Checklist: Configuring Google Analytics for Insights

Quick Checklist

- ❏ Set up Different Views & Filter Erroneous Referrers & Spam - 10 min.
- ❏ Configure Goals to Measure Conversions - 10 min.
- ❏ Activate User Demographics and Interests Reports - 10 min.
- ❏ Configure the Site Search Report - 10 min.
- ❏ Use Segmentation & Secondary Dimensions When Generating Reports
- ❏ Associate Google Search Console - 15 min.
- ❏ Link Google Adwords - 15 min
- ❏ BONUS TIP: Annotate the Timeline - 5 min.

Set up Different Views & Filter Erroneous Referrers and Spam
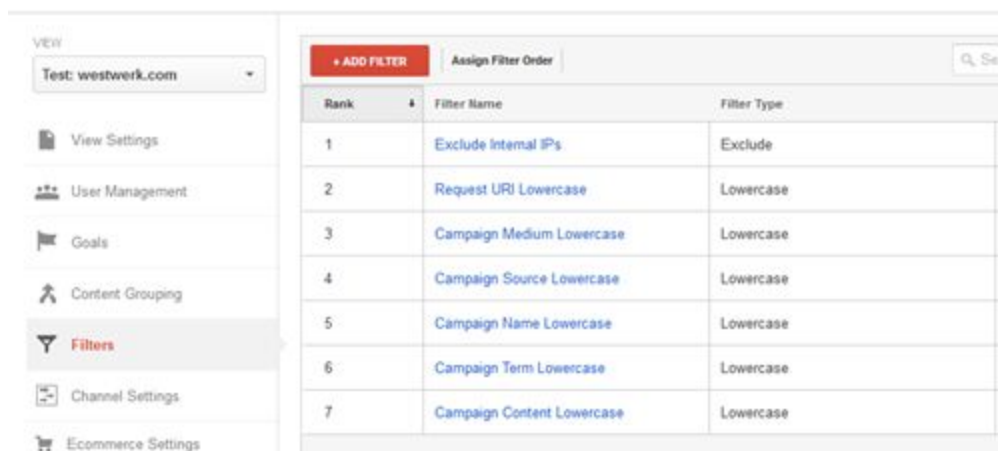
Why is this important? Filters ensure that the data you're collecting is as accurate as possible. What filters should everyone use?

- Exclude internal IP addresses
- Lowercase Request URI, Campaign Medium, Source, Name, Term, and Content
- Filter out spam

Note that additional filters that aren't discussed here should be used if you have a unique Analytics setup, such as cross-domain tracking or sub-domains.

You can add up to 25 views but everyone should have at least one view that has no filters applied so you always have access to the raw data, and another that has filters applied to have access to more accurate data.

When you're done setting up your filtered view, it should look like this:
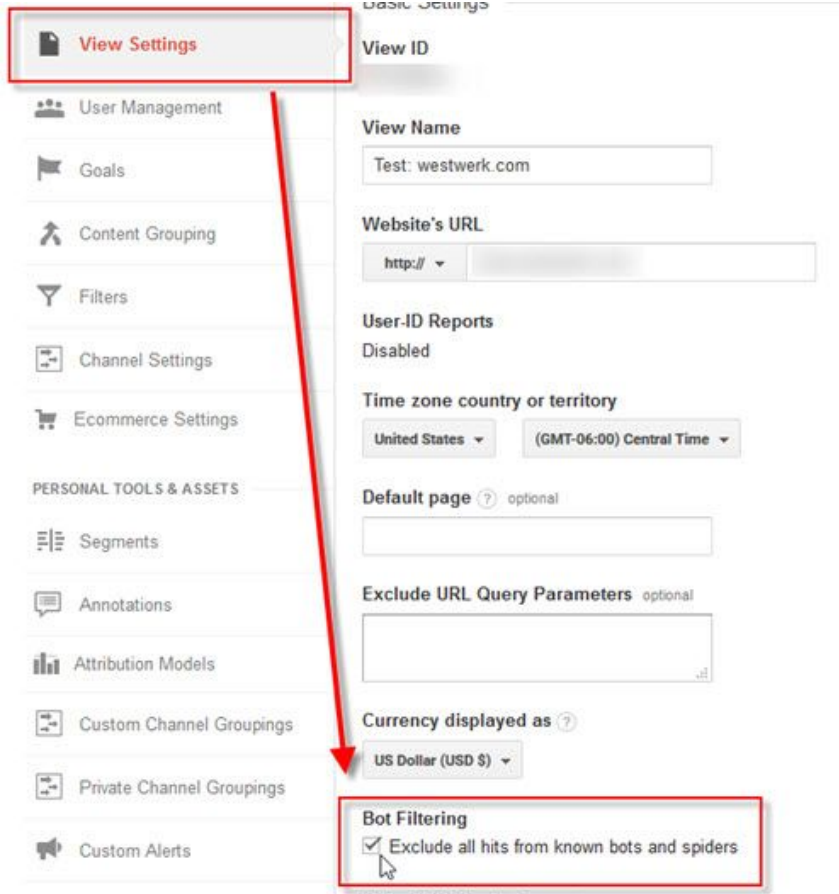

How to Exclude Spam:
On the **Admin.** page, under the **View** column, click **View Settings**. Under "Bot Filtering" check the "**Exclude all hits from known bots and spiders**" checkbox and save your changes.
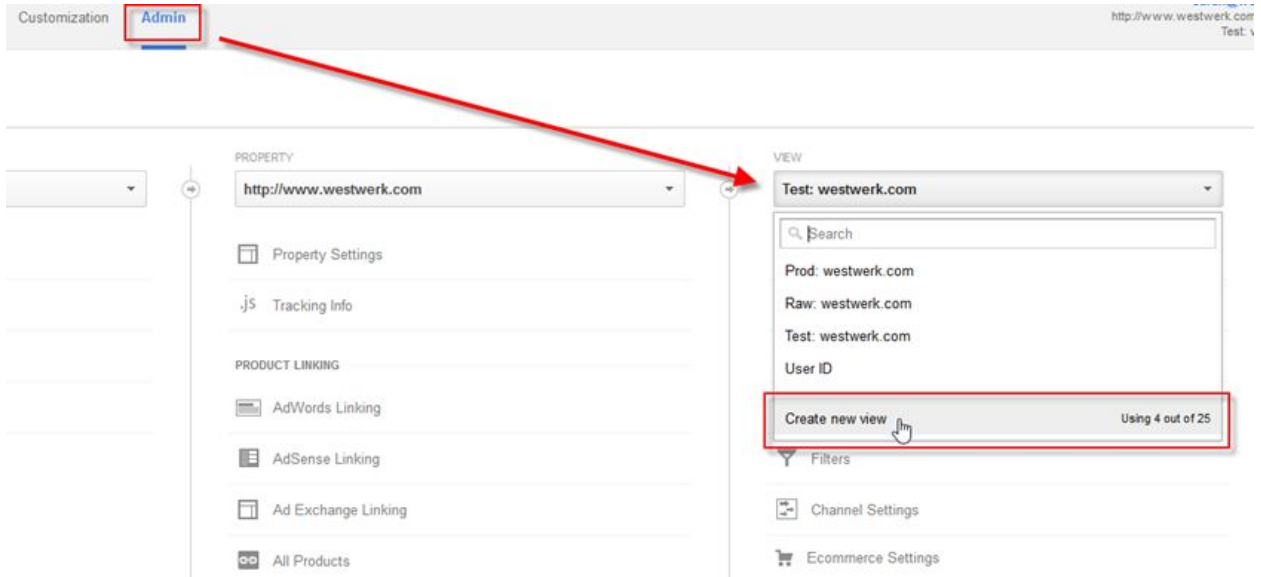
How to Create a New View:
To view the Google documentation, click here.
On the **Admin.** page for your property, under the **View** section, click the down arrow and select
"**Create new view.**"

Generate a descriptive name for the view and click the "**Create View**" button.

How to Add Filters:
From the **View** area, select the necessary view from the drop-down. Then click **Filters**.
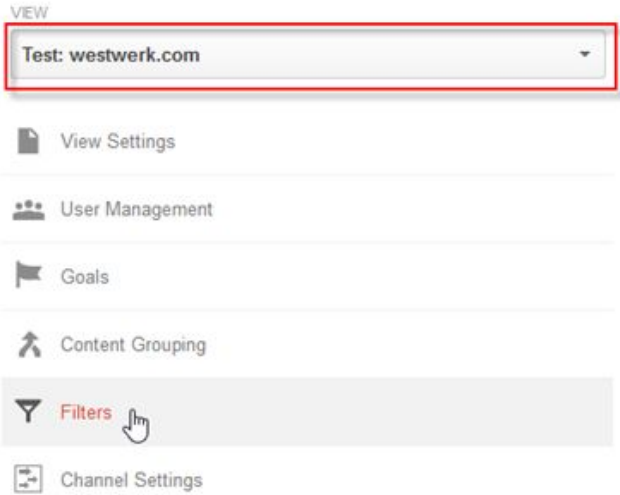
For the unfiltered view, do not configure any filters.
For the filtered view, add each of the views shown below by replicating the settings shown.

Exclude Internal IP

Force URLs to Lowercase

Filter Name

Request URI Lowercase

Filter Type

Predefined | Custom

○ Exclude
○ Include
● Lowercase
　　Filter Field
　　Hostname ▾

○ Uppercase
○ Search and Replace
○ Advanced

Force Custom Campaign URLs to Lowercase (x5)

Filter Information

Filter Name

Campaign Medium Lowercase

Filter Type

Predefined | Custom

○ Exclude
○ Include
● Lowercase
　　Filter Field
　　Campaign Medium ▾

○ Uppercase
○ Search and Replace
○ Advanced

Repeat this one for each of the following "filter fields:" Campaign Source, Campaign Name, Campaign Term, Campaign Content.

Configure Goals to Measure Conversions

Why is this important? With goals configured you can better obtain insights about your users or website. A very common goal is form submissions to measure lead generation.

The image below shows how goals are included as a dimension on the Channels report. Below you can see that organic search and email marketing drove no form submissions, but referral, direct and social channels did.

How to Configure a Lead Gen Form Goal:
For the Google documentation, <u>click here</u>.
In the **Admin.** section, select the necessary view from the drop down, then click **Goals**.
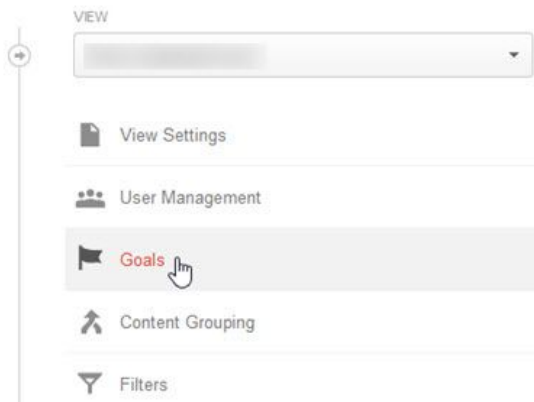
1. Click the **New Goal** button.
2. Create a descriptive name for the goal.
3. Select the **Destination** radio button then click **Continue**.
4. Leave the Destination set to "Equals To."
5. Input the url extension of your form thank you page in the text box.
6. Click **Save**.

Don't forget to test your goal configuration by submitting a test form and verifying that the conversion was recorded. It takes approximately two days for the data to be reflected in Google Analytics, or you can view it in the **Real Time** > **Conversions** area of Google Analytics (remember that if you've set up an exclude filter for your IP any tests you run won't display!).

Activate User Demographics and Interests Reports

Why is this important? With advanced user demographics: Age, Gender, Affinity Categories, In-Market Segments and Other, you can get a better picture of who is coming to your website.
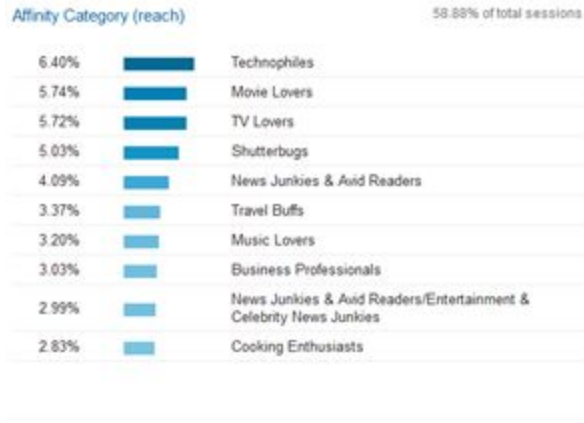
How to Configure the Demographics & Interest Reports:
For Google documentation, click here.
In the Admin. section, under the Property column for the appropriate property, click **Property Settings**.
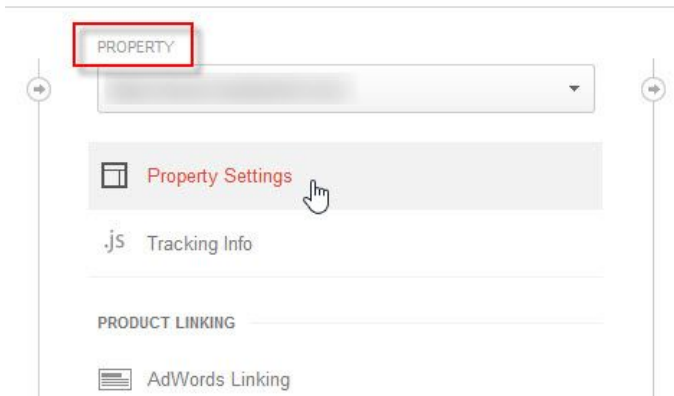

Under the Advertising Features section, click the button so that ON displays. Click **Save**.

How to Enable Remarketing & Advertising Reporting Features:
For Google documentation, <u>click here</u>.

Again, under the Property column, click **Tracking Info**. From the resulting list click **Data Collection**.

Under the Remarketing section, click the button so that ON displays.
Under the Advertising Reporting Features section, click the button so that ON displays. Click **Save**.

NOTE: You must adhere to Google's <u>policy requirements for using Analytics advertising features</u> once these features are enabled on your website. This typically means creating or updating your internet privacy policy page.

Configure the Site Search Report

Why is this important? If you have site search functionality on your website, you can collect users' queries in the site search report in Google Analytics. Capturing this data can provide useful insights into what your users are looking for on your website and may help you make decisions about your navigation or content.

How to Configure Site Search:
For Google documentation, <u>click here</u>.
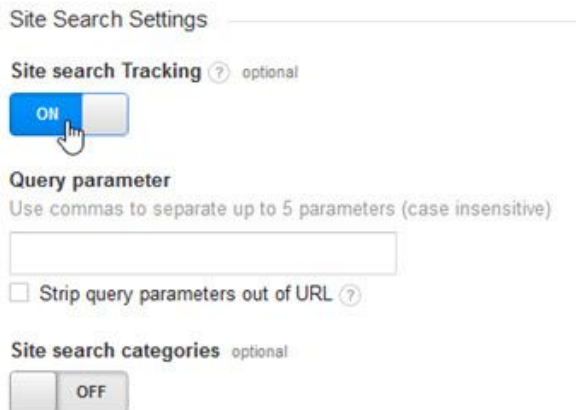
Note: this configuration is only relevant to sites with site search functionality. If you do not have this functionality on your website, you do not need to configure the site search report.

In the Admin. section, under the View column, select the appropriate view to configure. Click **View Settings**.

Under the Site Search Settings section, click the button so that ON displays. The Query Parameter fields display.

Input the query parameter(s) used on your website in the field and click **Save**.

NOTE: for more details about the "strip query parameters" checkbox and site search categories, see the Google Help documentation.

How to determine your query parameter:
Navigate to your website's search functionality and input a search term.
Look at the URL of the results page and you will see a character or word prior to an "=" sign. Here are some examples to demonstrate the different forms the query parameter can take.

On cnn.com, the query parameter is "text."
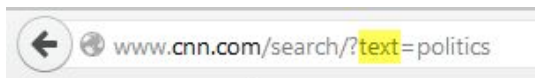
On foodnetwork.com it's "searchTerm."
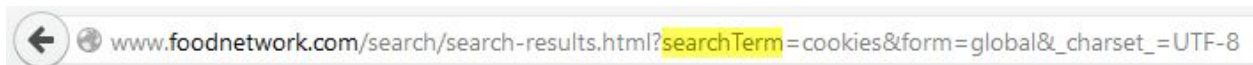
On lunametrics.com, it's "q."
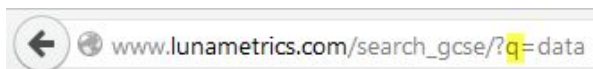
Use Segmentation & Secondary Dimensions on Reports

Why is this important? Overlaying segments and secondary dimensions on the default clickstream reports can yield more actionable insights. Useful default segments and secondary dimensions include:

- Desktop vs. Mobile
- Converters
- Multi-Session Users
- Gender / Age
- Location
- In-Market Segment
- Affinity Category
- Other Category

Here's an example of a useful insight obtained by adding a secondary dimension "In-Market Segment" to the Gender report.

| Gender	In-Market Segment	Acquisition	
		Sessions	**% New Sessions**
		6,408 % of Total: 464.68% (1,379)	64.47% Avg for View: 73.39% (-12.16%)
1. male	Business Services/Business Technology/Web Services/Web Design & Development	249 (3.89%)	61.85%
2. male	Employment	207 (3.23%)	68.12%
3. male	Business Services/Advertising & Marketing Services	169 (2.64%)	58.58%
4. female	Employment	137 (2.14%)	59.85%
5. male	Software/Business & Productivity Software	122 (1.90%)	72.13%

This indicates that men seeking information or services related to

comprise the majority of the website's audience. We would expect the majority of the audience to have this in-market affiliation for a website design and development agency.

The second most popular group is men seeking information on employment, followed by women seeking information on employment. It is somewhat surprising that these employment-seeking audiences are so prevalent. Is there a more profitable in-market

audience segment that we'd rather see coming in second, such as
?

Looking further down the report, women seeking information about
comprises less than half of
the amount of traffic to the website compared to men in the same market segment! This
suggests one of two things that could warrant further research and potential changes to the
website.

- Women make up a much smaller percentage of the demographic that we're trying to attract to our services so the website is hitting the mark, or
- Women comprise a larger percentage of the target demographic in the Business Services market segment and the website is missing the mark with this audience.

How to Apply Segments:
At the top of most reports is an option to add a segment (or multiple segments). Click the
region to view the different segments options.
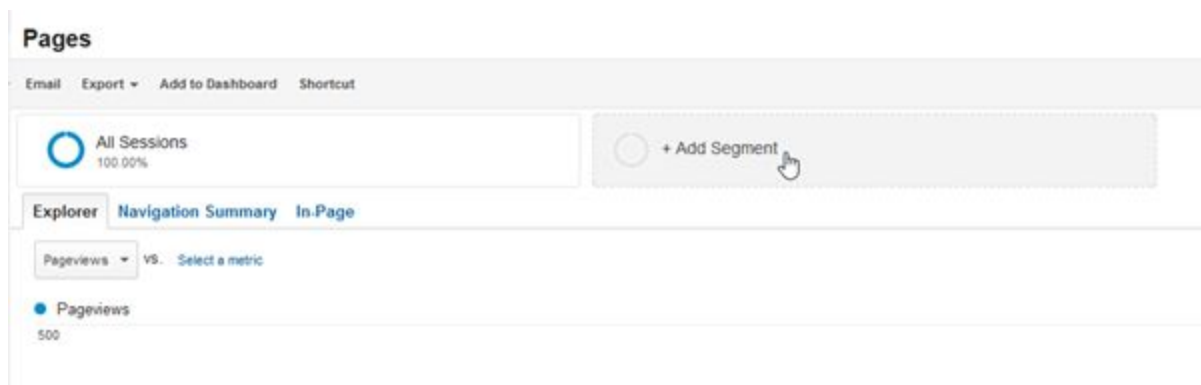
Select the segment(s) you wish to apply from the list and click **Apply**. Note that when
segmenting or viewing by demographics, Google forces the data set being used to be smaller.

You can also create custom segments relating to user profiles by clicking the **New Segment**
button. Apply these segments to different reports, such as Top Pages, to quickly see how
different content resonates with different user groups.

Apply it to the Channels report to see if there are patterns in the different marketing channels.
For example, does Facebook inbound a predominantly younger, female audience? If so, this
might suggest you should tailor your Facebook messaging towards this demographic.

How to Apply Secondary Dimensions:
For any report, click the **Secondary Dimension** button at the top of the table. Select the necessary dimension from the drop-down.

Different types of businesses will find different combinations of segments and dimensions helpful on their reports. Experiment with different combinations or write down specific questions that you have about your website or audience that you want to try to uncover with the data, and use that to inform your research and analysis.

Associate Google Search Console

Why is this important? Associating Google Search Console (formerly Webmaster Tools) brings data from that Google tool into your Analytics account so you can view it with the different dimensions and segments that are available in Analytics. The data is located in the Acquisition > Search Engine Optimization reports.

How to Associate Google Search Console:
In order to perform the association, you need to be a property owner in Search Console and have full permissions configured in Google Analytics. You may only sync your Analytics account to a single Search Console property, so the steps below may not work as described for properties implementing cross-domain tracking.

Follow one of the paths below to associate your property. You will know if you have a verified property already set up if you are able to login to your Search Console account and see your verified property.

If you do not have a verified property in Search Console
In your Google Analytics account > Admin. page > Property column, click **Property Settings** and navigate to the Search Console Section. Click **Adjust Search Console**. An "Edit" link displays.

Click the link and follow the prompts provided on the subsequent "Enable Search Console in Google Analytics" page to create a property in Search Console and associate it to Google Analytics.

If you do have a verified property in Search Console
Go to this page while logged in to your Google account, click the **Associate Properties** button and follow the prompts to complete the association.

Link Google Adwords

Why is this important? Linking Google Adwords brings your paid search data into your Google Analytics account and populates reports under the "Adwords" menu. One of the key benefits of viewing your Adwords data in Analytics is being able to see the goal conversions associated with your paid campaigns. It is not necessary to link Adwords if you don't do paid search.

How to Link Adwords to Google Analytics:
For Google documentation, click here.

From within your Google Analytics account > Admin screen > Property column, click **Adwords Linking**.
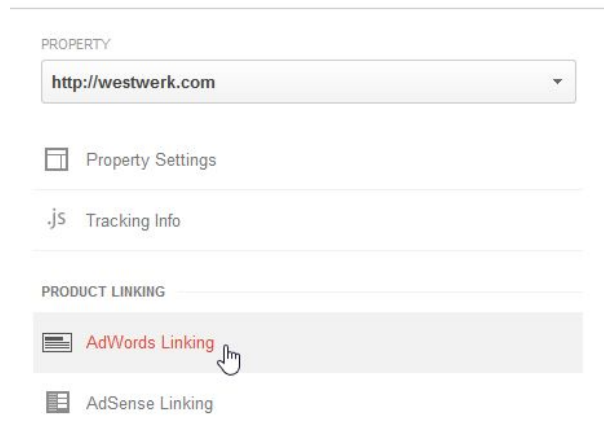
Follow the steps provided in the Wizard. The most common configuration is to only use one link group per property.

BONUS TIP: Annotate the Timeline

Why is this important? Adding annotations to your timeline helps contextualize your clickstream data. You could add annotations when:

- You send out an e-newsletter or perform other digital marketing campaigns
- You perform updates, upgrades, or other important maintenance or design changes on your website (or you relaunch your website!)
- Google performs an algorithm update
- You've changed or added filters for your view

How to annotate the timeline:
You can add an annotation from just about any report by clicking the small arrow underneath the timeline. When clicked it expands to provide an area to view, add and edit annotations.

Alternatively, you can add annotations from the Admin. screen by selecting the necessary view, then clicking **Annotations**.
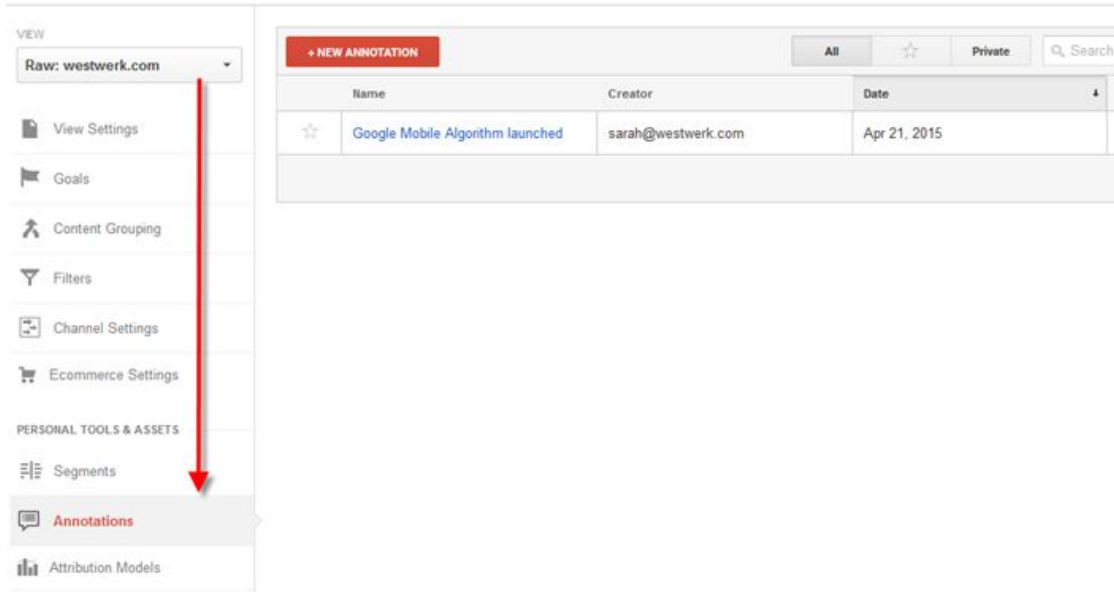
When adding an annotation:
1) Select the date.
2) "Bookmark" it with a star (allows you to pull up only your starred annotations in a view)
3) Write a description, 160 characters or less.
4) Denote it as shared or private. Private shows the annotation only for the person logged in, shared shows the annotation for anyone with access to the View.

The image below shows an annotation added in March 2015 to denote the Google Mobile Algorithm update.

Once an annotation is added, click on the annotation on the timeline to view the annotation notes.