

TAG YOU'RE IT

hope you're game



Reyna Bovee | Ironwood
Venture



Jeremy Veatch | Ironwood Venture

We make Virtuous Automations easy







**IRONWOOD
VENTURE**

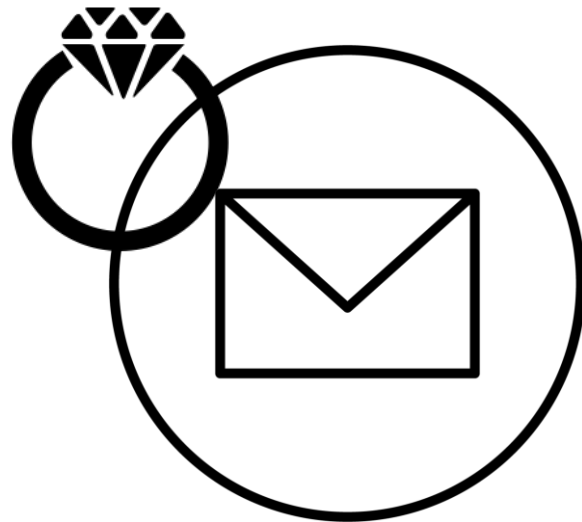
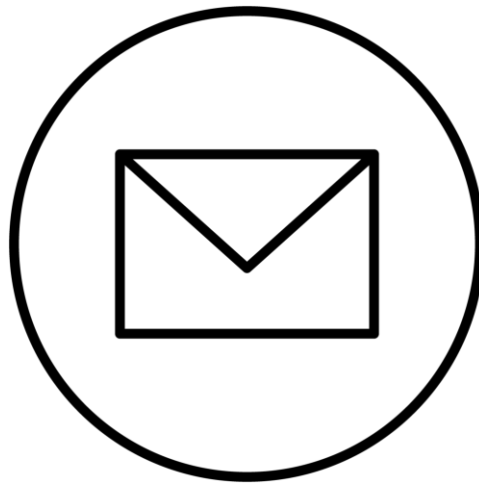
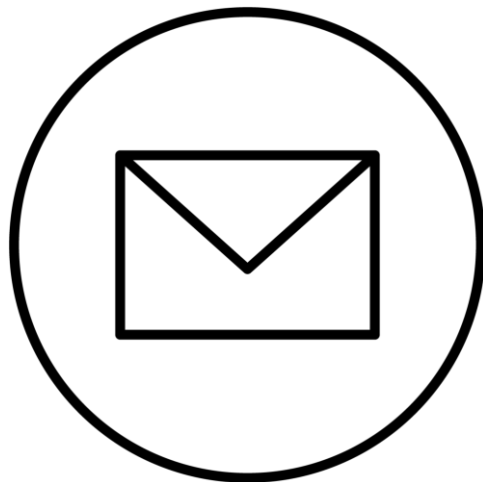
TAG YOU'RE IT

hope you're game

MARKETING AUTOMATION

WORKFLOWS

EMAIL MARKETING



HOW TO USE THIS WEBINAR

Close out of Virtuous

Take It In

Take Notes on Pro Tips

Re-Watch



4 PRO TIPS

**LET'S GET DOWN TO
BUSINESS**

WHAT IS A TAG?

SEGMENT

SEARCH

TRIGGER



DONOR



**INTEREST:
CLEAN
WATER**



**START:
WORKFLOW**



DONOR



INTEREST:
CLEAN
WATER

**MOST USERS HAVE
AROUND 150 TAGS**

IRONWOOD PRO TIP

THE ROLE OF A TAG

Segment

Search

Trigger

SEGMENT

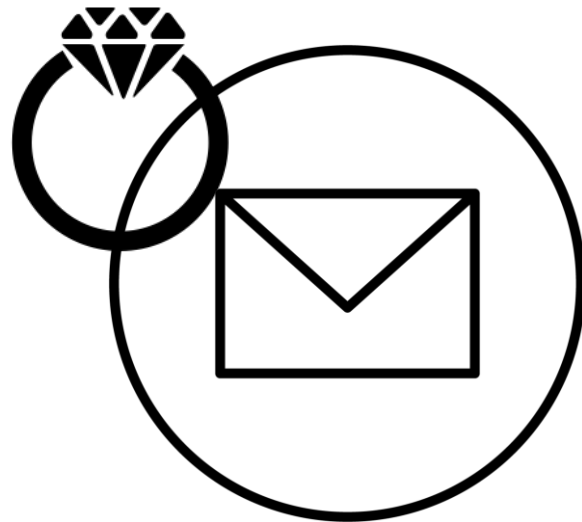
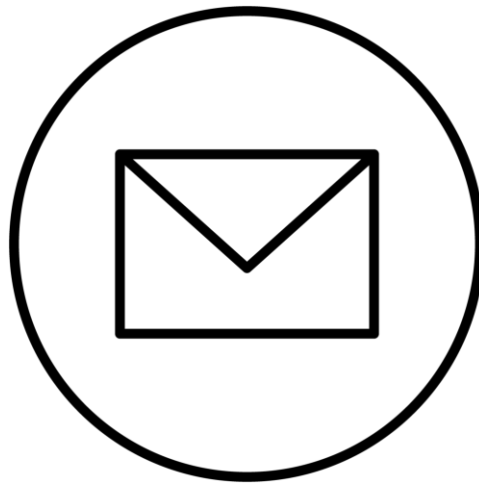
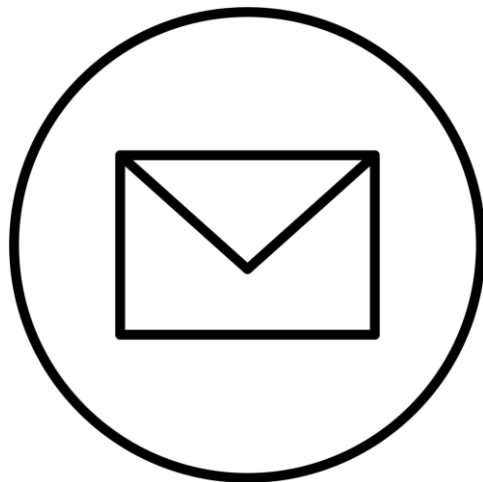
SEARCH

TRIGGER

RIGHT AUDIENCE

RIGHT QUESTION

RIGHT TIME



THREE KEY PRINCIPLES

Less Is More

Start with a Plan

Keep It Tidy

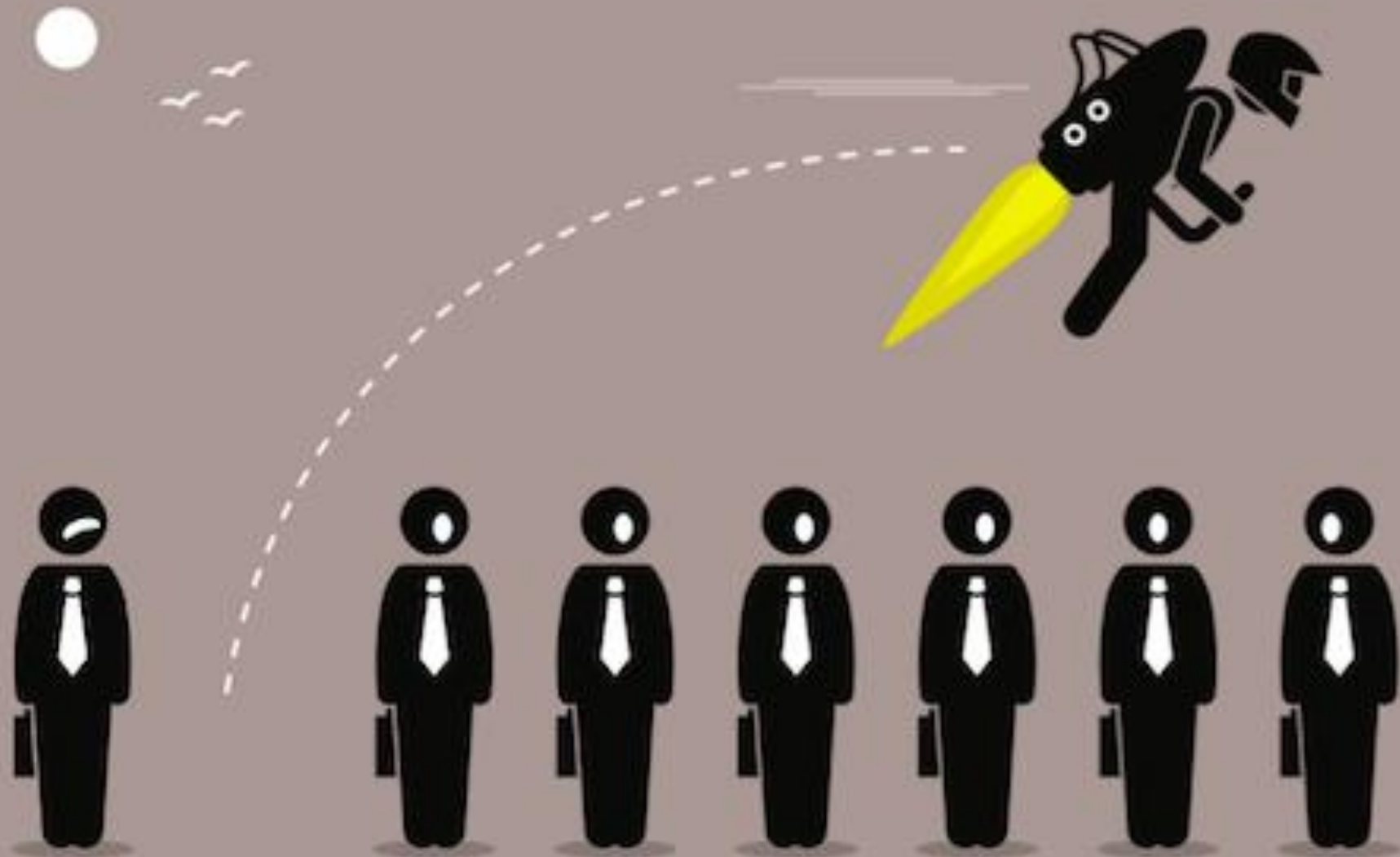
**LESS
IS MORE**



**AVOID TAG
OVERWHELM**









**IF YOU DON'T HAVE
TO, DON'T CREATE IT**

IRONWOOD PRO TIP



“Will this tag be helpful
in 3 months?”

SEGMENT

SEARCH

TRIGGER



“Will this tag be helpful
in 1 year?”

START WITH A PLAN



THE ALGORITHM

TAG ALGORITHM

Tag Name

Group

Description



Manage Tags

[Dashboard](#) / [Configuration](#) / Manage Tags

TAGS

| NAME | GROUP | DESCRIPTION |
|--|---------------------------|--|
| Do not call | Communication Preferences | Do not call |
| Newsletter Only | Communication Preferences | Newsletter Only |
| No direct mail | Communication Preferences | No direct mail |
| No email | Communication Preferences | No email |
| HSLPHX | Communication Preferences | Hustle PHX |
| Major Rep Assigned | Communication Preferences | Major Rep Assigned |
| West Coast | Communication Preferences | West Coast |
| ReEngagement Series - Automation Trigger | Communication Preferences | ReEngagement Series - Automation Trigger |
| ReEngagement Series - Ask - Automation Trigger | Communication Preferences | ReEngagement Series - Ask - Automation Trigger |

TAG NAME | GROUP | DESCRIPTION

**MAKE THIS A
DYNAMIC
SPREADSHEET**

IRONWOOD PRO TIP

| | A | B | |
|----|--|---------------------------|-------------------------------|
| 1 | TAG NAME | GROUPS | DESCRIPTION |
| 2 | Do not call | Communication Preferences | Do not call |
| 3 | Newsletter Only | Communication Preferences | Newsletter Only |
| 4 | No direct mail | Communication Preferences | No direct mail |
| 5 | No email | Communication Preferences | No email |
| 6 | HSLPHX | Communication Preferences | Hustle PHX |
| 7 | Major Rep Assigned | Communication Preferences | Major Rep Assigned |
| 8 | West Coast | Communication Preferences | West Coast |
| 9 | ReEngagement Series - Automation Trigger | Communication Preferences | ReEngagement Series - Auto |
| 10 | ReEngagement Series - Ask - Automation Trigger | Communication Preferences | ReEngagement Series - Ask - |
| 11 | President's Club | Groups | President's Club |
| 12 | Shalom Partner | Groups | Is a part of the SP program - |
| 13 | JVMI - Not Eligible for Appreciation Contact | Groups | Calling Queue - Wait 90 days |
| 14 | Funding small business | Imported Tags | Imported Tag |
| 15 | Sports/coaching | Imported Tags | Imported Tag |
| 16 | Volunteer management | Imported Tags | Imported Tag |

TAG NAME

STAY CONSISTENT

TAGGING STRATEGY - VIRTUOUS

| | | |
|-------------------|--------|--|
| Profile - | Groups | (Answers the question: "Who is this person?" – Donor, Prospect, Referral Partner, Promoter, Detractor, etc) |
| Historical - | Groups | (Answers the question: "What has this person done?" – Downloaded – File, Requested Consult, Purchased – Product, etc) |
| Workflow Status - | Groups | (Answers the question: "Where in my workflow is this persons?" – Trigger Tags, Loop Tags, Active in... Tags, etc) |
| Admin - | Groups | (Failed Invoices, Follow Up Lists, and other administrative groups) |
| Communication - | Groups | (Communication preferences like how often they'd like to be emailed and email engagement including how engaged they are) |
| Events - | Groups | (Event Name, Status, and Date) |
| Misc - | Groups | (Catch all for random and temporary tags) |

| TAG NAME | GROUPS | DESCRIPTION |
|--|---------------------------|--|
| Communication - Do not call | Communication Preferences | Do not call |
| Communication - Major Rep Assigned | Communication Preferences | Major Rep Assigned |
| Communication - Newsletter Only | Communication Preferences | Newsletter Only |
| Communication - No direct mail | Communication Preferences | No direct mail |
| Communication - No email | Communication Preferences | No email |
| Communication - West Coast | Communication Preferences | West Coast |
| Communication Preferences - Do not call, email or mail | Communication Preferences | Imported Tag |
| Event - Webinar 1 - 20180518 - Attended | Groups | Workflow Automation Webinar Attended 20180518 |
| Event - Webinar 1 - 20180518 - Did Not Attend | Groups | Workflow Automation Webinar Registered but did not Attend 20180518 |
| Event - Webinar 1 - 20180518 - Early Jumped | Groups | Workflow Automation Webinar Attended but Jumped Early 20180518 |



GROUP

DESCRIPTION

STAY ORGANIZED

ALPHABETIZATION

SPECIAL CHARACTERS

!@#\$%^&*()_+

ISO DATES

IRONWOOD PRO TIP

Event - Webinar 1 - 20170612 - Attended
Event - Webinar 1 - 20170712 - Attended
Event - Webinar 1 - 20170812 - Attended
Event - Webinar 2 - 20170610 - Attended

IRONWOOD PRO TIP

**KEEP
IT TIDY**



HOW TO CREATE A TAG

**SYSTEM ADMIN
ACCESS**

Virtuous CRM - Configuration


Reyna

Securehttps://app.virtuoussoftware.com/Generosity/Configuration

Q ☆

YouTubeGoogle DriveDropboxPinterestWhatsAppTelegramFacebookMessengerZoom

PersonPerson+GraduationCapProfileMore



DASHBOARD

CONTACTS

GIFTS

QUERY TOOL

AUTOMATION

GIFT & CONTACT IMPORT

MERGE CONTACTS

CAMPAIGNS

PROJECTS

EVENT MANAGEMENT


GRANT MANAGEMENT


VOLUNTEER MANAGEMENT


TASKS


SETTINGS


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
























Search for...

Q

Virtuous Settings & Configuration

[Dashboard](#) / Configuration


TEAM

DATA CUSTOMIZATION

DATA MANAGEMENT

CONNECTIVITY


ODDS & ENDS



ORGANIZATION

Manage preferences for your organization.


MANAGE ORGANIZATION



TEAM MEMBERS

Invite and manage team members for your organization.


MANAGE TEAM



PERMISSIONS

Create and edit permission groups and permissions to Virtuous modules.


MANAGE PERMISSIONS



ORGANIZATION GROUPS

Create and edit organization groups which can be used to assign users and contacts to.

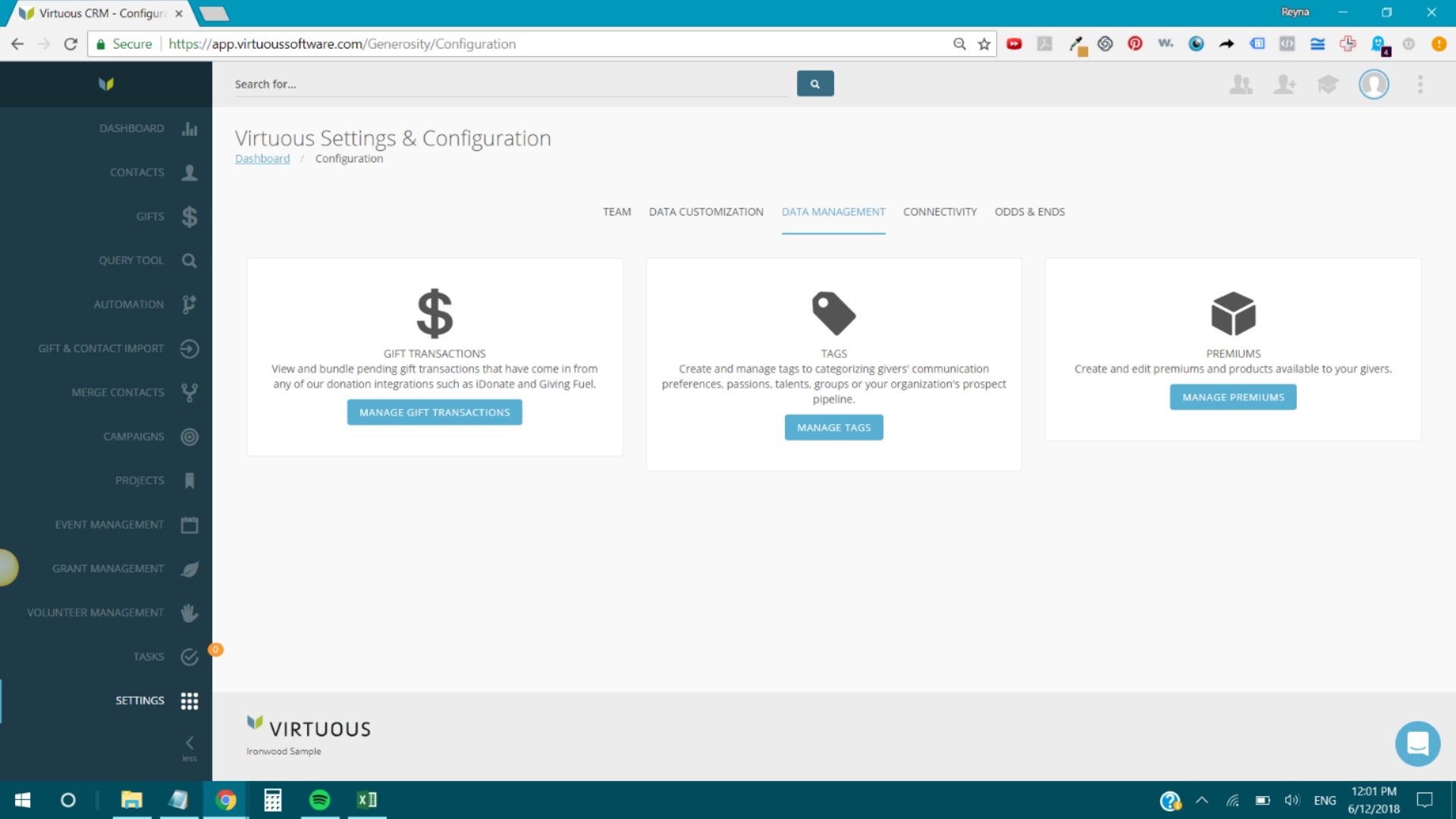
MANAGE ORGANIZATION GROUPS

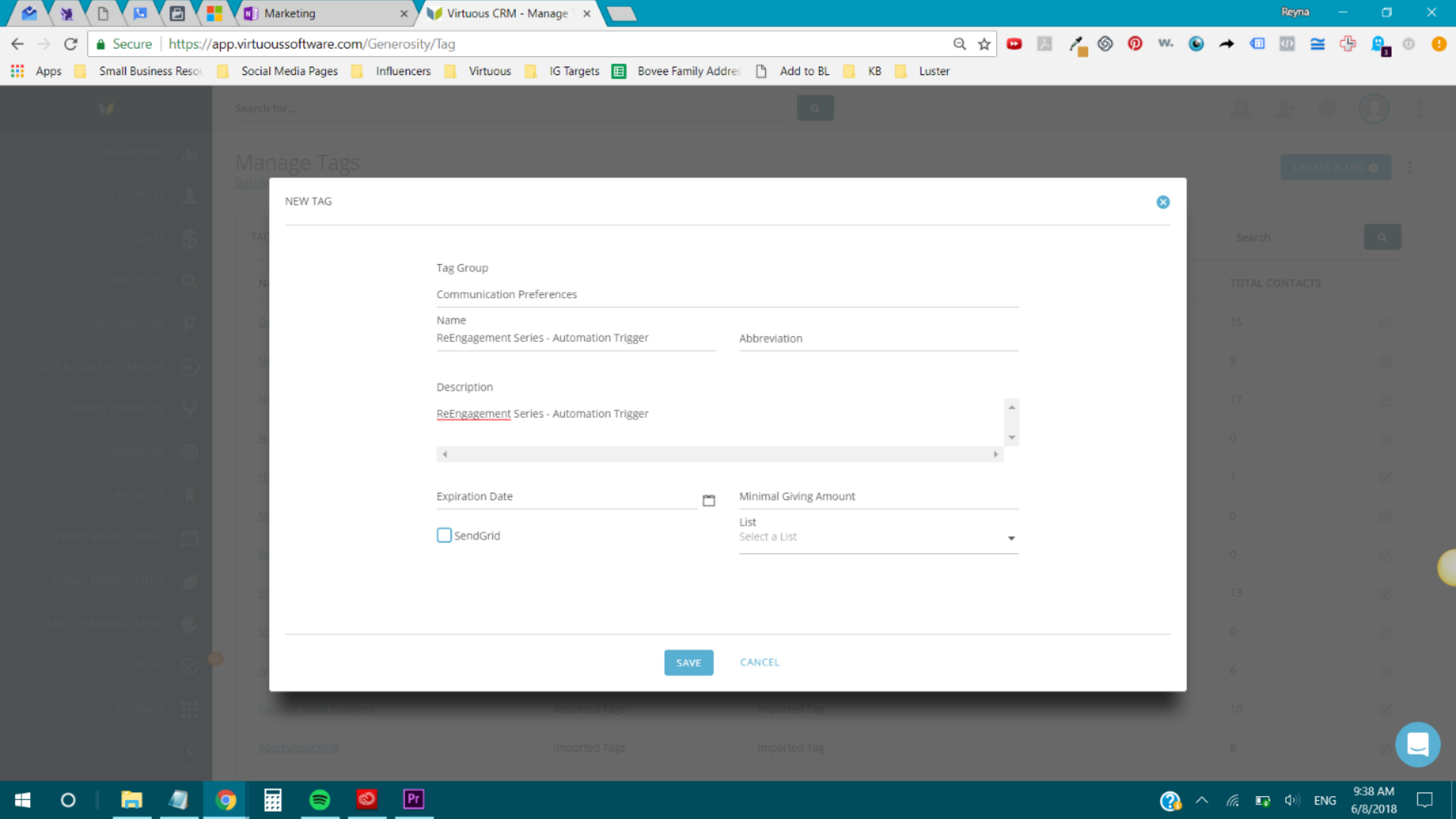
 VIRTUOUS

Ironwood Sample

Chat Icon

12:00 PM 6/12/2018





Reyna

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Secure | https://app.virtuoussoftware.com/Generosity/Tag

Apps | Small Business Reso | Social Media Pages | Influencers | Virtuous | IG Targets | Bovee Family Address | Add to BL | KB | Luster

Search for...

Manage Tags

NEW TAG

Tag Group

Communication Preferences

Name

ReEngagement Series - Automation Trigger

Abbreviation

Description

ReEngagement Series - Automation Trigger

Expiration Date

Minimal Giving Amount

☐ SendGrid

List

Select a List

SAVE

CANCEL

TOTAL CONTACTS

15

9

17

0

1

0

0

13

0

6

10

8

9:38 AM

6/8/2018

ENG

TAG HYGIENE

REMOVE TAG
IF NOT HELPFUL

IRONWOOD PRO TIP

**USE AUTOMATION
TO REMOVE TAGS**

IRONWOOD PRO TIP

BONUS: TAG STRATEGY WORKSHEET



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PERSONAL COACH



3 WEEKS



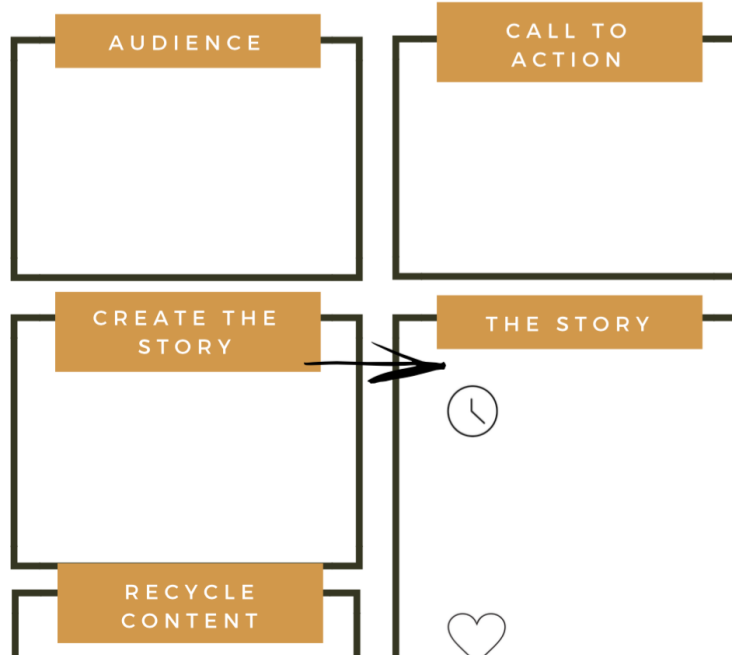




WHERE WE'VE BEEN

Workflow Automation Planner

4 KEY COMPONENTS TO EVERY WELL-RUN AUTOMATION



**WILL YOU
MARRY ME?**

**WILL YOU DONATE
RIGHT NOW?**



DETERMINE AUDIENCE

1



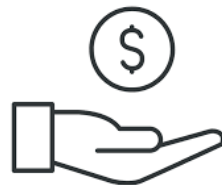
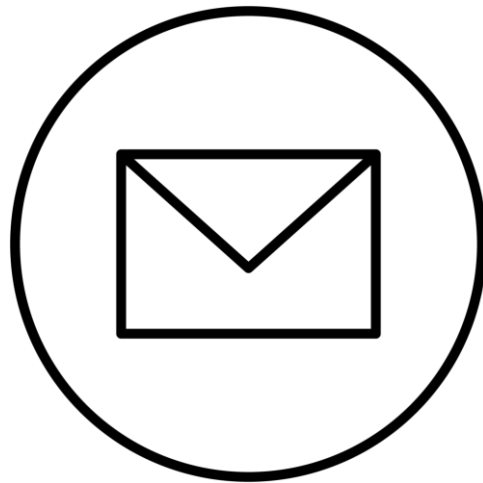
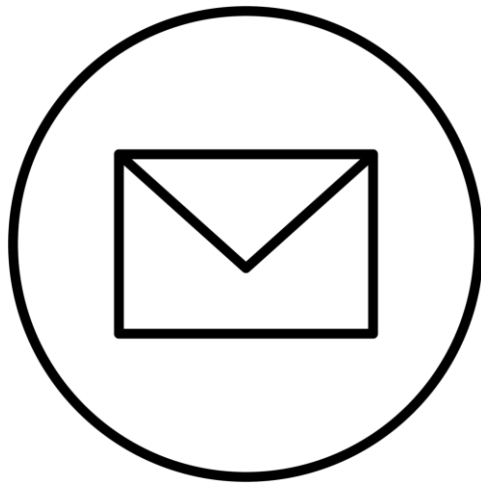
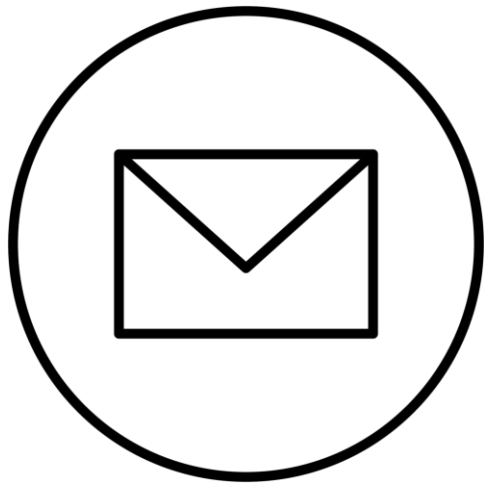
IRONWOOD
VENTURE

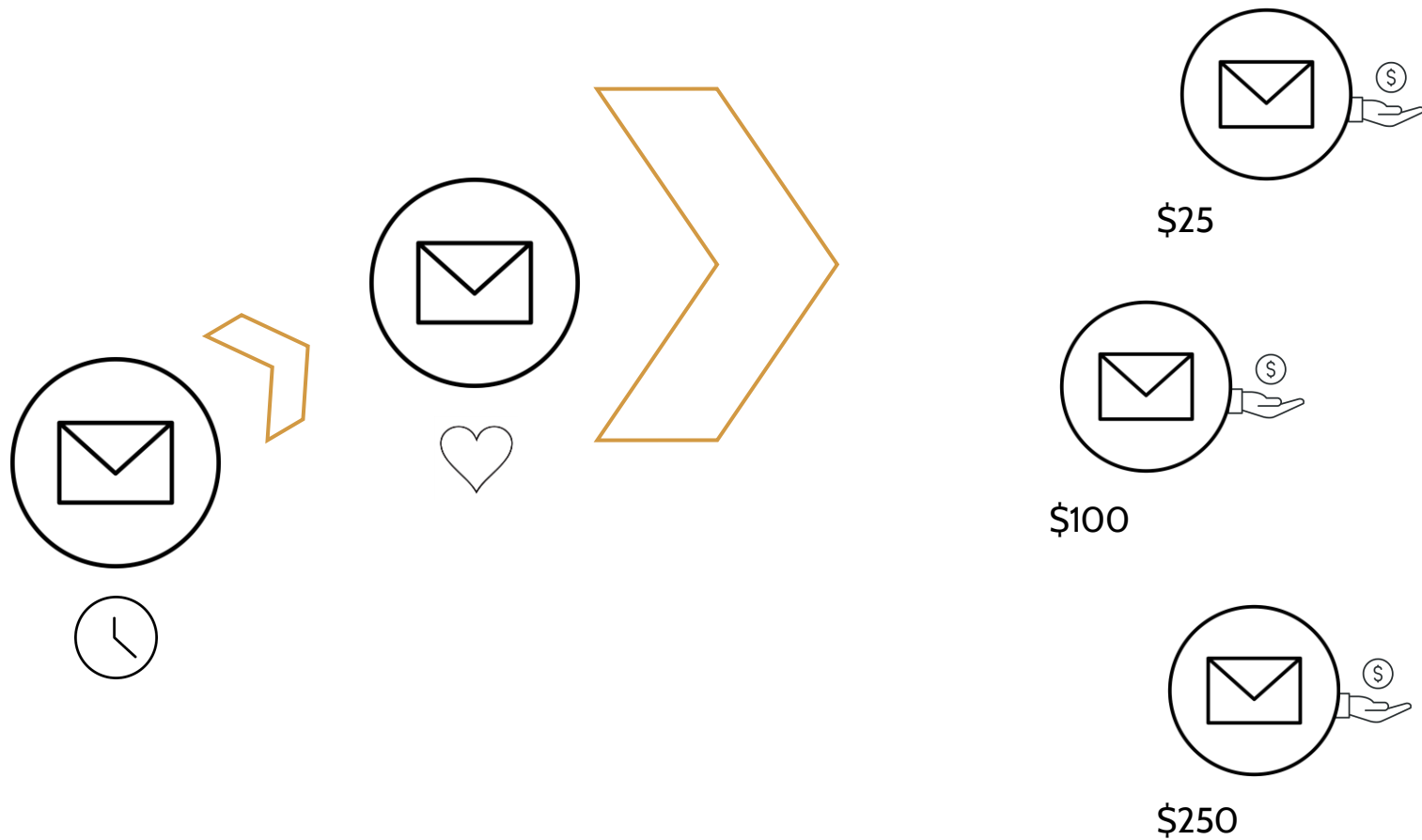
DETERMINE CALL TO ACTION

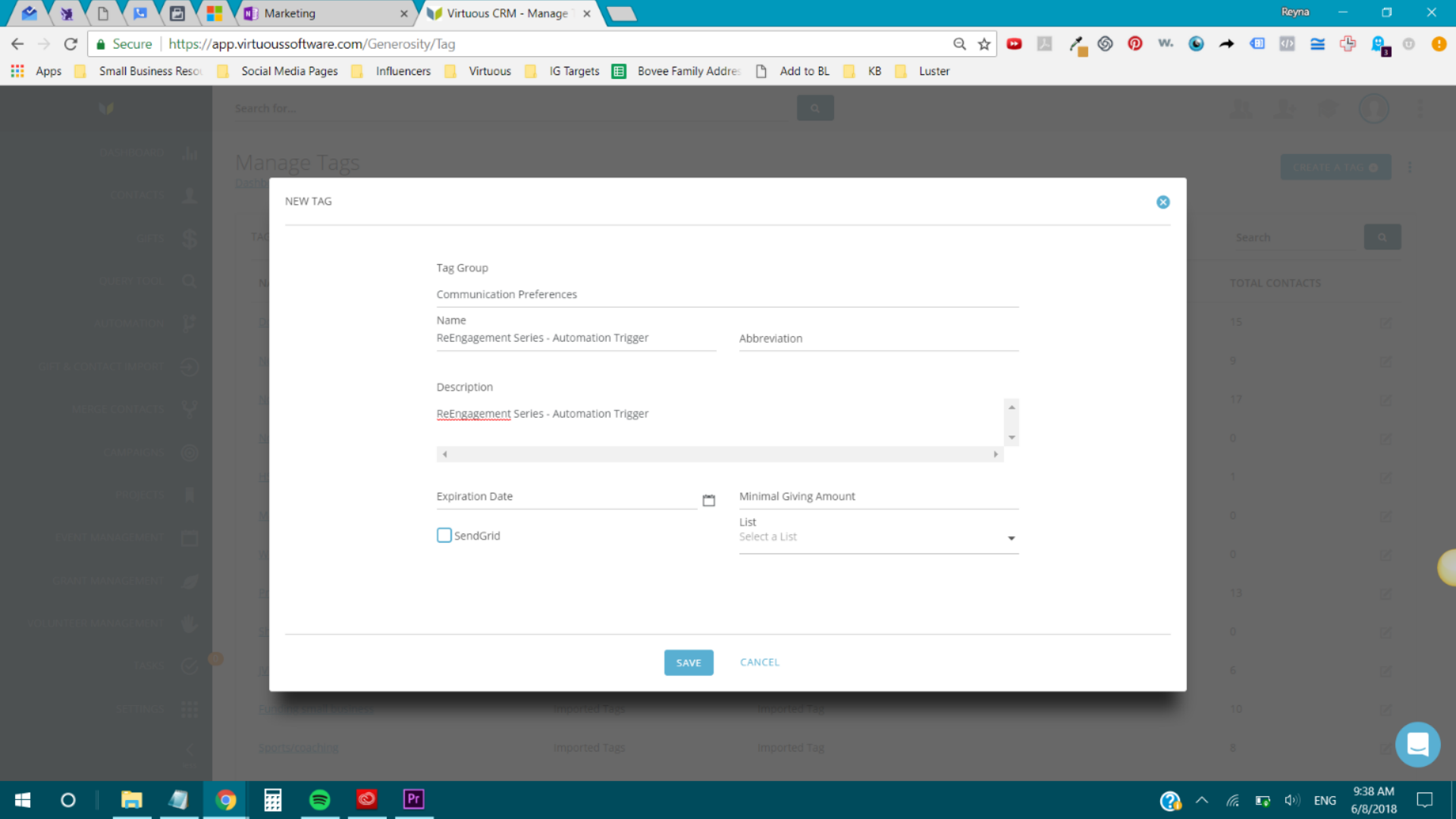
2

CREATE THE STORY

3







Reyna

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Venture



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**IRONWOOD
VENTURE**