

Analytics Checklist: Re-Branding



Analytics Items

- ☐ **Account Structure:** You may choose to “sunset” old Google Analytics properties (leave them alone, but quit sending data to them) and launch new ones for your new brand. This keeps the data for your sites cleanly separate. This might make sense if your company is moving in an entirely new direction, such as changing their services or products. However, if your company is purely undergoing a brand change, you may prefer to leave the existing property intact and simply rename it to match your brand.
(Reference: [Hierarchy of accounts](#), [Best practices for views](#), [Google Analytics account configuration](#))
- ☐ **Universal Analytics:** If your tracking code is not already the latest version of Google Analytics, this might be a good opportunity to upgrade to Universal Analytics (analytics.js). However, this can be a large undertaking. Speak with your Analytics Consultant for more details on this.
(Reference: [Universal Analytics](#))
- ☐ **Naming Conventions:** If your account, property or view names reflect your old corporate identity, it is a good idea to update them to reflect on your new business.
- ☐ **Content Filters:** You may have filters set up that are based on your URL or hostname, such as including only domain.com sessions.
(Reference: [About view filters](#))
- ☐ **IP Filters:** If the company IP address or ISP network is changing, you might want to update any filters that were blocking this, or take the opportunity to create a new one.
(Reference: [Best practices for filters in GA](#))
- ☐ **User Management:** You may need to update users that had email addresses on your old domain. For example, if a user was [thisuser@olddomain.com](#), you may need to update them to [thisuser@newdomain.com](#). Remember that only Google accounts (Gmail addresses or accounts registered at Google.com/accounts) can gain access to Google Analytics reporting. This is also a good time to audit your users - should anyone be removed, or have their access level changed?
(Reference: [User management](#))
- ☐ **Default URL:** This setting is in your Property settings. This controls the domain that is prepended to a page URI when you try to open the page from within the Google Analytics interface.
(Reference: [Edit a property](#))
- ☐ **Referral Exclusion:** This setting is important to keep user data consistent across subdomains, and is part of keeping user data consistent across separate domains as well. You may need to update this if you have subdomains or separate domains involved in normal user behavior.
(Reference: [Referral exclusions](#))

- ☐ **Search Term Exclusion:** If you were using this to mark some organic searches to your domain (i.e. users who type www.mysite.com into Google's organic search) as direct (type-in) traffic, you may need to update this setting.
(Reference: [Search terms exclusions](#))
- ☐ **AdWords and/or Search Console Account Linkage:** With a re-branding, it is not uncommon for companies to update their other products as well or even launch new ones. You should audit your currently linked accounts and check with your marketing teams to see if any new ones will be created that should be linked.
(Reference: [Link/unlink Analytics & AdWords](#), [Verify site ownership on Google search console](#))
- ☐ **Excluded Query Parameters:** This is in your View settings. This is a great opportunity to audit any URL query parameters that you may want stripped from your Google Analytics reporting. For example, if you have URLs that post lat/long information in query strings, this can create many rows of additional URLs and can complicate Google Analytics reporting.
(Reference: [Edit view settings](#))
- ☐ **Data Import:** If you had any data importing where URLs or hostnames were key, you'll need to update your settings here to not lose any dimension widening information.
(Reference: [About data import](#))
- ☐ **Social Tracking:** If your brand is changing on your website, your social brand is likely changing too. If you were tracking YouTube Channel URLs or other social pages you may need to update those settings. This may also be a great opportunity to get those set up, if they haven't been previously.
(Reference: [About Social Analytics](#), [Social activities reference](#))
- ☐ **Content Grouping:** Content Groups can be a great way to organize many pages of content together. If you had been using this feature, you should check to make sure any URL changes wouldn't break these settings.
(Reference: [About content grouping](#))
- ☐ **Segments/Custom Reports/Dashboards:** Check for any frequently used custom reporting, dashboards, or advanced segments in your company that may have been dependent on the old URL/domain. You may want to provide some guidance to your internal teams on how to update these settings if you cannot update it for them.
(Reference: [About segments](#), [Create and manage custom reports](#), [Create and customize dashboards](#))
- ☐ **Annotations:** You will definitely want to annotate when your new domains go live! It is also a good idea to annotate when development testing occurs, when any staged launches go live, etc., to ensure that any spikes in traffic with this change are explained.
(Reference: [Back to basics: GA annotations](#))
- ☐ **Goal Tracking:** If your URLs will update with this domain change then you'll need to revise your goal settings.
(Reference: [Create, edit, and share goals](#))

- ☐ **Privacy Policy:** If you haven't, please review your Privacy Policy and ensure it contains language specific to your Google Analytics usage. At a minimum, you should state your usage of Google Analytics and offer links to more information and user opt-outs.
(Reference: [GA Terms of Service](#), [GA opt-out browser add-on](#))

Additional Items (Not Related to Google Analytics)

- ☐ **Google Search Console:** Ensure that you have this tool set up, and/or have access to this tool in order to help monitor your organic performance. It is a good idea to download performance reports from this tool prior to your domain/brand switch, so that you have a record of performance for that time period.
(Reference: [Search Console](#))
- ☐ **Bing Webmaster Tools:** Ensure that you have this tool set up, and/or have access to this tool in order to help monitor your organic performance. It is a good idea to download performance reports from this tool prior to your domain/brand switch, so that you have a record of performance for that time period.
(Reference: [Bing Webmaster Tools](#))
- ☐ **Change of Address Tool:** Google Search Console offers a Change of Address tool which notifies Google of any new URLs for existing content. This can help prevent (but doesn't ensure against) a loss of ranking.
(Reference: [Use the change of address tool](#))
- ☐ **301 Redirects:** Ensure that you have 301 redirects in place between your old URLs and your new ones, to prevent a loss in organic ranking or traffic from links to your old domain.
(Reference: [Change page URLs with 301 redirects](#))