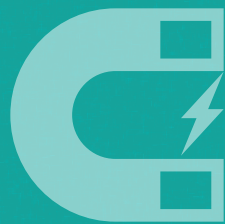

HOW TO GET THE REAL
LEAD VALUE
OF YOUR OPTIN MAGNETS

(INFUSIONSOFT EDITION)



Why Is Lead Value Important?

The first step to optimizing your marketing is understanding how much revenue your average lead brings in -- whether paid, search, referral or by any other marketing channel.

In this guide, we'll walk you through how to get the lead values of all of your optin magnets, so you can find the marketing content that makes you the most money.

Its easy to bet on the winners when you know who they are.

Here's an overview of what you'll do today to unlock your Infusionsoft Lead Values (manually) so that you can better understand the leads who makes your business successful:

1. Export critical Tags and E-commerce reports from Infusionsoft
Calculate individual Lead Values in Excel
2. Blend your reports in Excel
3. Behold your Lead Values!
4. Go out into the world a better business owner and marketer

Before you start, make sure you have the following:

1. Access to the Marketing Reports in your Infusionsoft account
2. Access to the E-commerce Reports in your Infusionsoft account
3. Microsoft Excel
4. 40 minutes to nerd out on your analytics

Got it? Then let's calculate those Lead Values.

Here's how to do it ...

Export the Tag Application Report



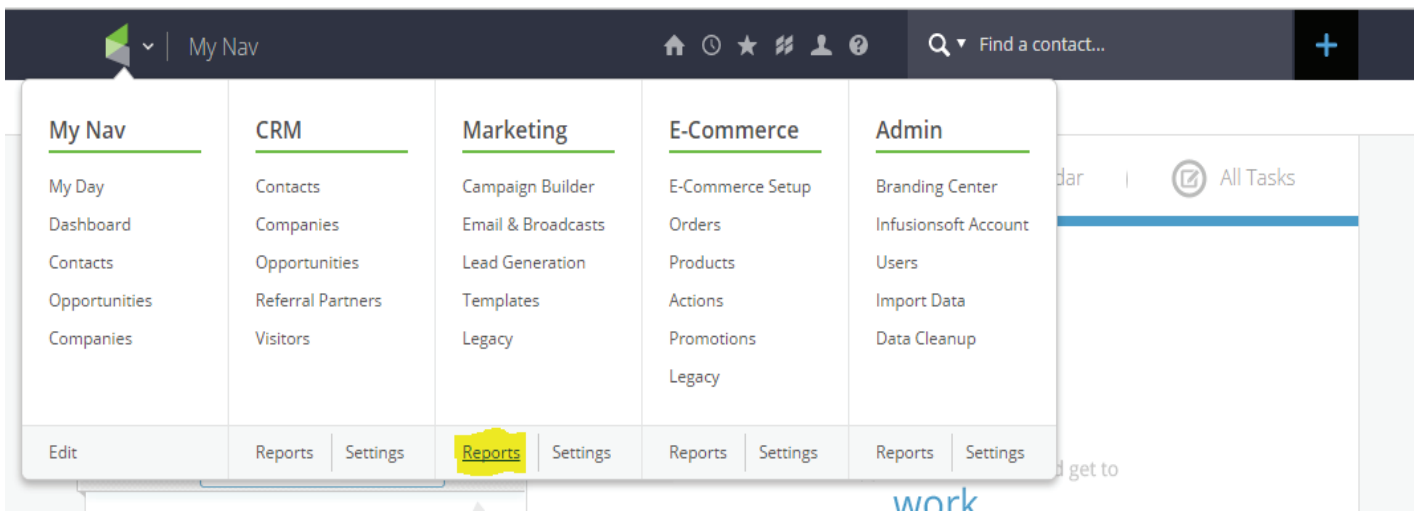
The Tag Application Report is a list of all your contacts in Infusionsoft, as well as the tags that are applied to them. It's a big list, and is the cornerstone of the data we're going to be analyzing to find your most effective lead magnets.

Let's get started!

1) Log in to your Infusionsoft account.

If this is a challenge, we're in trouble

2) From the top navigation, select Marketing > Reports



3) Select the Tag Applications Report.

This is the report we'll use to calculate the number of leads you have for each Tag.

4) Set the Tag Application Date Range.

Do you only want Tags that were applied to your Leads over the past 30 days? Then use the date filters to select your specific time frame.

Want every Tag ever? Then just click Search.

Export the Tag Application Report

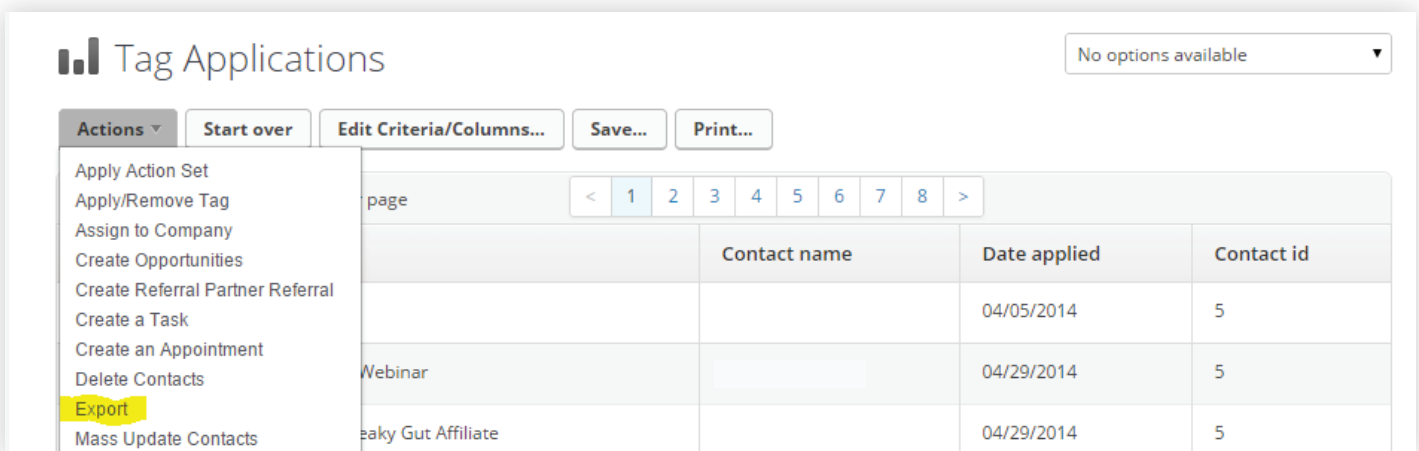
Do you have more than 1,048,576 Tag Applications?

If you're tagging your leads correctly, you might! Unfortunately Excel has a hard limit on how many data rows it can handle. Any more than that, and your Lead Value report will not have data integrity.

So you should stop now and buy SegMetrics

5) Export the Tag Applications Report.

From the "Actions" dropdown select "Export", like this:



The screenshot shows the 'Tag Applications' report interface. At the top left, there is a bar chart icon and the text 'Tag Applications'. On the right, there is a dropdown menu with the text 'No options available'. Below this, there are several buttons: 'Actions' (with a dropdown arrow), 'Start over', 'Edit Criteria/Columns...', 'Save...', and 'Print...'. The 'Actions' dropdown menu is open, showing a list of options: 'Apply Action Set', 'Apply/Remove Tag', 'Assign to Company', 'Create Opportunities', 'Create Referral Partner Referral', 'Create a Task', 'Create an Appointment', 'Delete Contacts', 'Export' (highlighted in yellow), and 'Mass Update Contacts'. Below the dropdown, there is a table with columns: 'Contact name', 'Date applied', and 'Contact id'. The table has three rows of data. The first row has 'Webinar' in the 'Contact name' column, '04/05/2014' in the 'Date applied' column, and '5' in the 'Contact id' column. The second row has 'Webinar' in the 'Contact name' column, '04/29/2014' in the 'Date applied' column, and '5' in the 'Contact id' column. The third row has 'eaky Gut Affiliate' in the 'Contact name' column, '04/29/2014' in the 'Date applied' column, and '5' in the 'Contact id' column. Above the table, there is a pagination control with a '<' button, a '1' button, a '2' button, a '3' button, a '4' button, a '5' button, a '6' button, a '7' button, an '8' button, and a '>' button.

6) Select the fields you want to export and click "Process".

We recommend exporting only "Contact Id" and "Tag". This will keep your file size manageable.

Once you've selected your field, click "Process" and save the file as "tag-applications-report".

One report down, one more to go

Export the All Sales Report



Now that we've gotten a list of all the contacts and their tags, we're going to get all the purchases those contacts have made. This is the "Value" part of our lead value calculations.

1) From the top navigation, select E-commerce > Reports.

2) Select the All Sales Report.

3) Filter your Search Results (if you want to).

A screenshot of a "Search Criteria" form. It includes input fields for "Invoice Id", a dropdown for "Inv Total" set to "equals", a date range selector for "Date" with values "03-01-2015" and "03-05-2015", and another dropdown for "Bal Due" set to "equals". At the bottom are "Search" and "Reset Filters" buttons.

Only want to include sales from a specific date range? Then use the date filters. Only want to include sales that have been paid in full? Then set "Bal Due" to zero.

When you're done, click Search

4) From the Actions dropdown, select "Export"

Select the fields "Contact Id" and "Inv Total" and hit "Process". Again, you can select as many fields as you please, but have mercy on your computer's processing

Your computer can't handle all of this data the way SegMetrics can.

5) Save this report as "all-sales-report"

Nice work, you survived the Infusionsoft interface!

Calculate Individual Lead Values



Now we're getting into the nitty gritty of your data. Here's where we'll take the reports that we just exported, and turn them into data that we can actually work with!

1) Find your All Sales Report and open that sucker.

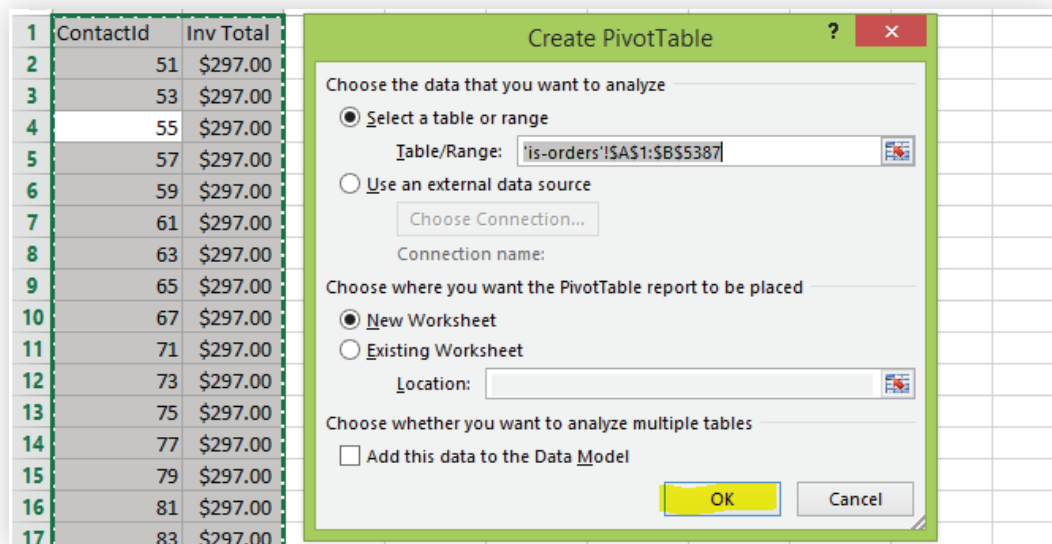
You should see two columns of data. Something like this:

	A	B	C	D	E	F	G	H	I
1	ContactId	Inv Total							
2	51	\$297.00							
3	53	\$297.00							

2) Create a Pivot Table.

Select all of your data (CTRL+A), then click "Pivot Table" under the "Insert" Tab of Excel. Then click "Ok".

Excel will open a Pivot Table – arguably its most powerful tool for analyzing data – in another sheet.



Label this sheet "Sales Pivot". We'll be using it later

Calculate Individual Lead Values

3) Drag “Contact Id” to the Rows shelf and “Inv Total” to the Values shelf.

Congrats, you now have a Table that shows the all-time revenue generated for each of your Leads.

Does it look like this? Good

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable has 'Row Labels' in column A and 'Sum of Inv Total' in column B. The data rows are numbered 4 through 28. The 'Contact Id' values in column A are: 51, 53, 55, 57, 59, 61, 63, 65, 67, 71, 73, 75, 77, 79, 81, 83, 85, 87, 89, 91, 93, 95, 97, 101, 105, 107. The 'Sum of Inv Total' values in column B are: 297, 297, 297, 297, 297, 297, 297, 297, 297, 394, 297, 297, 297, 297, 297, 297, 297, 297, 297, 297, 938, 297, 297, 297, 297, 297, 297. The cell containing '61' in row 9 is highlighted with a green border. To the right of the spreadsheet is the 'PivotTable Fields' task pane. It shows 'ContactId' and 'Inv Total' checked under 'Choose fields to add to report:'. Below that, 'ContactId' is in the 'ROWS' area and 'Sum of Inv Total' is in the 'VALUES' area. The 'UPDATE' button is visible at the bottom right of the task pane.

Row Labels	Sum of Inv Total
51	297
53	297
55	297
57	297
59	297
61	297
63	297
65	297
67	297
71	394
73	297
75	297
77	297
79	297
81	297
83	297
85	297
87	297
89	297
91	297
93	938
95	297
97	297
101	297
105	297
107	297

If you're already sick of this, visit segmetrics.io.

The Pro plan probably costs less than the revenue generated by just one of your Leads

Blend Your Data



Open your Tag Applications report. It should look like this:

	A	B	C	D	E
1	Contact Id	Tag			
2	375827	Prospect Tags -& Quiz Optin			
3	375829	Prospect Tags -& Quiz Optin			
4	375831	Prospect Tags -& Quiz Optin			
5	375833	Prospect Tags -& Quiz Optin			

In cell C1, type “Revenue”. This is where you’ll put – you guessed it! – your revenue values. You’ll do it using an Excel formula called a VLOOKUP.

If you’re unfamiliar with VLOOKUPS, this will at first be confusing but eventually be mind-blowingly simple and powerful

Use a VLOOKUP to populate your Revenue. You need both reports open for this. And it may get messy, but we swear it’ll work.

In cell C2 of the Tag Applications Report, type the following formula:

```
=VLOOKUP (A2,
```

After typing the comma after A2, open your “Sales Pivot” tab in your All Sales Report and select all of the values in Columns A and B.

That is, click the first Contact Id in the Sales Pivot tab – probably cell A4 – and then drag over to Column B, then all the way down to the revenue total of the last value in your pivot table.

Your formula will now look something like this:

```
=VLOOKUP (A2, '[all-sales-report.xlsx]  
Sales Pivot'!$A$4:$B$9873,
```


Blend Your Data

NOW, finish your formula by typing “,2,FALSE” and clicking Enter. The end result will look something like this:

```
=VLOOKUP(A2, '[all-sales-report.xlsx]Sales Pivot  
ot'!$A$4:$B$9873,2,false)
```

To make some sense of this insanity, what we’re doing here is using the Contact Id from the Tag Applications Report to look up in the Sales Pivot tab how much revenue each Contact Id has generated.

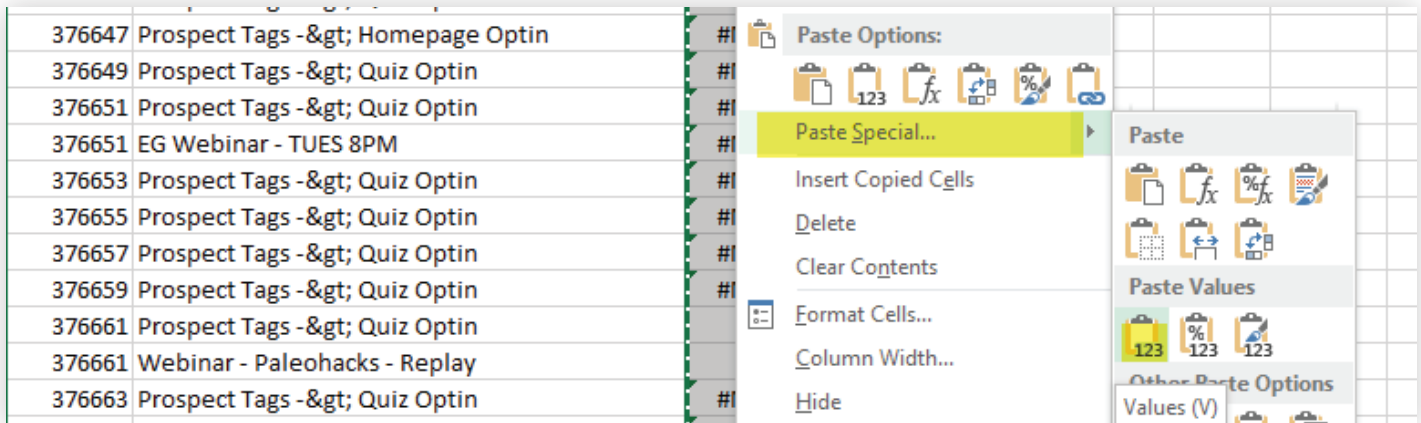
Drag your formula from Cell C2 down to the last row of your report. Not all the way down, but down to the last row that has a Contact Id in Column A.

Maybe your report now looks like this?

	A	B	C	D	E
1	Contact Id	Tag	Revenue		
380	376631	Prospect Tags -> Quiz Optin	#N/A		
381	376633	Prospect Tags -> Quiz Optin	#N/A		
382	376635	Webinar - Nourished Kitchen - Replay	#N/A		
383	376637	Prospect Tags -> Quiz Optin	#N/A		
384	376639	Prospect Tags -> Quiz Optin	#N/A		
385	376641	Prospect Tags -> Quiz Optin	#N/A		
386	376643	Prospect Tags -> Quiz Optin	#N/A		
387	376645	Prospect Tags -> Quiz Optin	#N/A		
388	376647	Prospect Tags -> Homepage Optin	#N/A		
389	376649	Prospect Tags -> Quiz Optin	#N/A		
390	376651	Prospect Tags -> Quiz Optin	#N/A		
391	376651	EG Webinar - TUES 8PM	#N/A		
392	376653	Prospect Tags -> Quiz Optin	#N/A		
393	376655	Prospect Tags -> Quiz Optin	#N/A		
394	376657	Prospect Tags -> Quiz Optin	#N/A		
395	376659	Prospect Tags -> Quiz Optin	#N/A		
396	376661	Prospect Tags -> Quiz Optin	297		
397	376661	Webinar - Paleo hacks - Replay	297		

Blend Your Data

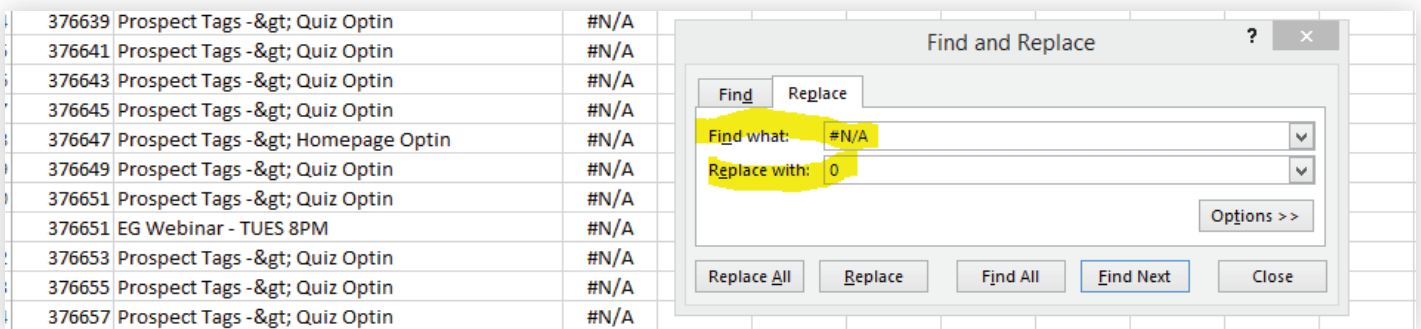
In the Tag Applications Report, click on Column C to select it. Copy all values (CTRL+C). Then, right-click anywhere on Column C and select “Past Special ... Values”, like this:



Now, select Column C again and do a Replace All (CTRL+H). Find all instances of #N/A and replace all with 0. Like this pretty picture:

Create another Pivot Table, this time using all of the data in the Tag Applications Report

Drag “Tag” to the Rows shelf and drag “Contact Id” and “Revenue” to the Values Shelf. Here it is:



Get a cup of coffee because this has been a snoozefest.

Blend Your Data

Click the dropdown arrow next to “Sum of Contact Id” and select “Value Field Settings”.

When prompted, select “Count” instead of “Sum” and Click “Ok”.

The values in this column now represent the number of Leads per each Tag, which means we’re getting close

Create a new tab and call it “Lead Value Paradise”.
Or something similar.

Copy the entire table from the Tag Pivot sheet, open the Lead Value Paradise tab and do a “Paste Special Values” (remember we did this earlier).

You should have three columns: “Row Labels”, “Count of Contact Id” and “Sum of Revenue”.

Change these to “Tags”, “Leads” and “Revenue” and add a fourth called “Lead Value”.

Got it?

2	Tags	Leads	Revenue	Lead Value			
3	Affiliate Tags -> Ch	9385	150042				
4	Affiliate Tags -> So	101	3247				

This is it!

This is the moment you’ve been waiting for (instead of buying SegMetrics like a person whose time is worth something)

Just one more step, and we’ve got the lead value.

Blend Your Data

In the first Row of your Lead Value column, type =C3/B3 (assuming your Column Head row is Row 2)

Drag this formula all the way to the bottom.

Format Column D to a currency format and presto: You have your Lead Values for all of your Tags.

5	EG Sara Webinar - TUES 2PM	191	3161	\$	16.55		
6	EG Sara Webinar - TUES 8PM	174	2667	\$	15.33		
7	EG Webinar - Do Call	6462	36349	\$	5.63		
8	EG Webinar - TUES 2PM	1714	11451	\$	6.68		
9	EG Webinar - TUES 8PM	1271	10659	\$	8.39		

Finally, you can make data-driven business decisions based on the almighty Lead Value calculation. Go forth and make us proud!

Want to do this again?

We thought not.

Sign up for SegMetrics at segmetrics.io, get a free 14-day trial and get your Lead Values instantly

