GA4 MIGRATION CHECKLIST

Many users – and sometimes agencies, too – think that for a successful migration they can just use the Setup Assistant, or simply integrate a new tracking code and consider the job done.

This goes to show how often the complexity of a migration on this scale is underestimated.

In this short guide, we'll take you through the essentials of a quality Google Analytics 4 (GA4) implementation.

We'll cover what to audit in your current analytics setup, the key elements of a measurement plan, and the order in which every migration step should take place - to ensure your project goes through without a hitch.

Chart out a well-structured path to Google Analytics 4 - [plan your implementation with e-CENS](#).

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Any switch between analytics tools is a long, labor-intensive process that typically takes several months to complete fully. And this particular migration from UA to GA4 comes with its own set of challenges:

NEED FOR SPEED

The migration from UA to GA4 needs to be done as quickly as possible to have accurate and reliable data available. You should at least be positioned to make one year-on-year comparison.

COMPROMISED DATA

Google will most likely delete the existing Universal Analytics properties and all data contained in these properties after the migration period expires. This happened in the past, when Google discontinued the Mobile SDK.

LACK OF FEATURES

GA4 is still under development and, therefore, is lacking dimensions, metrics, and features. Having said that, the GA4 implementation needs to be reviewed, revised, and maintained frequently.

LACK OF REPORTS

Currently, GA4 offers less than 30 pre-built reports, which seem to be focused on data scientists and digital analysts – not marketers. This needs to be compensated for by creating ready-to-use reports in a separate App such as Google Data Studio.

NEED FOR TRAINING

Since GA4's data model and UI are completely different in comparison to UA, there's a need for training in this tool in order for marketers to know how to uncover relevant insights and derive action from them.

All of the issues mentioned can be tackled during the appropriate migration phase.

1.

AUDIT

Depending on the accuracy of your existing documentation and the scope of your Universal Analytics implementation, this phase may take only a day – or it could last several weeks.

We recommend auditing the following:

Your Google Tag Manager (GTM) setup

If you used GTM to fire your Universal Analytics Tags, you should consider auditing your setup. However, if you haven't made use of GTM in the past and integrated Universal Analytics natively into your website's source code, this phase is definitely mandatory. We also suggest planning to migrate to GTM to fire GA4 Tags.

Account structure

As Views don't exist in GA4 anymore, it's absolutely crucial to audit your Universal Analytics account structure's hierarchy in order to be able to replicate its outcomes in GA4. Also, it's important to identify which user/s have access to which level of the structure and have been granted which permissions. These role-based and user-based access controls should be validated before being recreated.

Property configuration

During this step, it is important to check whether Demographics, Enhanced Link Attribution, or User Metrics have been enabled in the Property settings. Additionally, it is recommended to check whether Google Products have been linked to Universal Analytics, and whether Audiences, Custom Dimensions, and Custom Metrics have been previously set up.

View configuration

See whether Goals, Content Groups, Filters, Channel Groupings, or Calculated Metrics have been created or modified.

Firebase Console

If necessary, you will, of course, need to audit your Firebase Console in regards to tracking the use of your App/s.

2.
INTEGRATION PLANNING

This phase is likely to consume most of your time during the process of migrating to GA4 – integration planning can take up to 8 weeks, or even longer. This is due to the fact that it involves several separate steps, which are:

- **Defining the stakeholders** who will be part of the project and are eligible to make decisions

- **Defining a measurement plan** which will outline and document the following topics:
  - Business objectives
  - Identified strategies and tactics
  - KPIs, Quality Metrics, and Helper Metrics
  - Decisions on data segmentation
  - Defined targets for the KPIs
  - Data Privacy Regulations

- **Documenting technical conditions** such as:
  - The inventory of websites and Apps as well as corresponding sitemaps
  - Online and offline marketing activities
  - Technical characteristics, which will determine whether all required data can be collected with the technologies used

- The last step of integration planning is **creating the implementation plan**, as a summation of previous steps.

  The Implementation plan should cover:
  - a list of missing features in GA4 and the impact on your implementation
  - a list of limitations in GA4 which might impact your implementation or your business
  - a Tag Implementation Plan, which outlines which Tags need to be created and when they should fire

3.
STRATEGY

With a duration of 4 or more weeks, this phase is less time-consuming compared to integration planning. However, it requires everyone involved to be fully focused on the migration project.

Following the Tag Implementation Plan from your integration plan, you will now need to prioritize which Tags need to be implemented first, and which can be postponed for a later implementation.

The next step will be to come up with solutions regarding:

- **Custom definitions** like Custom Metrics and Custom Dimensions

- **Filters** to alter incoming traffic

- **Goals** that need to be translated into Conversions

- **Content groups** as well as Channel groupings

- Enhanced **e-Commerce**

The outcome of this should be two Checklists, covering all that needs doing. The first would be the **GA4 Setup Checklist**, and the second the **Migration Checklist**.

Lastly, at this time, it would be wise to decide what you want to happen to your existing Universal Analytics data.

As we've mentioned before, the chances are high that Universal Analytics Properties might be deleted some months after Universal Analytics's sunset. Google will not be able to provide you with the option of simply transferring your existing data from UA to GA4, as the data models do not map.

With that in mind, data export might be something to think about. You can either export your data to BigQuery, or import it into some other Web Analytics solution.

After you have successfully taken care of this step, it's time to start with the implementation.

4.

IMPLEMENTATION

You should be ready to spend up to four, or even more weeks on your GA4 implementation, depending on the scope of your plans and the amount of work that needs to be done.

During this time, you will have to take care of **Implementation** and **Configuration**, which means:

🎯   **implementing high priority tracking** according to your Tag Implementation Plan

🎯   **configuring GA4** according to the GA4 Setup checklist

The next step should be to define the Events and Parameters which you want to use to collect data. You have the option to use automated, recommended, or custom Events in conjunction with built-in, recommended, or custom Parameters.
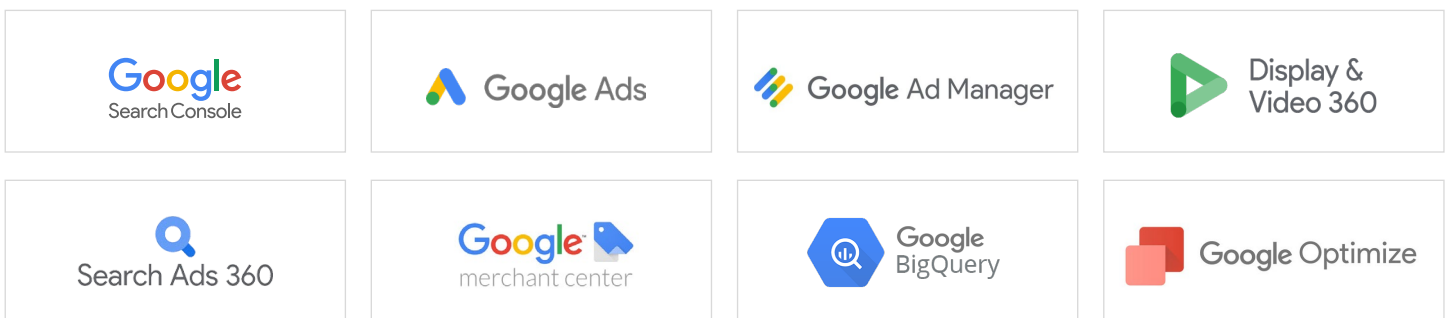
Additionally, every time you make use of custom parameters, you will most likely need to register a GA4-specific element such as custom dimensions or custom metrics. You might also want to specify certain Events as conversion Events.

Once done with the work of defining Events and Parameters, Quality Assurance is mandatory to check the accuracy of data being collected and whether the desired outcomes are met.

5.
INTEGRATION

In this phase, you should focus on integrating GA4 with other Google products.

At the time of writing, GA4 can be integrated with:

Google Search Console	Google Ads	Google Ad Manager	Display & Video 360
Search Ads 360	Google merchant center	Google BigQuery	Google Optimize

At this stage, you might be tempted to think: "Perfect! Now we're all done with our GA4 migration."

However, there are still a few steps to complete before you can consider your work truly completed.

6.
REPORTS

We've covered the differences between UA's and GA4's reports in the previous chapter of this eBook. To compensate for these differences and the lack of pre-built reports in GA4 in general, you can create additional, customized reports in GA4.

This is done by copying and modifying existing reports, as well as utilizing GA4's Explorations. You may integrate GA4 with Google Data Studio to create beautiful and meaningful reports.

Alternatively, you can also connect **Google Data Studio** to **BigQuery** once you've exported your GA4 data there.

7.
TRAINING

GA4 training can last from a couple of days to several weeks, depending on the number of people who require training and their skill level.

Generic training on Google Analytics 4 should cover the following:

- Getting to know the new UI and the terminology regarding new dimensions and metrics

- Learning how to implement campaign tracking and attribute the credit to different channels

- Learning the difference between standard reports, customized reports, and Explorations

- Learning how to configure GA4 to your needs

Additionally, some teams should also be trained on more specific topics. For example, marketers should learn how to do their day-to-day evaluations, and data scientists could undergo training to adapt to GA4's new data model.

Once you're done with the last phase of the migration process, you'll need to loop back to the implementation phase to take care of lower-priority tracking.

If this can be done in one go – perfect! Otherwise, you'll simply go through the phases again.

After implementing all the necessary tracking, it's time to maintain and refine the integration planning. This is due to the fact that your business requirements and your technical environment can change over time. Without maintaining your plan, your data won't keep pace with your reporting needs.

e-CENS is an internationally-recognized team of data scientists, analysts, technologists, and strategists.

We have over 15 years of experience working with leading global brands in finance, travel and hospitality, publishing, and e-Commerce.

Our team of data analytics and strategy experts has helped many of our clients migrate to GA4 already, and our consultants are also experienced GA4 trainers.

To learn more about how to approach the challenge of migrating to GA4, **get in touch with us at e-CENS**.

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