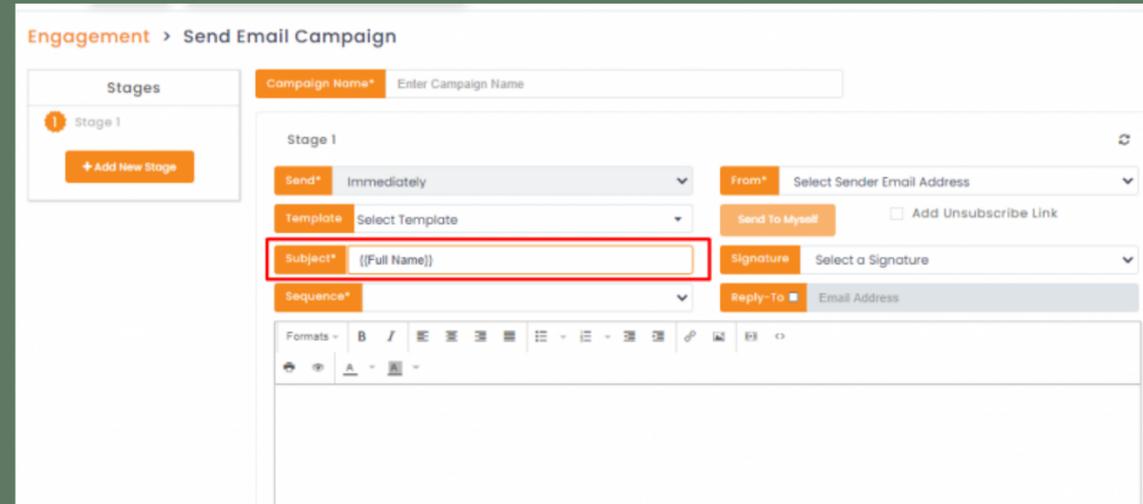


Add Tags to Subject Line

Personalization is known to increase open rates

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

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



THANK YOU!

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