



# FORTUNE 500 FIRM VALIDATES CRITICAL PAGE ANALYTICS

## Leader in Data Security

The ability to securely capture and validate critical analytics data is a competitive differentiator for this leading US, Fortune 500 wealth management firm.

To that end, they adopted ObservePoint's Technology Governance to test and audit their implementations, ensuring against data loss while also confirming analytics functionality and reporting accuracy.

Because data security and loss prevention are top priorities for this company, each pre-production analytics Audit is conducted expertly behind their secure firewall.

## Behind the Firewall

The firm's analysts first use Technology Governance to audit their implementations in development and then in staging environments, testing for discrepancies that need to be corrected before the pages go live.

After pages are pushed live, a comprehensive Audit verifies analytics solutions are in place and functioning correctly.

One of the most critical pages on this firm's website allows customers to use targeted search options to find financial advisors in a specified location that suit their individual needs.

This page alone delivers a large portion of business and marketing opportunities, so it is paramount that all analytics tracking works.

In redesigning this search page to further improve the customer experience, the firm used Technology Governance to audit and test their Adobe Analytics implementation through development, staging and production.

ObservePoint's solutions operate entirely within the digital properties instead of migrating your organization's information and without deploying any code.

Technology Governance is also capable of auditing from behind the firm's secure firewall, meeting their rigorous security requirements.

The firm granted Technology Governance access to the dev and staging environments behind their firewall and implemented 42 continuous Journeys—activity simulations—to monitor every link, button, user login process, and conversion funnel.

These Journeys identified analytics functionality issues that the firm was able to adjust before the pages went live.

# Live Confirmation

The Journey findings allowed the firm's analysts to address many flagged concerns within their staging environment.

However, after the new search page was pushed live, they ran a subsequent Technology Governance Audit and found discrepancies between the staging and live sites.

## *Inconsistencies Between Browsers*

Quality assurance best practices call for implementation teams to test for uniformity across various browsers and channels.

Technology Governance audited the financial advisor search page using three different browsers (Safari, Chrome, Firefox) and found that certain Adobe Analytics variables were not being captured consistently across all three browsers.

This inconsistency can greatly alter analytics data. Ideally, analytics solutions should perform identically across different browsers to collect accurate data.

## *Search Bar Discrepancies*

In addition to uniformity across browsers, analytics solutions should also perform consistently when tracking various devices.

When the analysts tested the live financial advisor search page on different devices, Technology Governance Journeys revealed that analytics on the search bar were not firing during mobile simulations.

This meant that every user searching on a mobile device was not being tracked, putting a large variant in the firm's data.

Another search bar Journey discovered that, when used on non-mobile devices, the search bar analytics were logging a second visit whenever a user exited the search bar, falsely doubling the search bar interactions.



## *Search Activity Tracking*

Arguably the largest hindrance to the analytics on the financial advisor search page was that when the page was pushed live, the Adobe Analytics tags were not firing for most of the activities (various search option entries) occurring on the page.

Of major concern to the wealth management firm was that the activities on their community hub and client login functions were not being tracked.

Because the firm's analysts performed an Audit with Technology Governance immediately after the launch of the new financial advisor search page, they were able to discover and correct analytics issues on their most crucial functions, preventing data loss.

## *Secure Data Collection*

By using Technology Governance, the Fortune 500 firm was able to identify and address each of these potentially detrimental issues in their data collection processes on one of their most crucial pages.

The firm used Technology Governance to validate functionality behind their firewall during development and staging and to ensure that their Adobe Analytics tracking followed through to their live pages, so they could trust that they were collecting accurate analytics data in a secure way.

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