



EVE ALEXANDER

TECHNICAL SUCCESS MANAGER - EMEA

Observe Point



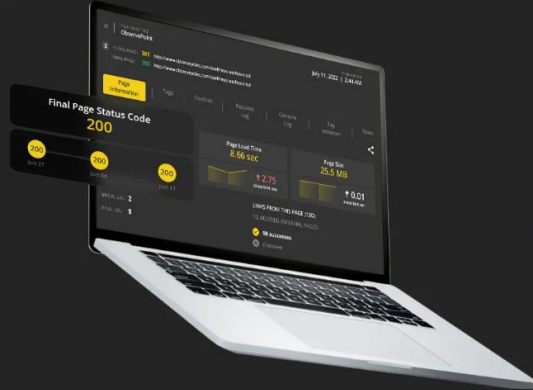


Objectives

- To understand the **why** behind using audits/journeys, and the basics of **how to**
- Leave inspired to set up basic audits/journeys in your account
- Have a better foundation to help make the other sessions more meaningful



The Mighty Web Page - What happens here?



ObservePoint Solutions ▾ Resources ▾ Company ▾ Pricing Partners Login [Get a Demo](#) [Try for Free](#)

The **clearest view** of what's really happening on your websites.

Automatically govern all pages, tags, cookies, martech, and more across any number of sites.

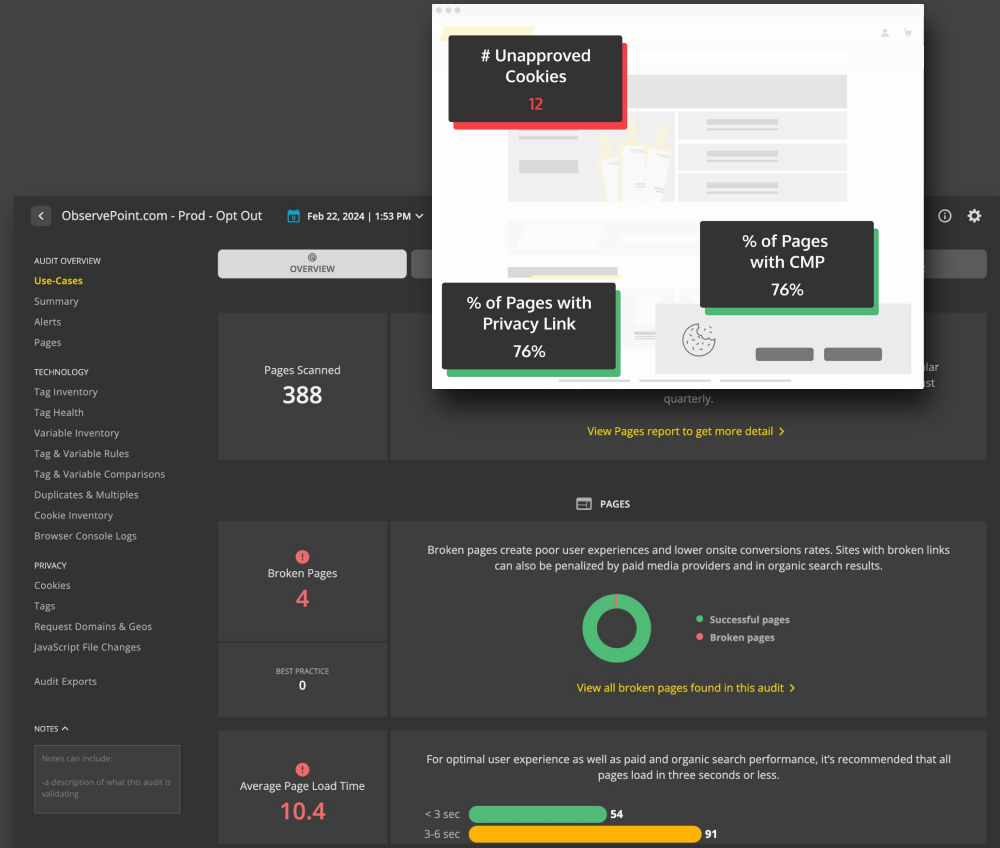
[Start Today for Free!](#)

- Cookies
- Broken Pages
- Data Layer
- Tags
- Analytics
- Request Geos
- Emails
- Page Load Time



What is an Audit?

- OP audits enable you to automatically scan your website **AT SCALE** to ensure your analytics and data collection technologies are installed and collecting data correctly. It also tests for consent preferences, and more
- It reports on all **technologies, cookies, tags, and data collected**
- And **alerts** you to let you know if something is amiss





Why use ObservePoint Audits?

- Automate QA at scale, for your entire site
- Help mitigate risk of privacy violations
- Receive notifications if something is awry on your site





Audit Use Cases



- Page Load Cookie Governance
- Privacy Compliance Testing
- Cookie Security Monitoring
- Find Cookie Initiators



- Page Load Analytics Validation
- Page Load Tag Validation Governance
- Data Layer Validation
- Identify Unauthorized Tags
- Test TMS changes before publishing
- Hard coded



- Page Performance (Core Web Vitals)
- Accessibility Compliance
- SEO Testing
- Keyword Searching
- LPV for paid ads / email
- More...



Audits - Where to Start

- Identify all Web Properties with analytics technologies that need to be monitored and **create at least 3 Audits for each one.**
 - A **Daily Opt In Audit** of pages that receive **98%** of visitor traffic
 - **WHY:** Get the most ROI if you use whatever scanning resources you have on your most trafficked pages
 - A **Weekly / Monthly Opt In Audit** across all pages
 - **WHY:** If a page is experiencing missing or broken tags, you won't see them in your most visited pages reports.
 - An **Weekly / Monthly Opted Out** Audit
 - **WHY:** To ensure you honor consumer preferences and are compliant with GDPR.
 - *(If monitoring US websites)* - An Audit with **Global Privacy Control (GPC) Signal** enabled.
 - **WHY:** Respecting GPC and other opt out signals is now required in multiple US states including California, Connecticut, Colorado, Montana, and Texas



Setting Up An Audit

CREATE AUDIT ✕

TEST SCENARIO | URL SOURCES | STANDARDS | PRE-AUDIT ACTIONS | ON-PAGE ACTIONS

Use an Audit to run a repeatable test across a website to look for incorrect implementations of marketing technologies, broken or poor experiences, privacy issues, and many other use cases. [Learn more.](#)

AUDIT NAME* FOLDER & SUB-FOLDER

HOW FAST SHOULD THE AUDIT GO?

LABELS WHERE SHOULD THE AUDIT RUN FROM?*

USER AGENT WIDTH (PIXELS) HEIGHT (PIXELS)

ARE THERE SPECIFIC TAGS OR TAG CATEGORIES THAT SHOULD BE BLOCKED?

FILE SUBSTITUTIONS (REMOTE FILE MAPPING) VPN Mode (Allows outside access to secure content on your website) [Learn more.](#)

PRIVACY SETTINGS



Getting Insights from Reports

AUDIT OVERVIEW

- Use-Cases
- Summary**
- Alerts
- Pages

TECHNOLOGY

- Tag Inventory
- Tag Health
- Variable Inventory
- Tag & Variable Rules
- Tag & Variable Comparisons
- Duplicates & Multiples
- Cookie Inventory
- Browser Console Logs

PRIVACY

- Cookies
- Tags
- Request Domains & Geos
- JavaScript File Changes
- Audit Exports

Search By URL Filters

Pages Scanned
1,137

Audit Score
37/100
↑ 1.1 since last run

Tag Presence
2/30
No Change since last run

Tag Pe
16

Rules Failed
no rules applied this run

Rules Passed
no rules applied this run

Rules M
no rules a

0 0 0 0 0 No Change FAILURES No Change PASSING





Best Practices - Recurring Audits

WHEN & HOW OFTEN SHOULD THE AUDIT RUN?

HOW OFTEN SHOULD THE AUDIT RUN?

Once



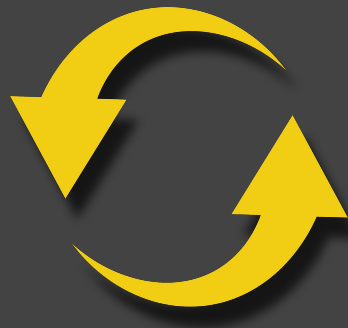
INITIAL RUN DATE

12/31/2037



INITIAL RUN TIME

05:01 PM





The Mighty Conversion Event - What happens here?

Request a Demo

Scan and monitor your website's **most crucial data** like cookies, tags, user journeys, and more.

What cookies and tags are on your website?

Bring insights, automation, and compliance to the chaos of your website with ObservePoint's Web Governance Platform. Easily scan your entire website for a full view of all the moving parts and pieces that make up your customers' web experience.

Technology Governance – Validate the deployment, accuracy, and ROI of website technologies and data.

Privacy Validation – Ensure compliance to digital standards and privacy regulations for customer data.

Landing Page Validation – Test your landing pages to ensure smooth experiences and tracking.

Cookie Governance – Find all the cookies on your website



First Name *	Last Name *
Business Email *	Phone *
Company *	United States -- Select --
Your website address *	
Get Started →	



What is a Journey?

- A **journey** is a critical user path your customer takes to accomplish a key process (i.e. shopping cart, login, etc.)
- ObservePoint will create and simulate that critical path and will go through the steps your customers will go through
- ObservePoint will automatically monitor the steps and flow your customer is experiencing and will alert you if something breaks in that system

The screenshot displays the ObservePoint interface for a journey report. The browser address bar shows 'ObservePoint.com / Marketing Site - Prod' and 'ObservePoint.com - Get a Demo' with a timestamp of 'Sep 05, 2024 01:04pm'. The left sidebar lists 'REPORT VIEWS' including 'Journey Report', 'Journey Rules', and 'Journey Exports'. The main content area is titled 'Action 1 of 3: Navigate to homepage'. Below the title, there are three numbered steps: '1. Navigate To' (highlighted with a yellow box), '2. Click', and '3. Input'. To the right, there are tabs for 'TAG PRESENCE (16)', 'VARIABLE SUMMARY', 'COOKIES (2)', 'RULES (1)', and 'ACTION DETAILS'. The 'TAG PRESENCE (16)' tab is active, showing a table of tags with columns for 'Tag Name', 'Account', 'Previous Run', and 'Current Run'. The table lists various tags such as Google Fonts, Data Layer, Google Tag Manager, Crazy Egg, OneTrust CMP Banner, Google reCAPTCHA Loader, Hotjar Loader, OneTrust Geolocation, jQuery Library, WordPress CMS, and OneTrust CMP Metadata.

Tag Name	Account	Previous Run:	Current Run:
Google Fonts	None	Aug 20, 2024 2:42 PM	Sep 5, 2024 1:04 PM
Data Layer	dataLayer	1	1
Google Tag Manager	GTM-5L53NZ	1	0
Crazy Egg	None	1	0
OneTrust CMP Banner	None	1	1
Google reCAPTCHA Loader	None	1	0
Hotjar Loader	3841224	1	0
OneTrust Geolocation	None	1	1
jQuery Library	None	1	0
WordPress CMS	None	1	0
OneTrust CMP Metadata	a10cf9da-889a-4783-bda4-14737...	1	1



Why Monitor Journeys?

- **Automate monitoring** of key customer experiences on your site
- **Get notified** if a vital part of your site is broken in just minutes
- **Avoid clunky, broken customer experiences** that tarnish your brand





Journey Use Cases



- Complete cookie inventory



- Event Analytics Validation
- Event Tag Governance
- Validating Retargeting tags
- Cross Domain Cookie ID Tracking



- Conversion attribution collection
- Web Functionality
- PII Tag Mishandling
- More...



Journeys - Where to Start

- Identify all of your conversion funnels on your site / **most critical events** as far as data collection is concerned and **create a journey for each one**
 - Run these **at least Daily**
 - **WHY:** To catch issues before a high volume of visitors are impacted
 - When prioritizing Journeys, **align with your KPIs**
 - Create rules for **key conversion events** in user flows and apply them to Journeys
 - Include conditions for key variables
(AA: events; GA4: en)



Journey Reports

TAG PRESENCE (34)	VARIABLE SUMMARY	COOKIES (3)	RULES (0)	ACTION DETAILS
Filter by Tag, Variable or Variable Value		<input type="checkbox"/> Primary Tags Only	<input type="checkbox"/> Only Show Changes	
Vendor	Tag Load Time	Tag Status Code	Comparison Results	
▼ DATA LAYER Account ID: dataLayer	0 ms	200	59 Changes	⊕
Variables ↑	Run 1: August 20, 2:42:05 PM	Run 2: September 5, 1:04:44 PM	Tag, Variables, & Value Results	
0.OnetrustActiveGroups	—	,C0001,C0002,C0003,C0004,C0007,	Variable Added	
0.event	gtm.js	OneTrustLoaded	Value Changed	
(0.gtm.start)	1724186493041	—	Variable Absent	



Journey Setup

JOURNEY SETUP

ACTIONS

STANDARDS

Automate a series of actions to monitor and test more complex and critical pages on a website. [Learn more.](#)

JOURNEY NAME*

ObservePoint.com - Get a Demo

FOLDER & SUB-FOLDER

Observepoint.com / Marketing Site - Prod

How often should the journey run?

Once

Next run date

8/19/2024



Next run time

02:19 PM

Additional Setup Options

JOURNEY NOTIFICATIONS

Who should be notified if this journey has any action failures? (For back-to-back journey runs any notifications on subsequent failures will not be sent. If there are tag & variable rule failures a separate notice will be sent.)

Input email addresses (one per line)

Complete Webhook URL



Journey Actions

EDIT WEB JOURNEY - OBSERVEPOINT.COM - GET A DEMO

JOURNEY SETUP ACTIONS STANDARDS

Specify the actions and create tag & variable rules for each step to validate and/or monitor data tied to specific actions on your website.
(Actions will need to be updated from time to time as the website changes.) [Learn More.](#)

ACTION LIST

- 1 Navigate To - http://www.observe...
Navigate to homepage
- 2 Click
click "Get a Demo"
- 3 Input - Chris
Input First Name
- 4 Input - Chris
Enter First Name
- 5 Input - Hawkes
Enter Last Name
- 6 Input - chris.hawkes@observepoin...
undefined

ADD AN ACTION CREATE ACTION SET

1. Navigate to homepage

Action Type:

URL:

Wait: additional seconds on this action.

Action Rules (1)
www.ObservePoint.com - Page View

2. Click "Get a Demo"

Action Type: Prevent Navigation

Selector: Selector Value:

+ Add Alternate Selectors

Wait: additional seconds on this action.

Action Rules (1)
GA4 - Book a Demo CTA Click

CANCEL BACK CONTINUE SAVE CHANGES SAVE CHANGES & RUN NOW



Journey Support

- Our **Amazing Support Team:**
 - Leverage our Support team to create and fix Journeys
 - Use video to accelerate documentation of user flows
 - Enable monitoring for most critical Journeys

JOURNEY RUN INFORMATION

✘ Journey was stopped because there was a failure on action 3.

Error: No element found on the page using the following selectors: CSS selector with value "#field_41_31"

[JUMP TO ACTION FAILURE](#) [HAVE JOURNEY SUPPORT FIX THE ISSUE](#)

VARIABLE SUMMARY **COOKIES (2)**

Account	Previous Run
None	1 ●
dataLayer	1 ●
af0cf9da-889a-4783-bda4-f473f7...	1 ●
None	1 ●
af0cf9da-889a-4783-bda4-f473f7...	1 ●
None	1 ●

EXECUTED ACTIONS
2 of 6

RUN DURATION
START: Sep 5, 2024 | 2:20 PM
END: Sep 5, 2024 | 2:22 PM
DURATION: 2 min, 41 sec.

BROWSER VERSION
Chrome, Version 128.0.6613.119

USER AGENT USED
Mozilla/5.0 (X11; Linux x86_64)
AppleWebKit/537.36 (KHTML, like Gecko)
Chrome/128.0.0.0 Safari/537.36 ObservePoint

LOCATION
USA, Oregon

DATA LAYER
dataLayer

VPN
Not Configured

RUN ID
64028181

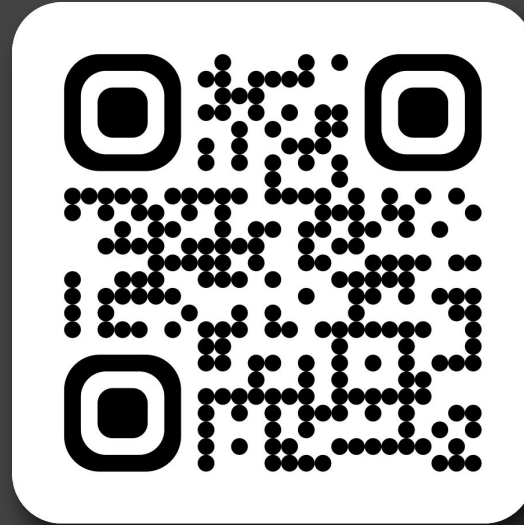
BROWSER VIEWPORT
1366 x 1200



Helpful Links



ObservePoint Academy



ObservePoint Help Docs



Questions?



Thank you.