

Tag Map Worksheet

Group tags by category and lock a naming convention.

Related week: Week 2 | Related SOP: Tag naming convention | Estimated use time: 20-30 min

Use this worksheet before building inside the CRM. Plan the path first, then build only what the plan supports.

Purpose

Use this worksheet to organize tags by category, prevent duplicate meanings, and create a naming convention the whole team can follow. Tags should help the CRM find, segment, trigger, exclude, or understand contacts.

When to Use This Template

- [] Before creating tags in a new account
- [] Before cleaning a messy tag list
- [] Before building workflows or campaigns that depend on tags
- [] Before importing contacts with source or batch tags
- [] When the team creates tags inconsistently

Naming Convention

Rule	Decision
Recommended format	category-detail
Example	source-facebook
Approved case	lowercase
Word separator	hyphen
Who can create new tags?	
Where is the tag map stored?	

Tag Category Map

Category	Purpose	Examples	Approved tags for this account
source-*	Where the contact came from	source-website, source-referral	
interest-*	What the contact is interested in	interest-crm, interest-training	
status-*	Broad relationship status	status-client, status-past-client	
campaign-*	Campaign membership or history	campaign-webinar-july	
service-*	Service or product relationship	service-crm-setup	
internal-*	Team-only operational label	internal-needs-review	

Tags to Review or Remove

Current tag	Problem	Dependency to check	Keep, rename, merge, or archive

Before You Finish

- ☐ Approved categories are defined
- ☐ Duplicate tags are identified
- ☐ Tags that should become custom fields are identified
- ☐ Status tags do not duplicate pipeline stages without a reason
- ☐ Workflow and smart list dependencies are checked before removing tags
- ☐ Team knows who can create new tags

Related Training and SOPs

Related training: Week 2 - Tags, Custom Fields, and Custom Values

Related SOPs: Tag naming convention; Plan custom fields; Plan reusable custom values; Prepare a clean CSV