



Foundational tracking checklist

The tracking everyone needs!

There are some foundational tracking elements that simply everyone who is running an online business (or working for one) must understand and have in place. This checklist guides exactly what to implement and provides a few resources to help with the implementation.



Google Analytics & Associated Goals via Google Tag Manager

- What are "goals"? Quite simply, the actions you want people to take on your website. You can set them up using either a destination URL (i.e. if someone fills out a form and subsequently is redirected to a "thank you" page) OR an event which is fired when a user performs a particular action on a website page (e.g. hits the submit button on a form).
- Events are generally more reliable than destinations but require a little extra tech savviness. If it feels a little beyond your skill set, brief in what you'd like tracked to your developer or tagging expert using my briefing sheet.
- A note on consistency: what we generally recommend is getting Google Analytics set up to be your top of funnel, reliable and validated source of truth. This data is then used to send it back to your other advertising platforms such as Facebook and Google Ads. While tracking can occur on the individual ad account level - different platforms leverage slightly different tracking technology and the discrepancies can be enough to drive anyone mad!

Here's a link to a great Google Analytics Implementation Guide from LovesData. Oh and did you catch my note on the rollout of the new Google Analytics 4 (GA4)? Be sure to **follow my quick tutorial** on getting this installed ASAP so you can take advantage of the features as they become available. In the digital world, it always pays to move quickly!



Google Ads

- As highlighted above, we ideally want to first implement tracking to be reliable and validated in our Google Analytics account and subsequently import this data into our Google Ads account so that we have consistency in the metrics we're monitoring.

LovesData has a brilliant, short video tutorial on explaining the ins and outs of Google Ads tracking vs. importing goals from Google Analytics into Google ads, which you can find here.



Facebook Pixel

- You want to implement this right away - even if you're not yet advertising on Facebook or Instagram. Having the Facebook pixel installed allows you to gain additional audience insights and retarget users who visited particular pages of your website, so this is an example of where collecting the right data early can be beneficial.

Link to Facebook Pixel Guide here.



Other advertising tracking pixels

- This really comes down to the other ad platforms you intend to utilise in your mix - but it's safe to say that most advertisers have a pixel that needs to be installed for accurate tracking and improved targeting across the platform.
 - LinkedIn tracking pixel guide
 - Twitter tracking pixel guide



Behavioural analysis

- Tools like HotJar and CrazyEgg can help to gain additional insights into how users navigate through your website and the content and messaging that they pay attention to. Learn how you might optimise the placement of buttons and call to actions on your website by tracking customer behaviour via heatmaps and other actions. Tracking varies by provider but is often implemented using a pixel.
- Similarly, tools like Google Optimise can help with monitoring A/B page testing (whether it be a layout, copy or image change)!

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Customer data

Where are you housing your customer data? By this I mean actual names, email addresses, phone numbers. When you're first starting up a business, it doesn't matter if this is simply in a spreadsheet or your email platform. As you grow it's a good idea to invest in customer relationship management software of some sort. Regardless of where you're storing your data based on your business maturity level - here are some principles to consider:

- Think in "columns" Capturing customer names? Always try to create separate fields where possible for "First" and "Last" names. That is - if you even need to capture both! If you're only capturing names for personalisation purposes, you probably don't need to bother capturing last names, but if you decide to, keep the columns separate to save on cleaning data entries later!
- Postcode over location: Generally speaking, anything that can limit typos is best. You can always go down the route of form validation to ensure all the data you're capturing is correct, but this can get expensive depending on the platforms you're using. Asking for numbers over written responses is best and limiting the number of characters helps to limit human error.
- DOB over age By asking for DOB you'll not only be able to calculate their age - but you could offer up a happy birthday freebie in the future too!



Everything else, all the time - UTM tracking!

When all else fails - implement UTM tracking codes on absolutely everything. What on earth is UTM tracking? I'm glad you asked. UTM Tracking is a little piece of code we can add to the back end of ANY URL which tells Google Analytics how to "file" it when we look into the system. Ever seen a URL that looks something like this?

https://sptagency.co/blog/?utm_source=google&utm_medium=cpc&utm_campaign=virtualcmo

Whenever we're promoting links directed TO our websites FROM any channel outside of our website (whether that be an organic channel OR paid channel) we can implement UTM link tracking to tell us a little more about exactly where we promoted that URL.

You can keep it pretty high level or get really specific depending on how much you want to be able to review later but generally speaking, at a minimum we want to track the SOURCE of where we're promoting the link, the MEDIUM for which it's being promoted or an indication of the ACTION that is being taken and finally, a DESCRIPTION of how we're promoting it.

As you can see from this example, I've set this up to track clicks from paid a Google search ad campaign and I've kept things pretty simple, just tracking broadly from a campaign level. You can add additional layers if you're wanting to give more specific detail around the content in the campaigns or ads you're promoting.

Here's another example:

https://www.example.com.au/?utm_source=Facebook&utm_medium=cpc&utm_campaign=BAU&utm_content=Summer

But hey - it doesn't have to be so complicated! I've always got you.

See below a quick link to a spreadsheet template you can use. Simply make a copy by clicking "File">"Make a copy" and customise it to make it your own!

This sheet is structured by allowing you to add in your "go to" channels, campaigns and content types on the first sheet - which populate through the second sheet as simple dropdowns.

And the kicker - using this sheet ALSO provides you with a log of what you have out there in the world! So whether you're wanting to track the performance of your organic or paid activity OR you have someone kindly promoting your website for you, you can send them a tracking link that tells you exactly how effective that activity was (great in particular when you're collaborating with another person or brand to promote your offer)!

Oh and if you don't like the look of that big ugly long link, you can always use a URL shortener like Bit.ly or ask your developer to help you set up your own custom URL shortener

Note, this is something you'll get into the habit of doing ongoing - no need for any development, it's something you can do on your own with my handy template for every link in your life! Be sure to reference [Google's best practice standards](#) if you want to make sure traffic is logged in a tidy way!



[FREE UTM TRACKING TEMPLATE](#)

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Governance

ICK! I know what a topic. It's never anyone's favourite but honestly it's so important. It also doesn't have to be anything crazy - it can be super duper simple. No matter who you are or what you're tracking,

I want you to do two things from governance perspective.

1. Validate the data you're seeing in your ad accounts and Google Analytics against what's "hitting the bank" at the bottom of your funnel (if you're seeing less than 99% accuracy, there's something funny going on. Talk to your developer or tagging expert).
2. Create a copy of my CHANGE LOG TEMPLATE and start using it - TODAY! You guys, our memory is not that good, I promise you. We think we can remember all the changes we've made to our marketing mix. Whether it was an increase in budget across certain campaigns or channels, a change of messaging etc. When it comes time to reviewing this data you're capturing, you want a reliable source of truth to correlate key changes against. Seeing an uplift in total leads since you changed that creative? It must be resonating! Changed your target audience sets but aren't seeing it flow through the funnel? Duh downwww. Do not pass go...



[FREE CHANGE LOG TEMPLATE](#)

Other considerations:

- IP Exclusions
 - Do you have many people testing your website? Consider excluding their IP addresses to ensure this does not skew your data.
- Google Search Console
 - Want to view your organic search performance in one place? Connect your Google Search Console account to your Google Analytics account. [Here's how](#). Prioritise this if SEO is key to your strategy.

What's next?

Okay now that you have your foundations sorted - it's time to get a little more specific based on what you specifically need for your business.

Check the additional "bolt on" considerations on the following page to get specific prompts depending on whether you're an ecommerce, lead based or digital product business.

Once you've mapped your customer journey and ticked and flicked these checklists - you're ready to brief in your tracking requirements to your developer or tagging expert.



READY? LET'S GO! SEE NEXT PAGE.