

Global Retail & Business Banking Firm Implements Data Governance

FOR TAG VALIDATION AUTOMATION

Company Profile

- 232,000+ employees
- 40 million customers across 64 countries worldwide
- \$50B in revenue in 2020
- 50-60Bn server calls per annum

Tag Management	Tealium IQ
Digital Analytics	Adobe Analytics

Challenges:

- Improve and govern data quality
- Automate tag validation
- Reduce time spent validating
- Integrate with authentication and security protocols
- Reduce broken and missing tags
- Support regression tests and monitor tags
- Scan cookies and mobile apps

Key ObservePoint Features Used:

- Audits
- Journeys
- Action Set Library
- Rules
- Remote File Mapping

Results:

- Successfully integrated with authentication protocols in a staging environment
- Automated their tag validation process
- Documented a repeatable validation process
- Began establishing a cohesive governance process between development, insights, and marketing teams

As a global financial institution, this company places a high importance on data quality but also has to contend with a massive online presence that is maintained by multiple teams of developers spread across many regions and countries.

To date, the bank has utilized ObservePoint for over three years to check their Tealium profiles, govern their digital data quality, and monitor their data layer. The Global Insights team, who are responsible for data quality and standards which govern tags implemented by developers, is testing a specific use case for the first time.

The financial services firm also puts a great deal of importance on the security of their customer's data, so any implementation of data governance software has to be able to integrate with an existing architecture that sits behind authentication protocols. This has been an issue with past attempts to implement data governance tools.

In this initial use case, the bank's Global Insights team chose to deploy ObservePoint and has been able to:

- Integrate with a complex legacy system and its revolving number tokens or two-factor authentication
- Work with iframes and single page applications
- Scan for broken tags and data across their pre-production implementations
- Automate parts of a manual, bottleneck process involving 2-4 analysts validating updates from multiple teams of developers spread across the globe

Accessing Online Banking Infrastructure

One of the most important points in this pilot was to prove that ObservePoint could integrate with the firm's online banking infrastructure.

"This has always been a big issue across most tagging and analytics platforms that I've worked on - getting it to work within authenticated platforms, the absolute behemoths of legacy architecture with new, optimized user experiences," said a Senior Manager within the Global Insights team. "Just getting ObservePoint to work with our architecture was a massive victory."

One challenge the team faced was platform developers getting the ObservePoint profile locked out of their authenticated banking site during testing. The team managed to set up dedicated authentication profiles and utilized ObservePoint's Action Set Library feature to access their staging environment successfully.

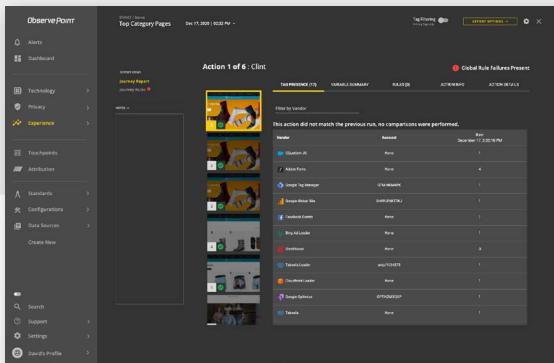
Because they're a financial institution, the company also needs to make sure that no sensitive customer information like account numbers, names, usernames, and passwords are being captured by any third-party tools they implement. ObservePoint is quite familiar with this requirement due to its work in the privacy compliance arena.



The Global Insights team is also specifically focused on creating a frictionless experience agnostic of security, regulatory, or architectural complexities within a journey or task a customer would want to achieve, ultimately with a view of improving the experience based on data-driven insights and recommendations.

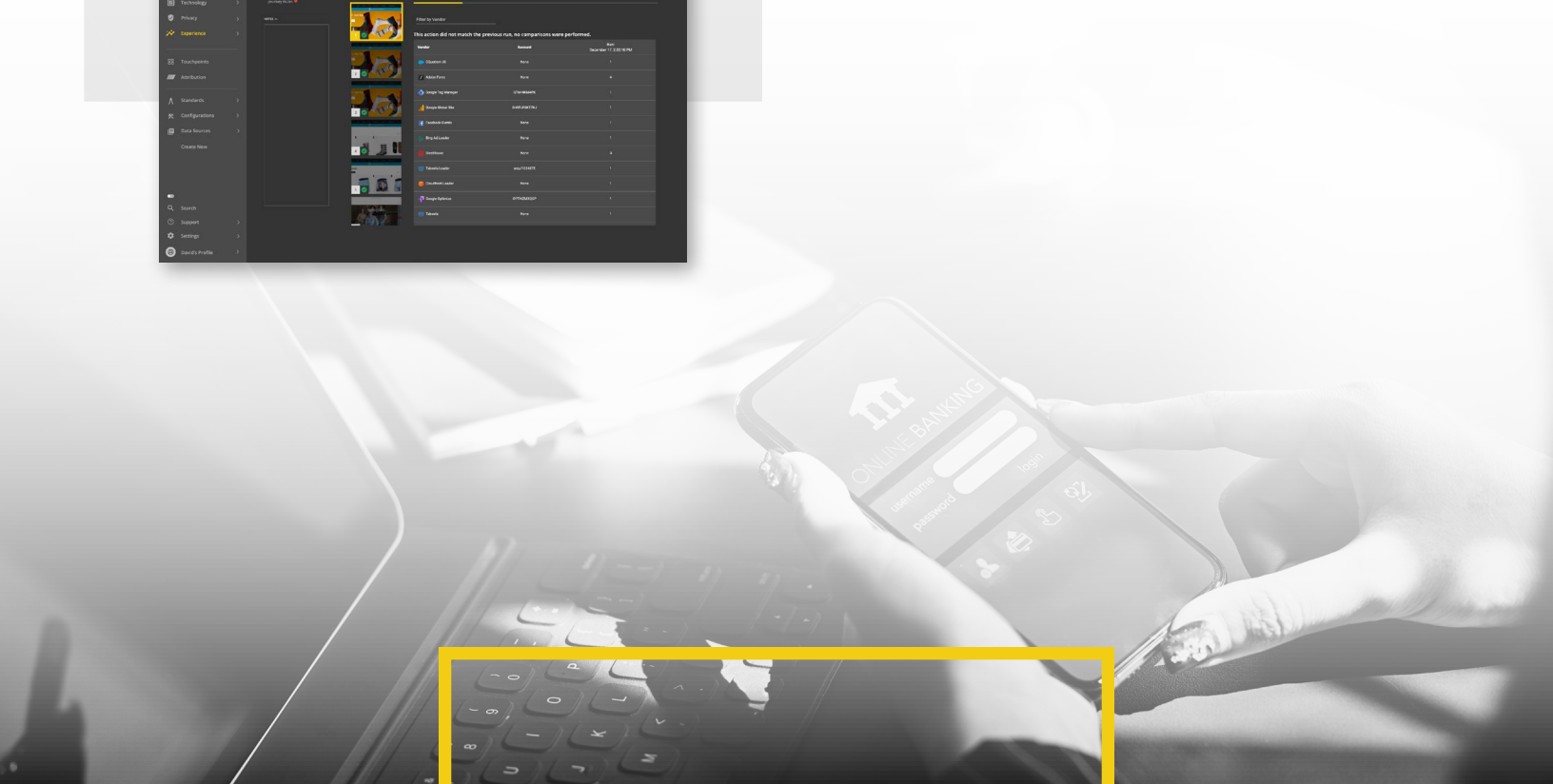
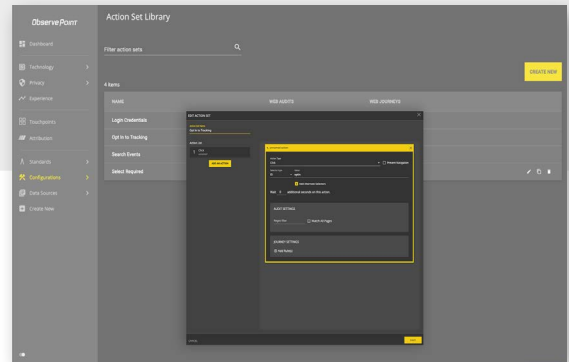
FEATURE HIGHLIGHT: JOURNEYS

Journeys replicate your site's user flows or critical paths from start to finish, so you can verify that nothing is preventing completion of the path and that analytics are tracking accurately and completely. You can configure items such as browser, location, and consent preferences to detect all issues a user may encounter.



FEATURE HIGHLIGHT: ACTION SET LIBRARY

Action Set Libraries allow ObservePoint users to save frequently completed actions, such as a login process, so you don't have to build the steps each time. You can edit an Action Set and all Journeys with that set will be bulk edited.



Validating Tag Implementations at Scale

At the financial services firm, there is a strategic focus on data-driven insights and recommendations to improve the customer experience at scale. The bank handles large data sets and has many pods of developers who work on different parts of their digital platforms, which can be quite complex, such as their corporate banking platform. A lot of time and effort is spent manually checking marketing tag deployments, validating data, and doubling-up on QA resources.

Although their Tagging QA process has become semi-automated, it still involves Excel sheets of data points and tags utilizing complex formulas. Their two-stage governance process is pretty intensive for all teams involved, including developers who must submit their testing results to the Global Insights team to validate their work.

A typical testing process for a developer at the bank would be:

1. Fire the tag.
2. Ensure the critical test criteria are met: tag fires when it should, correct Tealium profile is set, correct Report Suite is set, etc.
3. Copy the Tag URL from the browser development console and paste into the Tag Spec document.
4. Review the auto-validation and add any manual check results into the document.
5. Implement fixes for any defects discovered.

6. Retest and repeat steps 1 to 4.
7. Send to Global Insights teams for final review.
8. Implement any final fixes and retest if required.

The Global Insights team, consisting of 4 people, review all of the developers' tag testing documentation, and the release can't go live without their approval. Over a 12-month period, the team reviewed over 300 tag specs with an average volume of 45 tags per spec.

That would take them a significant number of days to validate, depending on how many times they would need to re-test. Reducing or eliminating the manual aspect of this validation process would therefore save them considerable man hours.

ObservePoint is currently partially implemented with the Global Insights team to test the tag testing and validation features. Ideally, once it is fully rolled out across all platforms, the developers themselves would build the Action Sets and Rules within the tool that the tag should follow. Then once they're built, they could run the automated validation process repeatedly.

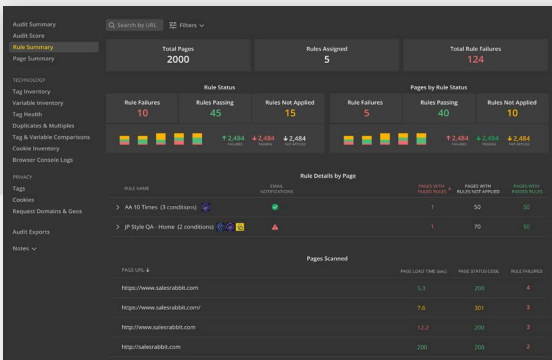
"So, the goal is to get the developers and testers to become more hands-on with the ObservePoint platform and more self-sufficient. We believe in empowering teams with tools and knowledge so they can self-serve and improve their ways of working," a Senior Manager within the Global Insights team said, "The intention is for technology to do some of the heavy lifting of what we're doing today. Automation for me is always the key. Using technology smartly to do more resource-intensive tasks."



That way, the team can focus on the critical piece of actually using the data they're collecting and acting upon insights and recommendations.

FEATURE HIGHLIGHT: RULES

Custom Rules allow you to validate analytics and marketing tags against expected values. You can test if tags, variables, and values match a specific RegEx pattern, such as a campaign code format. Filters and conditions can be combined to test tags with a high level of detail. Failures can be sent via reports or immediate alerts.



Future Expansion of Project

The team foresees that once ObservePoint is fully integrated, they will be able to replace the manual parts of their validation across all of their digital properties. They will then roll it out to the rest of the company, train the staff, and bake it into their regular process.

Deploying ObservePoint globally will enable them to:

- Catch human errors that developers might make unwittingly when they make small changes without fully understanding the complete downstream effects because many teams are developing in parallel
- Enable the bank to make site functionality updates by deadlines often mandated by regulatory entities without sacrificing data quality
- Set up alerts for tagging errors that may affect their pages with the highest traffic
- Give the business complete confidence in data quality, accuracy, and insights
- Monitor mobile apps
- Check for sensitive or restricted data before a release goes live

The Global Insights team has always been aware of ObservePoint due to their ongoing interest in data quality, accuracy, and usability and is pleased to be finally implementing the solution. A Senior

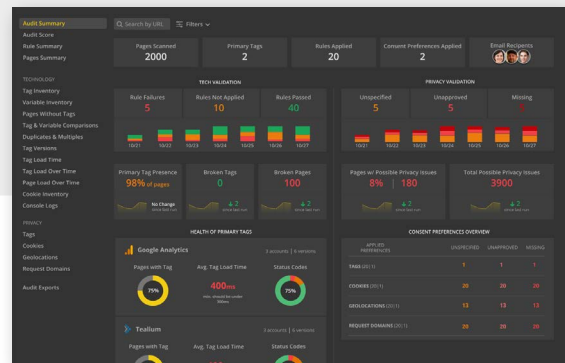


Manager stated, "While large organizations tend to be very data-driven, it depends on what area of focus they have at the moment, whether it's marketing insights, investor relations, or digital analytics data." At our organization, "There's a massive focus on digital data, analytics-wise, in terms of: What's the data telling us? How are our products and services performing? How can we use the data to drive actionable insights which ultimately benefit the customer's relationship with us? And that's a change of focus and a change of mindset."

The team sees a great deal of value in executing these automations and auditing initiatives to help the company get the most out of their digital analytics data and also to mitigate risk and save countless hours.

FEATURE HIGHLIGHT: AUDITS

Audits allow automatic scanning of your site or application at scale. It can regularly crawl through the code of each page of your site or a specific set of pages. Discover errors such as missing, duplicate, or unauthorized tags. Get alerts for any irregularities so you can collect accurate data and make effective decisions.



About ObservePoint

For organizations to be truly data-driven, they must answer two vital questions: 1) What is this data telling me about our customers? and 2) Can I trust my data?

ObservePoint empowers insights-driven companies to trust their data and create better experiences for their customers using automated data governance. Our automated Technology Governance, Privacy Compliance, and Campaign Performance solutions enable companies to scan their digital properties for data collection errors—ensuring they are collecting accurate, secure data to guide their decisions.

ObservePoint's Data Governance solutions bring insights, automation, and compliance to the chaos of customer experience data.

