

# UNDERSTANDING & IMPLEMENTING A **TAG GOVERNANCE SOLUTION**



*ObservePoint*

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# INTRODUCTION

What does the word "governance" make you think of? Control? Oversight? Protection? Strength?

This is exactly what marketers, analysts, digital architects, engineers and developers want for the data sent to and from their websites. Since data collection and transmission on websites relies on tags, companies are looking for a way to govern those tags and the data they collect.

Enter tag governance. Tag governance answers the need to reduce tagging errors and thereby protect against losing value on the technologies companies invest in.

Jump in to learn more about what tag governance is, as well as the basic components of a tag governance solution.

# What Is Tag Governance?

Tag governance is a sub-discipline within the broader discipline of data governance, focused specifically on the data collected by digital marketing and analytics tags and sent via network request.

Tag governance, like tag management, is a software-dependent discipline. In the same way that true tag management relies on a TMS, true tag governance requires the use of software. To do what, exactly?

Tag governance solutions scan the network requests sent from websites and apps in their various stages of development in order to identify potential tagging errors.

Let's unpack that statement: Tag governance solutions...

**Scan network requests.** Tag governance solutions crawl websites scanning for network requests sent by tags. When a digital marketing or analytics tag sends out a request, a tag governance solution will capture that data and parse it out into its component values. These values are checked against predefined rules to determine whether they are correct or not.

**In various stages of development.** Ideally, any company deploying new tags to their website or app should be doing so early on in the development cycle.

A good tag governance solution should be able to scan websites and apps within pre-production environments (such as a staging environment). In so doing, technology teams can resolve issues before a website or app goes live.

In addition, a tag governance solution also monitors tag performance in the production environment, notifying the appropriate stakeholders if anything goes wrong.

**To identify potential tagging errors.** A tagging error is any deviation from tagging best practices or from a company's internal business requirements (the predefined rules we mentioned earlier). When a tag governance solution discovers a potential tagging error, it notifies the appropriate stakeholders.

## Manual Tag Governance?

While in theory you could manually spot-check network logs in search of tagging errors (many companies do), this process is highly inefficient and prone to human error. Manual spot-checks are like aspirin for heart health: the benefits are there, but they're insignificant when you go into cardiac arrest.

Better to adopt automation and avoid a triple-bypass on your tagging implementation.

## Features of a Tag Governance Solution

Some of the key features of a tag governance solution include:

- \* Tagging plan assistance
- \* Audits
- \* Journeys (also known as critical path monitoring)
- \* Rule-based testing

We'll take some time to talk about these features, along with some of the best practices with each.

## Start with the “Why”

Before we get into the weeds of what a tag governance solution can do, let's talk about why. Why are you investigating a tag governance solution? To govern your tags, to have full transparency into your analytics implementation, to be in control of data collection.

While there are many ways you could go about governing your tags, knowing what you *should* do is an entirely different ball game. You need to start with the “why.”

To get started, you should look at each of your analytics and marketing vendors, the different sections of your site and critical user paths, asking yourself the following questions:

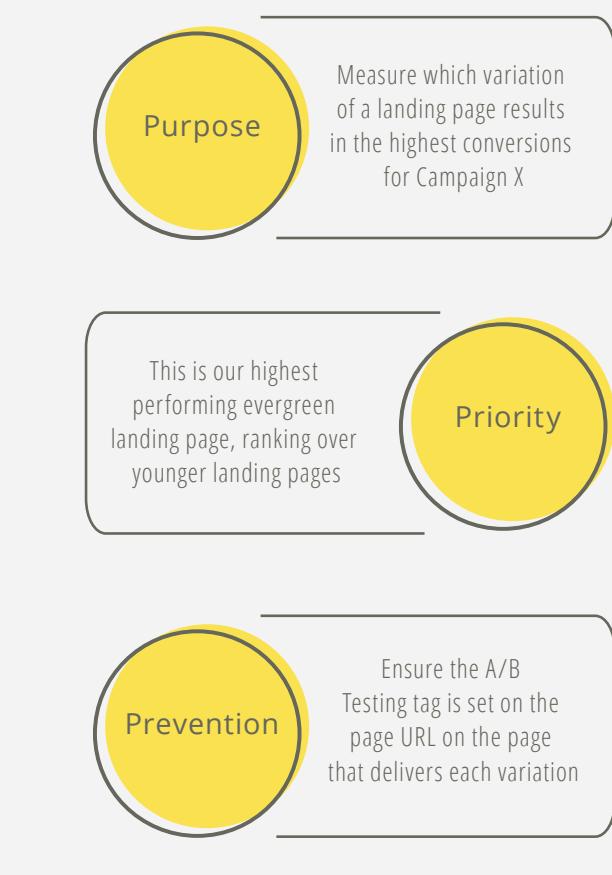
- ★ *Why is this technology/page/user path included on my site?*
- ★ *What would happen to my business if it failed?*
- ★ *How would I define success/failure for this technology/page/user path?*

Think in terms of Purpose, Priority, and Prevention:

<b>Purpose:</b>	Why does this technology/page/user path exist?
<b>Priority:</b>	How important is it to my site?
<b>Prevention:</b>	How can I identify and protect against failure?

Outlining Purpose, Priority and Prevention (we'll call it Triple P) will help you know in what order you should validate your assets (Priority) and exactly what you're validating (Purpose and Prevention).

As an example, for an A/B testing solution tied with an advertising campaign, Triple P would look like this:



# The Tagging Plan and Rules

Once you understand the “why” behind your tagging implementation, you’re ready to document your strategy.

Tag governance begins with documentation. In order to have a baseline to validate your implementation against, you need to clearly outline your business requirements.

The principal document in your tag governance portfolio is the tagging plan, alternatively known as a solution design reference, tech spec or variable strategy. The tagging plan outlines the variables deployed on your site for each vendor, and will serve as the basis of what you will be testing using your tag governance solution.

The structure, scope and format of your tagging plan will vary from organization to organization depending on the size of the implementation. For small implementations, all vendor data could be gathered together into one master tagging plan that outlines each technology and its corresponding variables. For larger implementations, you might have a series of vendor-specific tagging plans that correspond to business functions.

Regardless of the structure, your documentation should include the following information for each vendor →



## Status

Active or inactive tag

## Use Case

How the user interacts with the site

## Variable

Predefined, such as `pageName` or `utmdt`, or a custom variable, such as `eVar10`, or `cd10`

## Variable Description

A quick explanation of the variable

## Example

What you expect the values to look like

## When to Set

Page load, click or other

## Where to Set

A URL, stating where this variable will be placed

## Notes

Additional notes to give context to the data

This information should direct how you configure and apply your rules, as well as serve as a blueprint for the QA team to use to hold development teams accountable.

## Rules

Rules are like the checklist in an annual safety and emissions test for your car: any infraction and your car fails the test. In tag governance, whenever a rule fails when scanning your implementation, you receive a notification so you can resolve the issue.

For example, a rule might look for the presence of a page title variable on each page, or check to see if the language variable matches the language parameter in the query string. If you have a clear tagging plan in order, setting up these rules should be a straightforward process.

When using a tag governance solution, every rule is saved in a library so they can be reused on demand. Rules can be applied to any audit, web journey or app journey. And they can be created on-the-fly from any audit or journey (more about these later).

## “What if I don’t have a tagging plan?”

If you don’t have a tagging plan, you can use a tag governance solution to gather information from your existing implementation of marketing technologies to reverse engineer a tagging plan.

Tim Munsell, Lead Web Analyst at DaveRamsey.com, applied this process using ObservePoint:

*“The report we get from ObservePoint is a more useful and accurate reflection of our implementation than our original documentation. We are able to export our audit to Excel and essentially work backwards, making sure that the data collected on each page on our site matches our business requirements.”*

Mapping audit data against your existing tagging plan on a continuous basis will help you keep a pulse on your tag governance strategy. To learn more about building an SDR (a tagging plan for an Adobe implementation), check out this on-demand webinar: [7 Steps to Set Up Your Analytics Solution Design](#).

# Audits and Journeys

ObservePoint's tag governance solution provides two modes of tag governance for websites: audits and journeys. (For apps, only journeys are available.) Both audits and journeys fill fundamental roles in governing tags in multiple development environments, but differ in their objectives. Using each properly will help ensure your tags, pages and user paths are working properly.

## What's the difference between audits and journeys?

Audits are broad discovery tools. They look for problems occurring across the site, such as with page templates. They scour a website or predetermined sets of pages, returning back any supported technologies they discover, along with corresponding accounts, versions and variables. They help you know what, where and how tech is deployed.

Journeys are sequential micro-audits that measure pre-defined user paths. By setting up a journey, you can simulate the interactions of a user with your website or mobile app, validating that event-triggered tags are functioning properly.

## What is the use case for audits vs. journeys?

Audits are not focused on events—an audit will show you what technologies fire on page load, unless you set up Actions to perform an action on a page during an audit. The main use case of audits is to validate tag presence and variable existence and values.

Journeys are focused on events. If you have a critical user path—usually paths to conversion—then you can use a journey to simulate user traffic, checking that tags are deployed at each step, including for user actions like clicks and scrolls. Examples of critical user paths include:

- ★ Testing to see if a loan application form is capturing and submitting data correctly
- ★ Validating the functionality of a shopping cart funnel
- ★ Confirming that tags are collecting the right data in a conversion path

# More About Audits and Journeys

## How should I organize my audits/journeys?

If your tag governance solution allows you to categorize audits and journeys in folders, you will want to group them based on similar characteristics. A good practice for naming folders is to categorize your audits and journeys based on the property they are testing (e.g. domain or app) and their stage in the product life cycle (e.g. development, staging and production).

So for example if you had one website in three different environments, you might have the following three folders: "example.com\_dev", "example.com\_staging", "example.com\_prod".

## How big should my audits/journeys be?

Get ready for the classic answer: it depends. It will depend on how large your site is, how long your critical user paths are or how many screens there are in your app.

That being said, your audits and journeys should only be as large as you need them to be.

When it comes to audits, we have found that a 1,000-page audit is not as good as a 10,000-page audit, but that a 100,000-page audit is not any better than a 10,000-page audit. Here's why:

If you have a large website, a 1,000-page audit doesn't do quite enough to capture anomalies across your website. A 10,000-page audit shows you a more comprehensive and varied view of your website. Using include and exclude filters can help with achieving the desired variety.

However, a 100,000-page audit mostly just shows you more of the same. And because a 100K audit takes 10 times as long to process and analyze, you'll end up losing time.

A 10K audit is usually sufficient to identify any systemic issues with your implementation. As you find issues on your website, create smaller audits targeted to specific site sections.

A site-wide or large sample audit can be referred to as a discovery audit, as it helps you discover information about your implementation as a whole. Discovery audits should be performed periodically to check for systemic issues or to validate against your tagging plan, but they should not be your only audit.

Small audits specific to different sections of your website (like your blog or all product pages) are highly useful as you can analyze tag performance for groups of similar pages. This is because these pages will likely be tagged the same way, allowing you to apply a group of relevant rules specific to each section of your website.

## How do I decide where to perform an audit or journey?

Think of the first two Ps of Triple P: Purpose and Priority. Here are a few different questions to help you decide how to allocate tag governance resources:

- ★ *What are the most highly trafficked sections of my website?*
- ★ *What sections of my site are most valuable to my business objectives?*
- ★ *What sections of my site have a high volume of vendor tags?*
- ★ *Which vendors are most integral to the functionality of my site? Where are they deployed?*
- ★ *Which vendors have the most customizability? Where are they deployed?*

Overall, you will want to have enough audits to sample every section of your site. However, the order in which you implement these audits or journeys and the frequency in which they are performed will depend on the priority of the asset (keep reading).

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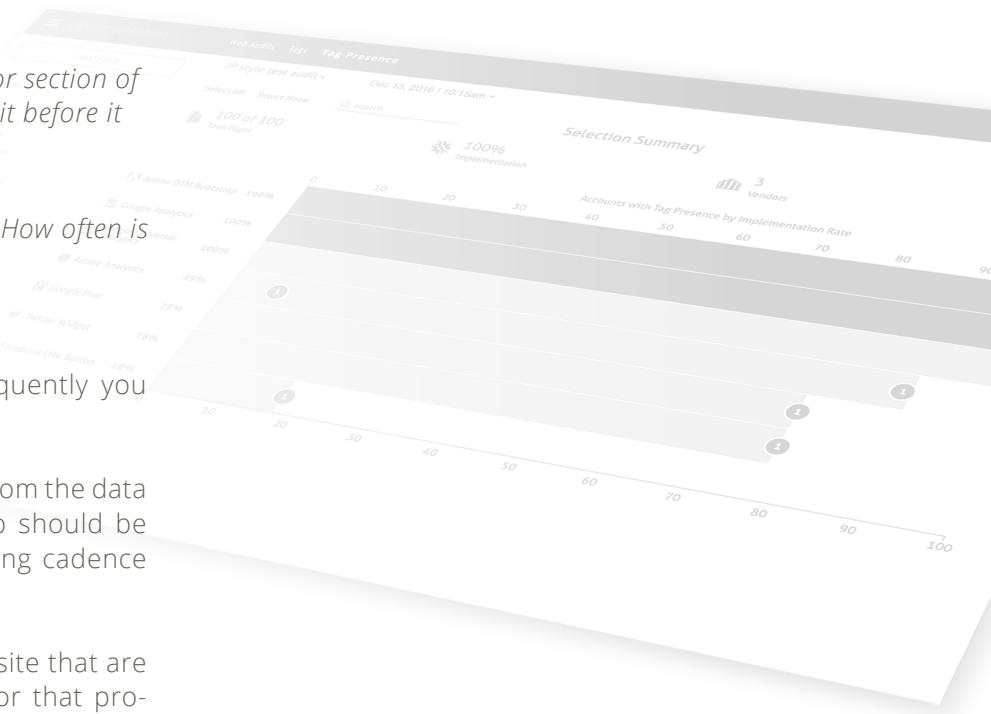
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## How frequently should I schedule an audit or journey?

Frequency is an issue of Priority—ask yourself:

- ★ If this technology failed on this page or section of pages, how long could we go without it before it would be missed?
- ★ How customizable is this technology? How often is it updated or changed?



This should give you an idea of how frequently you should audit your web and mobile assets.

If your business would immediately suffer from the data loss, then these areas of your site or app should be audited daily. If not, a less frequent auditing cadence could be sufficient.

For example, you may have pages on your site that are almost never visited and rarely updated, or that provide only cursory value to your organization. Pages that fall under this category might only need to be audited monthly or quarterly, while other sections of your website that are frequently changed and/or regularly visited might need to be audited daily.

**Note:** Remember, audits and journeys can and should be set up with rules to check against your implementation, sending you alerts whenever a rule fails. That is where the real utility of daily auditing comes in: automated alerts. Automated alerts make it so you don't have to be in the audits daily—just when alerted to a problem.

# Naming and Labeling Your Audits, Journeys and Rules

Properly organizing your audits, journeys and rules in your tag governance solution will make accessing and configuring reports easy and efficient. This organization comes by means of standardized naming conventions and labels.

## Naming Conventions

You should have a company-wide standard for how to name audits and journeys.

The goal of these conventions is to provide some context about the purpose and scope of an audit or journey.

You'll want to make naming as concise as possible. Abbreviations are useful, as long as they are intuitive. Here are some examples that follow the pattern [Domain/Unit/Location] [Environment] [Audit/Journey] [Context]:

Audit: example.com\_prod\_audit\_ProductPages

Journey: USA\_stage\_journey\_ShoppingCart

App Journey: v7.0\_dev\_aj\_Onboarding

With intuitive names like the ones above, anyone who receives a notification or browses the library of reports will be able to understand the objective of each audit or journey. Ultimately you will need to discover what works best for your own organization.

Rule names should be short explanations of what the rule is testing, such as "Custom Link Type is Set with Link Name."

## Labels

If available within your solution, labels allow you to add an extra level of organization to your audits, journeys and rules by some common thread. Within the platform you can search labels, allowing you to quickly find any item by filtering through items with the same labels. To make the most of labels, it is important to have a well-defined labeling convention agreed on across your organization.

The advantage of organizing with labels is that items can be grouped in multiple ways, depending on your objectives.

For example, you may have 100 rules set up, and each may be listed under multiple labels. Later, when you apply rules to your audits, you can use different labels to quickly apply the specific rules that meet your purpose.

Some of the most common label categories are:

### For audits and journeys:

- ★ Use case or site section (e.g. shopping cart, search results page)
- ★ Owner
- ★ Country
- ★ Business unit/subsidiary

### For rules:

- ★ Technology (e.g. Adobe, Google, data layer, etc.)
- ★ Type (e.g. analytics, seo, campaign, etc.)
- ★ Use case (e.g. shopping cart, product, etc.)

Labeling your audits, journeys and rules allows you to:

 Filter audits and journeys by label

 Filter rules by label

 Assign rules to audits and journeys by label

Following best practices in naming conventions and labeling will result in greater command of your tag governance solution.

## Efficient and Effective Tag Governance

As you follow the above guidelines, you will be set up for success with your tag governance solution. Greater efficiency, more confidence in data and better decision-making are at the threshold. Getting organized from the get-go will make all the difference as your tag governance program evolves over time.

ObservePoint's tag governance solution is built on industry best practices to help you be more proactive about governing your tags. With our experienced consultants available to help you get started, you can achieve greater control over your tags. The result: more confidence in data collection and greater value on your technology spend.

[SCHEDULE A DEMO](#)

# ABOUT THE AUTHORS

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## MATT THOMAS

Matt Thomas has worked with product implementation and development since 2007, working for high-profile software companies like Omniture and Adobe, and consulting both domestically and internationally for renowned tech giants including Apple, Inc. and Telstra.

His area of expertise is customer-centric product development, working with cross-functional teams to create an intuitive platform and positive customer experience.

Before ObservePoint, Matt worked at Needle, an industry-leader in advocate-powered customer experience, which heightened his passion for CX optimization.

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## MATT MADDOX

Passionate about training, Matt's mission is to educate and enable customers to use the marketing technologies they select for their sites most effectively.

For more than eight years, Matt delivered analytics training at Omniture and Adobe and also managed a customer training team before joining ObservePoint. He trained globally for many Fortune 500 companies, creating and delivering custom courses based on their corporate business requirements.

With a wealth of experience solving analytics questions in many industry verticals, including e-commerce, media, finance, lead generation, and automotive, Matt offers sound direction and analytics insight.

