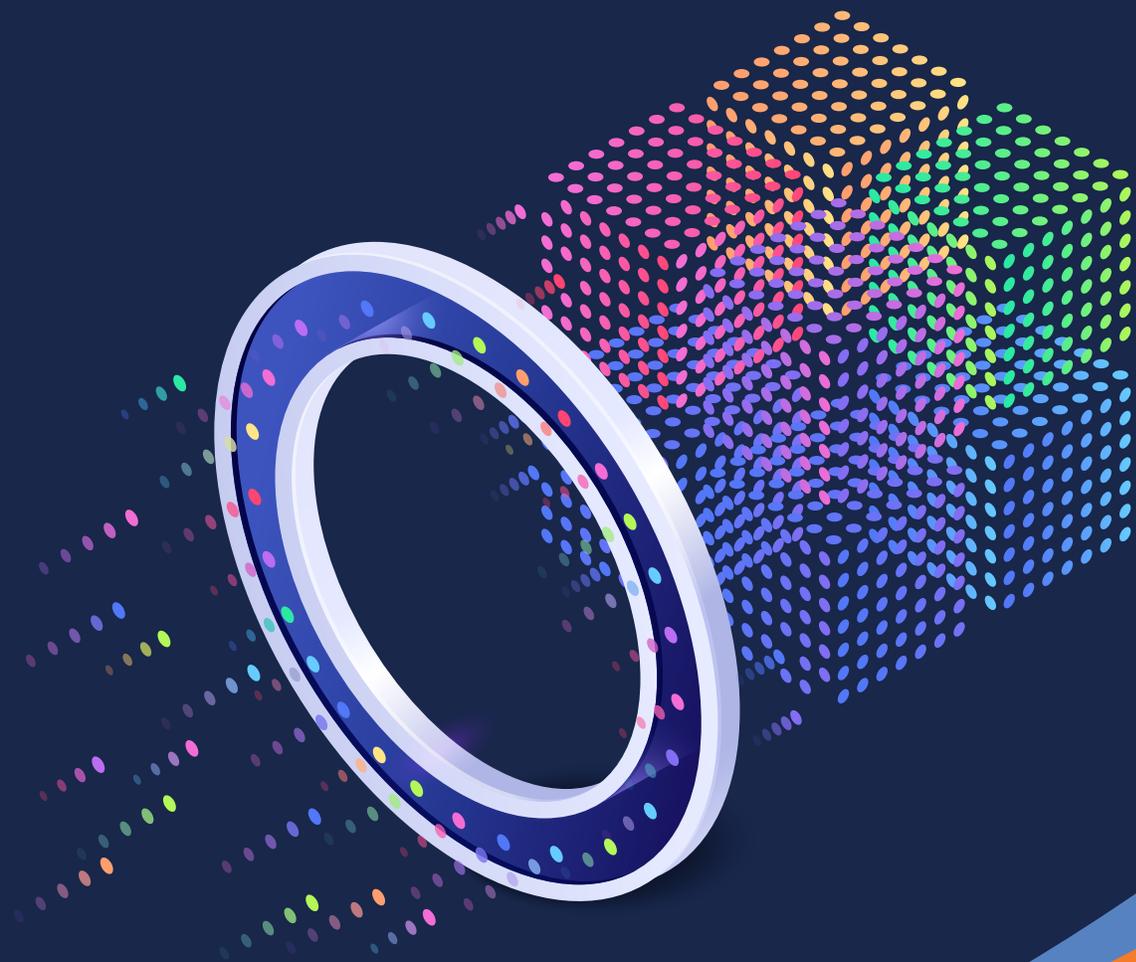


GA4 Migration Guide for B2B Marketers

www.vendedigital.com





Are you ready to migrate to Google Analytics 4 (GA4)?

In October 2020, Google announced its plans to sunset its current Universal Analytics (UA) tool in response to global communities' focus on enforcing data privacy policies. Since early 2022, their revised reporting tool, GA4, has been rolling out to website domains, allowing businesses to connect their current UA instance to the new tool. All the talk and preparation are coming to a head, and on July 1, 2023, your existing Universal Analytics account will no longer collect data. Google will only pull data analysis into GA4 moving forward.

In this guide, we've called out some of the features and benefits B2B marketers should be familiar with as the new reality of GA4 unfolds within your organization. Following the benefits, you'll find key steps

and tips to help you successfully migrate your website from UA to GA4. You'll want to review and familiarize yourself with these details to communicate the data and analytics that will be available moving forward across company verticals.

You'll also want to note the section on "Pitfalls to Avoid" so you can understand issues with relying on Google's auto migration feature and changes in the language surrounding the new measurements.

If this already seems daunting and you'd rather hit the easy button, our team can assist you in installing and setting up GA4 on your website, enabling you to receive accurate data promptly. We will also customize and configure available features within GA4 to generate high-quality, clear, and precise data.

I. GA4's Improved Capabilities



Advanced Analytics Capabilities - GA4 provides advanced tracking and analytics capabilities for B2B marketers, including event tracking, user engagement tracking, and cross-device tracking. Rather than Universal Analytics' way of tracking data via tags on individual website pages, GA4 uses event-based tracking, allowing you to understand the customer journey better.

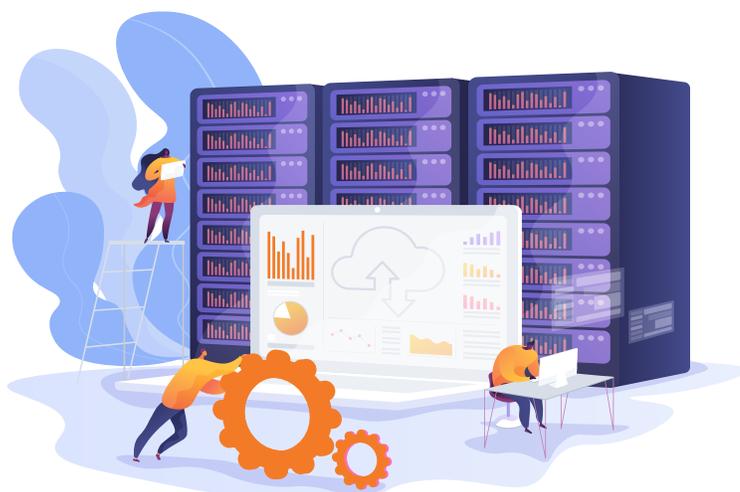
More Flexibility - GA4 offers more flexibility and accuracy to track user behavior across devices easily. GA4 lets you focus on the behaviors of users engaging in your site. It's a holistic look at how someone moves through your website, their actions, and how valuable those actions are to your customer journey.

Improved Website Speed - Although GA4 does not currently have site speed reports like Universal Analytics, Google still considers site speed an essential user experience factor. A benefit that could naturally occur with your migration is improving site speed. This is because your tags are now deployed in Google Tag Manager (Google servers) rather than on the individual page.

II. Begin Your GA4 Migration Process

It's important to note that the improper transition plan could cause missing data, poor insights, and an inability to measure performance and track leads. This will all lead to poor marketing choices or a lack of understanding of what is or isn't working.

As you begin the GA4 migration process, take your time and do not rush.



Pro Tip: have a list of everything that you currently track.

Audit Your Existing UA Account and Goals

The first thing you need to do is assess your current UA account. You'll want to have a solid understanding of what your existing UA property is doing before you start configuration work in GA4. Consider making a report of all your most valuable data points in Universal Analytics, such as:

- ➔ Events
- ➔ Audiences
- ➔ Goals (Conversions)
- ➔ Content Groupings
- ➔ Traffic Sources

Once you've created a list of the above data points, review these with the decision-makers in your organization or department. You'll want to start a discussion with the end goal in mind. What do we want to be able to measure moving forward? Analyze this against your objectives in UA to identify any gaps you need to solve.

Set Up Your GA4 Account

As you configure your new GA4 account, there are some basic steps to pay heed to. Paying close attention at the beginning of setup will prevent potential issues that could have been avoided. Ensure your time zone is updated to reflect the location of your company's headquarters. Often, this mistake is made and could cause a spike or flat spot in your data if you make changes later.

Also, be clear on the industry category your business falls under. Based on your choice, Google offers a set of default reports that you could find valuable in the future. Lastly, you'll add your data stream. If you manage multiple properties, take the time to double-check your work by confirming you have the correct data stream and property together.

Migrate Over Events From Universal Analytics (UA)

When beginning the migration, consider starting with your event-based goals. Ideally, a majority of the events that you were tracking in UA will seamlessly migrate over as you set up your account.

However, because GA4 captures these events differently, there is also a good chance that some things didn't automatically migrate to your new account. For example, for previously destination-based goals, you'll likely need to make some changes to how you track those going forward. Other previous goals may also need to be tweaked to fit within the new GA4 parameters.

“Paying close attention at the beginning of setup will prevent potential issues that could have been avoided.”



Have a Plan to Archive Historical Data

Unfortunately, in addition to the required migration from UA to GA4, Google announced that all historical UA data will be deleted beginning in January 2024. That means marketers will need a plan for archiving their historical data if they want to keep it. A balance between accessibility to data and security will be paramount.



One of the significant paradigm shifts in GA4 is the historical data stored. Moving forward, users can set their data to be stored for 2 or 14 months. The jury is still out on the usefulness and value of UA historical data. Still, it would be prudent to ensure you have some of it available if the opportunity arises.

Since data visualization is not available in GA4 as it was in UA, you'll likely want a 3rd party dashboard set up to easily see how your site is performing. Google has provided a solution via their tool, [Looker Studio](#), however, the pricing model of the platform could create a bigger ticket than you want to manage. Looker Studio maintenance requires a dev-level expertise, and incurs more monthly costs if you want to pursue an integrated view of all of your marketing channels. We recommend researching other, more cost-effective tools so the migration and data visualization transition is less painful. With an integrated dashboard and reasonable pricepoint, you can have your KPIs, goals, and reports transferred accurately so you can see the data and make smart marketing decisions.

III. Key GA4 Steps for B2B Marketers

Create Custom Metrics

GA4 has several built-in metrics that cover many general use cases, but most businesses will also need custom metrics specific to their unique requirements.

In GA4, custom dimensions and metrics will allow you to analyze data specific to your business needs. Marketers can create these custom metrics from event parameters and user reports, allowing them to efficiently access and explore this data.



Set Up Integrations

Setting up integrations is another crucial step to ensure your GA4 platform is customized to your needs. Start by reviewing the integrations you have used with UA. Some of the most significant integrations for many businesses include Google Ads, Google Optimize, AdSense, Ad Exchange, and MerchantCentre.

While Google integrations with Google tools should work fairly smoothly, not all third-party tools and platforms may have compatible integrations with GA4. Universal Analytics has been around for a long time, and as GA4 is gaining traction, it may take time for the same integrations to become available.

Configure Custom Events Using Google Tag Manager

Within GA4, there are multiple ways to create events, including working with one of the platform's default reports, using tagging software, or creating a custom event through the GA4 dashboard.

To set up a custom event using Google Tag Manager, marketers will want to configure a GA4 Event tag and then create a trigger that specifies when you want to send the event. For example, you might create a GA4 Event that you name 'signup_webinar' with a trigger set to send the event when someone clicks the button to sign up for your webinar.

Once you have set up your custom events, you will want to double-check that GA4 can process them. You can use preview mode to test your custom event before you publish those changes to your website.

Set Up Data Retention Settings

Data retention settings allow users to set the time before user-level and event-level data is automatically deleted from UA servers. While UA allowed users to select that some data never automatically expires, GA4 takes steps to alleviate previous privacy concerns regarding how Google Analytics uses and processes data online and has more privacy-focused options.

For GA4 properties, the default data retention setting is 2 months. Although this 2-month timeline resets each time a user visits your website, it is still a short time frame. You do have the option to change this setting to 14 months.

“You can use preview mode to test your custom event before you publish those changes to your website.”



IV. Pitfalls to Avoid



Although GA4 boasts some exciting updates to Google's legacy free dashboard experience, there are a number of changes that will impact marketers historical practices in data analysis.

GA4 Auto Implementation

Why should you avoid the auto-implementation of GA4? For one, it doesn't account for conversion or event tracking, which will essentially break your ability to make data-driven marketing decisions. Additionally, even [Google says they 'strongly recommend you manually migrate your Universal Analytics settings to GA4' with any additional warning that, 'not all configurations have an obvious GA4 counterpart, and the automated process might not make the same choices as you would.'](#)

Limited event tracking, limited customization, the possibility of inaccurate data, and debugging issues are just a few of the reasons not to utilize GA4 auto-implementation. Instead, rely on an expert like Vende Digital who can assist you in installing and setting up GA4 on your website.

Trying to Measure the Same Ol' Thing

Designed to provide a more comprehensive understanding of marketing metrics, B2B marketers could think of GA4 as really 3 tools: Dashboard, GA4, and GTM. GA4 may be able to offer more comprehensive insights into user behavior and engagement across devices and platforms; this new event-based data model does take away some features that B2B marketers may miss, including data segmentation, attribution modeling, and some custom reports.



Instead of trying to set everything up just like it was in UA, marketers may be better off looking at the patterns in the data between UA and GA4 and then determining how best to use that data going forward.

Worried about being able to access the data you need? Vende Digital GA4 solutions include implementation and a reporting dashboard to ensure seamless reporting of website data. We will customize and configure critical features within GA4 to generate clear and precise reporting.

Storage of Historical Data:

GA4 will not receive any historical data from Universal Analytics, meaning that your GA4 property will only start collecting traffic data from the moment you create it. For marketers, any delays in implementing GA4 will directly lead to a loss in data insights.

Not only can you lose historical data, but GA4 uses predictive analytics, which means it uses historical data to predict future metrics. Businesses that are behind on the transition to GA4 should start the transition now to begin harnessing the full capabilities of GA4.

What To Do Next

Embracing GA4 will provide a more comprehensive view of user behavior, allowing for data-driven decisions that drive business growth and stay ahead of competitors. But it's not a change that will happen overnight.



By familiarizing yourself with GA4 and taking steps to prepare for the switchover, you can ensure a smooth transition and continue driving your business's success.



TO GET STARTED:

- Audit Your Existing UA Account and Goals
- Set Up Your GA4 Account
- Migrate Over Events From Universal Analytics (UA)
- Have a Plan to Archive Historical Data



OPTIMIZE YOUR GA4 ACCOUNT TO GET THE BEST RESULTS:

- Create Custom Metrics
- Set Up Integrations
- Configure Custom Events Using Google Tag Manager
- Set Up Data Retention Settings



DON'T FORGET TO AVOID THESE POTENTIAL PITFALLS:

- GA4 Auto Implementation
- Trying to Measure the Same Ol' Thing

Now, what are your next steps?

Setting up GA4 and Google Tag Manager is just the beginning of the transition. While Google may make the move to GA4 seem simple, it takes more than a few clicks to ensure a successful transition. That's where Vende Digital can help.

We can provide a smooth migration process to GA4 by conducting a thorough Google Analytics and Google Tag Manager audit to ensure data accuracy. We can also create a migration plan to fit your unique situation, capture data effectively, and provide clear reporting.

With our team of experts, you can hit the easy button and be confident your data is protected, and you're set up for success after July 1st.

Schedule a GA4 Planning Meeting today.

