



Whitepaper

**MARKETING
CAMPAIGN DATA
GOVERNANCE**



Why the need for a whitepaper on **marketing campaign data governance?**

Data governance is perhaps not the most exciting topic as marketers - although this depends on the audience. If you are reading this then maybe you appreciate its importance for an organization, or maybe you just want to learn more about the topic. Either way, because of its reputation, it's often overlooked, undervalued, or mismanaged, becoming an afterthought in a wave of creativity, innovation and 'strategic initiatives'.

But should that really be the case, when it is the foundation that allows the organization to flourish from a data and marketing perspective? For marketing teams and analytics

professionals, it is the key to campaign granularity, measurability and understanding the true ROI of digital advertising campaigns.

At Uptimal, we have seen first-hand how poor data governance impacts people at every level of the organization, from hands-on marketing, data and analytics teams, right up to the C suite. What we noticed however, was that often the pain points around data governance were rooted in the processes and policies that organizations had and that if they had the correct tools in place - the conversation suddenly became a lot more

interesting. Teams all want the same thing, clean, reliable data they can trust and if there is a solution or tool that can help them, then compliance becomes much less difficult.

It's in this context that we decided to create this guide - to help educate people in the industry around the topic and help provide solutions for the problems and challenges businesses face in marketing data governance and specifically, campaign data.

Contents

- **What is data governance?**
- **Principles of data governance**
- **Data governance in marketing**
 - Creating a Single Source of Truth
 - Unifying Analytics & Media Data
- **Challenges**
- **The way forward**
- **Recommendations & conclusion**
- **Summary of Uptimal**





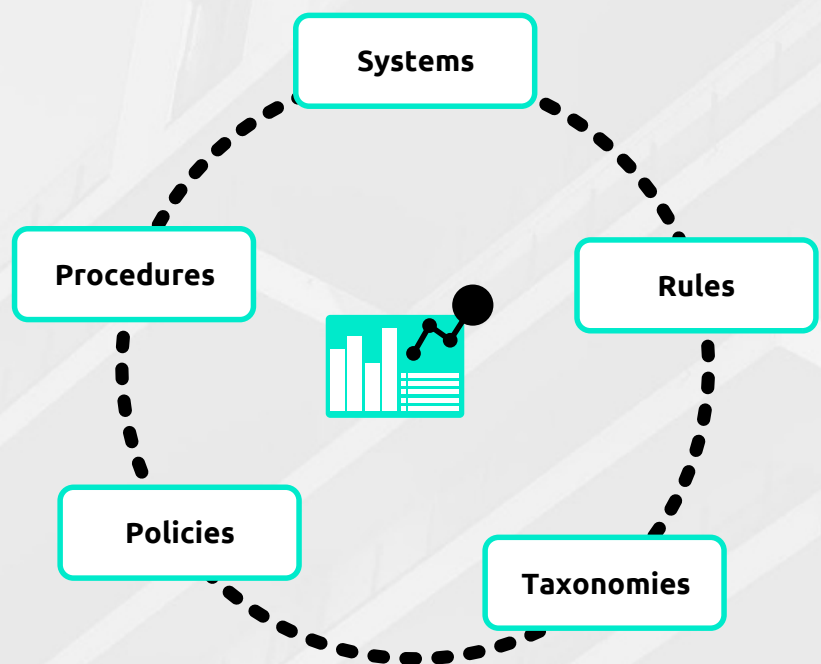
WHAT IS DATA GOVERNANCE?

What Is Data Governance?

Before we look at **data governance in the context of marketing campaigns**, let's recap and give a quick overview of what we mean by the term more broadly.

Typically, when we talk about data governance, we mean **the ways in which companies manage large volumes of data** through systems, rules, taxonomies, policies, and procedures.

Data governance is the foundation that enables better decision making. By standardizing data definitions across teams, departments, and the wider organization, we enable this better decision making, increase transparency, reduce wastage, and streamline operations.



Often large organisations have a grip on this in context of finance, production, procurement etc. Marketing departments frequently don't have the same alignment, clarity, accuracy, and accountability.

Whether that's because of a lack of understanding and appreciation of its importance internally, or working with third parties like agencies who don't always follow the directions given, it is problematic for a number of reasons.



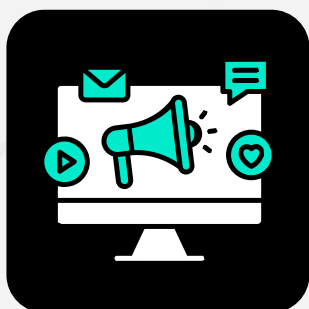
PRINCIPLES OF DATA GOVERNANCE

Principles of Data Governance

There are a number of guiding principles for data governance as per the Data Governance Institute. It is valuable to consider them as they give stakeholders direction for analysis to examine where their organization may be lacking within specific areas as it relates to data governance.

The conversation should center around:

- | | |
|------------------|-----------------------|
| 1 Integrity | 5 Stewardship |
| 2 Transparency | 6 Checks and Balances |
| 3 Audibility | 7 Standardization |
| 4 Accountability | 8 Change Management |

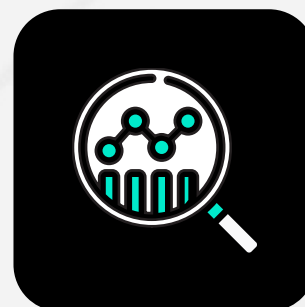


WHAT HAS THIS GOT TO DO WITH MARKETING CAMPAIGNS THOUGH?

Well although these are enterprise-level, cross-departmental principles for an entire organization, their application to marketing departments of all sizes should be clear.

WHAT MARKETING DEPARTMENT DOESN'T WANT INTEGRITY AND TRANSPARENCY IN THEIR DATA?

We do need ways to be able to audit where mistakes are, where processes are breaking, and where a lack of standardization is obscuring our ability to make sense of data and the efficiency of our campaigns.



Let's investigate a little further in a specific marketing context



DATA GOVERNANCE IN MARKETING

Data Governance in Marketing

For marketing purposes, our main concerns and challenges from a governance perspective are the integrity and consistency of the data we have. This ensures we can effectively measure, and in turn, optimise our campaigns. This process starts at the point of the data's collection, and typically in marketing we are referring to two broad categories and sources:



Web/App Tracking



Campaign Tracking

If we are to truly understand and improve our digital marketing efforts, we must ensure that we have both sources accounted for and consider how they work together (more on this later).

Needless to say, web/app tracking has its own challenges, policies and procedures for accurate data collection, but for the purposes of this material, we will assume onsite behaviour is being collected accurately.

We will therefore focus on campaign tracking, and by this we mean the data collection and governing of campaign (and sub level) naming conventions and campaign URL tracking.

These are pivotal for accurate measurement, reporting, attribution, and understanding the ROI of advertising campaign performance:

CAMPAIGN TRACKING IS KEY



Cross Channel Conversion De-duplication



Advertising Efficiency



Meaningful Attribution Models



Accurate Advertising Reporting



Creating a Single Source of Truth

Yes, it's that overused phrase again, but in this case it really is applicable.

Why are accurate campaign naming conventions and URL tracking so important? Because they provide the information that is sent to our analytics/measurement platform that we use to measure campaign performance across channels and truly understand the ROI of our campaigns.

This is only possible with accurate, standardized, and consistent marketing and analytics data which allows for the unification and merging of the two sources.

Data Governance in Marketing

Let's break down the process of how this happens and understand why campaign tracking (UTM in Google Analytics or CID in Adobe Analytics) is so important. On one side we have our media platforms and all their associated dimensions and metrics, and on the other, our analytics platforms with its own set of metrics and dimensions. For now - two sources of siloed data.

UTM

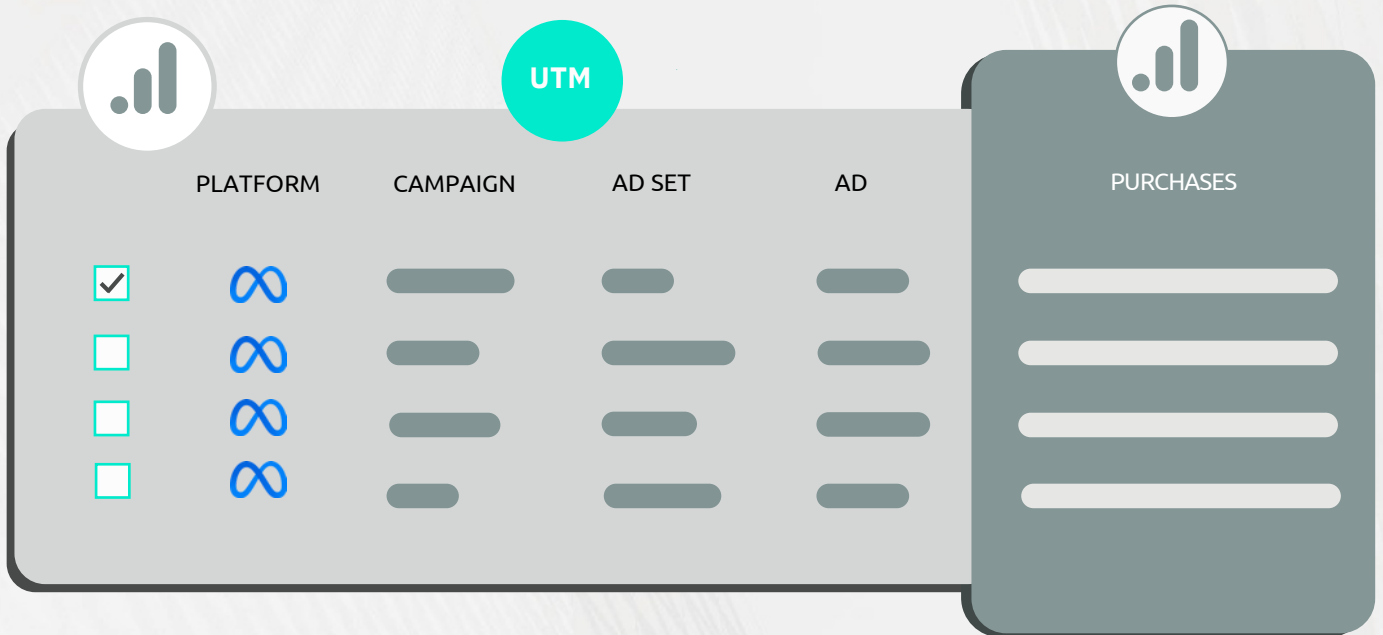
Campaign tracking is the bridge that enables our analytics platform to read the source of our media campaign and de-duplicate conversions across channels so we can report and analyse.



Information passed in the query string helps our analytics platform to define the specifics of where our visitors or conversions came from.

Data Governance in Marketing

This is critical information for a marketer enabling us to report de-duplicated conversions (split by the parameters we have defined in the URL eg, campaign, ad set, etc).



However, what happens if you want to report from a single source of truth and required impression, click and cost data or you wanted to get a deduplicated cost per acquisition. We can't pass the information in the campaign tracking.

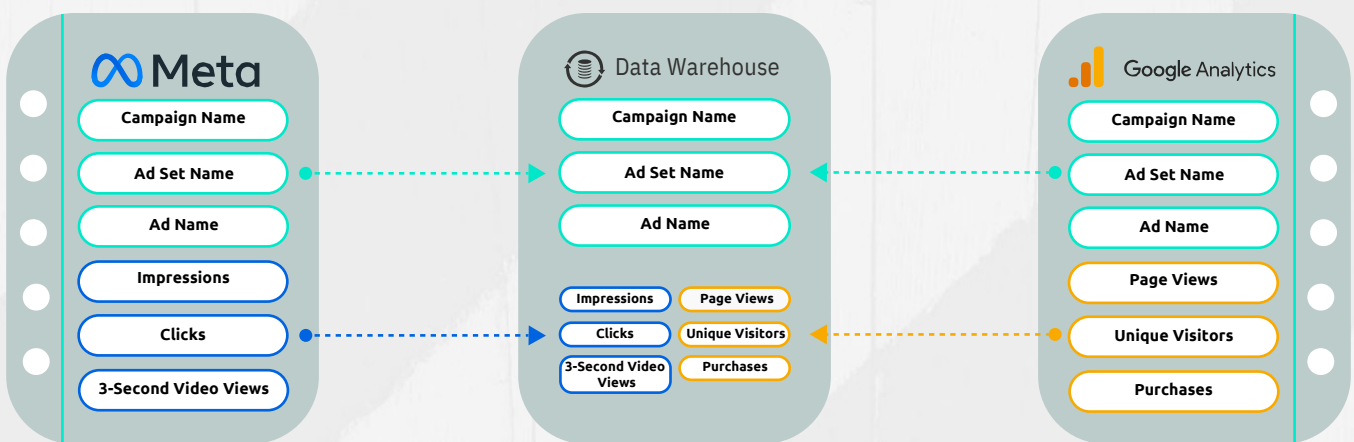


So what are our options?

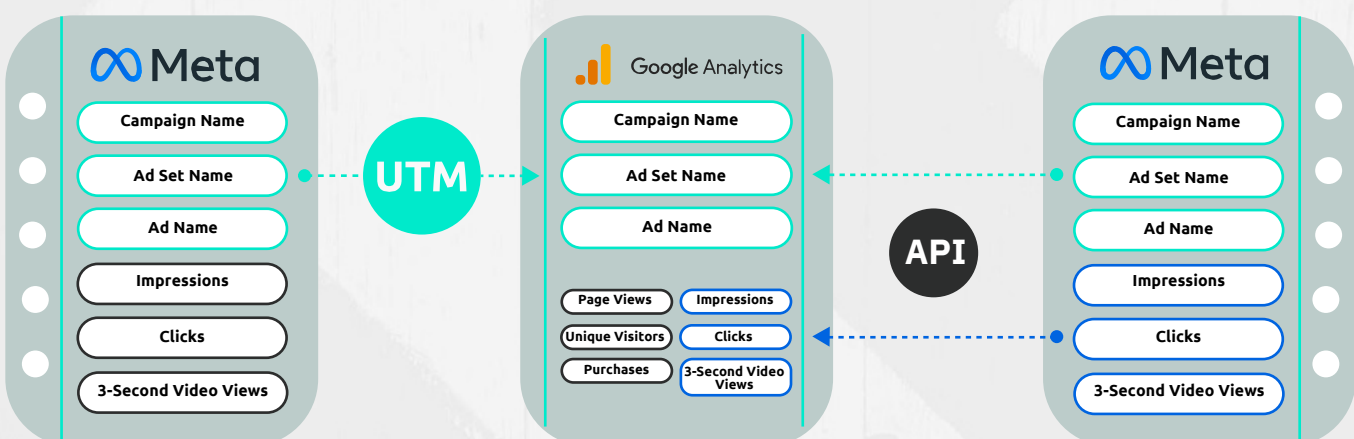
Data Governance in Marketing

We know that if we have information such as campaign name, ad set, ad in the query string (UTM), then our analytics platform can read this information - that is clear. However, if we want to be able to understand how media platform metrics/dimensions such as impressions or clicks relate to analytics specific metrics and dimensions like pages views or purchases, we need a common ID to be joined. It's this joining that enables a true and accurate de-duplicated CPA.

This can be done in two ways, either via stitching in a data warehouse



Or by using APIs to pass additional information from the media platforms to the analytics platform



Critical to both methods however, are standardized campaign, ad group and creative names



CHALLENGES

“ So we know how important these standardization and classification processes are, and how it's the cause of so many reporting, attribution, and budget oversights, so **why are so many organizations struggling to implement them in practice?** ”

Challenges



Fundamentally, it comes down to in-house teams and agencies not having the required tools & processes, which makes the governance and management difficult, error-prone, and time consuming.

Traditional ways of working are typically not suitable for organizations that want to be data driven and that rely on such potentially valuable information. The level of complexity and detail required is too important to be left to manual, error prone ways of working.

Consider how campaigns, ad group/ad sets, and creative names can become disorganized, disjointed and incomplete as campaigns span multiple channels, platforms, campaign aims, creative variations, audience profiles, geographies, products etc.

The number of variations and data points we want to be able to analyze and act on can be vast and this is true not only of large organizations, but of smaller companies who want to be able to manage their campaigns with precision and granularity.

Aside from this, multiple people are involved in this process; both internally in the marketing team and often with multiple partners, including tech vendors and agencies. **You can see how reliance on a spreadsheet can cause the process to break down.**

So how do we address the issues that are at the root of inaccurate attribution, inconsistent (and outright wrong) reporting, and huge amounts of wasted media spend?



THE WAY FORWARD

Schooling

You should begin by educating teams on why naming conventions and URL tracking are so important. We previously mentioned how we seldom give this part of the campaign implementation the attention it deserves. However, without an understanding of why it's so important to a campaign's success, teams, partners and agencies will continue to make the same mistakes and oversights.

Everyone involved in the marketing activity needs to have at least a basic understanding of the rationale and the impact incorrect governance can have - even if it doesn't directly impact their role. This is not to say that everyone must know and understand every detail of the taxonomy and process, but they should at least have a basic understanding to keep each other accountable. Teams cannot afford to work in silos where the impact of their



decisions directly or indirectly affects other parts of the organization. A trafficker may need to know the specifics of the taxonomies, and an analyst may need a data dictionary to interpret naming codes, but everyone up to the CMO needs to at least have an appreciation of its importance to make data-driven decisions.

Tooling



Appropriate tooling is arguably the most critical factor. With this in place, the policies, procedures, and processes can be clearly defined and configured from the outset. **The tools used need to be intuitive and make the parties involved in jobs and processes easier and more efficient.** Compliance and adherence is a naturally occurring result with the appropriate tooling.

When manual, labor-intensive processes for creating naming conventions and tracking URLs are removed, and scalable and automation solutions are introduced, it creates repeatability and standardization. **And as we highlighted before, you need this if you want to measure marketing performance effectively.**

Some of the benefits we see for clients who onboard the appropriate tools for campaign data governance are:



Operational Efficiency

Improved collaboration across agencies and internal departments, the removal of redundant steps in their existing processes, and time to campaign launch.



Effective Governance and Removal of Errors

Marketing Governance Platforms have the capability to have pre-built and configured fields specific to the business, ensuring compliance and accuracy.



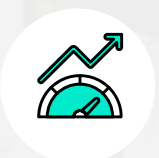
Increased Security & Privacy

Many organizations have important policies for data security and sharing. With one unified platform they can manage all metadata from one secure location.



Data Credibility & Reliability

The outcome of a robust platform for campaign data governance is improved data reliability as standardized campaign data enables the fueling of marketing insights.



Improved Campaign Performance

Improved data accuracy results in better attribution, more accurate reporting, and more efficient budgeting decisions across markets, channels, formats, audiences etc.

So what features should we look for in a platform for campaign data governance?

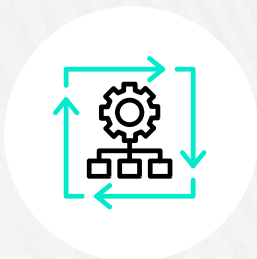
We are partnered with a number of vendors and what we like to see with any platform we work with, in terms of functionality, are the following:



Perhaps the most obvious: the ability to create consistent campaign tracking naming conventions at scale with a user friendly interface.



The capability to manage teams, user roles, and cross department/company collaboration.



Scalable and automated processes for tracking link creation (UTMs).



Tailored configuration bespoke to how your organization needs to classify and report on campaign data.



Programmatic validation of tracking and naming applied in the media platforms and the functionality to troubleshoot and identify if there are any issues.



A method to send via APIs, media-specific metrics, and dimensions to the web analytics platform for a single source of truth.



CONCLUDING THOUGHTS

Concluding Thoughts

Hopefully, this paper raised a couple of interesting topics or points of conversation for you and your team's organization to think a little more about campaign data and how it's managed and governed.

Whilst the collection and maintenance of on-site/app data appears to have been relatively well catered for in terms of the tools and processes, **historically there has been an underappreciation of the value of campaign tracking data.** We understand that if we are truly striving to be a data-driven organization, it simply cannot be overlooked.

Fortunately, new tools and platforms are entering the market that help make advancements in these areas. Those who adopt this early, and find a way to get this data accurate and reliable, will be the first to benefit.

About us

Uptimal are a team of marketing, analytics, and data specialists who combine technical expertise and big-picture business thinking. As an agency/consultancy hybrid, we bring years of experience across industries and specialisms to leverage the power of data to drive business growth, impact, and value through marketing and analytics.

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