

Rick Dilliott: So welcome everybody, this is Instant Customers Weekly Support Webinar. Today is Tuesday, January 24, 2012. This is episode number two. My name is Rick Dilliott. I'm the Senior Support Manager with Instant Customer and with me today is Jean Scally, who is the senior of everything of "boots on the ground" marketing with Instant Customers.

Jean Scally: I like that senior of everything, boots on the ground.

Rick Dilliott: Senior of everything in real life marketing returns absolutely. Okay, so if you are brand new to the Instant Customer, you've never seen it before or using this as a way to learn more about it right off the bat, Instant Customer is the easiest, fastest way to build a list, sell books, products, services and make money and build an intimate, authentic relationship with your prospects and customers all on Autopilot.

Who is IC? I mean, otherwise who's the Instant Customer? Who is the IC for it Jean?

Jean Scally: It's for small business owners, authors, experts, speakers, consultants, service professionals, in short anybody who either has a small business or bigger and or who services those businesses.

Rick Dilliott: Absolutely. Anybody that understands that old style, put it or add on yellow pages and just sit back and wait and understands that it really does not work anymore and really the way to go is using its many different ways as you can to build your own list in the market directly to your own list.

Jean Scally: Perfect, that's right.

Rick Dilliott: Okay, what will you discover today in today's webinar? As usually you will learn from the IC pros. Today's frequently asked question section is on tags, how to use them, what they are and what they have to do with templates. We will be answering as many of your questions as we can get to as well. And we will have some special offers for everybody at the end for some of our sister companies. Before we begin, this broadcast is being recorded. All of these webinars will be recorded. We are now putting the links to the replays inside your inbox in the Instant Customer.

So we'll be showing you a little bit around the inbox and some of the other support tabs a little bit later. If you have questions, put them in the question box. Here, there is apparently a separate chat questions. I'm getting all of your questions in the question box, so please put them there. What makes a good question today, Jean?

Jean Scally: It's a good question, Rick, because we tend to see this and answer this out of order. Good question, we'll reframe the question or let us know the context anyway.

So if you have a question rather than say, "Hey, explain more about that." Because you might get to it that minute that you type it, please say, "Hey, could you explain more about using a tag in a custom message," for example.

Rick Dilliott: Right, be specific as you can. Try to make it relevant to what we're talking about at the time. I will try to monitor this in realtime and if I do see one that does make sense, I will try to work it in. Some of the other ones, we will try to get back to it at the end of the broadcast, if we don't though, keep in mind that each one of these webcast is going to have a theme to it, so we will be answering your question sooner rather than later.

Jean Scally: One more point on that too, if you're asking questions that are completely off topic, this is not the place to do that. Unfortunately, we might be able to get some if we have time, but these have been running really full. So if you can keep your questions to tags and using tags today that would be most helpful to everybody.

Rick Dilliott: Exactly. Let's move on. Today's tip of the week is using the Instant Customer Support Search to locate answers to your questions. It is fast and easy help. Basically, there is a support tab on the right side if there's a feedback to have -- it does actually say support and really all you have to do is click that. That'll bring up a question box, just try to use what you think are the most common or useful keywords. So if you wanted to know what your point breakdown was or type a video and an email. You know all of these, all of our form articles, our keyword tag, and you'll get a little list of the possible answers to your questions.

So we're really working hard on keeping those updated and I know that I adjust those tags periodically as often as I can to try to make sure that you get the right answers. It's definitely an ongoing process so if you have any questions or suggestions to that please that is also a really good reason just (00:04:42) support to go(ph).

Jean Scally: We have a bonus tip of the week.

Rick Dilliott: We have a bonus tip of the week this week and that is you have mail. Your inbox has links to more helpful resources. Sometimes if you have a special building package that you get special offers, no not offers, but other resources to like different videos or PDFs, what else would be in there?

00:05:08

Jean Scally: Sometimes special campaigns. Two things to mention after this webinar, we're going to be putting in a page in everybody's inbox that will have a link to all of the webinars that we're doing. So you can always go back and review them and this is where the collateral for campaigns is going to show up and this has been a hot topic on support lately and where is my PDF or where is my file that went along with that message and they're all going to be in your inbox.

Rick Dilliott: As much as possible, we're going to try to use that resource to get to specific things that really only are part of your build package. So start checking that, I think right now, I think it still needs to be updated so that it shows you that there's something new, but get used to checking that each time when you log in just to see if there is something new or to check out last week's replay or the replay of this one, a little bit. Usually, there are more than a day or maybe later probably by Thursday, the replay would be out.

Jean Scally: Yeah, replays will always be out within a day or so about our broadcast and there will be something in everybody's email box later today.

Rick Dilliott: Next one, today's Hero of the Week is Chris Bole. Chris used Instant Customer to sell a house using a launch strategy, something, Jean, you're kind of working on as well. So it's a really good example of being creative, using different ideas in any kind of way where you can leverage the messaging especially the interactive messaging components of Instant Customer.

Jean Scally: Yeah, and I love what Chris did here. He kind of made some inquiry and curiosity about the house, but not revealing the address right away, so that's pretty cool, that's pretty smart.

Rick Dilliott: We give people bonuses for doing things by a certain period and put a deadline on it. So he used like that same kind of launch formula, but he applied it to a house. He used a lot of our tools to do it. It was really successful, really interesting, innovative use. So sky is the limit, make it work.

Jean Scally: Great job.

Rick Dilliott: Yeah, great job Chris.

Jean Scally: So now we get to move on to our top four FAQs.

Rick Dilliott: Yup, these are FAQs this week. They are on tags. Now, this is an interesting term, I mean, usually for years and years and years, they were really known as merged fields. So there are really two different kind of tags once you go ahead -- and move it on. So what is tag? That's what I was just talking about there. It replaces what you see with actual data.

- Jean Scally: There are two kinds of tags in our systems, so I'm doing something because Rick would be like getting, pick up them. There are two different kinds of tags in Instant Customer, merge tags and replacement tags. Now merge tags are the ones that take data from your customer records or from your event record or something on your campaign and replaces them with information.
- Rick Dilliott: So give us some examples of merged tags that you use daily.
- Jean Scally: First name.
- Rick Dilliott: First name, it's probably the most common.
- Jean Scally: Yeah. First name uses your actual subscriber's first name. So you might see it as first name when you're looking at your email, but when that email goes out, the first name gets replaced with Rick for example.
- Rick Dilliott: I mean, if there is nothing in that field, if they didn't give you a first name.
- Jean Scally: And then you're just going to get a space.
- Rick Dilliott: You're going to get a space. So that's one of those things when you're creating your messages, you always got to keep that in mind. What happens if there is nothing in there? How is that space going to affect my message?
- Jean Scally: It's right.
- Rick Dilliott: What about replacement?
- Jean Scally: And the other type of tag is the replacement tag and replacement tags are merged tags that you could create yourself or in our templates there are merged tags that we've created that you can customize, so it's kind of like bonus tags.
- Rick Dilliott: Exactly. And where's the place you're going to see the most especially for Mojo users or other people that have other different templates that are actually --
- Jean Scally: Mostly in the templates.
- Rick Dilliott: Yeah, mostly in the templates. So we'll actually go through a demo of using one of the template campaigns to show you where those customized tags are, how to use them and really how to get an idea just in your head, what really the main point of this webinar is just get you use to what they are, what to look for and where the minds are and stuff like that, so --

Jean Scally: Right. So the important way to think of a tag is that tags help you personalize your message for your reader and they also are a good way to customize your content, so that you can really quickly duplicate what you're doing with minimal effort, they simplify your work.

Rick Dilliott: Good, how do you use tags? We're going to go straight to --

Jean Scally: We're going to start the easy way.

Rick Dilliott: Okay, let's go with this.

Jean Scally: Which is picking a tag from the list and I'll show you how to do that right here in Instant Customer.

00:10:06

Rick Dilliott: Yeah, I mean this is a really good point. You can definitely just type this in, but what's the big downside to typing it in, Jean?

Jean Scally: Typos.

Rick Dilliott: Typos, what happens if you type one of this in the wrong -- guess what?

Jean Scally: Yeah, they don't work.

Rick Dilliott: Not only are they not going to work, but then you'll end up seeing the actual curly braces with what you put in, because if the system does not recognize the tag exists, it doesn't even know what to tag and it's just going to put the actual text there.

Jean Scally: Yeah. Somebody will show you how to create a tag or use it just by picking it from a list. What I've done here is I've gone to create a new autoresponder and I want to start by saying, "Hello" and using somebody's first name. So let's type the word in "Hello" and then I want to put their first name, over on the right side of your edit field there are tags, if you click on one of those tags, it's going to show you five distinct categories. Personal tags which are your contact and demographic information about your contact and to get to this little tag list, Rick, all I'm doing is clicking on the title. Intelligent tags which show you some of the global (00:11:14) course for example. Campaign tags which are specific to your campaign and usually that means the campaign opener.

And then event tags, if what I was setting up here is an event, this would have things like my event URL or my replay URL, event time and day that kind of information. And this tag line here at the bottom of the events tags, this will let you do what I called math on dates. So because what I've setup here is an event, I can do math on today plus three days. So I could

create an offer for example that says to somebody, "I'm going to come in before --" and then calculate three days out from when they're getting the message and it would put that date right into their message.

But getting back to our point here, now that it kind of oriented to where they are.

Rick Dilliott: Yeah, so let's go to another good point here which is --

Jean Scally: Well, hold that out one second.

Rick Dilliott: Okay.

Jean Scally: What I didn't tell you when I initially came here to tell you, how to do is you need to have to put one in there, I'll just show you where they are. So I put my cursor where I want the tag and then I come over to my list and I click. Noticed --

Rick Dilliott: That's definitely the easiest way to do it.

Jean Scally: Typo-free.

Rick Dilliott: You just find it and you just put the cursor where you want it and then just find the tags and click on it. But as you were going through, here are the first thing that comes to mind with me is, "Man, there are lots of tags here. What do they do? How do I know which categories are in?" And things like that, if you go -- yeah, go to the tip section. So the tip section at the bottom definitely has a complete description of what the tags are and what they do and some examples of them as well.

So the tip section at the bottom of the page is something that I wish people would use a little bit more and maybe as we build it out and put more stuff in there, maybe they will. But in -- we'll also get it here.

Jean Scally: Yeah, the descriptions are here. Good.

Rick Dilliott: If the descriptions are good and if they tell you what category everything is in, some of the more advance tags, it does give examples. So this is one of those documents that you really should just go in. This document would be available anywhere that the tags are. So if you're in an email, if you're in an SMS that you're creating, these tips are supposed to be set up so that they're appropriate for whatever page you're on. So since there are tags used on this page, the tips should go along with that.

So that document is something if you have five or ten minutes, it is something that you should definitely just go through, look at, just familiarize yourself, you don't have to study it, it is not

a test or anything like that. But just get use to where they're going to be and then think --

Jean Scally: And in case you missed it the first time, in case that went too quick, just click that little light bulb in the bottom of any screen where you can see a tag and then it's the first one.

Rick Dillott: But then the categories are really are pretty self descriptive. Go and hit that tag in the side there again. Let's just take a quick look at those. So, there are personal tags. So by personal tags we mean subscribers. So everything in this section is going to be -- are having to do with your subscribers, their first name, their phone number, really anything that any kind of personal information that you would use as more of the traditional merge field for many other kind of spreadsheet program that you're going to use or a mailing programs, something like that.

The intelligence tags and the social media tags, now these are really interesting, because I did see a question in there about the disc profile. So we're just going to do this as an example right now, because it's really easy.

00:15:00

If you did want to send somebody a link to go fill out this part(ph) if you know what that is, what our -- two of that in this broadcast. But really all you have to do is put in the link to it, the tag to it, which is -- right.

Jean Scally: DiSC Profile?

Rick Dillott: There DiSC Profiling. So again, what the system is going to do is when this email goes out, that tag will be replaced by a unique link to the profile that somebody could fill out and that when they're done filling that out, all that information comes back into your campaign.

As you can see there are other tags that you can use to say like, "Your DiSC Profile was an I, it was this much," and there's a tag in there for that. But it's a simple -- it really is as simple as that if you want to use the DiSC Profile.

All right, the next category, campaign tags, Jean?

Jean Scally: Campaign tags are the tags, like I said, that are related to the campaign owner so if you set this campaign up to be your customers' campaign, this would be your customers' business name, owner name, address, email, phone number, et cetera.

And then the last category, about (00:16:18) category, event tags, and again, they went through this -- this is your event webinar URL or replay URL or event, time, date, et cetera.

Rick Dilliott: And some really good feedback already. So the people are saying that they are having a hard time reading the tags. So yes, that's the kind of feedback we'd definitely want from this. That stuff will take the -- we'll make those easier to read and I mean I get -- when you expand it. The font color and the background color worked as wonderful as even I thought they could be.

So that kind of feedback is definitely needed and appreciated so thank you very much.

Jean Scally: Okay.

Rick Dilliott: Uh, where were we? Can we go to event tags at all or do you want to go through all that categories or --

Jean Scally: Yeah, we've got all the way -- basically through the (00:17:08)

Rick Dilliott: Okay. I think that the most important ones are the personal tags and the campaign tags.

Jean Scally: Those are the most used.

Rick Dilliott: Those are the ones you're going to use the most. If you were using the custom fields then the advanced ones come in. The if tags or something are much later down the road and the event tags are definitely something that you're going to need.

Jean Scally: You need an event.

Rick Dilliott: Yeah, if you have an event. So we're not going to if-tags quite today?

Jean Scally: No. But the other thing we wanted to talk about here is that there were two methods to basically use to get the tag into your campaign. One was picking them from a list as we just did. And the other one is typing a tag into your content.

Now, I need to caution everybody from my own experience, if you have fat fingers and you typo everything, good chances aren't going to work the first time out.

Rick Dilliott: I got to say that the other reason not to type it in is, and I've done this before, where I was like forgot the exact name of the tag and I've used something like web event URL instead of webinar event URL, in that case.

Jean Scally: Oh, business underscore name?

Rick Dilliott: Business underscore name. And these are the failures or something like that. I think it is really the best practice to find them on the site and click them on in.

Jean Scally: Yeah. I'll show you one example of a place where you might actually want to type it. Well, actually I can't even do that anymore. I'll show you that later. That's definitely on our topic for later.

So you can type them in -- a few notes if you are typing them in, make sure you get them exact and don't have any spaces between the curly bracket and the word that is the field name.

Rick Dilliott: Yeah, you have to be completely exact. So another thing, and this goes to all of your campaigns, is make sure you test them. Make sure you've seen every email, go through it. Make sure you've just joined the campaign and get it. Delete yourself out or redo it. I mean it's a little bit --

Jean Scally: Absolutely.

Rick Dilliott: It's a little difficult but that is something that is totally worthwhile. I mean I do it all the time. You know, you make little changes, take yourself out of the campaign, put yourself back in. See what it looks like and maybe not totally happy with it.

Jean Scally: Right.

Rick Dilliott: And now, I think a lot of that is overblown, frankly on some of the formatting but when it comes to tags, it has to make sense. That's the biggest thing here and there. There are just enough mistakes you can make so that doesn't make sense --

Jean Scally: Right.

Rick Dilliott: -- which is another thing that -- there are big reasons that we have Jean on it.

Jean Scally: So one of the questions we see a lot are tags used in templates, and they are. They are used in the messages. They are used on forms like the lead generation forms and they help customize the content. How do you use customized tags or how do you customize tags? Sorry.

00:20:04

I'm going to show you how you can create tags and a new campaign using a template going back to other questions, are they using templates. So let's take a look over here and create a new campaign from a template.

And I'm just going to go ahead and -- Rick what's your favorite template?

Rick Dilllott: Well, I can say my favorite template is the -- from the 21 Ways Campaign, number nine, the Seven ways to get a Lead Capture. I think really, I honestly think this is where everyone should start because if you don't understand all of the different ways you can get people in your campaign, you're leaving money on the table period, because there's really no excuse for not using every way to get people in.

Now, some of the communication messages back gets a little bit trickier. But if somebody wants to use their phone, let them. If they want to text in let them call, let them web form, let them -- and if you don't know how those things work -- and the really the best way to learn that is to do it. Just --

Jean Scally: I agree.

Rick Dilllott: Yeah. Just set this campaign up but just subscribe every single, different ways. You can use different email addresses whatever, but let's go ahead and get to the template. Was there -- this is something that we really want to do a better job just getting people to understand how to get through these quickly and effectively, so --

Jean Scally: Right. So I've gone ahead and jumped in and selected that template to use and just for now clicked all the way down on the customized which is on the right side of the right bottom and static tags are what we call our replacement tags and what you can see here is there's a line up above it. It says, "What is the subject of your expertise business or product line?" And it's completely to do with Internet Marketing.

So for lack of any one particular business to choose, I selected Internet Marketing when I did the templates, so every question and every response that we've done as dummy data is about Internet Marketing but if you're setting up this business to capture leads for a pet store, this answer isn't appropriate.

And what you need to do is come here and answer the question, "What is the subject of your expertise business or product line?" And our example now is pet store. So the example is expertise in business, we're going to call it "gourmet".

Now, using that wizard, if you're modifying your tags, every time you've got one completed you can click this, "Add this tag" or the little plus sign right below it. That adds it to the campaign and it shows you the next one.

And it also tells you here at the bottom how many you have remaining. That's an important thing. You can't skip these. You can't complete and save your template until you've gone through every one of these tags. So please make sure you do it. If you don't want to do them now just go through and add

them all and then go to the very bottom and your "save" button will light up.

Rick Dilliott: Okay, that's the biggest point here, is I think this is a really easy part for people to get tripped up on thinking they have to or really over thinking everyone of these. All of these are editable. And really, a lot of times I think that just one -- the one question you're given here to try to find some context for what this answer would be might not be enough for you.

So don't waste time here. Really, if you don't get it -- I think if you don't get the question right off the bat and have a good answer that you can put in and go --

Jean Scally: I'm going to show you where you can go and take a look at this in just a minute.

Rick Dilliott: Exactly. But you can put anything in here. You could put a placeholder, you could accept the default. You know, she had to put again, yes, she's definitely -- we need to show them where these could be adjusted and how to get a little more context for these making sense. I think that's --

Jean Scally: So what I've done is I've completed the first two for the pet store example that we were using. I'm going to back and just change this to Demo Pet Store Company.

All right, and then I'm going to be able to -- because I've added two customized tags at the start and I just added all or accepted all for defaults, I'm going to save the campaign and then I'm going to go back to my autoresponders and I will see or show you rather where those tags exist.

If I look at my first message, it's a text message and I'm using some standard fields, I'm using first name, and giveaway is not a standard field. That is one of our custom tags. So if I didn't complete giveaway and I know that I haven't, what I'd do is I'd go back to edit.

00:25:57

Rick Dilliott: And this is one of those if you joined at the campaign, you've got a text message back and that space was either blank or it's something you didn't like this is where you find and fix it.

Jean Scally: Right. So, let's edit, again, click on customize, scroll down the list and I see "giveaway". And to edit it, all I need to do is --

Rick Dilliott: Yeah. We're still working kind of formatting this, but literally you just have to click in and you should be --

Jean Scally: Right, just click and then change it.

Rick Dilliott: And you should be able to change it.

Jean Scally: Now, I get free --

Rick Dilliott: So the things that are recommended to change here are either the description or the actual values. So, the description is just for your sake what is this? What does this tag do? And there's a value --

Jean Scally: Yeah. And the description is in the middle column.

Rick Dilliott: Right.

Jean Scally: What you want to avoid doing is you don't want to change the tag name, because the tag name is used in lots of messages, not just that first message. So, if you're using a template, frequently, those tags are used everywhere. Don't change the tag name.

Rick Dilliott: Right. So right now --

Jean Scally: Just change the tag --

Rick Dilliott: -- you're on that you are changing the description right there.

Jean Scally: -- that's on giveaway. Right, that's why I scrolled up the top to show you. The second column is description and I'm in giveaway, the second column. I've changed the free pet food for you. So, what am I giving away? Free pet food for you.

Rick Dilliott: Right. But in this case, what would come up as the value? What would the SMS to generate for giveaway? Now, that's the description of the field but that's not the value. The value is what goes in. So, sometimes we're making mistakes on purposes.

Jean Scally: I'm sorry.

Rick Dilliott: So if you guys catch us --

Jean Scally: Exactly what I did.

Rick Dilliott: Thank you David, I see, for catching that, we'll keep you guys on your toes.--

Jean Scally: Well, we did that intentionally so people can see. Because most of the time when people have changed their content, they've changed this middle column because they see giveaway and they go, "Hey, there it is."

Rick Dilliott: All right so once again, the first column is the tag value itself. If you change it, then your campaign will pretty much not work. Unless you go back at every single message and email and

change those tags as well. So, my recommendation here is don't change the tag itself. If you're going to use something different, add a new one. Take this one out. Don't confuse yourself. The middle column is for description that is simply for your own benefit. What is this suppose to do? And then, the actual value of the tag. That's what's going to be replaced when the email or the SMS is generated.

Jean Scally: Right. And sometimes on these description fields what we've done is we've given you more information so that you know a little bit more about how it's being used or how you should format it. So for some of this, you may find the instructions like, don't use all capitals, or don't us punctuations, because there are already punctuations where the tag exists and use one with a straight data.

Rick Dilllott: Right. And this is again, one of those things that goes back to testing your campaign. This is where you're going to need to see the full email and you're going to have to make some adjustments. Just note that in advance. I mean, if you do get stuck and you need to use one of the niches or niche templates, they will work right out of the box. They're not going to be perfect though, so no, you're going to have to go back.

Then, if you get stuck, use them, but in general, putting a little bit of time and craft them. Again, like we've talked about last week, even different pet stores, again, their owners are going to have a different voice. Some people are not going to want to sound too professional. Some of them are going to want more colloquial, some less, so this definitely goes back into doing your homework on your client, what do they like, what's the business like, what's their demographic like, how much money do they have so you'll know what to charge them, things like that.

So again, the point was do they work right out of the box? Yes. Are you going to want that as your finished product? Are you never going to edit them or improve them over time? Of course you are.

Jean Scally: Right. Now, I'm going to show how to edit one in an existing campaign.

Rick Dilllott: I just got a really good question from Kim(ph).

Jean Scally: Let's hear it.

Rick Dilllott: And that was, "What if they have multiple campaigns with different giveaways?" So this is actually a wonderful question, because the system tags like we said are first name, phone, and things like that. Those are system wide, those who worked in any campaign they're exactly the same. The static tags however are completely campaign specific. If you have used

the giveaway tag that is only going to apply to that specific campaign, and let's use that template somewhere else.

00:29:59

Jean Scally: Well even then, each campaign uses unique data, so you have to go through and customize every one of them. And even with things like the first name, that applies to the individual subscribers, so that's going to be changed for every subscriber every campaign.

Rick Dilliott: Exactly right. The point is yes, each campaign, you can use the giveaway tag for something completely different because that's perfect --

Jean Scally: It's unique to the campaign.

Rick Dilliott: -- that's unique to the campaign a 100%.

Jean Scally: So to change the campaign -- I'm sorry, to change a tag in an existing campaign, it's the same process. You'll just go pick your campaigns. So, I'm going back to my message campaign list. I want to pick the same campaign just for the like of it.

Rick Dilliott: Okay.

Jean Scally: And then, I'm just going to randomly pick a message. Right now, our system decided to go slow, because I think we've got everybody on it.

Rick Dilliott: That's okay. I think everybody is used to having something to do during the internet spin a wheel going on.

Jean Scally: So again, let's say I wanted to change tag in this one right here. It says, "One way to benefit one," and this is a text an email. So that's probably the subject line on this email. The tag I'm looking for is benefit one. So again, any existing campaign, you'll just go to edit the campaign and you can find all of those tags or replacements of tags or static tags in every one of the column on the customize tab.

Rick Dilliott: So, the point of that campaign is you're sending out -- drop emails over a period of time, listing different benefits --

Jean Scally: Right.

Rick Dilliott: -- of dealing with this, dealing with you or your client, and probably some pain points or other things that are -- were using that like for carpet cleaning.

Jean Scally: Yeah.

Rick Dilliott: The negative stuff that people might use to trick you that you have a respectful business so you're not going to do.

Jean Scally: Like in the consumer awareness.

Rick Dilliott: Exactly, right. So, there are emails that make you want stuff and there are emails that make you a little bit afraid of stuff, so you'd say, "Oh! I don't want that."

Jean Scally: Right. One important note here for people is if you're changing the content of the tag, again, that's the value in the tag field. If you're changing the content of the tag, you've got to go down and click the "save" and "exit" button, no saving, no changes. So, that's how you change the tag in an existing campaign.

Now, we get to the fun part, common issues with tags. Sometimes Rick, you'll see the word tag in your content. What's that from?

Rick Dilliott: Well, any time you see anything like that, it means that the tag doesn't exist.

Jean Scally: Yeah. So if you've accidentally deleted one of those replacement tags or static tags, when you get that email or that message, you'll see the actual tag and the content.

Rick Dilliott: Right. I mean, this is really a good point where you're going to understand -- if you understand how the system works, it becomes much easier. The system is basically doing a search through the document for tags that it knows, okay? It doesn't take curly braces and just say, "Oh! That's the tag." It's really much more specific than that. So if you see something like this actually in your email when you get it, it means that the system just simply could not find that as a tag, because if there's no information at all, it will show up completely blank.

So like we've said before, if you're using a tag that's the first name which is a system tag that could be used anywhere, it's definitely, you know it's there. And if there's a blank spot there, it just means that that person had not given you first name. Now and for some reason, you needed to use curly braces inside, it's something you'd have to do some advance kind of HTML coding to actually get them to show up which is a pain, so don't use them.

Jean Scally: [Laughs] Exactly.

Rick Dilliott: Or use curly brace. Unless, you're doing a tag name or any app, use brackets or --

Jean Scally: One of the point I wanted to make about seeing tags in your content, it means that this system doesn't recognize that tag.

One of the most common things is, and I'm guilty of this everyday of the week, somebody typed it in and had a typo. So for me, I typed too quick, and sometimes instead of F-I-R-S-T name, I get F-I-R-T-S name which is I don't want to fill.

Rick Dilliott: Well, what's even more common that I saw -- and this is one of the earlier versions of some of the templates.

Jean Scally: Spaces.

Rick Dilliott: It was a space between that first name. It's had first space name and then it was coming out exactly like that, because that point system is just reading it completely, literally.

Jean Scally: Or space before the brackets or after the colored brackets, right? Another important issue for troubleshooting is content that doesn't make sense.

00:35:03

Rick Dilliott: That's huge. In some of this longer tag, replacement tags where you're dealing with benefits or you're dealing with pain points are really something and anything that's kind of more than one or two words, that something that you really just have to use some proofreading and it just make it sense.

Jean Scally: Right. I'm going to show an example of something that will work here. We're using our pet store example again. I want to go to the lead registration page. Our templates use tags in the lead registration page.

Rick Dilliott: Yes. We actually had this question, the jack question. So just to do a shameless plug for us for next week, next week, we are going to be doing, with the folks of the webinar is going to be on lead pages using the Instant Builder, so we're going to get a little preview of it here, just showing you how you can use the tags here. And really the biggest question is, "Why are we seeing the tags themselves there?"

Jean Scally: Now, we're seeing them here because we're only in a preview or in edit mode. We're not going to see this actually unless we hit the go link on --

Rick Dilliott: Yeah. You'd have to save. Once you save -- and this is, again, the difference between seeing a preview of something and then seeing it after it's been actually generated. Like I said, when you're looking at an email, you're going to see the tags in there. You won't see the actual generated content until you get the email itself. So, this is the same way. The system can't really find the tags while it's in build mode. That gets put in there during the actual build. So, once you save this, you'll be able to go to the link. So yeah, and this is another of the

response. So we're going to have to go back and forth a little bit and tweak and go back in, but it's definitely worth it.

Jean Scally: I'm going to hit "go to link" now so people can see how the tags I've filled in are being used to populate this page.

Rick Dilliott: There you go. So, perfect.

Jean Scally: There's something here I wanted to show. Intentionally, I've put punctuation.

Rick Dilliott: Yeah, that's exactly what I was going to say, the whole exclamation point and comma was not working for me.

Jean Scally: Well intentionally, I put punctuation in my tag, my tag value.

Rick Dilliott: Right.

Jean Scally: And I wanted to do that to show that really you need to double check things, because most of the tags are set up to be used in multiple places and you don't want to punctuate them.

Rick Dilliott: Yeah.

Jean Scally: One exception.

Rick Dilliott: That is a fantastic point that in the templates, I mean the whole reason to use a tag in the template is so you can use the same thing in multiple places. That's the whole point of it, because otherwise, why would you even use it? It's just -- this way, if you need to change benefit number one, you can change it in one place and it will change everything in your whole sequence, saving you time if you do it, right? That's the whole point of it.

Jean Scally: So, I just wanted to show how you could take a preview and see if they're working and --

Rick Dilliott: Yeah. Punctuation thing is really interesting. I think for most of those, I would think you would want to leave the punctuation and the --

Jean Scally: Most tags don't want you to use punctuation. The exception would be those benefit tags, those that were showing up here with checkmarks. And those tend to be longer, so you can punctuate appropriately between things and at the end of those. But, most of the other ones, you don't want to be using them. Let me show you here.

Rick Dilliott: Right.

Jean Scally: So, content that doesn't make sense. Preview everything. Test everything and adjust where its' needed.

Rick Dilliott: Exactly right.

Jean Scally: Another tag type that we've kind of skated over are custom field tags. And I know we have lots problems with these. One of the things I see most often, and Rick you can jump in on this one too. But, people create custom fields when they're setting up their campaign. Then, when they try to use the tag, they use the name of the field as they typed it. Have you seen this?

Rick Dilliott: This is one of those things that the developers were kind of going back and forth with. Why don't you set one up and let's just take a look at it and let's give you guys the current state of custom field tags. Because it did use to be in the old system that it was called custom\_1, custom\_2, and it was like that. But there have been some changes in the way that the new designer has been doing things. So, we're supposed to kind of go back to the old way but let's just take a quick look, because I actually need to see if --

Jean Scally: So I've gone ahead and I --

Rick Dilliott: That should be showing up on the list, too right?

Jean Scally: Exactly what I wanted to show to you. So, I've gone ahead on that in the favorite pet toy as a custom field.

Rick Dilliott: Great.

00:40:00

Jean Scally: And then let's save my campaign.

Rick Dilliott: And why would you even make such a field?

Jean Scally: Well, because remember this is the best pet store company.

Rick Dilliott: Right.

Jean Scally: And they may want to offer somebody a discount on their pet's favorite toy.

Rick Dilliott: All right. So, this is a great way to get demographic information by your clients. You can send out a text or an email or a link to a form that says, "Hey, what's your pet's favorite toy so we can let you know when we have a deal."

Jean Scally: Absolutely. And even more powerfully than that, if you're using this as a mapped in strategy, then you can ask them what their pet's favorite toy is and immediately, give them a discount on that item.

Rick Dilliott: Okay, Jerry's got a question, real quick we'll get back since we're actually pretty close to it. Where you had the checkmarks of the bullet points in the lead page --

Jean Scally: Yeah.

Rick Dilliott: -- what were those tags? Were those the benefit tags?

Jean Scally: Benefit tags.

Rick Dilliott: Those were just the benefit tags, so benefit\_1, 2, 3 as tags. That's exactly where those were going and that whole page is set up that way to highlight the benefits right there in bold with big green checkmarks on the page. So we're going to drop people's eyes to good things right there for green.

Jean Scally: So, I'm going in to an autoresponder message right now. And I want to add favorite pet toy. And this message is just going to make a whole lot of sense, so I'm just kind of start it over. So, I'm going to use your first name and I go type in it because it's just the way it ends.

Rick Dilliott: Yeah. This is pretty much happened, I think they need to make that -- it's here.

Jean Scally: And now, I want to put in my favorite pet toy.

Rick Dilliott: Right.

Jean Scally: So, I want to go over my tags. And go to my advance tags and they're not showing. I'm going to revert back to typing.

Rick Dilliott: Okay. So that's definitely --

Jean Scally: Sorry guys, we just found the site.

Rick Dilliott: Yeah, definitely something that we would work on. Really, the custom fields -- the time we're going to use those most often are kind of on a custom field form maybe that's on your page, because there are typically going to be a question. Something like, "What's your favorite pet toy?" Would you really use that inside of a message? Probably not. It's really the custom field is really more used on a place to put replies. But most definitely, they should be showing up here as a field you can use, so that's one (00:42:34).

Jean Scally: Do we have questions on some of the tags that we've shown already? I see Chat Box right in it.

Rick Dilliott: No, not directly with the text, so I'm trying to get this a little bit, okay.

Jean Scally: Do you want to talk about some of your favorite issues with tags?

Rick Dilliott: We're pretty much going over them right there. I think the typos, not understanding how they're used, not giving them in context. Those are far and away the biggest problems. I think people definitely go through that wizard process thinking they have to nail those down perfectly as they go through the process. I really don't think you do that. I think you should just go through them to get an idea of which tags are being used and if someone jumps out of you as being -- act like some of the benefits. Like if one of the benefits is that you can retire early, that's pretty easy, throw it in there.

Jean Scally: Right.

Rick Dilliott: If you understand -- one of those things I think if you understand it right away, do it. Otherwise, just save before they do their homework and make sure you craft it a little bit more. Some of the more advance tags, we'll do a webinar on these tags. Some people want to do that but they are really sort of tricky. It's because of the formatting.

Jean Scally: Right. Well, if there's no other problems let's move it on. And do answer everybody's(ph) question?

Rick Dilliott: Well let me take a look. What else did he inquire?

Jean Scally: So as a summary, go ahead and use tags to personalize the experience for the reader. And I didn't touch on this enough. You know my feeling on personal content, if you're creating content that's personalized, you're going to draw people in and you're going to hold their attention longer. So, use tags to personalize the experience through the reader. And they helped you to take one campaign and use it for multiple clients with minimal revisions.

For example, if you're going after an industry like pet stores or any other industry, house painting, auto body mechanics, whatever, you can take that campaign that you're using through one customer and replicate it in less than five minutes. Touch up the tags and you're done. So rather than having to create 60 messages for every client you're bringing it on, you've created it one time and the next time you just customize the campaign owner information and some of the tags.

00:45:08

Rick Dilliott: I think that's fantastic. If you have a niche market that you go after or certain store or certain clients, and you're building your own campaigns for them, think about where you can use tags in order to make your life easier, to make your edits easier. A lot of times, I use them for -- and here's one of the questions,

it's just for social media URL. But we also had one of the PDF URL.

Jean Scally: Yeah.

Rick Dilliott: I used tags there religiously because you're going to update PDFs, you're going to update reports, you're going to update videos, so if you have a link to a video and you're using a tag for that, I mean typically, I would just use one that's called video\_link, something like that.

Jean Scally: I do.

Rick Dilliott: That way when you changed your video, you don't have to change it throughout your emails. You don't even have to look for an email. You can just go to customize, change the tag, done. I think that's one of the best uses for tags or for links that you know at some point if you're going to have to change.

Our webinar send URL link that if you're using events as a system tag is wonderful because it automatically generates a link that allows you to track person while they're on the event. They didn't have that link that would copy very much (00:46:29)

Jean Scally: That would be pencil cases(ph).

Rick Dilliott: There was another question in here that is really a good one also, because we just came up in this week or last week. This particular question is the -- on a form especially on the lead pages, it just says "Phone number". I don't think it says, "Mobile". Does it actually say mobile phone?

Jean Scally: No, it just says phone.

Rick Dilliott: And it just says, "Phone number". So, the question was, "Should they create a custom?"

Jean Scally: Oh my God! I know where you will go --

Rick Dilliott: Should they create a static tag that says, "Mobile phone"?

Jean Scally: No.

Rick Dilliott: Absolutely not. It is a really bad idea to make any tag that can possibly interfere with the system tags with the hard -- yeah, we had somebody the other day that actually tried to create their own first name tag.

Jean Scally: Yeah.

Rick Dilliott: That's like, "We're making analogies there." And that somebody having the same phone number or something that

the system is not going to know where to go to get that and it's in the whole sense or something.

Jean Scally: And here's the thing. On every campaign, if you go to the opt-in channels and you click on field at the top, you'll see all these fields right here. These are all system fields. So, all of these will have tags, merged tags from the system. What you want to do is you want to use these fields as much as possible. On our forms for example, we're selecting or showing the phone number and right here, it's listed as mobile phone number. But what the system does is it checks and it knows if you're a mobile phone or if you're a landline.

Rick Dilliott: That is absolutely correct. In the specific case why you never wanted to create another one for different phone, whatever phone number they put in there, the system doesn't like -- as she says, makes a check and it will check against the database to whether or not it's a landline or not, because we have to know that in order to know whether it's in text messages. Because you can send text messages to the landline, so the system needs to know anyway. So that kind of --

Jean Scally: Well, the confusing --

Rick Dilliott: Yeah, the confusion is that that should be editable and should you just say mobile phone or on the form, that's something we will put in there. Or you could put that on the form itself. You can put your mobile number below, something like that. So, the point here is don't try to kind of outwit the system on something that it's already really kind of programmed in a complex way.

Jean Scally: Right. The confusion of the person that has (00:48:59) last week, like you said, they've created a custom field to hold data, but then they were using the merged tags to try to retrieve that data. And the merged tags are going to use the system fields. So they were trying to use the first name field, thinking it was going to pull the data out of the crazy field they've created.

Rick Dilliott: Yeah right. Yeah. So, I mean to say, here's another good follow up question where the client did use a landline number. How do you go back and get the sell number later? There's a really nice tag for that. If you want to go ahead and just (00:49:35) forget anything with tags. There is an edit information URL tag, which basically gives people a link to update other information. So you could send out an email that has a link to the edit information you're around. You go and say, "Hey look, to get a bonus frame, to get a bonus video, please go to this link, update all your info and make sure that for a phone number, you give me your cell number," if it's not in there or something like that.

00:50:01

So I can get you extra -- I mean, I usually use updates and announcements to find a tag, something like that. I wanted to give them a read -- you always want to give people a reason to do that and to let them know that you're not going to abuse them.

Jean Scally: Yes. So, one of the ways that I used that and I think it's pretty clever, is I used it when I'm doing contests and I gather a little bit of information from people. And I let them know that I'm going to ship them their price and all I have is actually their name and their email address at that point. And then I send them a message that says, "Here's the information showing your shipping address that I have. Remember we're going to ship this fabulous price right to your doorstep. And if your information needs to be updated, here's a link so you can touch up whatever needs to be touched up and let us know where to ship the price." And it works like a charm.

Rick Dilliott: Excellent. So, did you try that?

Jean Scally: Yeah, I didn't show it yet. But again, if you go to the message that you want to add that field too, and you can click on personal tags and there's -- edit information URL, I think.

Rick Dilliott: Excellent. So again, that link and we are going to be giving people more control over that link. What it looks like right now is kind of a non-styled page which if you see a lot of autoresponders when you go to a page like that is really -- it really is very basic. But we do want to give you that.

Jean Scally: Right. Anymore questions?

Rick Dilliott: And look for (00:51:27). I don't see anymore that I don't think we can handle on these --

Jean Scally: Okay.

Rick Dilliott: -- specific issues here.

Jean Scally: We're getting close to the top of the hour anyway.

Rick Dilliott: We are getting close to the top of the hour, so --

Jean Scally: My final summary message is --?

Rick Dilliott: Finally summary message.

Jean Scally: Test and troubleshoot your messages before sending them.

Rick Dilliott: That's my final -- that's always my final (00:51:50).

Jean Scally: I'll be giving you one later. That's yours.

Rick Dilliott: Okay and --

Jean Scally: These are all yours.

Rick Dilliott: And that is mine. The formula for success doesn't really change. More messages engage people and keep them wanting more. Content is king --

Jean Scally: Always.

Rick Dilliott: -- Spam is not.

Jean Scally: Spam.

Rick Dilliott: Spam is spam.

Jean Scally: It should be just a bracket(ph) --

Rick Dilliott: People (00:52:10). Your own host better off doing something a little bit wrong that is at least new and thoughtful.

Jean Scally: If you've test it, you can do everything wrong.

Rick Dilliott: Testing I'd say it over and over again, all marketing has test marketing. Nobody does the same thing that they did last year, not Kern, not Richard, not Mike, or anybody. We're always constantly, constantly getting feedback on what's working, what's not. How's the market changing? What are the demographics? Are they doing anything different? So never be afraid to really put a good effort for we can try it and understanding that you're going to have to make changes and edit as you go.

Jean Scally: Yeah, don't be afraid to edit.

Rick Dilliott: Don't be afraid. You're probably -- and it's like anything else. You're going to learn as much from your mistakes as your failures, and people are much more forgiving than I think people get (00:53:06).

Jean Scally: I agree. I'm going to run through these special offers?

Rick Dilliott: Let's run through these special offers.

Let's run business special offers. So, we still have I think a few spots left in Cross Channel Mojo. Now, Cross Channel Mojo if you're unfamiliar with it, is a comprehensive training in mentoring program using the templates and campaigns from actual users of Instant Customer that have been successful. People you know like Jimmy Harding, Eric Kurt and Jody, his buddy there, and of course our very own Jean Scally with her grand opening campaign for restaurants. So it's a wonderful

program, highly recommended. If you want more information, please go to [crosschannelmojo.com/web](http://crosschannelmojo.com/web).

They are continually updating Main Street Marketing Machines 2.0 Fusion, so that is really a combination of Traffic Geyser and Instant Customer and are linked in a lot of different ways. Facebook like generator, they have a minisite generator over there. The Influence Engines Campaign which I believe just went live in Canada finally. So, always working hard over there as well, but it's a good way to integrate your video marketing with your lead capture. That's at [mainstreetmarketingmachines.com/web](http://mainstreetmarketingmachines.com/web). And if you're just interested in trying out Traffic Geyser, which again is really pretty much based on video marketing and other --

Jean Scally: And article marketing.

Rick Dilliott: -- article marketing, blog posting, and really interlinking all of those allowing you to make one video and then having it transcribed, send out this blog postings like that. A lot of us are interactive and there are connected things you can do over there. Just go to [trafficgeyser.com/21days/web](http://trafficgeyser.com/21days/web) for trial there.

Jean Scally: Yeah. Next week, what are we going to cover?

Rick Dilliott: Next week? We've already did that.

Jean Scally: Wait.

Rick Dilliott: This is this week.

Jean Scally: They're on next week's (00:54:59) there.

00:55:00

Rick Dilliott: Next we are to be going over lead pages on these customers using the Instant Builder, using tags in your lead pages as well as --

Jean Scally: Lead page generator, right?

Rick Dilliott: Some other basic stuff -- changing your texts, customizing --

Jean Scally: Customizing and making it look good, adding video.

Rick Dilliott: Adding some images, maybe we'll get to an advance thing like that.

Jean Scally: Yes, custom headers.

Rick Dilliott: That's what people will be doing next week.

Jean Scally: We'll cover all of that next week.

Rick Dilliott: Thank you everybody for coming. We hope to see you again next week. I had a great time. Jean?

Jean Scally: And I'm completely embarrassed that I had the wrong glass right out there. So I will changing that ASAP, you will find this PowerPoint presentation.

Rick Dilliott: Like I said people are --

Jean Scally: And the webinar.

Rick Dilliott: -- than you think.

00:55:43