

ObservePoint



FINNING[®]

Finning Automates QA for Efficient and Secure
Technology Deployment

WITH OBSERVEPOINT

Challenges:

Needed to:

- Automate the QA process to increase testing efficiency
- Conduct repeatable, custom analytics tests across multiple domains
- Protect against piggybacking technologies and data leakage

Key Product Used:

ObservePoint's Technology Governance, specifically:

- Audits
- Integrations
- Tag Initiators

Results:

- Set up an automated QA process with ObservePoint to verify accurate data collection
- Caught data collection errors in testing environments before going live
- Prevented unauthorized technologies from appearing on their site



Image provided by Finning

Finning Profile

- Largest dealer of Caterpillar equipment
- Established in 1933
- Over 13,000 employees
- Operations in Canada, the UK, and South America

Technology Stack

Tag management	Adobe Launch
Digital analytics	Adobe Analytics
A/B testing and personalization	Adobe Target

Founded in 1933, Finning is the world's largest dealer of Caterpillar industrial equipment. Together with their strong emphasis on quality machinery and unparalleled service, Finning has a strong focus on digital innovation, with a dedicated team leading the charge.

As part of the Global Digital Marketing team, Maggie Vega, senior marketing analytics analyst, plays a key role in delivering on the company's global digital strategy and enablement, focusing on value, performance, and transformation.

Foundational to this vision is the integrity of analytics deployment and marketing technologies across Finning's digital platforms and multilingual websites. Maggie is the bridge between the business, technical development, and marketing disciplines, where her day-to-day accountabilities include:

1. Collaborating with business leads and technical teams to ensure business needs and KPIs are translated to correct technical (and infrastructure) requirements
2. Deploying analytics and marketing tags via a tag management system (TMS)
3. Evaluating and implementing regional marketing requests to install new technologies, scripts and capabilities

As the internal demand for digital at Finning has grown, so has the need to implement controls for digital technologies to ensure the integrity and security of data collection and reporting.



In order to meet the growing business demands of data and analytics, Maggie and her team adopted ObservePoint to:

- Automatically QA their analytics and marketing implementation with each new release to their websites and digital platforms
- Efficiently test across multiple domains
- Verify 3rd party tags do not share data to unauthorized parties



Automating QA for Data Collection

In order to perform quality assurance testing on data collection, Maggie often works with the web development team. The relationship between analytics practitioners and developers can be dynamic—as she observed, “It is always a delicate balance working across teams that have competing priorities and pressures. Finding ways to meet everyone’s needs is key to overall project success.”

When analytics breaks websites, developers often respond by shutting off analytics on the live site—resulting in critical data loss while developers work to fix the error.

On the other hand, if new website updates break analytics, analysts have to scramble to figure out the issue and then wait for developers to fix the problem, losing data all the while.

In order to avoid these errors and remove any awkward human dynamics, Maggie determined ObservePoint’s testing capabilities were the right solution to run tests on website updates before they went live.

“Automating QA testing allows us to identify errors early, leading to less friction, so we can minimize the delays that cause downtime.”

Aligning Developers and Analysts

By combining ObservePoint's Audits and Notifications features, Maggie is able to automatically perform QA on websites in staging before they go live. If an error ever crops up, the Audit picks up on that error and notifies the team of the details.

Since implementing this process, the Global Digital Marketing team and the development team have caught data collection errors that, if they hadn't tested, would have made it onto their live site.

Now that they've automated these tests, Maggie and her team have greater confidence in the integrity of their live implementation. They have also been able to increase the efficiency of cross-functional resources, with greater time-to-value delivered through a faster, automated approach to QA.

Regarding these benefits, Maggie said, "With ObservePoint, I'm able to reassure stakeholders that errors won't pop up and that the integrity of their reports will be sound."

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Getting Technical: How to Create an Automated QA workflow

In order to set up the automated QA testing, Maggie worked with developers to create a trigger in Jenkins, their continuous integration solution.

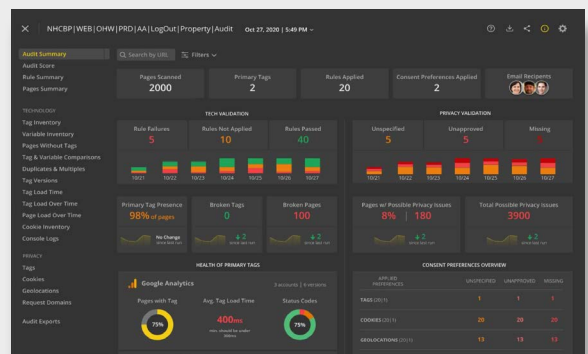
This trigger would kick off an ObservePoint Audit whenever developers pushed an update to the staging environment. The Audit then validates that all expected tags and variables are present and formatted correctly, creating a Jira ticket if any errors occur.

Some key ObservePoint features that make this automated QA workflow possible include:

- Audits, which scan a batch of pages to validate that data collection technologies are firing as expected
- Jenkins Integration, which makes it possible to start Audits whenever a new update is pushed into staging
- Notifications, which communicate errors to the team via email or in the ObservePoint app, as well as submit new tickets in Jira when errors occur

FEATURE HIGHLIGHT: AUDITS

Finning uses Audits to scan their site and discover what technologies are gathering data. Each Audit scans a given number of pages, cataloging the discovered technologies and aggregating them into an easy-to-consume report.



Use Case: No More Page Names

In one situation, after setting up the automated QA process, Maggie received a notification from ObservePoint that Adobe Analytics tags in the staging environment were not capturing page names.

If this issue had been pushed live, analysts would not have been able to accurately analyze page-level metrics because there would be no page name.

Because Maggie and her team were using ObservePoint, they were able to catch the error early and then resolve it before going live.

In another situation, product names weren't being collected properly in analytics. Maggie notified the development team, who quickly resolved the issue.

Sharing her feelings about ObservePoint, Maggie said, "It's reassuring to know that testing is one of the things I don't need to overthink. ObservePoint just runs the tests and notifies us if there are any issues."

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Efficiently Testing Across Multiple Domains

An important benefit of Finning's automated QA process is how they can now efficiently test website updates across multiple domains.

Maggie's team manages the analytics and marketing implementations for multiple regional websites and digital platforms that require QA testing during ongoing website releases. She said, "We can have as many as a hundred variables in one website and a hundred in another. In one week I could have five different releases across five different websites and testing each of those releases can be a challenge."

With ObservePoint, Maggie has been able to set up individualized testing for each domain. These tests run on their own every two weeks according to Finning's release cycle, making it possible for her to cover more ground than she could have on her own.



Image provided by Finning

Protecting Against Unauthorized Data Collection

Another important function of the team is to vet and deploy new technologies that other teams request.

A challenge with new technologies can be their security, since third-party tags are the most vulnerable entry points for unauthorized data collection. In order to verify that none of the proposed technologies deploy unauthorized piggybacking tags or leak data to unauthorized locations, Maggie inspects these tags using ObservePoint.

She said, "I implement the code in development and use the ObservePoint browser plugin, network tools, and ObservePoint's Tag Initiators to make sure that these technologies aren't collecting any PII."

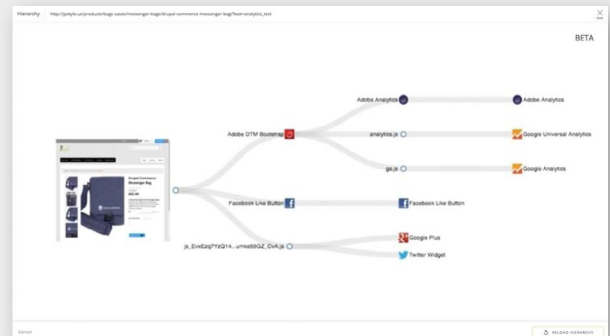
"I use the ObservePoint browser plugin, network tools, and ObservePoint's Tag Initiators to make sure that these technologies aren't collecting any PII."

With Tag Initiators, Maggie is able to quickly visualize which tags are loading and if any are piggybacking off of other tags, and then either authorize or deny these tags. As a result, she is able to protect visitor data, as well as protect Finning from becoming the target of rogue data collection.

FEATURE HIGHLIGHT: TAG INITIATORS

Finning uses Tag Initiators to conduct real-time scans that illustrate the relationship of the analytics and marketing technologies present on every page of their site.

With Tag Initiators, you can quickly see where your analytics requests are referenced and how they are registering. You can also locate duplicate or missing tags and identify unauthorized technologies that are being loaded outside of your tag management system.



A background image of a modern building with large, multi-paned windows. The image is slightly faded and has a yellow rectangular box at the bottom center.

Looking to the Future

When Finning determined their plan to adopt ObservePoint, they were most excited about the low maintenance requirements of the solution, where the team didn't have to actively manage the technology that carries out their QA tests.

By automating their QA process, the team can rest easy knowing that if an error crops up, they'll receive a notification and be able to resolve that error in staging before pushing code live. Looking to the future, Maggie hopes to be able to roll out ObservePoint to other teams to help them catch errors early and automatically, resulting in greater efficiencies for Finning.