THE COLORING IN DEPARTMENT

GOOGLE ANALYTICS COURSE

MODULE 4: ADMIN OVERVIEW & AUDIT

Google Analytics & Measurement Plans

We've mentioned the term "admin audit" and also the idea of a measurement plan in previous modules, but what exactly is it, and why do you need one?

Well, the idea behind a Google Analytics audit is for you to identify what your current setup looks like, never assuming that the settings are correct and that somebody, somewhere, has gone off and changed your configuration so that you have a perfect setup.

In truth, we have yet to see a perfect setup and just as rare, any formal documentation on how a website's Google Analytics setup has been carried out.

So, as a result, you end up with departments and businesses using Google Analytics data to justify their strategies and tactics, however, nobody really knows if the data is correct or who was responsible for creating it. Hardly ideal foundations to build trust in the data. Even less, the decisions made based on it.

Which, we think is weird, think about it, if you have a new content management system (CMS) for your website you will likely get training and documentation on how it all works and how it has been built. Same goes if you were using a new email service provider, hello documentation and training!

But, because there is no real formal training in Google Analytics most people are self-taught, and maybe don't know about the concept of having a measurement plan.

The bottom line is, you need to know what your current setup looks like, the ultimate goal here, is to have valid clean data that you will use to drive growth for your business.

You need to have the right data to do this, and tailor your analytics account to match your business and marketing needs.

Once you have an idea regarding the health of your analytics account, you can start to write out a measurement plan.

A measurement plan is the formal documentation that's going to outline the details of your technical setup, whilst always keeping the business and marketing objectives in mind, because that's why you're using Google Analytics in the first place.

So, if your boss wants to know how many people are watching the videos she has paid for, you need to set up the account in a way that can record that information, otherwise, you can't report on it. Sad times.

So, this document is a list of all your suggestions, with the justification of why you need to make changes to your account. It will also have a detailed action plan of who does what, and when, as well as occasionally, why.

Especially as there are likely going to be some resources and some budget needed to get the configuration to where you need it to be. Clearly, it becomes a lot easier to get said resources if you have a solid business case for it.

So, instead of just tweaking your account here and there, emailing IT or development for help, or trying to talk to your boss about why you may need budget and resources to complete a task in GA, have a measurement plan outlining what you need to do for your job - and why it should matter to him or her.

Your formal measurement plan should be reviewed and updated every 6 to 12 months or whenever you feel it would most likely need to be reviewed. Your business requirements and technical setup will naturally change over time, your site is not static and is ever growing, so are your marketing strategy and tactics.

You need to adapt and review your analytics plan to check if anything needs to be updated or changed so that the data you get is always correct and you're not missing anything. We would also recommend that you keep the measurement plan and audit in a centralized folder for people in the business to refer back to.

You may also find as you work through this course, that there may be a lot of things that you need to update or change, and you might end up with quite a long list of tasks - which can feel overwhelming. But, having a measurement plan in place will help you evaluate and prioritize the tasks, which makes it more manageable. Fabulous.

Remember though, this is a process, please allow yourself time to get Google Analytics set up correctly. How long does it take you say? How long is a piece of string!? I have seen companies sprint through an all singing and dancing setup but the company was going for funding and needed solid numbers, so the motivation was there.

On the other side of the spectrum, I have seen companies just plod away at their list of tasks in a specific order and they completed it within a year. So, each to their own.

The marketing department needs to have this skill set under its belt, this ability to correctly collect, segment, interrogate, visualize, and interpret data in a way that supports the work that we are doing so that we can be better at our jobs.

So, instead of just tweaking your account here and there, emailing IT or development for help, or trying to talk you your boss about why you may need budget and resources to complete a task in GA, you would know what your current setup is and use this to build your measurement plan.

Every single analytics audit that we have done, and every measurement plan that we have written, have all been different, they have used the same template, but the recommendations and changes are unique to each business, and each website, because you're all kinda unique in that way.

So positive vibes, here, outwork the competition, and work smarter. Own the process, own the audit, own the plan, and kick some data ass!

How to Flag Issues of Importance in Your Audits

Now that we are all on board with the idea that you need to audit, and then formally document the changes that you need to take action on, to get the data that you want, (Yay!), we can move on.

As mentioned in the previous lesson, you will develop a list, and that list may be very long. So how do you know which task to do first?

Your completed admin audit will help guide you when working through the individual sections of the measurement plan template. For each section, you are going to write out where you are now and any issues that you've identified with that current setup. You're going to make the case for where you need to be and therefore what you need to do to get there.

And, because you want to provide a business case to highlight and justify the need for this change in your setup, you'll have to bring it back to the benefits for the company if these issues are addressed.

The measurement plan has the following sections for you to complete, all of which we will deep dive with individual modules, so this is a birds eye view style rundown, just to give you some context.

1.0 Admin Audit: this is where you're going to flag any issues that you found with your admin set up across the account, property and view level.

2.0 Account Setup: based on your admin audit and how your website ecosystem is built, how is your house looking? Do you need to create additional properties and views, do you need to set up cross domain tracking?

3.0 Event Tracking: if you want to track things like people watching videos or people clicking on telephone numbers, or downloading PDFs, or submitting contact forms, you need event tracking to be set up. So, you need to see if you're using event tracking and then provide suggestions on changes to existing events or suggest new ones.

4.0 Goals: you can have 20 goals per view, so how many goals have you currently got within your current admin setup, and are they correct? What are you missing? Do you need to create funnels?

5.0 Acquisition and Campaign Tracking: is your current marketing activity being attributed correctly, are marketing channels being correctly tracked? Is the data being fractured?

6.0 Custom Dimensions, Metrics and Data Import: this is in more advanced analytics territory, but can you identify if you're currently using these advanced features?

7.0 Creating Reports and Dashboards: when you have sorted out points 1 through 6, how are you going to analyze the data? How are you going to segment this data? What dashboards do you need to create and for whom?

As you work through each section you'll start to notice that for some tasks to be completed there will be a dependency on a previous issue, that needs to be addressed beforehand.

If you want to create reports on the users going to your website, and what pages they are looking at, but you noticed you are not using filters at all. Well, you can only create the report once you have fixed your filters. So, I would flag that task as urgent in this case.

Something that can help you prioritize the tasks at hand is to use a traffic light system. It's nice and simple but it works really well. You would use this to identify all of the key issues that you find from your audit, that are present in your measurement plan, and you will grade them in terms of what are Red, Amber, and Green. Also known as RAG reporting.

Red tasks, these will be the urgent-and-must-happen-now jobs, then moving through to Amber for the jobs that are important but not as urgent as the red ones, or for the jobs that can only move forward once the Red tasks have been completed, and then you are left with the Green tasks, which are important, but not urgent.

Levels of Access in Google Analytics

Who has access to the account?

It is always worth looking at who has access to your Account. Lurking in here could be past employees, past consultants, agencies, your ex-husband - whomever. It's also worth checking in to see the level of access they have as well, whilst you are at it.

There's a section in our admin audit template for you to review who has access, and then agree if any users need to be removed (like people who don't work for you anymore, agencies you used to work with etc). Do any users need to have their access edited? For example, if someone on your team is going to do an admin audit, then they will need to be promoted to the correct access level, especially if they are on the lowest setting.

With that in mind, here's a recap on the permission levels so you know what to ask for, and which permissions to give.

Manage Users: You need to decide if you want people to have permission to add or delete others or amend other users' access levels.

It may seem obvious, but you need to have more than one person in the company with Manage User access, we have seen far too many examples where we have been told that a company could not add any more users as there was only one person who had access and they don't work for the company anymore!

Edit: Perform administrative and report related functions and see report data.

For example: Add, edit, or delete accounts, properties or views, filters, goals etc.
In addition to Collaborate, Read and Analyze data.

Collaborate: Individuals with this level of access can create personal assets and share them.

For example: Edit a dashboard or annotation, in addition to Read and Analyze.

Read and Analyze: Access the account and see reports and configuration data. They can manipulate data within the reports.

For example: Filter a table, create a segment, create a personal asset eg a private dashboard. They will not be allowed to collaborate on shared assets.

How to Give or Edit Access in Google Analytics

We are now going to head into the admin area of Google Analytics to see how you can view who has access to your account, and how to give access or edit access to your Google Analytics account.

Remember that if you can't see what I can see on the screen, it is possible that you don't have edit user access and thus need to ask for it, to complete this task.

Click on the Admin icon.

Across each of the Account, Property and View columns, you will notice that there is an option called 'User Management".

The reason why it appears across all three columns is that you can actually decide who gets access to your entire Google Analytics account or select access for certain properties or views.

For example, let's say you have a basic website set up where you have one Account and one Property, but you have several views which are geographically specific. Now, let's say you have someone new on the team in the USA, and you would like them to access the reporting view that shows only traffic from the American market.

You can decide if you only want them to have access data for that American reporting view, and only that American reporting view, or if you're happy for them to see data across all views that are available.

The same situation applies for different properties, you might have a company that has several different unique businesses, that all live under one brand. If you have a new team member looking after one brand and its website, you can opt to only allow them to see the data for that property, or you can give them access to all brand websites under that account.

You can see now, why having a process, and auditing who has access to your account is so important. Thankfully all of the settings across Account, Properties and View - within 'User Management' are the same, you just need to work out what you want people to see, so you may want to have your admin audit open in the background with the details you need.

Adding a user:

I'm going to add a user to our analytics account and I'm going to let them see everything, so I'm going to add them to the Account level. I don't want them to add any other users, but I'm giving them responsibility to make changes to the admin setup and do an audit, so I'm going to give them edit access.

Select 'User Management.'

You will then get a list of all of the users and their current permission levels.

Click on the 'plus icon,' which will give us the option to add a user or group.

Click add user.

And then enter the email address, which will need to be a Google email address, either Gmail, or a Google Business email address.

You have the option to tick 'notify new users by email,' which I always tick, because it automatically sends that person an email to say that they have been granted access, so that's one less job for me!

Then you just need to tick the permission boxes, which will default to 'Read and Analyze,' the lowest access setting, and because I want to, hypothetically, for this person to do more than just read reports, I'm going to tick the box for edit and collaborate, leaving the manage users as unchecked.

Edit Permission:

If you want to edit somebody's permissions then you follow the same pattern, you can click on the 'User management' at Account, or View level.

Find the person's email address and name, and then navigate to the right and click on the right-hand side, where you see the three dots, you have the option to view the user's account details or remove access - should you wish.

To edit, you click on the pencil icon and then you'll be prompted with the option to select or deselect that person's permission options.

If I want to fully remove someone, I will just click remove access, and this will prompt you with a reminder to say you are removing this person from the account, you'll have the option to either cancel or confirm by clicking on the 'Remove'. Bye bye - user.

How to Create a Property or View in Google Analytics

We're now going to create a Property in Google Analytics, and we will need edit permission in order to complete this task.

You're going to find with this demo that creating Properties and Views is not that difficult, the hard part is identifying what your account structure needs to be - which we talked about using our House Model©, earlier in the course.

When you have identified strategically why you need a particular Property and View, go for it, go create it!

Sign in to your Google Analytics account.

Click on the Admin icon.

Now, navigate over to the property column and select 'create new property' from the menu. You can have 50 properties per account - by the way. Probably don't create them all right now.

You then have the option to create a Property for a website or mobile app.

We're going to demo creating a website-based Property, so we are going to select 'website' and then nice and simple, just add the name of the property. Note here, be specific and descriptive, ideally matching the name of the Property as identified from your measurement plan.

Then add the website URL. Don't get this wrong.

Select an industry category, which are quite broad, so just select the one that you can identify with best.

Select the reporting time zone, this is going to be used for the day boundaries in your reports, regardless of where the data originates.

You can always edit and change the time zones of your Views, and we will show you that when we go into our admin deep dive.

Once you've gone through all of these steps you just select 'Get tracking ID' and Google will give you the tracking code that you will use to collect data. High Five!

Creating a View:

Creating a View has a similar pattern thankfully, you have the option to add up to 25 Views per Property and again you are going to need ‘Edit’ permission, to create a new view.

If you haven’t already done so, click on the Admin icon and navigate to the Account and Property that you want to add a new View.

In your view column click ‘Create new view’.

You will then be prompted to select if this new view is for a website or app, and as our Property is for a website, we select ‘website’.

Now, we can give our View a nice specific name, so it’s really easy for people with access to our Account to understand where the data that this particular reporting View is from.

You then want to select the reporting time zone, so let’s say we’re going to create this view for the United Kingdom, I would set the time zone to Greenwich Mean Time. (GMT)

And then click ‘Create view’.

Well done, now you know how to create a Property and View. Woohoo!

Next time let’s go into a deep dive of the Admin for Account, Properties, and Views!