

4 Critical Metrics Hiding in Your Infusionsoft Account

4 Critical Metrics Hiding in Your Infusionsoft Account (and How To Uncover Them)

Over 40,000 users have signed up for Infusionsoft, and it's understandable why. Infusionsoft provides businesses with a stellar way to automate their marketing.

Unfortunately, trying to extract data from Infusionsoft can be challenging. And trying to extract the exact data you actually need to grow your business? Nearly impossible.

If you're one of the many business owners struggling to find actionable data, worry no more. If you've given up and moved on... come back! SegMetrics provides the metrics you need to get the good stuff from Infusionsoft's marketing automation. And not just _get _the data, but actually understand it, know what drives value and transform your business.

Here are just a few of the metrics Infusionsoft is keeping from you and how you can uncover them.

1. Lead Value

The value of a lead. What could be more—we'll say it—valuable?

If it's so valuable, let's be clear about what this metric is. Lead Value is the average amount of revenue generated by a group of leads.

So, if in the history of your Infusionsoft business you've generated 120,000 leads and \$3,000,000 in revenue, your total Lead Value is \$25 ($\$3,000,000 / 120,000$ leads).

That's a nice number to know. But it's not actionable until you know which of your leads are most valuable, *why* they're valuable, and *when* they became valuable. Once you have that level of data you can generate insights to improve your marketing.

Find When Your Most Valuable Leads Joined Your List

With SegMetrics you can see your Lead Values based on when people first signed up for your Infusionsoft account.

Here we see the Lead Values of people who opted joined your Infusionsoft account—by signing up for a Lead Magnet, webinar, newsletter, etc.—during December 2014:

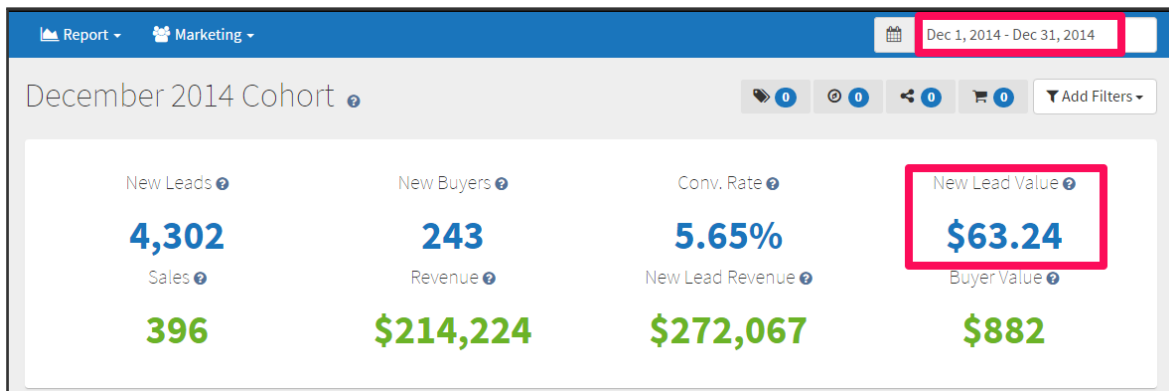


Figure 0.1

Now compare that to people who opted in during December 2015:

The leads from December 2014 are now worth \$63.24 each (awesome!). The leads from December 2015 are worth \$5.65 – roughly 11 times less than the December 2014 leads.

Knowing the monetization of the December 2014 leads can help

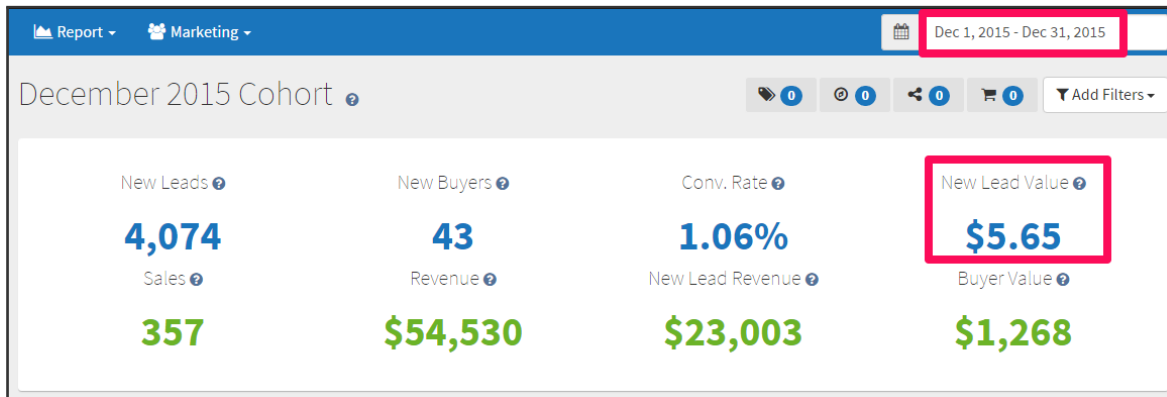


Figure 0.2

you predict the December 2015 cohort growing to a ~\$60 Lead Value by December 2016.

If those 4,074 New Leads mature to a \$63.24 Lead Value—as the December 2014 leads did—that translates to an additional \$234,637 over the next 12 months!

With SegMetrics you can track these “time-based cohorts” to see how their values change over time and gain insights to your revenue flow.

Find the Value of Your Tags

Nothing is more important to your Infusionsoft data than the Tags you apply to your leads. Infusionsoft tags tell you what people

are interested in and what actions they take. *Based on how you apply Tags*, you can see which Lead Magnets people sign up for, which webinars they attend, how they answer survey questions or whether they purchased during your evergreen sequences.

Now with SegMetrics, you can see the `_value_` of every Tag. When you sign up for SegMetrics, we import your pre-existing Tags data so you can instantly see their value.

Tag	Data for new leads during this timeframe				
	New Leads	New Buyers	Conv.%	Lead Revenue	Lead Value
	55,625	1,553	2.79%	\$1,572,751	\$28.27
List: Master Prospect List	33,440	523	1.56%	\$422,011	\$12.62
2015-06-28 to 2015-10-28 Opens	25,362	1,214	4.79%	\$1,287,080	\$50.75
Free Instant Access to EOF	21,875	653	2.99%	\$658,511	\$30.10
Invite to Nurture Campaign	21,565	642	2.98%	\$568,720	\$26.37
List: EOFire Weekly Newsletter	20,763	616	2.97%	\$643,783	\$31.01
2015-06-28 to 2015-10-28 Webforms	20,612	509	2.47%	\$524,082	\$25.43
Paradise Closing 10.28.15	18,805	292	1.55%	\$128,630	\$6.84
Free Podcast Course Campaign	18,557	852	4.59%	\$844,683	\$45.52
List: Master Podcast Interest List	17,409	335	1.92%	\$191,605	\$11.01
2015-06-28 to 2015-10-28 Clicks	17,041	987	5.79%	\$1,080,376	\$63.40
List: FPC Campaign	14,378	759	5.28%	\$771,777	\$53.68
Paradise Opening -> 12.2.15	14,085	221	1.57%	\$89,604	\$6.36

Figure 0.3

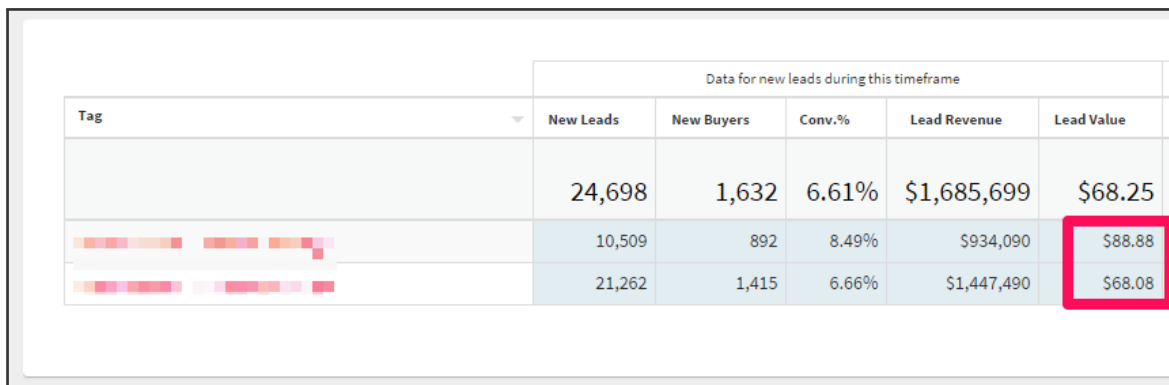
Now you can see the average value and revenue for every tag.

Is this giving you ideas for how to use Tag Value reporting to generate actionable insights to make smarter decisions in your business? (and look like the genius)?

You can use Tag value reporting to...

- Pick the winner of split tests
- Find the highest converting Lead Magnets
- Identify the worth of your webinar
- And report on whatever you use Infusionsoft Tags for!

One of our customers used our Tag reporting to compare two Lead Magnet Tags. They found that one had a 31% higher Lead Value!



The screenshot shows a table titled "Data for new leads during this timeframe". The table has six columns: Tag, New Leads, New Buyers, Conv.%, Lead Revenue, and Lead Value. There are three rows of data. The first row has 24,698 New Leads, 1,632 New Buyers, 6.61% Conv.%, \$1,685,699 Lead Revenue, and \$68.25 Lead Value. The second row has 10,509 New Leads, 892 New Buyers, 8.49% Conv.%, \$934,090 Lead Revenue, and \$88.88 Lead Value. The third row has 21,262 New Leads, 1,415 New Buyers, 6.66% Conv.%, \$1,447,490 Lead Revenue, and \$68.08 Lead Value. The \$88.88 value in the second row is highlighted with a red box.



Tag	Data for new leads during this timeframe				
	New Leads	New Buyers	Conv.%	Lead Revenue	Lead Value
	24,698	1,632	6.61%	\$1,685,699	\$68.25
	10,509	892	8.49%	\$934,090	\$88.88
	21,262	1,415	6.66%	\$1,447,490	\$68.08

Figure 0.4

With this insight, this SegMetrics user can work to get more leads to sign up for the first Lead Magnet (e.g., make it more prominent

on the website, send emails about it to leads who haven't signed up for it, tell affiliates to promote it).

The Value of Your Lead Sources and Ads

Infusionsoft Lead Source reporting can be a headache. (Hello spotty data integrity and tons of custom coding to populate custom fields.)

With SegMetrics, Lead Source reporting is much easier. Slap our Javascript snippet on your website (or integrate the custom fields you're already using in Infusionsoft) and we'll collect your *UTM tracking* and website referral data.

Now you can track the Lead Value of your social media links, Facebook Ads and Referring URLs, and answer that all important question...

How valuable are the sources that send me leads?

Check out this report: Lead Values for all ad channels!

What can you do with this data?

Data for new leads during this timeframe					
Source (utm_source)	New Leads	New Buyers	Conv.%	Lead Revenue	Lead Value
	79,814	3,940	4.94%	\$218,905	\$2.74
(empty)	66,595	3,472	5.2%	\$191,299	\$2.87
google	12,776	427	3.3%	\$23,494	\$1.84
Amazon	150	20	13.3%	\$2,861	\$19.07
bingppc	134	16	11.9%	\$416	\$3.10
facebook	63	4	6.3%	\$827	\$13.13

Figure 0.5

- **Set your Cost Per Acquisition.** If you know that Google ads generate \$1.84 per lead, you now know to buy them for less.
- **Distribute your ad spend based on effectiveness.** Find an ad channel that has a 3X Lead Value as compared to another channel? If you pay roughly the same to acquire these leads you should allocate *much* more of your spend to the more profitable channel.
- **Know the value of your paid leads.** A lot of paid traffic consultants only measure the cost to acquire a lead. It's critical to measure the value they generate—over a day, month, year and beyond—so you can truly know the ROI of your ad campaigns.

You can also use our Referring URL report to see the Lead Values

for every website that sends you leads. This includes Organic, Social and Referral traffic.

Here's a SegMetrics user with a bunch of leads from Organic Search and Social channels.

Referrer	Data for new leads during this timeframe				
	New Leads	New Buyers	Conv. %	Lead Revenue	Lead Value
	63,990	812	1.27%	\$296,103	\$4.63
(empty)	61,029	748	1.2%	\$290,987	\$4.77
google.com	1,600	40	2.5%	\$2,938	\$1.84
google.ca	170	5	2.9%	\$725	\$4.26
google.co.uk	156	2	1.3%	\$302	\$1.94
m.facebook.com	124	0	0.0%	\$0	\$0.00
google.com.au	117	5	4.3%	\$265	\$2.26
facebook.com	100	0	0.0%	\$0	\$0.00
bing.com	84	5	6.0%	\$190	\$2.26
r.search.yahoo.com	55	0	0.0%	\$0	\$0.00
l.facebook.com	27	1	3.7%	\$38	\$1.41
google.co.in	26	0	0.0%	\$0	\$0.00
google.co.za	26	0	0.0%	\$0	\$0.00
www.marriott.com	25	0	0.0%	\$0	\$0.00
pinterest.com	20	0	0.0%	\$0	\$0.00
www.etsy.com	19	1	5.3%	\$38	\$2.00

Figure 0.6

Using this reports, they can measure the value of their Search Engine Optimization and their social media marketing. You can

too, using SegMetrics's reporting – just keep your eye on that Lead Value metric!

2. Conversion Rate

Conversion rate measures the percentage of people you convert from Leads to Buyers. If you're like almost every company on the planet—and possibly on other planets—you want a higher percentage of your leads to be buyers. That means a higher conversion rate.

While Lead Value is our favorite metric at SegMetrics, Conversion Rate is also extremely powerful for measuring the success of your marketing efforts.

Why? Because it simplifies everything.

While your Lead Values can always go higher, the Conversion Rate gives you binary answers to the ever-important question, “Did we convert those Leads to Buyers?”

That simple.

Let's look at a classic split-tested sales funnel. In the following

Infusionsoft sequence, leads are equally split into two different warming sequences with separate downsells.

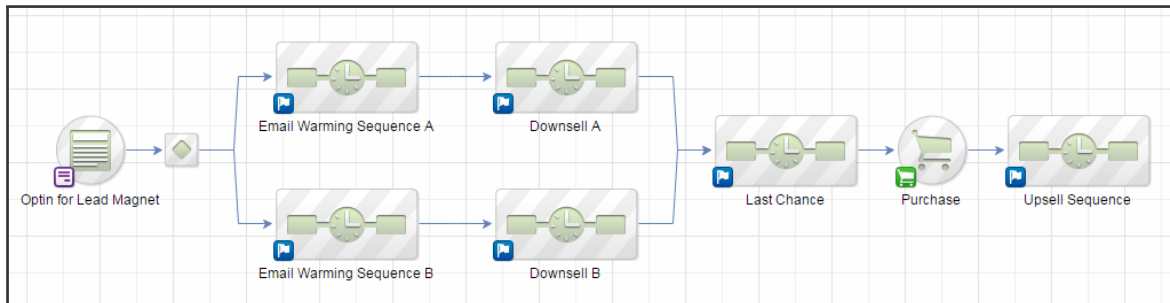


Figure 0.7

Our business question here is simple: How do people from Path A and people from Path B convert to that “Purchase” step?

Backing out the math in the Infusionsoft interface is usually a mess.

With SegMetrics you can use Tag Reporting to see which path converts more people to the finish line.

We’ve got a winner!



Tag	New Leads	New Buyers	Conv.%
	211,801	8,338	3.94%
	156,153	5,471	3.50%
	127,687	6,562	5.14%
A	107,703	4,283	3.98%
B	102,843	3,878	3.77%

Figure 0.8

3. Buyer Value

Buyer value is the amount of revenue per buyer. You know existing customers are valuable—they make up over 70% of purchases for most businesses—but how much are they spending?

According to Bain & Company, a 5% increase in customer retention can mean a 30% increase in company profitability. Getting your existing customers to buy multiple times—through cross-sells, upsells, downsells and new product launches—is one of the best ways for your company to move the needle.

You can't track it in Infusionsoft, but you can in SegMetrics.

Here's an example of how you'd use Buyer Value to measure the success of your upsells, cross-sells and down sells.

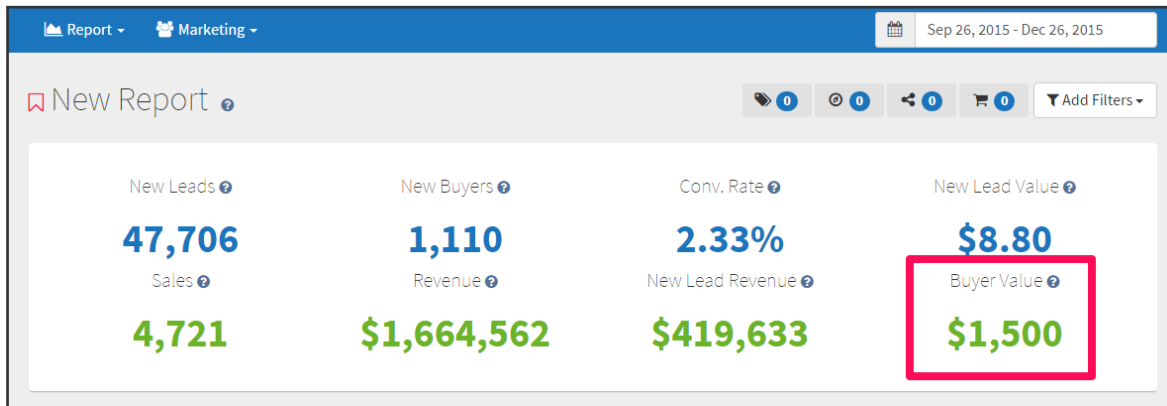


Figure 0.9

Let's say that in May you had 20 people buy your flagship product for \$500 (hooray!). That's \$10,000 total and a Buyer Value of \$500.

Imagine that by December, five of those people bought an additional \$200 worth of your products from a cross-sell funnel and five people bought an additional \$50 in products from an upsell funnel. That's an increase of \$1,250 in revenue, pushing your Buyer Value to \$563.

Now you know two things:

1. Buyers may be worth \$500 at first but they have the potential to grow to \$563 over time (that's 12.6% growth), and
2. Those cross-sell and upsell funnels are worth it. Let's do more of THAT!

It's easier to sell to pre-existing customers. They know who you are. You can cater your marketing to them and build funnels only for people with customer tags.

Focus on generating more repeat buyers, grow your Buyer Value, and measure it with SegMetrics.

4. Product Sales

Revenue per product is tracking how much revenue each product makes for your business. Seems important, doesn't it?

So why does an Infusionsoft product sales report looks like this:

Num orders	Num sold	Amt sold	Product	Product name	Product id	Order date	Aff id	Refund status
4	4	\$1,007.00	X_Fix Sales 150 Membership	X_Fix Sales 150 Membership	1	12/1/2015	0	Completely Refunded
4	4	\$3,175.00	Podcast Playlist	Podcast Playlist	6	12/4/2015	0	No Refund Issued
4	4	\$2,588.00	Webinar/On	Webinar/On	22	12/13/2015	716	Partially Refunded
1	1	\$97.00	The Fix Paid Course	The Fix Paid Course	46	12/16/2015	0	No Refund Issued
159	159	\$15,749.00	Podcast Playlist (30 Days)	Podcast Playlist (30 Days)	58	12/26/2015	28	No Refund Issued
76	76	\$22,572.00	Podcast Playlist (30 Day)	Podcast Playlist (30 Day)	62	12/1/2015	0	No Refund Issued
13	13	\$12,844.00	Podcast Playlist (30 Day)	Podcast Playlist (30 Day)	64	12/4/2015	0	Partially Refunded
1	1	\$1,495.00	Podcast Playlist (30)	Podcast Playlist (30)	66	12/7/2015	0	No Refund Issued

Figure 0.10

Can you tell what's going on? Can you tell WHEN these sales occurred? Which products are trending? Which are taking a nosedive?

If you want to get a better sense of how each product is performing, you have to export all your sales to a CSV then use pivot tables (yuck) to create reports. This is easy... if you have 10 extra hours a week. (If you do, *please* tell us how you do it.)

The other problem with manual reports: human error. Every time you take 10 hours to cobble together reports in Excel, you risk of messing up a pivot table, writing a bad Excel function or mistyping in a cell.

If it's your job to create these reports, you're nodding your head furiously. And such mistakes can lead to making important business decisions about your products using bad data, which can derail your company from reaching its goals.

That's why SegMetrics takes those hours of manual reporting and gives it to you in under 10 seconds, with clear product reports like this:

Sort by product name, price point, units sold, and total revenue or

Product Name	Price	# Sold	Revenue	% of Revenue
Production Paradise Basic (Monthly)	\$99.00	265	\$26,311	
Production Paradise Join Fee	\$297.00	82	\$24,354	
Production Paradise (Annual)	\$988.00	15	\$14,820	
Production Paradise	\$988.00	6	\$4,858	
Webinar/Office	\$647.00	5	\$3,235	
Production Paradise Elite	\$1495.00	1	\$1,495	
1,000 Nation Elite Membership	\$199.00	5	\$1,206	
Total Launch Package	\$995.00	1	\$995	

Figure 0.11

change the time selector to see how products perform day-to-day and month-to-month.

Don't have 10 seconds to check your KPIs? Get them sent to you with [email reports](#).

Ready to get started with these 4 critical metrics and more to supercharge your Infusionsoft business? Sign up for your [14-day Free Trial](#) of SegMetrics.