

5 Pillars

of a Successful Website Tagging Strategy



Tags provide extremely useful information regarding your customers' behaviors and the performance of your digital properties, but without a formalized tagging strategy, they can also lead to frustration and chaos.

To ensure the success of your analytics and marketing programs, a robust and documented tagging strategy will help you build a digital experience that both you and your customers find valuable.

Here are 5 pillars of a successful website tagging strategy.

Digital Governance Committee

A digital governance committee meets frequently to:

- ✓ Assess data quality
- ✓ Discuss new business requirements
- ✓ Review the success of data collection technology and efforts
- ✓ Strategize end-to-end efforts to plan, deploy, test, validate, and monitor performance over time

Who should be part of the digital governance committee?

- ✓ Company leaders
- ✓ Business stakeholders
- ✓ Implementation teams

When company leaders are proactive and consistent about governing the analytics and marketing tags on their site, they prevent more fires, data is more usable, and they get more return out of their investments.

Who should lead a digital governance committee?

Your committee's director, manager, or officer should have the following attributes to be an effective leader:

- ✓ Organizational seniority
- ✓ Understanding of the business value of data
- ✓ A strong technical background
- ✓ Familiarity with martech solutions
- ✓ Understanding of development frameworks, tag management systems, and content management systems

All parties affected by data (Marketing, Sales, IT, Operations, Development, etc.) should have a senior-level representative participate in at least a quarterly meeting.

If you don't have a committee in some form, start communicating the benefits to relevant stakeholders, including:

- ✓ Greater visibility into customer data architecture and objectives
- ✓ Improved efficiency in data quality
- ✓ Increased return on investments in marketing technology
- ✓ Reduced risk of non-compliant data collection

Once you have the right people involved, you can start planning.

Tagging Plan

Known by various names, including a solution design reference (SDR), site reference, or tracking plan, your tagging plan is the blueprint by which your implementation should live.

A tagging plan outlines all of the information having to do with your implementation, specifically vendors, tags, and variables.

Having a tagging plan makes it easier to promote order in your data implementation and easily communicate implementation architecture to new team members. Set up a clear and detailed tagging plan, but consider it a dynamic document that should be updated as your site and team grows and changes.

What does a tagging plan look like?

The format of your tagging plan will vary, but there are some standard pieces you should include when structuring your documentation.

Your plan should describe where, when, and how tags and variables should fire, outlining at least the following information:

Status

Active or inactive tag

Use Case

How the user interacts with the site

Variable

Predefined, such as a prop, eVar, or event

Variable Description

A quick explanation of the variable

Example

What you expect the values to look like

When to Set

Page load, click, or other

Where to Set

URLs stating on which pages the variable will be placed

Notes

Additional notes about the technology

Your tagging plan should be a readily-accessible, living document. All professionals involved in analyzing or building your implementation should have access to the documentation to avoid duplicate requests for data or inconsistent data collection. And, you should establish a protocol for updating governance documentation.

Reverse engineer a tagging plan

If you don't have any documentation, you can use an Audit from ObservePoint to scan your current implementation for all existing technologies and reverse engineer it.

You can also use ObservePoint's Rules to build and store a tagging plan in the format of rules, which allows you to validate the data collected during an Audit against expected values and alert you to any discrepancies.

Tag Management System

Tag management systems should be a cornerstone of every implementation as they are fundamental to the success of your data collection efforts, especially at scale. Every time your team deploys something new, they need to go through the appropriate channels via a TMS.

Some of the primary benefits of using a tag management system are that they:

- ✓ Provide agility and flexibility to large-scale implementations
- ✓ Collaborate with analytics and consent management software
- ✓ Reduce bulk or lag on your website
- ✓ Keep a handle on tags even when architects leave your company
- ✓ Conserve valuable development resources by granting access to analytics users to make changes themselves (with controlled review processes)

However, the use of a tag management platform does open the possibility of mistakes that impact your site's front-end experience via a "single point of failure" for marketing applications. Training and leadership are crucial to avoiding such mistakes.

Less plug-and-play than you might think

A successful TMS implementation will require time, money, and expertise. During the new implementation process, your team will need to learn the nuances of the tag management system and how its capabilities meet your business goals.

Minimizing risks

Other inherent risks present during your TMS implementation include impacts to your historical uptime and downtime trends, product release processes, disaster recovery plans, and overall business strategy.

As the single source of information for Consent Management Platforms, the connection to the TMS and any blindspots inherent to the TMS will also affect your CMP. Your first step is to work with your vendor to plan for these risks and take measures to avoid them.

In addition, you should use a digital governance solution to perform ongoing maintenance of your tagging implementation and monitor your production implementation for any rogue tags deployed outside the TMS.

Data Layer



The more complex your site gets, the more you need a data layer. A data layer can serve as a groundwork for your tag management system and marketing technologies, providing a level base to keep your martech stack from toppling over.

If you have a TMS on your site, it may have already added a data layer object for you. There are various methods you can use to push values into that data layer for your TMS—and other applications—to access, including DOM event handlers or the push API.

Here are 3 ways a data layer can boost your tag implementation and data collection:

1. Reduced development time

Variable naming conventions and data collection processes differ across vendors, meaning that the same values must be recorded multiple times in multiple ways. Without a data layer, getting new technologies up and running can take up development resources. When you combine a tag management system and a data layer, you have easy access to the data points you need.

2. Consistent data collection despite structural changes to HTML

One of the problems with using a TMS without a data layer is a process known as “DOM-scraping.” Using Javascript or jQuery, a TMS can “scrape” data from HTML elements—such as the title of a page or the value of a form field to gather data. While this may be a quick and easy way of getting the data you need front-end developers change HTML structures frequently, so a TMS may go looking for an element that has changed its identity.

The data layer is built separately from the DOM and is populated using methods that are agnostic to page structure, so the data will always be where it needs to be.

3. Standardized data across marketing technologies

TMSs don’t collect data—they deploy tags that collect their own data. When you rely on vendor-specific data collection, each technology is going to define event data a bit differently. As a result, technologies that

are meant to work in conjunction may be evaluating customer behavior a bit differently from each other. This will result in a fragmented customer experience.

Implementing a data layer puts you in control of data collection, so that you have consistent data to analyze, making it easier to optimize your digital experience.

Digital Governance Solution

By this point you have a beautifully designed implementation architecture, a robust data layer, and a time-saving, complexity-reducing tag management system. Plus you have all the right stakeholders organized and onboard. You've got it all, right?

Not yet.

Websites are dynamic creatures

How often do you update your website? Once a month? Twice a month? Once a week? The more often you update your site, the more likely you will face the impending threat of tagging errors, like:

- ✓ Broken tags due to conflicting JavaScript
- ✓ Missing tags due to negligence or technical failures

- ✓ Missing variables due to negligence or technical failures
- ✓ Variable inconsistencies, making your reports murky
- ✓ Duplicate tags, causing data inflation
- ✓ Unauthorized and piggybacking tags

While data layers and tag management systems greatly enhance your ability to avoid these tagging errors, they do not eliminate them. In fact, in some ways they exacerbate them due to being that single point of failure.

To proactively mitigate the risk of tagging errors, you should apply a digital governance solution.

Digital governance solutions:

- ✓ Test and validate your website technologies to ensure accurate data collection and insights
- ✓ Audit your cookies and tags for privacy compliance
- ✓ Find and alert you to journey interruptions, so you can optimize user experiences

When they audit tags, they scan the network requests sent from websites in their various stages of development in order to identify potential tagging errors.

Let's unpack that last statement: Digital governance solutions...

1) Scan network requests.

Digital governance solutions crawl websites scanning for network requests sent by tags. When a digital marketing or analytics tag sends out a request, the governance solution will capture that data and parse it out into its component values. These values are checked against pre-defined rules to determine whether they are correct or not.

2) In various stages of development.

Ideally, new tags should be deployed early on in the development cycle. A digital governance solution can scan websites and apps within pre-production environments (such as a staging environment), so technology teams can resolve issues before a site or update goes live.

In addition, a digital governance solution also monitors the production environment, notifying the appropriate stakeholders if anything goes wrong.

3) To identify potential tagging errors.

A tagging error is any deviation from tagging best practices or from a company's internal business requirements (from your tagging plan). When a digital governance solution discovers a potential tagging error, it notifies the appropriate stakeholders.

Without a digital governance solution, you don't have any confirmation that your implementation will continue to work as deployed. As a diagnostic tool, a digital governance solution like ObservePoint can help you ensure your tags are always present and sending the right data to the right places.

Focusing on the above pillars will give you a starting point to build your own custom website tagging strategy.

While you're not starting from scratch, you can still approach the issue methodically to create a robust and accurate implementation. The results will be more accurate data collection, greater confidence in data, and a cutting-edge website tagging strategy.

If you want to learn more about what a digital governance solution can do for you, schedule a demo with ObservePoint.

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