

claravine

# How to Stop Tracking Code Chaos

Campaign tracking is broken. Here are four steps to fix it.

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# THE CHALLENGE

*The process to manage and enforce consistent tracking of campaigns is broken. Analytics teams often rely on static spreadsheets, homegrown solutions, and manual processes to generate and manage tracking codes meant for agencies and marketing teams.*

Unfortunately, the common processes don't have a built-in means to easily and reliably validate that tracking is applied correctly, or that analytics tags are configured appropriately on landing pages.

With little enforcement and highly static tools, tracking standards are rarely enforced, and data flows in silos (or in many cases not at all). As a result, the business absorbs the negative impact on reporting, attribution models, and your greater marketing engine.

Progressive analytics teams are solving this challenge by employing an automated, governed approach to defining and enforcing tracking standards across the organization. This guide elaborates on each core part of this process.

Teams that deploy these practices are typically able to increase tracking code and campaign visibility, reduce time spent cleaning data, and improve decision-making with more rich and accurate campaign results.

# The Foundation of Campaign Success

*In an ideal process, teams create content, implement consistent tracking parameters, and ensure campaign readiness. Pages are tested, tags are placed appropriately, and experiences render correctly.*

Post-campaign, the analytics team interprets campaign tracking data and provides reports and insights to drive improved business decisions. As a result, teams understand their audience, deliver personalized experiences, and make data-driven decisions around future campaign creation.





# The Tracking Code

*Tracking success requires a systematic, consistent approach to the application of tracking codes across experiences and campaigns.*

As a quick background, campaign tracking codes collect data about a user's click to a webpage. They're most often populated via a query string parameter appended to a URL. The name of the parameter is considered the key, and the contents are considered the value. Each analytics platform is configured to look for specific parameters and send the values of those parameters to the relevant reports.

For example, values are sent to the tracking code report in Adobe Analytics, or the Source / Medium / Campaign / Term / Content reports in Google Analytics. Additional campaign attributes can be passed into classifications (Adobe Analytics) or custom dimensions (Google Analytics) that provide more detail about the campaign. Tracking codes facilitate the analysis of campaign performance and allow a view of performance metrics aggregated by different attributes about the campaign.

## TRACKING CODE ANATOMY

■ – Query     
 ■ – Parameters (Keys)     
 ■ – Values

GOOGLE ANALYTICS:

www.yoursite.com?utm\_source=fb&utm\_medium=social&utm\_campaign=aug19

URL

QUERY STRING

ADOBE ANALYTICS:

www.yoursite.com?cid=soc|fb|aug19|XWETVSB8

URL

QUERY STRING

# A Process Issue

## How did tracking chaos happen?

- *Enterprise teams often lack alignment and are increasingly fragmented.*
- *Processes to conduct QA tasks and maintain data hygiene haven't evolved to accommodate the proliferation of available marketing technologies and digital channels.*
- *Analytics practitioners—who bear the burden of data quality—are often responsible for creating and managing thousands of codes, across multiple channels and geographies, and dozens of digital marketing and agency teams.*

Unfortunately, the process to generate tracking, enforce consistent tracking application, and ensure campaign readiness is typically a manual process. As a result, current manual campaign tracking processes fail to produce complete, consistent, and reliable data: the foundation of campaign success.

Ultimately, the scale of digital has surpassed team bandwidth to maintain data quality and campaign accuracy manually. Analysts working within the current process lose productivity cleaning data and fixing reports instead of providing analysis.

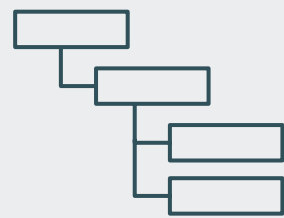
Marketing teams execute and track campaigns in silos and make decisions based on anecdotal or channel-specific results. Organizations with bad data miss chances to deliver enhanced experiences to their customers.

**Despite these barriers, creating order—and data clarity—is possible.**

# 4 KEYS TO TRACKING SUCCESS

## How to Stop Tracking Code Chaos

1



### ALIGN YOUR TRACKING TAXONOMY

Define enterprise-level standards for data fields and naming conventions that ensure you are uniformly capturing the data that matter.

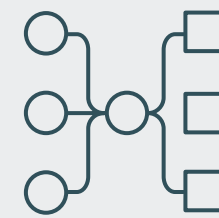
2



### GOVERN THE PROCESS TO GENERATE, IMPLEMENT, AND VALIDATE TRACKING

Establish a governed, scalable process to create compliant tracking links, validate that landing pages are live, and ensure tags are signaling correctly.

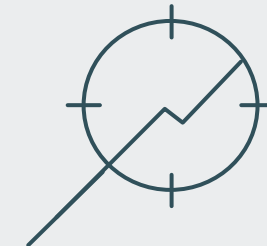
3



### CONNECT AND ENRICH YOUR DATA

Centrally manage data formats, connect metadata, and automate flows to ensure data powers your broader ecosystem at scale.

4



### DRIVE BUSINESS RESULTS WITH RICHER INSIGHTS

Translate comprehensive insights into better decisions with democratized processes and business team engagement.

# 1



## Align your tracking taxonomy

*The main objective of aligning your tracking taxonomy is to make sure you're able to capture data in a standardized format to allow for business insights. Investment in stakeholder needs, workflow mapping, and alignment on naming conventions all contribute to defining enterprise-level standards.*

### INVEST AND UNDERSTAND STAKEHOLDER NEEDS

Analytics teams typically get drawn into campaigns with requests to get data on a campaign being deployed. However, when requests are sourced from a team that doesn't care about the quality of the data, the requests don't tend to be well thought out.

Analytics professionals can guide teams toward making data-centric requests by being clear about their involvement in improving the customer journey on the website, and their investment in the production of quality, trackable information for the purpose of understanding that team's campaign.

Conversations with stakeholders ensure that you have a full understanding of all the data needs based on organizational end-goals. Conduct formal discussions with stakeholders to understand all of their pain points. More importantly, talk with them about everything they might want to know from a tracked campaign as if there were no barriers or budgets. Conversations on the team and stakeholder level will educate your organization on the importance of data quality and will help create buy-in for campaign tracking strategy early on.

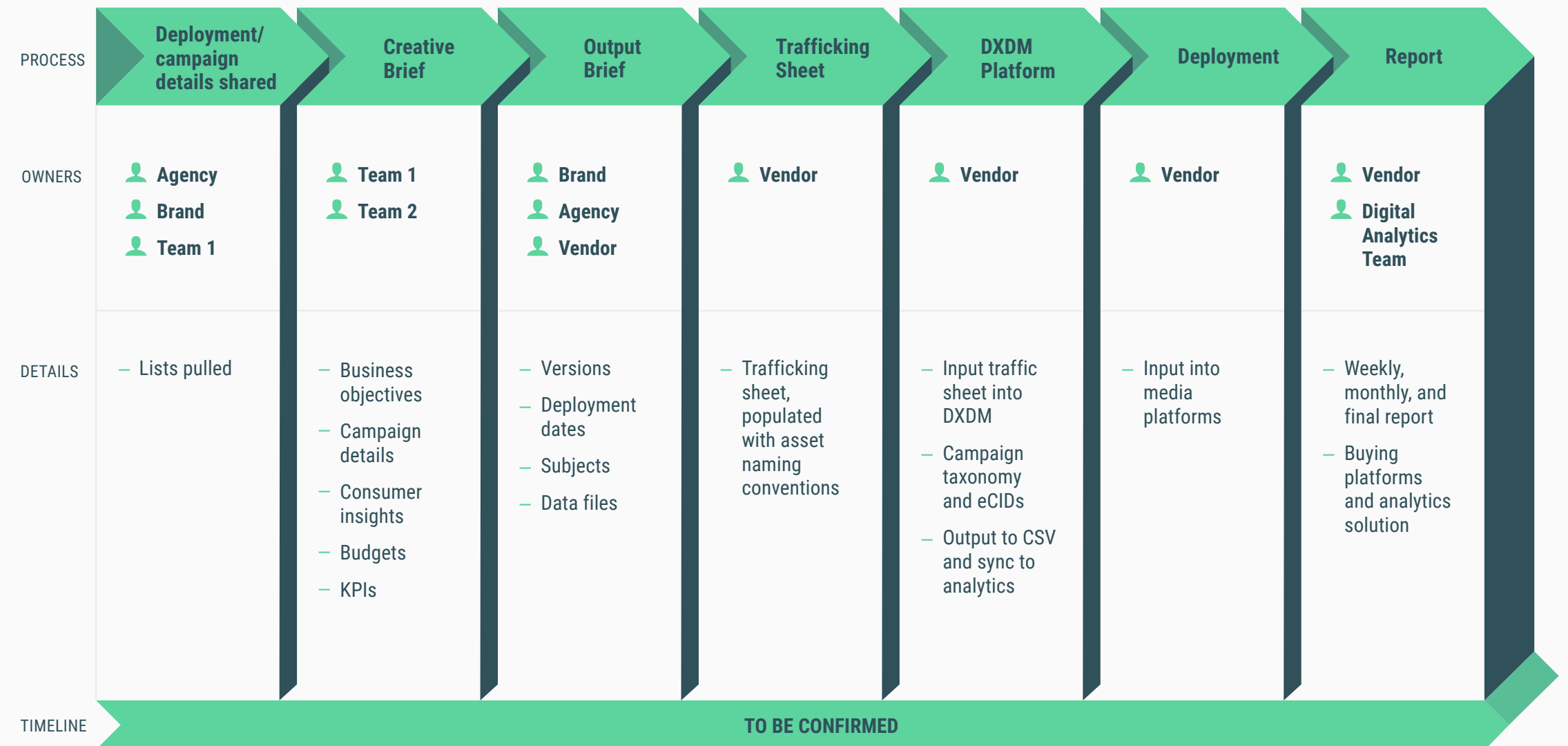


### MAP AN END-TO-END WORKFLOW

These conversations with stakeholders reveal what the business wants, but an end-to-end workflow will illustrate how campaign information is shared and used from ideation to analysis.

For example, if you start with a media brief for Campaign A, a workflow would outline how campaign details get passed, adapted, and approved through teams until actual deployment and analysis. Mapping how your processes will work should account for internal and external groups.

## Sample Workflow



## ALIGN ON BEST-FIT FOR DATA FIELDS AND NAMING CONVENTIONS

After the deep-dive discussions with stakeholders, you need to align on naming conventions and data fields. Working from a consistent taxonomy for marketing campaigns is essential to the success of post-campaign marketing attribution efforts.

From there, set rules for labeling the data fields you will be collecting. Remember to designate the taxonomy structure and pattern (the order of the values and characters that you use) to maintain structure and clarity across the organization. For example, a potential rule for Start Date could be MM/YYYY, with a dropdown format.

To truly succeed in this process, it's essential that you collaborate with champions from various channels in your organization. For example, as a digital analyst, you won't know everything about programmatic media buying or advertising.

Brainstorming with the correct individuals with each team will help you define the types of data you need, and how to best describe and abbreviate data fields and structure. Most of this can be consolidated from the information collected during workflow mapping.

Use the data requirements collected during those meetings (internal or external groups who will deploy campaigns) to decide on outputs and patterns for data fields. Additionally, compiling a year-long promotional plan from each brand will show you what campaigns are happening so you can plan taxonomy around them. *(Note: each brand will have a slightly different structure due to the intended segment they're aimed at.)*

### Example of items to define and abbreviate:

- Final campaign name
- Final ad set name
- Final creative name
- eCID
- Agency codes or Campaign IDs
- Creative format (e.g., video, carousel, other media)
- Brand or line of business
- Agency campaign code
- Media subtype (e.g., Social, with the dropdown Facebook, Pinterest, Instagram)
- Campaign objective
- Audience
- Creative size
- Languages

*When you decide on and map values for each line of business in a central location, you set yourself up to unify disparate teams, regardless of geography, channel, or other division of responsibility.*

# 2 Govern the process to generate, implement, and validate tracking

*Taxonomy alignment is the first step to optimizing your campaign tracking process but doesn't ensure compliance with a protocol, especially in a multi-faceted marketing organization. Governance around the creation and validation of your campaign tracking process improves tracking code accuracy and data consistency across your marketing organization.*

	A	B	C	D	E	F
1	<b>Campaign Name</b>	<b>Start Date</b>	<b>Source</b>	<b>Tactic</b>	<b>Creative Description</b>	<b>Key</b>
2	Summer Promo	4/1/20	Social Media	Twitter	Beach	SM_TW_SummerPromo_Beach
3	Summer Promo	4/2/20	Social Media	Twitter	Restaurant	SM_TW_SummerPromo_Restaurant
4	Summer Promo	4/3/20	Social Media	Instagram	SandVolleyball	SM_TW_SummerPromo_SandVolleyball
5	Summer Promo	4/4/20	Social Media	Instagram	Beach	SM_TW_SummerPromo_Beach
6	Summer Promo	4/5/20	Social Media	Facebook	Restaurant	SM_TW_SummerPromo_Restaurant
7	Summer Promo	4/6/20	Social Media	Facebook	Beach	SM_TW_SummerPromo_Beach
8	Summer Promo	4/7/20	Social Media	Facebook	Restaurant	SM_TW_SummerPromo_Restaurant
9	Summer Promo	4/8/20	Social Media	Facebook	SandVolleyball	SM_TW_SummerPromo_SandVolleyball
10	Summer Promo	4/9/20	Social Media	Twitter	Beach	SM_TW_SummerPromo_Beach
11	Summer Promo	4/10/20	Social Media	Twitter	Restaurant	SM_TW_SummerPromo_Restaurant
12	Summer Promo	4/11/20	Social Media	Instagram	SandVolleyball	SM_TW_SummerPromo_SandVolleyball
13	Summer Promo	4/12/20	Social Media	Instagram	Beach	SM_TW_SummerPromo_Beach
14	Summer Promo	4/13/20	Social Media	Facebook	Restaurant	SM_TW_SummerPromo_Restaurant
15	Summer Promo	4/14/20	Social Media	Facebook	Beach	SM_TW_SummerPromo_Beach
16	Summer Promo	4/15/20	Social Media	Facebook	Restaurant	SM_TW_SummerPromo_Restaurant
17	Summer Promo	4/16/20	Social Media	Facebook	SandVolleyball	SM_TW_SummerPromo_SandVolleyball
18	Summer Promo	4/17/20	Social Media	Facebook	Restaurant	SM_TW_SummerPromo_Restaurant
19	Summer Promo	4/18/20	Social Media	Facebook	Beach	SM_TW_SummerPromo_Beach

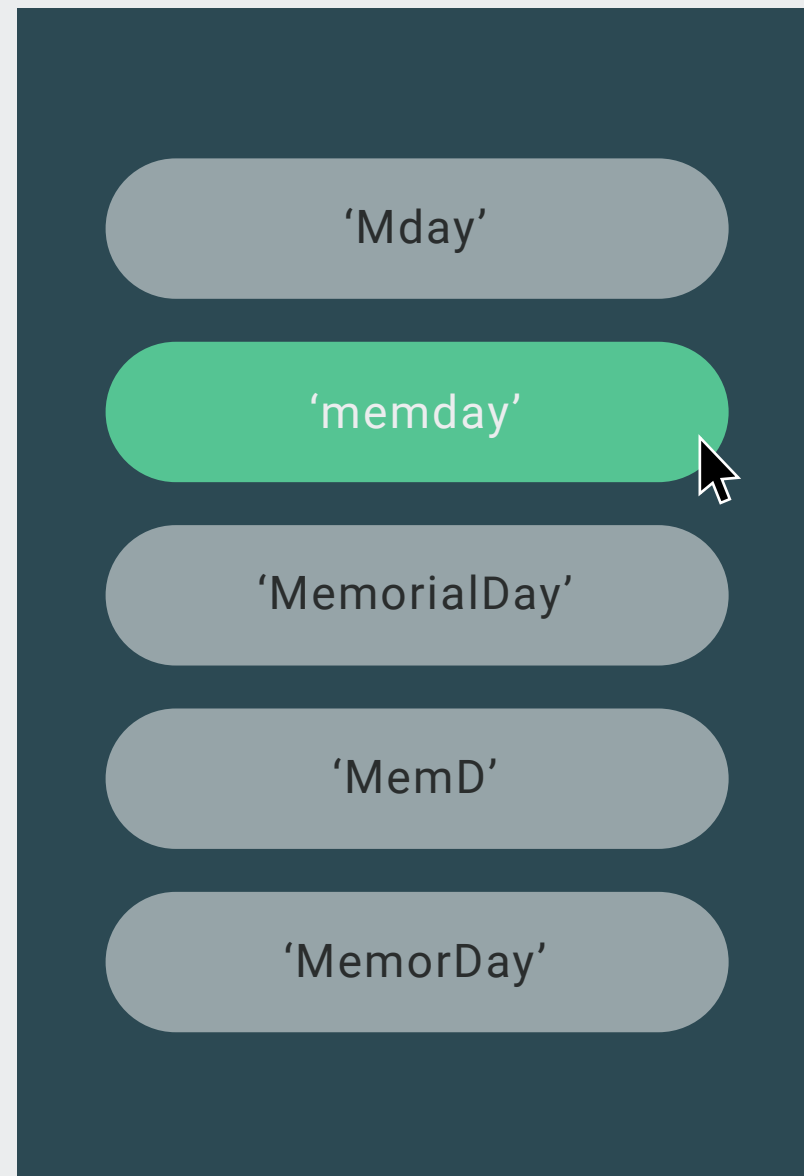
### CREATION

Currently, teams create campaign tracking codes with simple URL builders or use dropdowns, macros, VLOOKUP, and other functions on spreadsheets (either static or distributed documents like Google Sheets or Microsoft 360) similar to the one shown.

### A few downsides to using massive spreadsheets:

- There's no easy way to make sure users populate the data fields correctly
- It's laborious and time-consuming to manually manage spreadsheets across all lines of business
- Outdated versions are often saved or changed in personal drives, resulting in inaccurate, siloed, and missing data
- It's difficult to administer data management capabilities such as version control, data transformation, or integration with other systems
- Spreadsheets don't necessarily facilitate communication with third-party groups

## MEMORIAL DAY CAMPAIGN TAXONOMY EXAMPLE



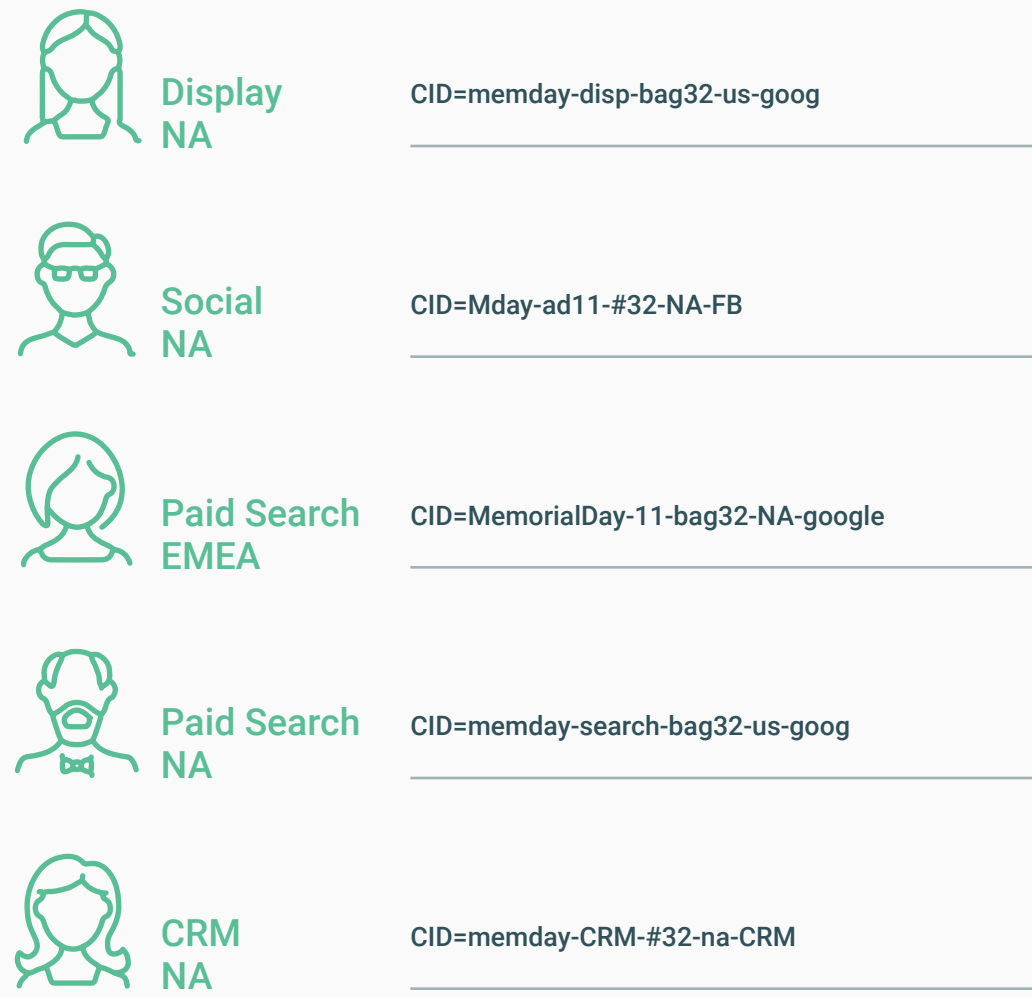
A marketing campaign can be active across a variety of platforms and channels, comprising thousands of ads, emails, dedicated landing pages, and other elements. Separate teams and business groups often vary on items like campaign names and values. For example, 'memday,' 'Mday,' and 'MemorialDay' can all be used by marketers to refer to the value for Campaign Name. Varied naming translates to the analytics solution as distinct values and disrupts views into traffic and campaign attribution.

An alternative is a centralized platform that ensures taxonomy compliance by restricting variation with customized patterns, for example, The Data Standards Cloud™. This allows you to avoid manual tracking code creation entirely.

Leaders can create custom templates based on your taxonomies centrally for each channel or team. Platform administrators can set the required fields, lock dropdown options, and grant access to relevant team members, ensuring standards aren't inappropriately changed.

Naturally, standards will evolve. Using a centralized platform in place of spreadsheets means changes can be made and implemented instantly across the enterprise, without having to chase down spreadsheet versions. This includes ensuring that fields in your analytics solution (for example, classifications and dimensions) are updated automatically. Furthermore, it provides a record for submissions and actions over time, supporting compliance for agencies and other teams who are involved in the campaign tracking process.

## Before The Data Standards Cloud

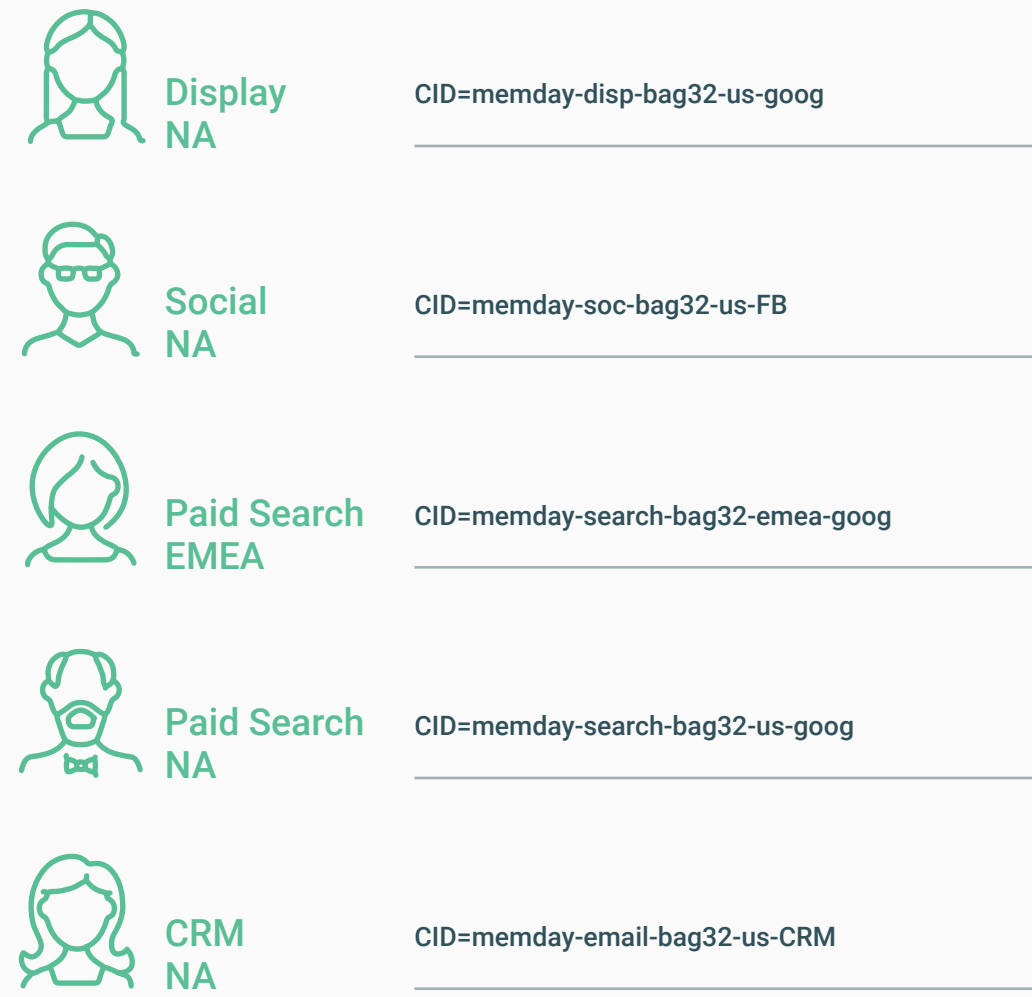


Campaign	Channel	Item	Region	Platform
✓ memday	✓ disp	✓ bag32	✓ us	✓ goog
✗ Mday	✓ ad11	✗ #32	✗ NA	✓ FB
✗ MemorialDay	✗ 11	✓ bag32	✗ NA	✗ google
✗ memday	✗ search	✗ bag32	✓ us	✓ goog
✓ memday	✓ CRM	✗ bag32	✗ NA	✓ CRM



A governed, cloud-based system empowers marketers at every level of analytics knowledge to conform to set parameters and avoid mistakes when they have access to a centralized database and intuitive user interface.

## After The Data Standards Cloud



Campaign	Channel	Item	Region	Platform
✓ memday	✓ disp	✓ bag32	✓ us	✓ goog
✓ memday	✓ soc	✓ bag32	✓ us	✓ FB
✓ memday	✓ search	✓ bag32	✓ emea	✓ goog
✓ memday	✓ search	✓ bag32	✓ us	✓ goog
✓ memday	✓ email	✓ bag32	✓ us	✓ CRM

## VALIDATION

Validation is the part of the campaign tracking process involved with ensuring proper data flow to your analytics platforms.

Successful campaign tracking validation requires three essential elements: A live landing page, accurate deployment of analytics code on the page, and analytics code that corresponds to the correct environment. In the case of Adobe Analytics, you also have to verify that the right variables (e.g., props, eVars, events) are firing.

When marketers miss one of these elements, and the campaign deploys, you've already invested valuable time and dollars, regardless of if your audience navigates to the page you intend, or

you collect the data you need. A comprehensive validation check is a huge time investment for internal and agency teams.

Automating validation is the best way to ensure full compliance. The Data Standards Cloud conducts validation at the same time as code generation. After checking that the correct taxonomy is applied and each data field is correctly populated, this platform will check that landing pages are live and that tags are signaling, so data flows accurately.

## 3 Essential Campaign Tracking Elements to Validate:



A live landing page



Accurate deployment of analytics code on the page



Analytics code that corresponds to the correct analytics environment

# 3



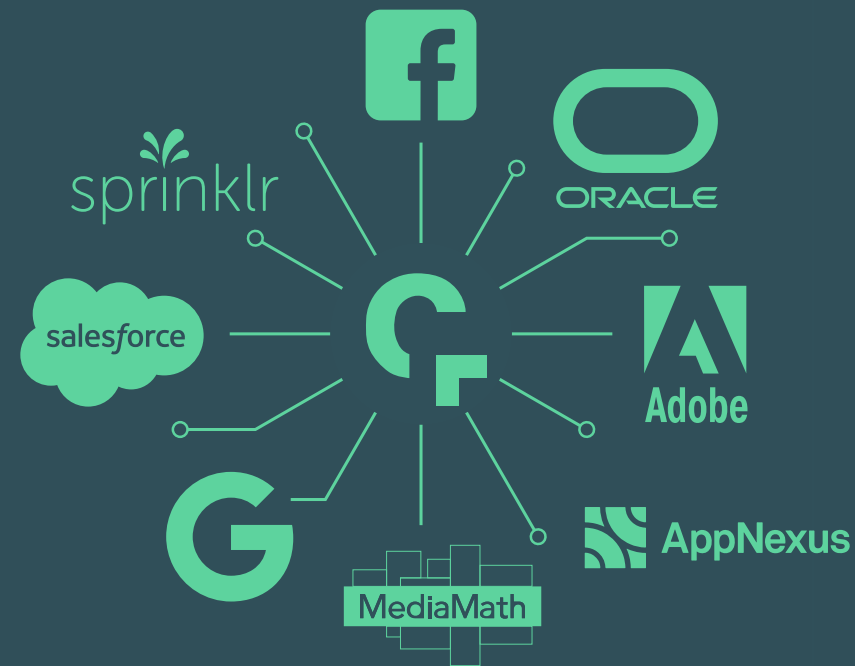
## Connect and enrich your data

*Given the vast array of channels and tools, each with discrete data structure and language, it's challenging to connect data beyond analytics platforms to each level of the marketing organization.*

Advertisers can use campaign data with CRM and third-party customer data to saturate customer profiles, refine existing audience segments, and identify new segments. Mobile app marketers can combine campaign data with customer support data to prioritize UX updates that will deliver a more seamless cross-channel experience. Retailers can use campaign data in conjunction with POS data to determine connections between digital and physical touchpoints. And marketing leaders can better track ROI with multi-touch attribution models.

Having your data in a consistent format also makes it possible to unify platforms used in disparate areas of your marketing engine. A centralized governance platform helps keep these data formats consistent and usable for disconnected groups.

For example, you can connect data collected by ad agencies to internal analytics teams by creating a unique ID that ties into systems such as Prisma or DCM. Mapping metadata across platforms can enrich the overall dataset and allow you to break down elements such as demographics with more granularity.



### The Data Standards Cloud:

- **Automates data governance at scale.**

Instead of generating tracking codes individually, this platform can automatically ingest, validate, append, or fix data in bulk from media platforms, where there are often thousands of ad iterations in each campaign.

- **Gives the analytics team power to manage their data.**

Leaders can change data formats centrally and push changes bi-directionally into analytics, business intelligence, AI and machine learning, optimization, and other platforms. You have actual control over your data and how or where it flows.

Uniformity between groups, platforms, and systems not only removes data silos but also enhances reporting and helps build a more specific story with the data. Instead of reporting on a click or an element, you can use that metadata on objectives, audiences, or geographic areas to segment the data in new ways within your analytics and campaign delivery platforms.

For example, organizations can begin to measure performance down to specific partners and use that information to make future investment decisions or personalize content and experiences.

This is another area in which The Data Standards Cloud is helpful because this type of system can help manage data formats and flows in addition to enforced taxonomies, governed tracking code generation, and validation-related activities.

Enterprise data quality requires the ability to manage data in addition to governing and validating tracking. At the enterprise level, this enables better analytics and better experiences at scale. Furthermore, teams have the bandwidth to focus on analytics and drive the business. Improvements accelerate campaigns and campaign results by reducing latency between launch and results.

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ADAM GRECO IN **UNDERSTANDING DIGITAL  
ANALYTICS DATA ENRICHMENT.**

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# 4 Drive business results with richer insights

*An at-scale campaign tracking process allows you to translate ideas into action. Consistent, reliable data enables analytics teams to produce optimal reporting, attribution, and optimization for the organization. In turn, more complete insights empower better business decisions and optimized marketing campaigns.*

An immediate benefit is that minimal latency in campaign reporting allows for mid-flight optimization; instead of spending time piecing together results across channels, teams can jump straight to analysis and decisions.

The improved data and metadata coverage allows you to dig into the results and get a clear idea of what is helping or holding you back from hitting campaign goals.

Consistent data also presents the opportunity to align with the rest of the organization. For example, when a campaign is deployed or being worked on, sit with a marketing specialist who's just deployed a campaign. Before the launch, you should have a general idea of what views they want, but now is the time to ask about the business questions they want to have answered; what does success look like for this campaign? Working closely with that 'data partner' will help you ask the right questions.



### Questions might include:

- *How much of the user base is mobile vs. desktop?*
- *How does messaging or creative targeting contribute to campaign performance?*
- *How is a hub flow or new activation performing?*
- *At what step do people fall off after reaching a particular landing page?*
- *How are tactics (a conversion technique or awareness campaign) working by region (channel and geography)?*

Finally, detailed views of the data can drive a truly data-driven culture. Prior to implementing these recommendations, a marketing team may only care about or have available reports relating to the top of the funnel.

With these improved processes, you can start to work on the handoff between customers 'looking in the window' to bringing them 'into the store.' Analysts can help other teams optimize their process by granting views into the buying funnel to groups involved with the online journey. This may also mean working with product teams, looking at buy flow, and using that new data to identify how to make experiences more seamless. More accurate attribution lets you recommend where to alter,

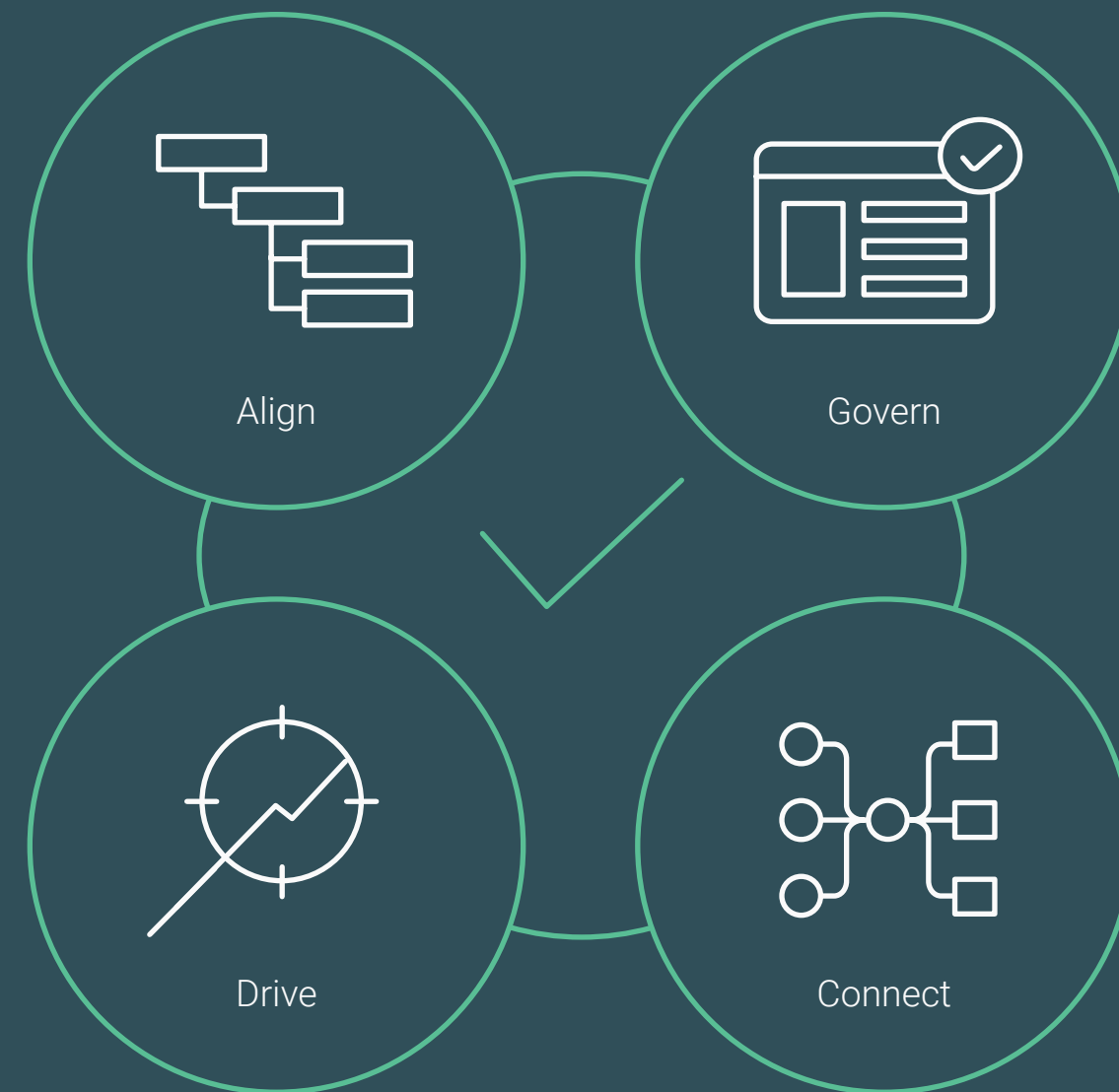
reinforce, or reallocate campaign dollars. The data-driven decisions that result encourage confidence within the greater organization.

When you lay the foundation to ensure data quality and consistency, at the level of granularity you need, you enable analytics teams to produce new, reliable business insights and clear campaign attribution.

# CONCLUSION

*Although elements of the traditional campaign tracking process make creating, governing, and managing codes and data chaotic and frustrating, it doesn't have to be.*

When you align on tracking taxonomy, establish a governed process to generate and validate tracking, and connect these systems to disparate parts of your marketing system, you'll empower yourself to drive results, reprioritize ROI, and re-establish trust in your data and insights.



## SUCCESS STORY



**Rogers Communications, listed as one of Forbes Top 100 Digital Companies for 2019, is a leading telecommunications service with brands and subsidiaries heavily invested in producing digital campaigns and experiences.**

Although headquartered in Toronto, Canada, a manager of digital analytics described the previous state of their campaign tracking process as “the wild west.” Inaccurate reporting, fragmented tracking codes, and overall poor visibility into campaign performance often resulted from a misalignment of cross-functional team processes and inconsistent tracking governance.

The organization, which began implementing The Data Standards Cloud in July of 2018, executes thousands of campaigns across its multiple brands. They needed Claravine’s platform to help standardize naming conventions, apply automated

governance for their campaign tracking process, and ultimately produce consistent data for paid media across all lines of business for display, social, and search.

Standardized naming within The Data Standards Cloud gave Rogers the ability to track campaigns at every level, including Campaign Names, Creative Asset Names via the Rogers trafficking sheet, and Placement Names on the ad set level. As a result, the company has experienced several wins, including more efficient eCID creation for campaigns.

Rogers was also able to synchronize multi-platform data—such as between Facebook and Adobe Analytics—via Claravine. Other connections allow DCM to map all data from platforms in Adobe Analytics using Prisma, including Creative Asset Name, Placement Name, and others.

End-to-end tracking benefits the business by facilitating analysis ‘beyond a click’ and ensuring there’s metadata to improve segmentation in their analytics tool. Additionally, insights more accurately inform decisions on budget and resource allocation for Rogers, Fido, EBU ChatR, Rogers Media Brands, and Rogers Bank campaigns.

Essentially, automated governance and tracking code creation helps them deploy and analyze campaign results more easily, without silos, and ask the deep questions only answerable through detailed metadata.

*“With Claravine, we’re capturing a lot more information than we’ve ever had before.*

*We’ve cleaned up that unspecified bucket to something more trackable, and we’re deploying campaigns in a more structured way, on top of having the data quality we need.”*

*— Digital Analytics manager*

## ABOUT CLARAVINE

Claravine is redefining data integrity for the global enterprise. The Data Standards Cloud™ makes it easy for teams to standardize, connect, and control data collaboratively, across the organization. Leading brands use Claravine to take greater ownership and control of their data from the start, for better decisions, stickier consumer experiences, and increased ROI.

For more information, visit [www.claravine.com](http://www.claravine.com)

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