



FROM EVIDON'S OPTIMIZATION DESK: 9 STEPS TO A DIGITAL GOVERNANCE PLAN

Establishing a Digital Governance Plan can be a challenge – managing multiple stakeholders, an increasingly complex marketing technology stack, and dealing with a changing regulatory environment. With the right education and the right tools, however, the job can be made a lot simpler. With this in mind, Evidon has compiled a nine-step guide to help you spearhead a successful digital governance program at your organization.

9 STEPS TO A DIGITAL GOVERNANCE PLAN:

What You Should Do:	How Evidon Helps:
 <p>Assign the digital governance “owner” (as well as identify key departmental stakeholders), in order to centralize vendor management. This includes task prioritization, tag remediation, defining standards for vendor vetting, implementation, monitoring, and removal.</p>	<p>Consulting: Evidon is one quarter of your digital governance team; a team that should be made up of representatives from three departments - business, technology and compliance.</p>

What You Should Do:



Audit your website's technologies to identify all direct and indirect tags (including redirects) and document their owners in order to isolate legacy, unknown, and unauthorized vendors, and to identify key (and prevalent) partners.

How Evidon Helps:

Data Governance Report (DGR): Utilize the DGR to familiarize yourself with the digital vendors found across your website. You should take note of:

- **Unique Tags Seen:** How many vendors currently have access to your audience? Is it high or low, and does it change week to week?
- **Prevalence:** Who are your key partners? Of those, do you have solid SLAs in place? Do you have strong and mutually beneficial relationships (think: those vendors found on greater than 25% of total pages seen on).
- **Cookies Dropped:** Note which vendors are dropping cookies (and especially those dropping locally stored objects, or LSOs, as those are particularly privacy-sensitive). You can sort by "cookies" to determine which vendors are dropping cookies.
- **Vendor Names (Hyperlinked):** Each vendor is click-able, and allows you the ability to further determine the type of business that vendor does, as well as offering detail on data it collects and privacy policy information, to shed additional detail regarding compliance concerns.
- **Categories:** While you aren't expected to know the business value of each vendor, it's important to familiarize yourself with the types of vendors on your site (i.e. how many vendors are "data aggregator/supplier," and how many offer "analytics" capabilities; the former should be investigated closely as they can be particularly intrusiveness when it comes to data collection, and the latter can help you to determine potential redundancies in vendor capabilities).

"Tags" Report: Utilize the Tags section to begin logging all vendor details (in one central place). Use the "tag categories" as labels (think: Gmail labels) to bucket vendors, and you can use the "more details" section to note historical vendor implementation information.

- Examples of labels, or "tag categories," including noting tags by:
 - Implementation type (i.e. direct, tag manager, indirect)
 - Page location (i.e. pre-onload, post-DOM complete)
 - Ownership (i.e. marketing, web operations)
 - Deployment Region (i.e. China, USA)
 - Deployment Host (i.e. www.xya, shop.xya)
 - Deployment Page (i.e. campaign XY, homepage, billing page)
 - Type (i.e. marketing, retargeting, on-site advertising)
 - Execution (i.e. synchronous, asynchronous)
- Examples of what should be logged in the "more details" section:
 - Tag Owner (Suzanne Smith, John – Agency XYZ)
 - Implementation Date
 - Expiration Date (or tag requestor "check in")
 - SLA details, where applicable
 - Vendor Overview, or Vendor Business Value

What You Should Do:



Take advantage of quick wins (*and early publicizing of digital governance benefits*) by remediating tags that are considered “low hanging fruit,” such as removing expired and unknown tags, and updating protocols and tag implementations where applicable.

How Evidon Helps:

Trackermap: Leverage the Trackermap to familiarize yourself with the vendor relationships found across your site. Identify unknown and unauthorized vendors by using the Trackermap in conjunction with the results from the previous vendor assignment exercise.

- **Tip 1:** Often legacy, or no-longer-used tags, can be found in Trackermaps, by looking at those tags that are directly implemented, versus those found in your tag manager, because they’ve often been forgotten about and have therefore not been removed and added to your tag manager.
- **Tip 2:** The Trackermap helps in identifying when vendor redirects, or piggybacking, is happening; the first step to understanding whether redirects are needed (or potential data leakage might be happening) is identifying who the culprits (originators) are. Leverage Trackermap data to inform discussions with partners to determine how and why redirects are occurring (*share* function).
- **Tip 3:** Often, utilizing the Trackermap in conjunction with other operational (and free) tools, such as Chrome developer tools, Firefox Firebug, WebPageTest, Charles Proxy and Fiddler, can help to troubleshoot more effectively. Where you would traditionally leverage one of the five referenced tools, Trackermap helps make the connection between the script pattern and the actual vendor (i.e. apnx.js in Chrome developer tools is shown appropriately as “Appnexus” in Trackermap).

Active Monitoring/EvTools (Beta): Utilize Active Monitoring to monitor critical paths, such as a conversion funnel, a shopping path or an account setup path, and set up alerting. The EvTool extension (think: an advanced version of the Ghostery consumer extension) can be used as the final step for troubleshooting tags on a page.

- **Set up alerts for:**
 - Non-secure (http) tags showing up on secure (https) pages, which can cause mixed content warnings for customers.
 - Latent tags, which can impact page load, as well as accuracy of analytics data.
 - Un-approved (non-whitelisted) tags, to ensure awareness of all tags with access to your audience at all times.
 - Tag errors, or tags that aren’t executing correctly.
 - Required tags, to ensure tags show up that need to.
- **Leverage the EvTools extension to understand, through an in-browser experience:**
 - Where tags load on the page, such as before or after specific page performance metrics (i.e. DOM-content loaded, or on-load event) to determine their impact on user experience.
 - How tags impact the page at the resource level (think: Trackermap, with greater detail), such as latency and weight metrics by resource (instead of aggregated at the tag level), as well as the order of resources.

What You Should Do:



Develop and internally circulate your website's "vendor strategy", after discussions with the identified departmental stakeholders (*partners*), in order to provide proper guidance to teams seeking to implement tags, and to allow for future cost-benefit calculations.

How Evidon Helps:

Data Governance Report (DGR): After utilizing the DGR to determine who your business's key partners are, as well as how prevalent digital vendors are on your site, leverage this information to inform how your business thinks about their strategy for using vendors. Utilize the DGR and the "Tags" report to determine who uses the most vendors and why, who uses the least and why, and whether further remediation is needed.

Evidon's public [vendor database](#) can be used to learn more about vendors, specifically regarding the type of data they collect and their privacy policies; this database also includes an "About Us" section that can be particularly helpful when defining the type of vendors allowed, or not allowed, on your site.



Define a set of tag standards and publish a governance policy framework to proactively and transparently define communications workflows, task ownership and approval processes, as well as a required tag implementation "questionnaire."

Consulting: Once your business has agreed on a united vendor strategy, or approach to tracking, utilize Evidon to better understand how to create and publicize an internal digital governance framework, including standards for when, how and where tags should be implemented, and the corresponding required processes.

Benchmarking Report: The Benchmarking report is especially helpful for two types of comparisons, to influence tag and performance standards:

- Internal benchmarking, to view how different pages or sections of pages compare. For example, if your product pages are faster than your homepage, perhaps your business should address number of technologies, latency of tags, implementation variations, and/or page architecture.
- External benchmarking, to compare your site, or specific pages to competitors in order to compare performance and tag metrics, as well as influence KPIs moving forward.



Document vendor details for all currently implemented technologies (*including approved redirects*) in order to ensure record keeping of usage, ownership, categorization, datapoints collected, technology capabilities, revenue expectations, latency expectations, redirect limits and implementation expirations.

"Tags" Report: Utilize the Tags section to log vendor details and capabilities. By having this information in a central and easily-accessible platform, you can ensure data is maintained and up-to-date. It's important to note vendor capabilities (including those capabilities your business isn't taking advantage of) to ensure conversations with the tag owner, or requestor, are productive, and help to cut out additional and unnecessary implementations.

Consulting: Ask your Evidon account manager to provide you with additional insights into vendors, as well as to provide you with a copy of our [Tag Implementation Request form](#), to allow for detailed documentation of implementation and business-specific details.

What You Should Do:

How Evidon Helps:



Utilize updated vendor strategy and governance framework to pinpoint additional tags for remediation, which are those deemed non-compliant through an analysis of items such as business function, category, performance, risk, footprint, and ROI.

Data Governance Report (DGR): Utilize the DGR to download tag and page details; specifically, which page URLs where tags or cookies are found, should they need remediation.

Trackermap and Active Monitoring/EvTools: Trackermap and the Active Monitoring & EvTools platform assist with tag and redirect troubleshooting and remediation.

Tag Latency Report: Leverage the Tag Latency report to benchmark how your site's tag latencies compare to the latency metrics exhibited across the rest of the web, helping you to determine the performance costs versus the potential benefits that a vendor allows you. The Tag Latency report can also help in diagnosing the poor-performers found across your site, by leveraging our percentile and mean metrics.



Update compliance disclosures and service agreements to accurately reflect newly defined vendor expectations, as well as privacy disclosures, per North American and European compliance regulations.

Data Governance Report (DGR): Leverage the DGR to inform which vendors are disclosed in your privacy policy and/or regulatory disclosures.

- **Tip 1:** Know which regulations you have to adhere to. The US, Canadian and EU AdChoices Program, the ePrivacy Directive, CalOPPA and the General Data Protection Regulation (GDPR) each cover disclosures slightly differently, so it is important to know which laws your business needs to abide by.
- **Tip 2:** Traditionally, the US self-regulatory AdChoices program requires only disclosure of vendors collecting or using data for third-party, or advertising purposes; however, EU and Canadian laws generally require disclosure of vendors collecting or using first-party data. The GDPR (coming into effect in 2018) is very strict about disclosing any and all digital data collection, among other items.

Auto-Population: If you are a consent-solution customer, leverage auto-pop features to populate mobile and desktop disclosures.



Proactively monitor tag usage, implementation and deactivation, and leverage benchmarking, and security and performance KPIs, to ensure ongoing benefits for optimal digital governance.

Dashboard: The Dashboard allows for easy monitoring of slow tags and pages, new and missing vendors, prevalent cookies and those with long durations, as well as vendor opt-out details. Each of these details help your business to better understand the impacts that the dynamic tag environment have on your site.

Active Monitoring/EvTools: Active Monitoring alerting capabilities ensures greater real-time issue remediation, as well as assurance that critical pages, or page paths, are safeguarding the user experience.

Benchmarking Report: Leverage internal and external benchmarking to monitor performance and tag metrics over time, to ensure you are outdoing peers, and ensuring optimized domain-level metrics.



These steps can put you on the path toward a sustainable and successful digital governance plan.
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