

001 - GA4 SETUP PLANNING - PREPARING FOR THE MIGRATION

Unlock Smarter insights in GA4 To Drive
MORE SALES



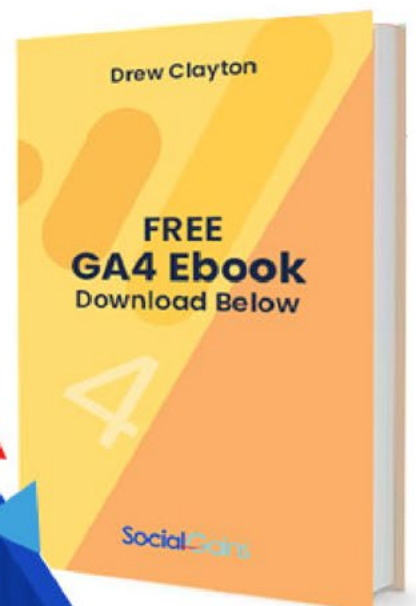
GA4 Onsite
Training Courses



GA4 Analytics
Upgrade Packages



GA4 Complete
Ecomm Tracking



INTRODUCTION

Google Analytics is changing and marketers are tasked with overseeing the migration from Universal Analytics (UA) to Google Analytics 4 (GA4).

You're committed to measuring your campaign success and website performance, but with so many fundamental differences between UA and GA4, it's easy to feel like you're missing something.

How Can You Get started?

Use this workbook to establish your website goals, document your current Google Analytics configuration, and recognise opportunities to improve your ability to measure success.

TRACKING SETUP

DATA COLLECTION

HISTORICAL DATA

REPORTING

TRACKING SETUP

Question 1.

How is Google Analytics currently implemented?

You're committed to measuring your campaign success and website performance, but with so many fundamental differences between UA and GA4, it's easy to feel like you're missing something.

In a tag manager container?

Or directly in the HTML code?

Question 2.

Who has access to your Google Analytics properties?

What levels of access do you provide to your team and external partners?

What level of access will you provide for new GA4 properties?

DATA COLLECTION

To determine the success of your marketing efforts, you need intuitive and actionable data about your digital campaigns and website performance.

Question 1.

What other data sources do you have linked to Google Analytics? Review the Product Links section in the GA admin area and note which links already exist to other Google products.

Google Ads

Google Search Console

Google Merchant Center

Google Optimize

Google AdSense

Google Tag Manager

Question 2.

Which data sources will you need to link to GA4? Consider current data sources and the ideal future state. Even if GA4 connectors aren't available yet, other solutions may exist in the future.

Google Ads

Google Search Console

Google Merchant Center

Google Optimize

Google AdSense

Google Tag Manager

Question 3.

How have you customised your current Google Analytics settings? Note any other changes you've made to your property and view settings in Universal Analytics. Note that GA4 does not have separate views within a property.

Properties & Views: _____

Segments: _____

Filters: _____

Dimensions & Metrics: _____

Other Property Settings: _____

Question 4.

List the objectives you have defined as "Goals" in Google Analytics.

E-commerce transactions

Lead Form Submissions

Phone Calls

Content Engagement

Video Views

Question 5.

List your website objectives that you still need to measure. For example, the visitors that engage with your highest-value content before an eventual purchase. The first step to getting this data is identifying the need.

Goal Name

Goal Definition

Question 6.

What other events are most important to track on your website? List the ways below, your visitors engage with your content and any other meaningful interactions that should be measured.

HISTORICAL DATA

Question 1.

How much UA data do you need to preserve for future analysis? How far back do you need to look to observe trends?

What time intervals do you need for future comparisons? For example, monthly and quarterly results for the past three years.

What format(s) do you want to store your historical data in? Depending on your needs and resources, you could opt for spreadsheets, custom databases, or Google's BigQuery cloud data warehouse.

Question 2.

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How far back do you need to look to observe trends? What time intervals do you need for future comparisons? For example, monthly and quarterly results for the past three years.

REPORTING

Great analytics programs are about more than just gathering data. Empowering your teams with data-driven insights can accelerate your digital marketing performance. Spend time thinking about the outputs of your GA4 migration and start dreaming up new ideas on the following pages.

Question 1.

What types of website analytics reports help your stakeholders make better decisions? Who consumes these reports, how often, and in what format? What questions do your reports need to answer?

Question 2.

What tools do you use to aggregate and visualize data? How do you transfer data between Google Analytics and other reporting or data visualization platforms such as Excel, Tableau, Power BI, or Google Data Studio?

Question 3.

What business questions will you need your analytics data to answer? Try to answer “So what?” whenever possible. For example, “What new products have been the most successful at driving conversions in the past year?” or, “How much should we invest in Paid Media in the next year?”

Question 4.

Which Events are currently tracked in your Universal Analytics account? List the most important GA Events that should be migrated to Google Analytics 4.

Category

Action

Label