

GA4 Implementation Checklist

Here is a comprehensive document that the client can use to ensure that his/her google analytics is set up correctly. Here are the steps that need to be followed:

- ☐ **Define Your Online Business Goals and KPIs:** The fundamental part of a digital measurement and optimization plan is defining your goals. Setting up smart and meaningful goals is an important part of my Google Analytics audits.
- ☐ **Determine What You Need to Track:** Take a close look at your online business objectives. Please make sure that what you are going to track is in line with your objectives and KPIs.
- ☐ **Set Up a Google Analytics Account:** It is easy to set up a Google Analytics account. If you haven't one already, just use this link: <http://goo.gl/KJbBb>. Since Universal Analytics is just launched and is in beta, I advise you to use the traditional GA tracking.
- ☐ **Set Up Profiles:** Profiles and filters are the building blocks of a Google Analytics account. You can collect a subset of your data within a profile. How many profiles you will need depends on your unique situation.
- ☐ **Set Up Filters:** Filters help you to define the dataset you want to collect in a specific profile. They give you the flexibility to modify the data that is being collected in each of your Google Analytics views.
- ☐ **Get the Basic Profile Settings Right:** Each profile in your Google Analytics account contains a number of basic configuration fields. You need to set this up correctly in order to get the right data coming in. Learn more about this by reading this [Google Analytics Profile Settings Guide](#).
- ☐ **Link Google AdWords to Google Analytics:** In order for Analytics to be able to attribute visits to specific AdWords campaigns, you also need to import your AdWords cost data to the relevant Analytics profile.
- ☐ **Set Up Goals and Funnels:** define the actions you would like your users to complete on your website.
- ☐ **Get Campaign Tracking in Place:** Campaign tracking is a vital component for every online business. You need to know exactly which campaigns drive traffic and conversions. Otherwise, you simply don't have a clue about how to improve! And, your Google Analytics implementation is worthless
- ☐ **Add Tracking Code to Website:** Make sure you tag all of your pages with the right code(s).
- ☐ **Test in a Development Environment:** It is always recommended to test your Google Analytics implementation on a test server first. This is because it is easy to make some mistakes with implementing scripts. Better to find it out on your test server!
- ☐ **Review the Results and Make Necessary Changes:** Very often more than a few mistakes need to be corrected after reviewing the initial implementation. Take the time for getting things right. When you find no more issues, you are ready to go live!
- ☐ **Implement on Live Site:** Upload all pages and scripts to the live site
Visit the site to see whether everything works correctly
Check whether all your profiles are receiving data after 24 hours (it usually takes up to only a few hours)
Check whether all your goals and filters are working correctly; if not, update the settings. A good practice is to test all your goals and filters first on a test profile, before applying them to other profiles
- ☐ **Set Up User Access Structure:** Carefully consider the roles of each individual who gets access to your Google Analytics account. You don't want anyone accidentally deletes profiles or goals.
A great new feature is the "Change History" tab that has been added to the "Account Settings" overview.
I would recommend keeping the number of people who are allowed to "edit" and "delete" to a minimum.
- ☐ **Create Custom Reports:** Google Analytics contains 80+ different reports with a lot of data.
In my experience, it is extremely powerful to integrate data from different reports within one report. This is where custom reports may come in handy.
- ☐ **Create Advanced Segments:** Google Analytics offers you a few ways to segment your data. One way to do this is by using advanced segments.
Advanced segments are very powerful in a way that they can be applied "on the fly" and on historical data. Profile filters do only work on data collected in the future.
Create dashboard: You can create and share KPI dashboards with your colleagues or clients. You can even add real-time reports to your dashboard: