

Ensuring Data Accuracy With a Tag Management Policy

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Tag Inspector

About Tag Inspector

Tag Inspector

Tag Inspector is a marketing tag auditing and alerting tool. It empowers clients to not only report on web analytics tags, but also track over 1,000 other marketing tags, including cases of tag piggybacking, where tag A loads tag B unbeknownst to the operators of the site. It is currently used to solve tag auditing and reporting needs of companies located in North America, Europe, Asia and Australia.

Our clients include such household names such as **Lenovo** and **Google**.

Visit [TagInspector.com](https://taginspector.com) to sign up for your free account today!

Brian Clifton

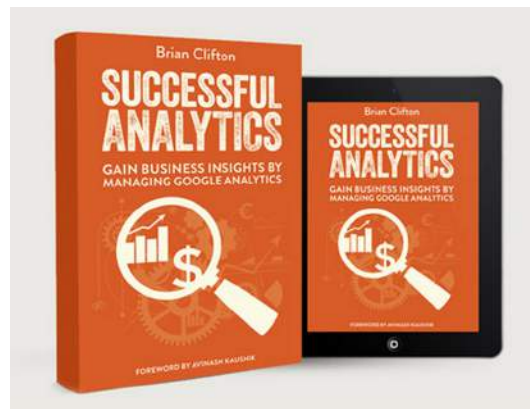


About Brian

Brian Clifton is a measurement strategist, advisor and renowned practitioner of website performance optimisation.

Recognised internationally as a Google Analytics expert, his books are used by students and professionals world-wide.

Photos courtesy of BrianClifton.com



Tag Inspector

 @TagInspector

About the Presenter



Andy Gibson, MBA

Marketing Manager

 @APGibson16

Agenda

- **Why a Tag Management Policy?**
- Creating a Tag Management Policy
- Implementation Process
- Getting Started Today
- Next Steps

Question...

On your website, can you identify...

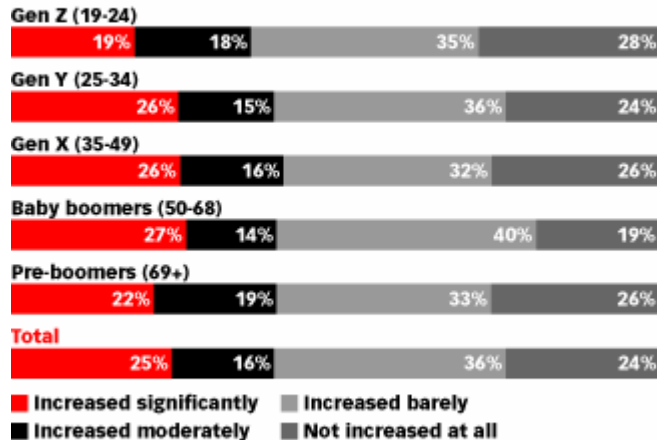
- All the tags that fire?
- How they are deployed?
- The data they are collecting?

If not, who can?

Growing US Privacy Concerns

Change* in Level of Concern About Personal Data Privacy According to US Internet Users, by Generation, March 2014

% of total



Note: numbers may not add up to 100% due to rounding; *in the past 12 months
Source: GfK, "Survey on Data Privacy and Trust," April 14, 2014

172744

www.eMarketer.com

Purchase Behaviors and Attitudes Toward Privacy/Security According to US Internet Users, Dec 2013

% of respondents

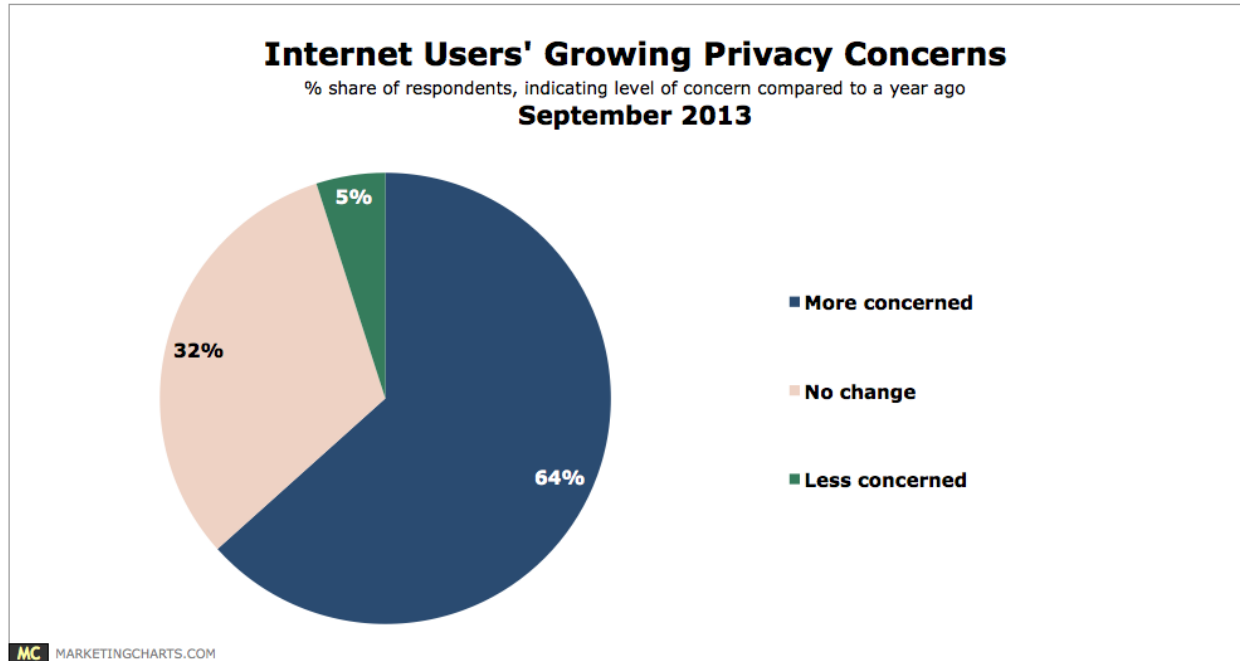


Note: top-two box responses for "completely" and "somewhat agree"
Source: Radius Global Market Research, "Privacy and Security Issues Among US Consumers," April 3, 2014

172689

www.eMarketer.com

Growing US Privacy Concerns



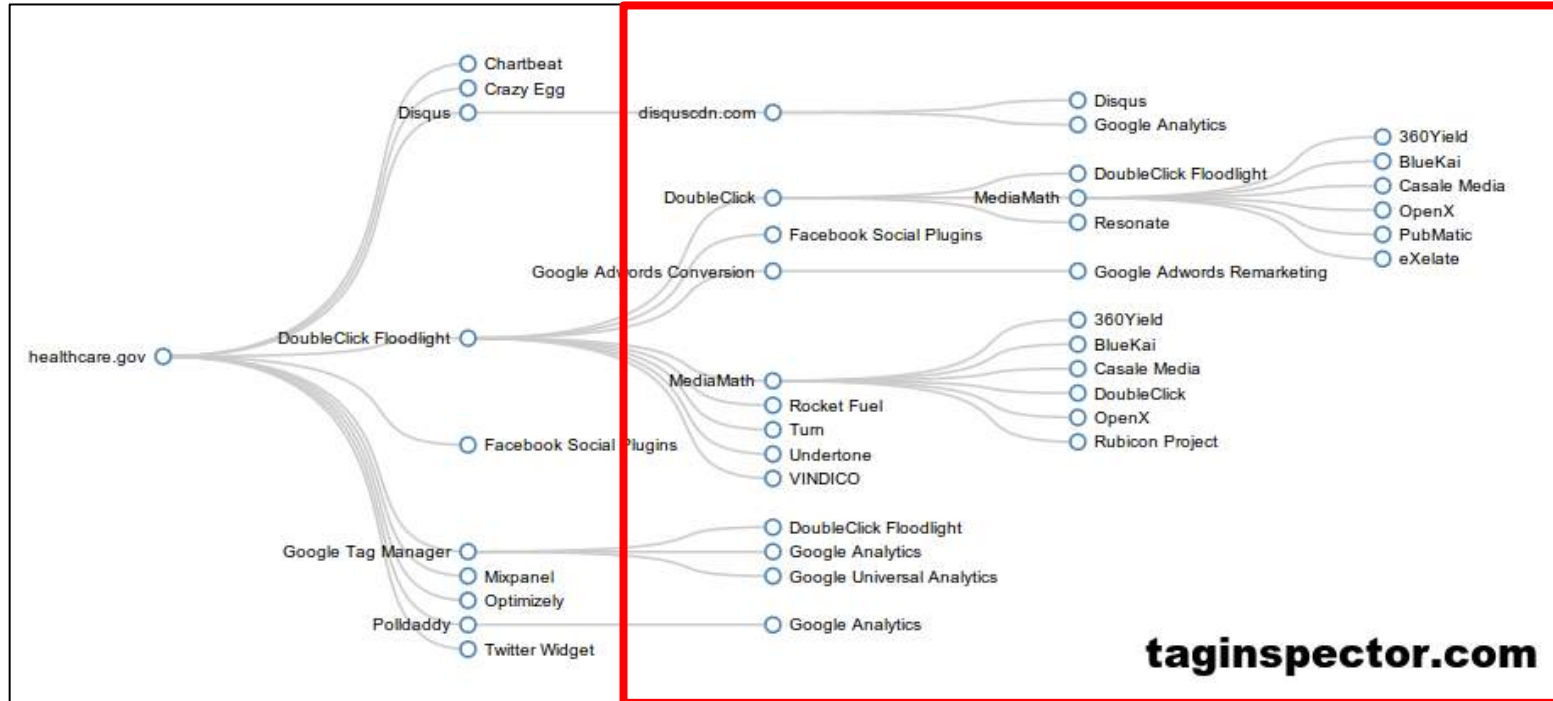
Source: TRUSTe

Germany's Federal Data Protection Act

- Organizations cannot collect any personally identifiable information without express permission from an individual (this includes obvious things like name and date of birth, as well as less obvious things like phone number, address, and computer IP address).
- The permission that an individual grants must specify how, where, how long, and for what purposes the data may be used.
- The individual can revoke the permission at any time.
- Organizations must have policies, procedures, and controls in place to protect all data types and categories that fall under the BDSG umbrella.

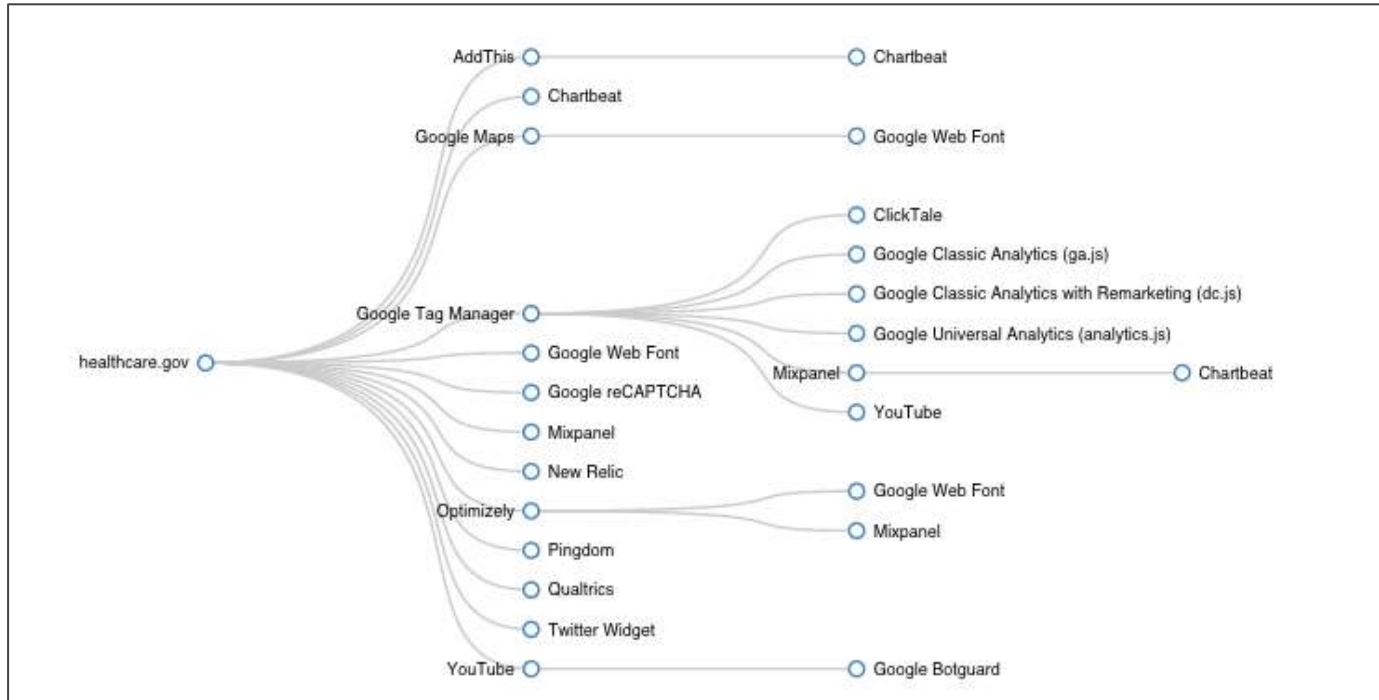
Source: perspecsys.com/how-we-help/cloud-privacy/german-data-privacy-law/

Healthcare.gov Issues (Spring 2014)



taginspector.com

Healthcare.gov Issues (Winter 2015)



Coincidentally...



Google healthcare.gov privacy

Web News Shopping Images Videos More Search tools

About 137,000,000 results (0.32 seconds)

Privacy | HealthCare.gov
<https://www.healthcare.gov/privacy/> - HealthCare.gov -
Protecting your privacy is very important to us. We're telling you about HealthCare.gov's privacy policy so you know what information we collect, why we collect it, ...

Individual Privacy Act Statement | HealthCare.gov
[https://www.healthcare.gov/individual-privacy-act-statem...](https://www.healthcare.gov/individual-privacy-act-statement...) - HealthCare.gov -
Privacy Act Statement. Permission for information submitted. By submitting this ...

Marketplace Account Registration - Log In - HealthCare.gov
<https://www.healthcare.gov/marketplace/global/en.../login> - HealthCare.gov -
ACCESSIBILITYopens in a new window - PRIVACY POLICYopens in a new window -
Links to other sites opens in a new window - PLAIN WRITING opens in a ...

GOP chairman wants answers on HealthCare.gov privacy ...

Advocates seek greater privacy protections for HealthCare.gov
www.pbs.org/.../privacy-advocates-seek-protection-consumers-feds-... - PBS -
Jan 24, 2015 - WASHINGTON — Privacy advocates say the Obama administration needs to ... "HealthCare.gov should meet good privacy standards for all its ...

Is Your Data Safe at HealthCare.gov? - NYTimes.com
op-tak.blogs.nytimes.com/2015/01/.../is-your-data-safe-at-healthcare-gov-... -
Jan 23, 2015 - But now another website is generating privacy worries: HealthCare.gov, Ricardo Alonso-Zaldívar and Jack Gillum of The Associated Press ...

Obama administration reverses on HealthCare.gov privacy ...
www.foxnews.com/.../obama-administration-reverses-... - Fox News Channel -
Jan 23, 2015 - Bowing to an outcry over online privacy, the Obama administration reversed itself Friday, scaling back the release of consumers' personal ...

HealthCare.gov Sends Personal Data to Dozens of Tracking ...
<https://www.eff.org/.../healthcare-gov-sen...> - Electronic Frontier Foundation -
Jan 20, 2015 - The Associated Press reports that healthcare.gov—the flagship site of ... Sending such personal information raises significant privacy concerns.

Go ooooooogole >
1 2 3 4 5 6 7 8 9 10 Next

Business Value Behind a Policy

Data Accuracy

According to a recent Experian Data Quality survey, 94% of companies surveyed suspect their customer and prospect data **might be inaccurate**



Wasted \$\$\$

Agenda

- Why a Tag Management Policy?
- **Creating a Tag Management Policy**
- Implementation Process
- Getting Started Today
- Next Steps

This is a Good Start



Cookie Policy

Last Updated: May 2012

This Cookie Policy applies to any websites, branded pages on third party platforms (such as Facebook or YouTube), and applications accessed or used through such websites or third party platforms ("Unilever Sites") which are operated by or on behalf of the Unilever group of companies.

By using the Unilever Sites, you are consenting to our use of cookies in accordance with this Cookie Policy. If you do not agree to our use of cookies in this way, you should set your browser settings accordingly or not use the Unilever Sites. If you disable the cookies that we use, this may impact your user experience while on the Unilever Sites.

The table below summarises the different types of cookie we use on Unilever Sites, together with their respective purpose and duration (i.e. how long each cookie will remain on your device).

What are cookies?

What do we use cookies for?

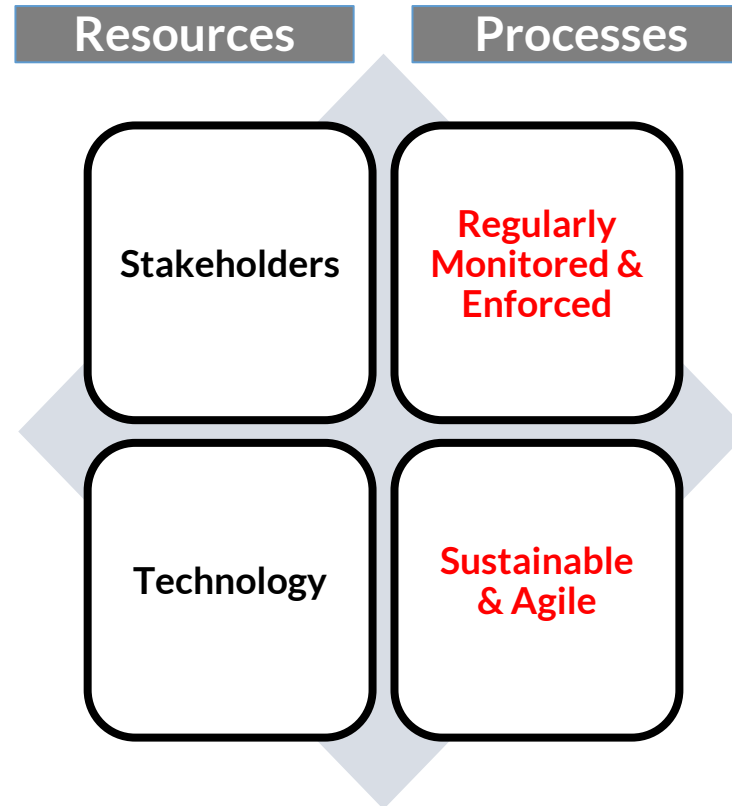
What types of cookies do we use?

Do we use third party cookies?

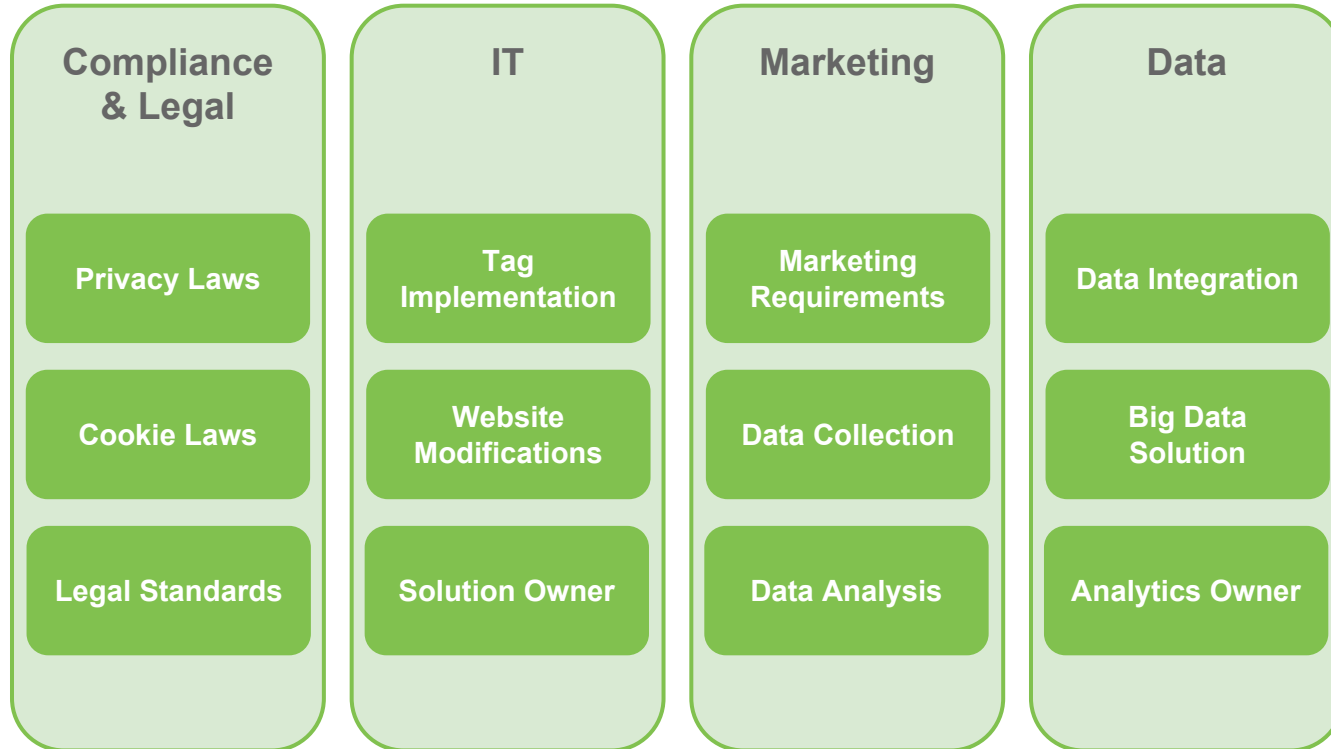
How can I control or delete cookies?

Opt out of all Unilever cookies. >

Policy Components



Stakeholders



Technology

- A tag management system to ensure accurate tag deployment with the ability to disable cookies to comply with cookie laws or visitor demands
- A tag scanning solution to ensure compliance and proper tag deployment
- An understanding of the tag architecture



Tag Management Systems

4 Key Benefits:

1. Quicker turnaround time for tag additions and changes (especially when you have many sites)
2. Faster page-load performance
3. Reduced dependency on the IT department
4. Business rule-based tag loading

Monitoring

Monitoring is extremely important to ensure:

- There are no cases of tag piggybacking (*looking at you, healthcare.gov*)
- The tag deployment adheres to the policy defined by the stakeholders
- Certain sections of the website, or country-specific sites, are tracked properly and comply with privacy laws.
- Accurate tag deployment across all pages (including pages that can only be accessed after authentication or follow a visitor's purchase path)



Sustainable & Agile

- Your technology should empower you to make changes faster and safer
- Adding, removing and/or modifying tags and tag rules should take minutes, not days or weeks
- You should have the ability to verify your tag deployment and established process. If there is no confidence that everything is following the established policy, your solution is useless.



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Step 1: Define What You Need

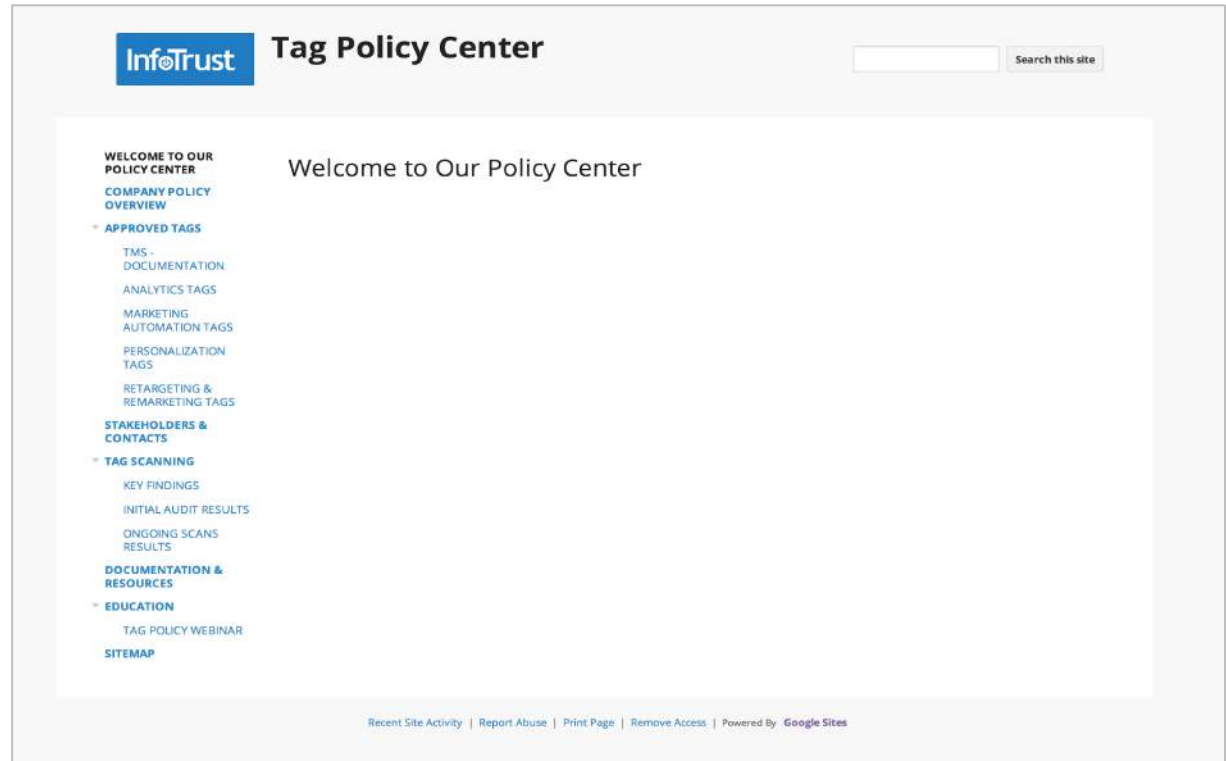
1. Distribute a questionnaire to all responsible parties to understand the current state of tag deployment
2. Work with your legal or compliance team to define what you **can do**, **should do** and **must do**
3. Review standards for each country where you do business to ensure you comply with the established laws
4. Work with each tag vendor to understand what information they collect and how and which 3rd party tags they load

Step 2: Define Where You Want to Be

1. How agile do you want to be in your data practices?
2. What business questions are currently not answered due to poor data quality?
3. Who are the stakeholders that are preventing you from getting there?
4. What processes need to change?
5. What tools do you need?

Step 3: Implementation

1. Owner and Teams Involved
2. Policy Overview
3. List of Approved/Unapproved tags
4. Documentation on your TMS
5. The process for requesting tag additions/removals/updates
6. Descriptions of tags used
7. Results from tag monitoring
8. Educational material



The screenshot displays the 'InfoTrust Tag Policy Center' website. The header features the InfoTrust logo and the title 'Tag Policy Center'. A search bar is located in the top right corner. The main content area is titled 'Welcome to Our Policy Center' and includes a navigation menu on the left with the following items:

- WELCOME TO OUR POLICY CENTER
- COMPANY POLICY OVERVIEW
- APPROVED TAGS
 - TMS - DOCUMENTATION
 - ANALYTICS TAGS
 - MARKETING AUTOMATION TAGS
 - PERSONALIZATION TAGS
 - RETARGETING & REMARKETING TAGS
- STAKEHOLDERS & CONTACTS
- TAG SCANNING
 - KEY FINDINGS
 - INITIAL AUDIT RESULTS
 - ONGOING SCANS RESULTS
- DOCUMENTATION & RESOURCES
- EDUCATION
 - TAG POLICY WEBINAR
- SITEMAP

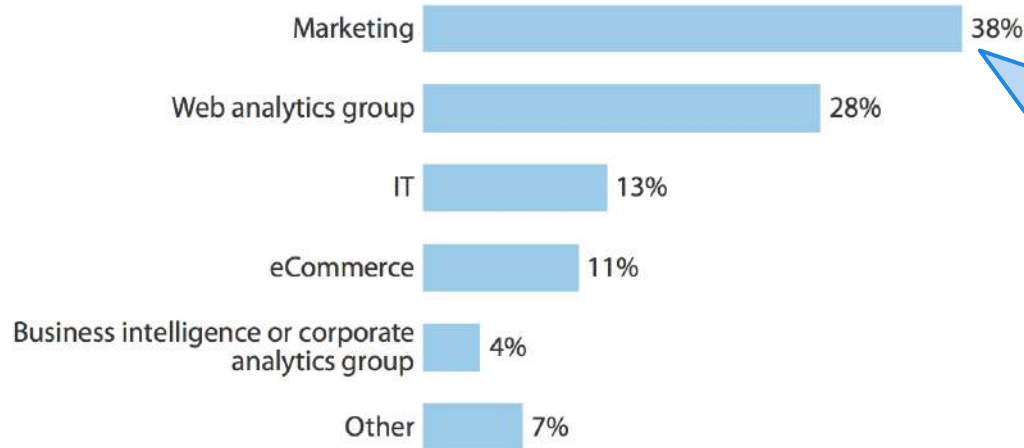
At the bottom of the page, there is a footer with the following links: Recent Site Activity | Report Abuse | Print Page | Remove Access | Powered By Google Sites.

Tag Template

Tag Questionnaire	Tag Details
Business Questions:	
Tag Name	
Tag Vendor (name & contact information)	
Data owner, inside the company:	
Business requirement for this tag.	
Technical questions:	
Data this tag is collecting.	
Where is the collected data stored? Implications of removing this tag?	
Pages/sites this tag needs to be on.	
Deployment method (TMS)	
Active period & termination date.	
Third party tags this tag is authorized to load.	

Ownership is the Problem

“What department in your firm is responsible for tag management?”



Marketers want the data that comes with tag deployment, but not the headaches of owning the solution.

Base: 76 tag management end users
(percentages do not total 100 because of rounding)

Source: Q2 2012 Global Tag Management User Online Survey

74123

Source: Forrester Research, Inc.

Training & Documentation

- Publish a policy
 - Tags
 - How they work
 - How they load
 - What tags are allowed
 - How tags are added/removed
- Educate everyone on why the policy was created and the implications for not following it
- Build a process for testing against the policy on a regular basis. SUSTAINABILITY.
- Publish your findings
- Keep everyone informed

Example Documentation

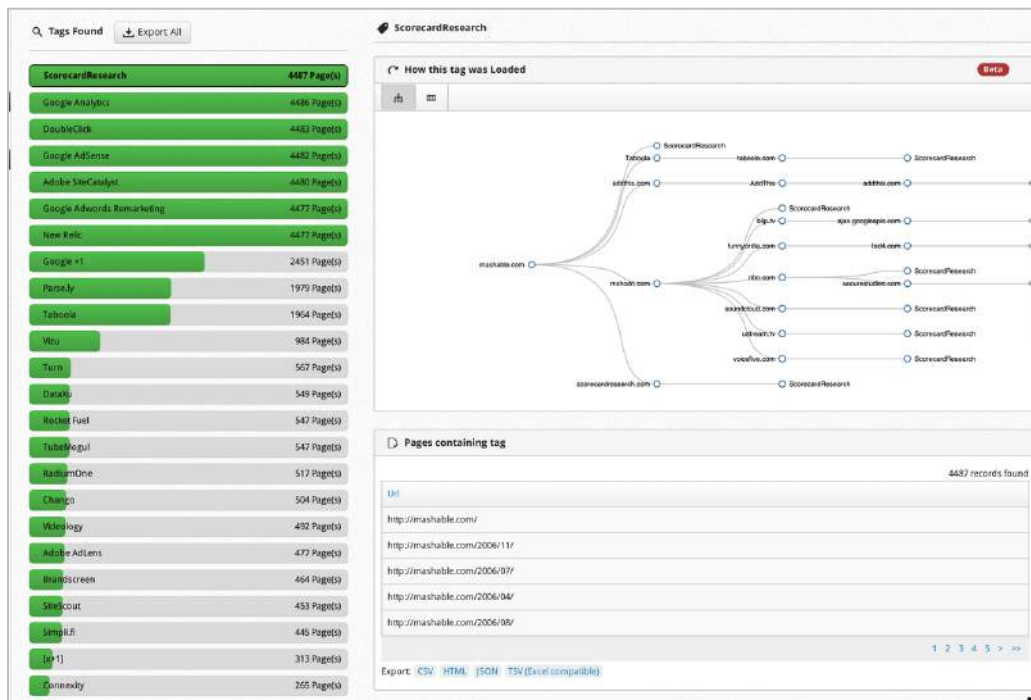
The screenshot displays the 'InfoTrust Tag Policy Center' interface. On the left is a navigation menu with categories like 'WELCOME TO OUR POLICY CENTER', 'COMPANY POLICY OVERVIEW', 'APPROVED TAGS', 'TAG TEMPLATE', 'STAKEHOLDERS & CONTACTS', 'TAG SCANNING', 'DOCUMENTATION & RESOURCES', 'EDUCATION', and 'SITEMAP'. The main content area is titled 'Tag Template' and contains a table for 'APPROVED TAG TEMPLATE'. The table has two columns: 'Tag Questionnaire' and 'Tag Details'. The 'Tag Questionnaire' column is divided into 'Business Questions' and 'Technical Questions' sections.

Tag Questionnaire	Tag Details
Business Questions:	
Tag Name	
Tag Vendor (name & contact information)	
Data owner inside the company	
Business requirement for this tag	
Technical Questions:	
Data this tag is collecting	
Tag dependency	
Where is the collected data stored? Implications of removing this tag?	
Pages/sites this tag needs to be on	
Deployment method (TMS)	
Active period & termination date	
Third party tags this tag is authorized to load	

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Tag Audit



Tag Inspector can help you understand where your website is today:

- Number of tags on the site
- Where they're located (and not located)
- TMS used
- Instances of tag piggybacking
- And more!

Tag Policy

View Scan Results

Scheduled Scans

My Account

Policies

Daily Scans

0 / 50

Monthly Page Scans

15238 / 150000

Edit Policy

Add Policy

Policy Description
Company Policy

Email Alert to (Seperate Emails with Comma):
mioban@infotrustllc.com

Policy Type

White List: Policies that are created as a white list will include only those tags that are **Allowed** or **Required** on site/scans. If a tag is not added to a white list policy, it is by default considered **Not Allowed**. If a tag is found that is on the white list, you're okay (pending rules). If a tag is not found that is on the white list, it will raise an error only if it is **Required** but not if it is only **Allowed**. If a tag is found that is not on the white list, it will also generate an error because it's not allowed.

Black List: Policies that are created as a black list will by default allow any/all tags. Any tag that is added to the black list will raise an error if set to **Required** but not found, or set to **Not Allowed** but found. If the tag is set to **Allowed** but found or not found, there is no error.

Save Policy **Cancel**

Conditions **Add Condition**

Conditions

1 1000mercis is Required **Manage Rules** **Remove**

Rules

Tag Loaded Through Tealium x

Add A Rule

2 Google Analyti is Required **Manage Rules** **Remove**

Rules

Tag Loaded Through Tealium x

Add A Rule

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- Why a Tag Management Policy?
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- **Summary & Next Steps**

To Summarize...

- US consumers are becoming increasingly concerned with their online privacy
- It's important for your organization to understand your current tag management situation - to ensure you are complying with all privacy laws
- Meet with your stakeholders to create a tag management policy that will be sustainable and agile
- Create trainings and documentation to educate others within your organizations on the policy - and constantly update
- Put measures in place to constantly monitor and enforce the policy

Next Steps

Tag Inspector

We'll email you a copy of this presentation tomorrow (2/26)

If you have additional questions, feel free to tweet us!

Visit TagInspector.com today to sign up for your free account!

Thank you

Questions?

Tag Inspector