

How users utilize tags

Creates or adds tags on import - says they are data specific so she has to re-tag every time

adds tags on import - puts dates in tag name so she knows when

to create a tag she goes to an active list looks at individual contacts then tags contacts profiles - is super easy to add and remove tags

Tried using tags to segment her first welcome email

"Location is something that's useful [for tags]"

when he imported list for students - had to manually tag them

how are you using tags? just a way of separating guidelines in the student list

"I use tags all the time in Shopify"

"I use Shopify tags to create collections automatically"

uses tags in Shopify to automate how products show up in my store

sends to tags she builds within the same day

Described tagging contacts as a pretty easy process

Tried using tags a little, but it wasn't very easy to apply

"I keep seeing the prompts for tags, but we haven't dove into that yet"

Used tags to denote where people came from (such as a house show)

last time created tag first identified who he wanted on the tag then did it manually

knew who to tag because they were coming from his excel files

Always based on clients, events, or what products they use or what type of support they like - some might be added more than a tag etc...

Not using tags for user audience (forgot) but two tags for people to sign up for newsletter - no need for tags yet

use cases for tags labels, different features, name in marketing to make sure people get the right information

Challenges with organization? no challenges now that she uses tags - everything is so much easier

have you sent emails to tagged groups? yes, sent follow up emails to students he has tagged

has not seen tags tags from contact profile - curious about bulk tag contacts

How users utilize segments or groups

Hasn't used segments and groups

Has not heard of segments or groups

when creating campaigns chooses list for them chooses group or segment (thinks that tag the most a combination - then adds other contacts - maybe segments could be incorporated in that named segment)

Segments or groups? Have not heard of them - maybe mentioned in email haven't used them

Tag expectations

knowing to tag even when would be helpful to know up front

would like to automatically tag in mc?

"I would want to assign a location-based tag to a user without having to do it manually"

Hasn't looked into tags at all; completely naive about it

"It might be even better to automate tag creation"

"it'd be great if I could go through my purchases and tag people who've been customers"

needed to add tags, could get more granular than having to manually tag each tag

"It would be useful to have tags based on sales or usage patterns"

wants to be able to identify student college and class - every student will have tag from class - then wants to have tag for where they came from

"If you can't automate, then what's the ideal approach to using tags?"

"Conceptually, using tags is a great idea, but it's kind of advanced Mailchimp"

"Can you set up an if then statement to add tags automatically?"

Have ideas about tags prior to using Mailchimp.

tag was introduced at first - thought it was related to social media - then had to figure out what was there and realized it was there to help

Assuming Mailchimp Tags are similar to Intercom tags.

Anything you know about tags? No, we use Intercom, they have a term called tags. We use that for categorizing customers.

"It's not clear to me how [tags] could be valuable beyond this in person touch"

Tags limitations

forming it to issues with tags being static - could have tagged a loyal customer - then a year later they might not be loyal anymore

Not confident in who has multiple tags so leans on building segments

wants to know when people have been contacted - when they've been uploaded

used segments because she has no way who has been tagged multiple times without going into contact profiles individually

might add more tags if he could get more granular or have some automation

Top Tags Concept

Top Tags questions

"What does it mean by top tags?"

"What is most used tags in this context?"

"I think it would mean, or what I would like it to mean is the group I contact the most"

"Top is based on the number of contacts assigned, not how frequently you use it"

"I'm not sure if Top is a valuable assessment"

Top Tags expectations

top tags are not helpful - her sends aren't based on number of tagged contacts - it's more about how often she's sending

Impressions of top tags - assuming this means tags that have most contacts associated - description should be about how often she's sending

top tags is telling me how many contacts are in a tag, which means the tag might mean the most contacts, but not necessarily the most important ones - they should be more important

didn't expect to see her name in the top tags - she's not the one who's sending the emails

instead of top tags maybe her most engaged tags

she used segments from templates that's created in the past - less creating new - would want to be able to use those from so

has ability to send to tags from here - but would only use if she could go to emails she's already drafted

Would like a revenue breakdown for these tags

Would like to see growth of the tags you have there (past 7 days, past 14 days) over time

I probably wouldn't care about the source of the tag, but any other econ data would be good

Suggestions: Open rate for that tag. The more you can visualize without having to go into it is best.

Her tags are all very different groups - would like to create something very specific to these 5 groups

See all of her types of tags will help her know what type of content to make

if there was some sort of case study or something about tags that'd help me probably push us to using it

if there was a social proof example of how others use tags, that'd help me understand the value

"Can you set up an if then statement to add tags automatically?"

"I know from email campaigns whether someone has opened my emails and added my website (unique tags)"

"It would be really useful to know how users came to me" (FB, etc.)

Would you use this page? (Top Tags) are a good reminder to me that I still do have tags"

"Tags might be useful based on the last time I used them"

Top tags usefulness: 2 out of 5 (1 being most valuable)

if top tags had some of the data he was looking for - it would be a one - it would tell him what tags are valuable

My most applied tag doesn't necessarily mean my most valuable/engaged tag

Tags usefulness: 4/5 out of 5 (1 being most useful)

"If AO doesn't replace the dashboard, tags make more sense"

Would like to know more info about the tags - which are more valuable/engaged (not) just top tags doesn't tell me a lot

what is the value of the top tags - which are more valuable/engaged (not) just top tags doesn't tell me a lot

if top tags had some of the data he was looking for - it would be a one - it would tell him what tags are valuable

Since her tags are all different - tags selection is a responsibility because they don't affect her content

"There's something about [AO] that's missing why tags are useful"

Tag creation

I'd want the shortcut to add a tag - it's almost like jotting a note

Could we create tags before uploading them? That'd be helpful.

Add a tag - I assume it'd ask me for the name of the tag and take me to the contact list afterwards"

Top Tags Slat & Modal

When the description of top tags on the modal - have the description that's using the segment say "Name her all the work influence between tag and segment"

"Take action modal makes usefulness more apparent"

Slat expectation: "I'd expect to see my list of email subscribers with the tagged subset"

What would you do with that? "I'm not sure what I'd do with that"

Paper plane: "I could email those contacts?"

Take action modal: "I think this is more useful than what I was saying would happen"

Slat expectations: I would expect to see a grid of my contacts

Take action modal: I would probably think I did something wrong and go back

I could see myself taking one of these send actions in the future

"how did you decide on surfacing email, ad an postcard?"

if we surfaced top 3 of each of email he sent out, that would be great for him - having top 3 choices for a specific tag would be helpful

Right now the three options in the modal look the same, could they have icons so he doesn't have to read?

in response to modal: "Assuming this is very helpful" like the suggestions, likes that she can check the contacts

Tags Page

Tags page is what user expected

User has never seen tags page before

"I wanted to add a contact to a tag, I'd have to go to my contact list and tag them"

Impressions around manage tags - would be able to see tags she already uses

Has not seen tags page - she creates tags from contact profile - curious about bulk tag contacts

Manage tags: I would assume I'd see a grid of all tags, who's in the list, etc.

add person icon would allow me to add new people to the tag

for manage tags - would expect list of tags - would like to see open rate, click rate, more data to view and make changes

when on tags page - wondering about stats/logic of secondary nav

Contact Table

Contact table: I'd figure out what contacts I want to tag

Creating tag: Seemed intuitive

Didn't notice the Tags column initially