Trustworthy tracking *set up kit*

Principles & reference guide [READ ME FIRST]

Implementing and getting our tracking sorted is like organising our insurance. It's totally a grudge purchase and not really anyone's favourite thing to do. We know we need it - we just want to tick it off the list!

Well that's exactly how I feel about it too but what I can tell you from YEARS in the game, is that many people DON'T get their tracking sorted correctly up front and the cost of not getting it right is always significant. Whether it be the opportunity cost of not tracking certain data points or worse - the cost of inaccurate reporting!

I'm here to make tracking implementation for you as pain free as possible. Guiding you through how you need to think about setting things up and educating you on how to articulate what you need effectively to your developer or tagging expert (I've even organised a discount code to work with one of the best and brightest in my network so I can feel confident you are in the right hands, should you choose to outsource it)!

Some of you may just want to get on with it. For you - feel free to skip directly to the checklists. For those of you who want to deeply UNDERSTAND and know the WHY behind what I'm recommending, keep reading.

Don't track EVERYTHING!

Alright, let's talk about how much you need to track. One of the biggest challenges around turning data into insight is learning how to navigate the plethora of data points that area available to us. We want to track meaningful metrics that help us make impactful decisions - we don't want to capture for the sake of capturing.

Data hoarding will only put you at risk of falling into analysis paralysis - where you're lost in your analytics account scratching your head as to what any of these data points actually *mean* for your ability to drive meaningful outcomes.

What we do want to track is the most meaningful metrics that paint a picture of whether our marketing decisions are effective by capturing the right ATTENTION, encouraging those eyeballs to ENGAGE with us in some meaningful way and then ultimately, drop out the bottom of the funnel by taking ACTION.

Too much data

Overwhelmed so shoot from the hip

No meaningful insights (just LOTS of data)
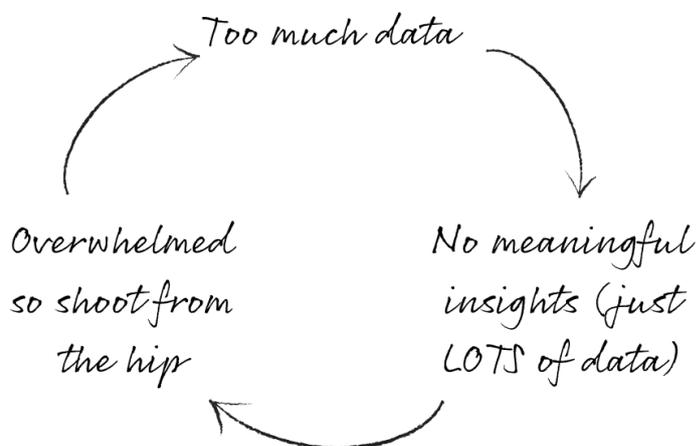
Now of course, as you implement new marketing systems or build out new digital infrastructure (such as creating new landing pages or developing an app) your tracking strategy should grow with you. If you're tech, you can follow some of the guides I include links to in this pack - if tech isn't your thing, no worries! I've included clear briefing sheets in this pack to help you navigate these tricky tracking conversations with your developer or tagging expert.

Even if you're DIY-ing for now, as you grow and become more profitable, it will serve you well to invest in a tracking partner (I can highly recommend Lee Jane Digital, my go-to tracking geeks to feel totally confident my tracking is up to scratch)!

In fact, LeeJane Digital have kindly offered SPT readers a discount, so if you want to outsource all your tracking woes, be sure to give them a bell!

What we don't want to do is track absolutely EVERYTHING! Not only will it be a costly exercise to set up, govern and maintain to ensure the data remains valid, but hoarding excess data "just in case" you might need it is a sure fire way to land yourself in that analysis paralysis loop... So what SHOULD you track? Great question, let's get into that now.
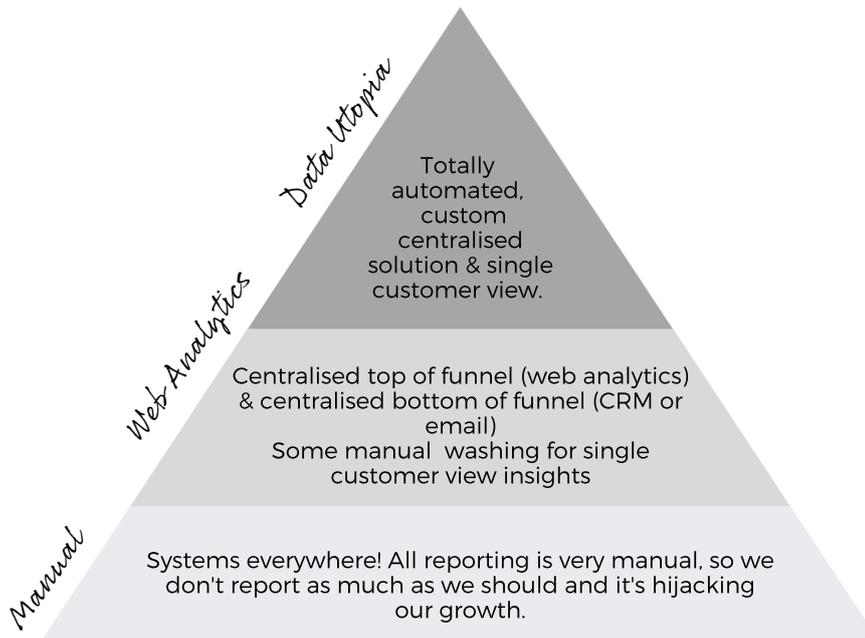
→ ROGER THAT, NEXT!

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Data sources (your sources of truth)!

If you're a start up just starting to get your tracking sorted, it's likely you're tracking your top of funnel (marketing activity) and bottom of funnel (leads, sales and outcomes) separately. This is totally and completely fine as you get started and is the most cost effective means of tracking. Remember, we only what to track *what we need, when we need it* so as to not bite off more than we can chew.

Navigating a plethora of data can be distracting, so focusing on what we need now is most important while allowing us to set up the right infrastructure to support growth as we become more profitable.

Journey to Marketing Data Utopia

Data Utopia

Totally automated, custom centralised solution & single customer view.

Web Analytics

Centralised top of funnel (web analytics) & centralised bottom of funnel (CRM or email)
Some manual washing for single customer view insights

Manual

Systems everywhere! All reporting is very manual, so we don't report as much as we should and it's hijacking our growth.

When you're at the stage where you can afford to pump all your data into a centralised warehouse, let me know. *THAT's* Data utopia that we can start making some super clever moves with. What is important to remember though is what you consider to be your best source of truth for your data, depending on the purpose you're tracking it for.

For example, we may wish to review goal or ecommerce transaction performance in Google Analytics to indicate how we should optimise our advertising and digital marketing channels, investing more in the channels that appear to be driving the most conversions - yet when it comes time to understanding exactly how profitable your business and marketing mix is - we want to look at what hit the bank! That means, what did Facebook charge your credit card and what revenue is sitting in your bank account?

"So does that mean my Google Analytics data can't be trusted?"

Well, yes and no. It's at this time that we need to take a step back from perfectionism and all or nothing, black and white thinking and remember to pop our "outcomes" cap on. We don't want to use GA to reconcile our accounts, but providing things have been set up well and validated, it should be pretty close to 99% accuracy. It's unlikely to ever reach 100% of what you see in your bank, due to things like ad blockers, once off test transactions and caching - but for all intents and purposes, when we are looking at GA to guide us on LinkedIn our marketing SOURCES (i.e. channels) and their effectiveness, GA is going to be within a close range of what we are to optimise for.

Talk to your tracking expert about your unique tracking scenarios and use my tracking checklists and briefing sheets as a guide to ask the right questions!

Pssst. are you all set up and ready for the new Google Analytics 4 (GA4)? If you haven't already, install your beta "Website & Apps" tag NOW so you can start tracking data for when it's forced to rollout.

Here's a quick video tutorial from me on making this 2 minute update.

→ WATCH TUTORIAL

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Customer journey mapping

I know I know, us digital marketers just love a customer journey map, don't we? But unlike some of the human centered design customer journeys you may have done in the past, the purpose of OUR map is to understand and log the channels and systems you have in the mix, prompting the key metrics we need to capture to define what success is for those channels.

At the end of the day, we want to be reporting on what hit the bank and what we spent and where to get that outcome. But some of our marketing activity may have been allocated to simply driving awareness (hello local billboard and YouTube pre-roll advertising!) while other channels have been optimised to capture hot prospects when they're ready (all those years of optimising and refining SEO strategies)!

Check out the customer journey mapping worksheet in this kit OR sign up to Miro and use my virtual template to log it digitally.

Regardless of whether you choose to map your journey in the real world or virtually, the process is the same.
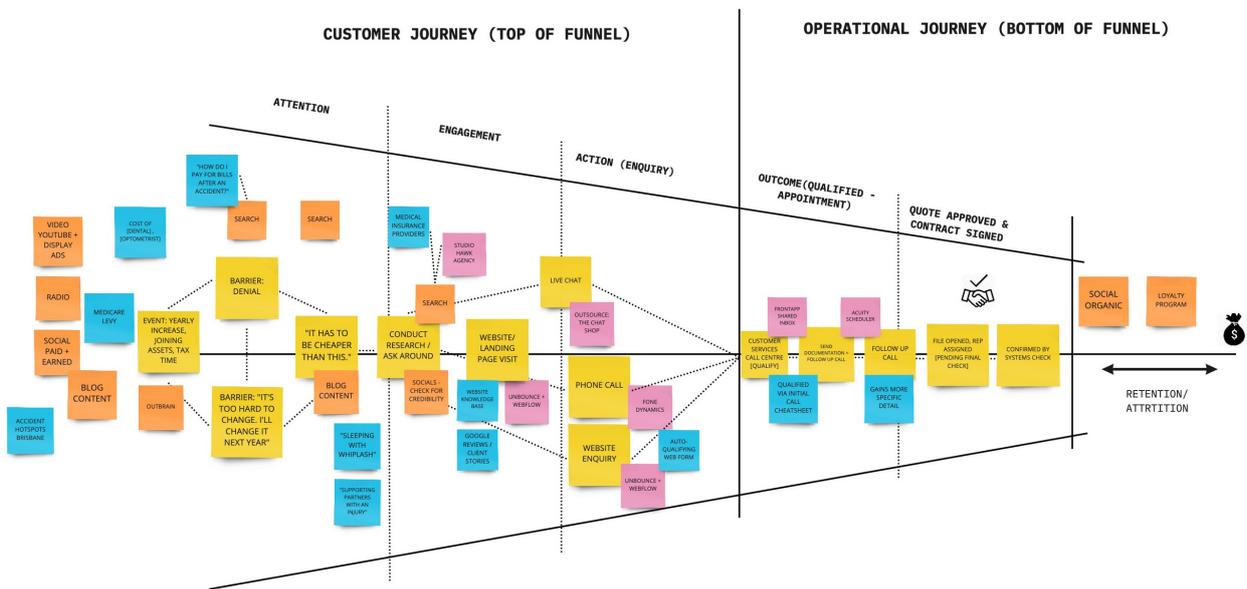
→ VIEW MIRO TEMPLATE EXAMPLE

→ DOWNLOAD WORD TEMPLATE

Here's what I want you to do:

1. Consider the touchpoints customers will have on their journey to you
2. Log the channels you have in play at each stage
3. Log the systems you are using to facilitate your outcome (from Instagram organic, Facebook ads, live chat, online forms and even VIP programs post sale - everything!)
4. Brainstorm the most meaningful metrics you want to track at each stage Then prioritise them in order of "nice to have"

Want some extra tips for how to think about the data you're tracking? I've got you. Head to the next page. →

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Customer journey mapping continued. [SUPPORT SHEET]

Attention:

Eyeballs are important here because we want to understand if we are attracting and warming up a new audience - but so is an understanding of whether some channels drive faster outcomes than others. If you've followed me for a while, you'll have heard me bang on about how funnels are not linear. I know as a consumer, I OFTEN buy a dress I've seen on an influencer I follow and I "Just have to have it!" - I might go from never having followed or seen that brand before, to buying immediately. I'd say if I was in charge of making marketing decisions, and the price was right for an influencer post - I might consider that to be pretty profitable activity!

Engage:

When at the engagement stage, we want to track people we enticed but who have not yet taken action. It gives us something to measure to understand who COULD be in our pipeline.

Say I saw that dress and kind of liked it, but am still on the fence since it's a little out of my price range. Perhaps I head to the website and sign up for a 10% off coupon by sharing my email address. You might also (if you get your tracking sorted!) hit me with a remarketing cookie so you can advertise to me on Facebook or Google KNOWING that I had some interest previously. Now you have my email address and I'm still thinking.

So the key metrics here: website visits, customer data captured (email list size), the size of "cookie pools" etc.

Keep in mind, you might want to track a number of "engage" metrics for the purposes of improving ad targeting- but this is different to monitoring performance. For example, you might be interested to track the number of people who started to fill out a form, but didn't complete that form so that you can re-target them and see whether they're still interested. This is an event that might be worthwhile to track from an advertising perspective, but isn't something you'd report on to indicate effectiveness. Make sense? It's for this reason that if advertising is a key part of your strategy, it makes sense to work with your advertising specialists to think about what events they want to capture from an ad optimisation perspective too.

Action:

Action taking us what we all want - and it can really happen at any time. After one interaction with the site or after MANY days and MANY interactions. This is called our path to purchase length and it often depends on the product we are selling. Check out my blog post on Path Length and Time Lag to learn more about how to get an indication of what yours is and therefore, how much to focus on the "engage" or "nurture" stage of your funnel. We all know what our action metrics are, whether it's phone calls, leads or sales!

Outcome:

Outcome metrics to me is exactly what "hit the bank". In the early phases, this can just be direct from your accounting system to see marketing expenses and revenue. When it comes time to scale up, we can build a utopia where we can wash this data with what we saw in the top of funnel (like if someone submitted their email in a Facebook lead ad, or are in our email system) - and optimisation can get CLEVER after that!

Alright, once you've got an idea of what YOUR customer journey looks like, it's time to implement. Use my checklists as a guide to prompt what metrics you might need. Keep in mind, there will likely be a combination of events that you're tracking to OPTIMISE for vs. events you're tracking that determine profitability. You'll need everything in the "foundations" checklist and can bolt on additional metrics by checking my eCommerce, Service Based Business and Interactive Digital Product checklists. Then from here, you simply prioritise them, with consideration to what you logged down in your Customer Journey Map) into your Trustworthy Tracking Briefing Sheet - ready to DIY pass off your developer or tracking expert to help you tag up.

⟶ LET'S DO THIS