Teach to Fish Digital

Digital Marketing Analytics
Program Setup Task List

No two metrics programs are alike, but the process to develop a new marketing analytics program typically involves the steps listed below.

Tasks are organized into two categories: Hands-On items, which require account creation, configuration, and some code alterations, and Hands-Off tasks, which are more strategic in nature and utilized to organize the program.

Hands-On

1. Create a Google Account (assuming there is none)
2. Create a Google Analytics Profile (assuming there is none)
3. Configure Google Analytics – *Most of these tasks are performed in the "Admin" area of Google Analytics.*
   - Set "exclude" and "include" traffic filters – *Update these Filters to remove traffic from internal visitors and/or illegitimate (spam) referral sources.*
   - Link/integrate appropriate accounts (Adwords, Ad Exchange, Call Tracking, etc.)
   - Configure site search
   - Configure ecommerce settings (if necessary)
   - Prepare custom alerts for sudden loss/influx of visits, conversions, errors, etc.
   - Create conversion goals
   - Add/include users for access to the account
4. Prepare and Label Client-Specific Advanced Segments – *These act as lenses or unique filters relevant to traffic sources, campaigns, behavior, etc. They can be applied to every Google Analytics report and shared with clients and partners.*
5. Test Google Analytics – *Utilize the Real-Time reports to verify tracking.*
   - Confirm traffic (with filters applied)
   - Confirm event actions
   - Confirm campaign tagging
6. Create a Google Tag Manager Container (assuming there is none)
7. Configure Google Tag Manager

- Enable Click and Page related variables
- Setup Required Google Analytics Variables & Tags
- Configure Tags and Triggers for Custom Events
- Add All Tags for Software, Advertising, Conversion Pixels, Custom HTML, etc.
- Configure DataLayer Variables, Triggers & Tags (for ecommerce primarily)

8. Place the Google Tag Manager Container Tag on the Website or Application
9. Conduct Preview Testing – *Utilize the Google Tag Manager "Preview" function here to ensure all of your tags are firing when they should.*
   - Tags Firing on Page Load
   - Tags Firing on Clicks
   - Tags Not Firing According to Triggers/Filters in Google Tag Manager

Hands-Off

1. Review the Site/Campaign in Full – *Prepare a master questions list that helps identify and articulate measurement nuances that you may revisit in reporting.*
2. Decide Upon Primary Objectives and Key Metrics for the Program - *Consider this an agreement with a client on meaningful success metrics and reporting cadence.*
3. Prepare High-Level Metrics Matrix – *Most important conversion goals and events are documented here.*
4. Prepare Deep-Level Metrics Matrix – *An expansive list of all your on-click events. This is mainly internal documentation that aids Google Tag Manager setup.*
5. Create Campaign Tracking Inventory – *Produce a Google Sheet or Excel document with Source / Medium / Campaign concatenations.*
6. Document Advanced Segments
7. Document Filters and Related Google Analytics Functionality
8. Draft, Edit and Finalize Your Reporting Structure and Layout
9. Prepare and Present Reports – *Report production is conducted on a weekly, monthly, bi-monthly or quarterly schedule.*
10. Create and Update the Analytics Task List – *This serves as a living document that records the suggestions and recommendations derived from each report.*