



ATEM ANALYTICS

Google Analytics 4 Migration Planner

Use this set of worksheets to plan your GA4 migration with these discussion points.

Google Analytics is changing and marketers are tasked with overseeing the migration from Universal Analytics (UA) to Google Analytics 4 (GA4). You're committed to measuring your campaign success and website performance, but with so many fundamental differences between UA and GA4, it's easy to feel like you're missing something. How can you get started?

Use this workbook to establish your website goals, document your current Google Analytics configuration, and recognize opportunities to improve your ability to measure success.

TRACKING SETUP

Get the conversation started with four elements that are key to success before, during, and after your migration to GA4.

DATA COLLECTION

HISTORICAL DATA

REPORTING

Get started now. →

TRACKING SETUP

Your success with GA4 starts with a successful implementation of the tracking code, so it's important to consider who will manage the changes to your website and how to implement them properly.

QUESTION 1

Who manages changes to your website?

Who is responsible for proposing, coding, reviewing, and approving changes to your website before changes are published?

QUESTION 2

How is Google Analytics currently implemented?

Is your ga.js code (UA) currently configured in your content management system (CMS) templates, a tag manager container, or directly in the HTML code?

TRACKING SETUP

QUESTION 3

Who has access to your Google Analytics properties?

What levels of access do you provide to your team and external partners? What level of access will you provide for new GA4 properties?

NOTES

DATA COLLECTION

To determine the success of your marketing efforts, you need intuitive and actionable data about your digital campaigns and website performance. Respond to the following questions regarding your organization's data.

QUESTION 1

What other data sources do you have linked to Google Analytics?

Review the Product Links section in the GA admin area and note which links already exist to other Google products.

- | | |
|---|---|
| <input type="checkbox"/> Google Ads | <input type="checkbox"/> Google AdSense |
| <input type="checkbox"/> Google Search Console | <input type="checkbox"/> Google Tag Manager |
| <input type="checkbox"/> Google Merchant Center | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Google Optimize | <input type="checkbox"/> _____ |

QUESTION 2

Which data sources will you need to link to GA4?

Consider current data sources and the ideal future state. Even if GA4 connectors aren't available yet, other solutions may exist in the future.

- | | |
|---|---|
| <input type="checkbox"/> Google Ads | <input type="checkbox"/> Google AdSense |
| <input type="checkbox"/> Google Search Console | <input type="checkbox"/> Google Tag Manager |
| <input type="checkbox"/> Google Merchant Center | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Google Optimize | <input type="checkbox"/> _____ |

DATA COLLECTION

QUESTION 3

How have you customized your current Google Analytics settings?

Note any other changes you've made to your property and view settings in Universal Analytics. Note that GA4 does not have separate views within a property.

Properties & Views: _____

Segments: _____

Filters: _____

Dimensions & Metrics: _____

Other Property Settings: _____

QUESTION 4

List the objectives you have defined as "Goals" in Google Analytics.

This could include e-commerce transactions, lead form submissions, phone calls, content engagement, video views, and more.

Goal Name	Goal Definition
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

DATA COLLECTION

QUESTION 5

List your website objectives that you still need to measure.

Dream big: for example, the visitors that engage with your highest-value content before an eventual purchase. The first step to getting this data is identifying the need.

Goal Name

Goal Definition

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

QUESTION 6

What other events are most important to track on your website?

List the ways your visitors engage with your content and any other meaningful interactions that should be measured.

HISTORICAL DATA

Universal Analytics will stop recording new sessions on July 1, 2023. Historical data will be deleted from Google Analytics six months later. Plan ahead to ensure you can compare your future GA4 data to historical performance.

QUESTION 1

How much UA data do you need to preserve for future analysis?

How far back do you need to look to observe trends? What time intervals do you need for future comparisons? For example, monthly and quarterly results for the past three years.

QUESTION 2

What format(s) do you want to store your historical data in?

Depending on your needs and resources, you could opt for spreadsheets, custom databases, or Google's BigQuery cloud data warehouse.

REPORTING

Great analytics programs are about more than just gathering data. Empowering your teams with data-driven insights can accelerate your digital marketing performance. Spend time thinking about the outputs of your GA4 migration and start dreaming up new ideas on the following pages.

QUESTION 1

What types of website analytics reports help your stakeholders make better decisions?

Who consumes these reports, how often, and in what format? What questions do your reports need to answer?

QUESTION 2

What tools do you use to aggregate and visualize data?

How do you transfer data between Google Analytics and other reporting or data visualization platforms such as Excel, Tableau, Power BI, or Google Data Studio?

REPORTING

QUESTION 3

What business questions will you need your analytics data to answer?

Try to answer "So what?" whenever possible. For example, "What new products have been the most successful at driving conversions in the past year?" or, "How much should we invest in Paid Media in the next year?"

QUESTION 4

Which Events are currently tracked in your Universal Analytics account?

List the most important GA Events that should be migrated to Google Analytics 4.

Category	Action	Label
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>