

Advanced Guide to PPC Account Audits



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Paid Media Account Audit

One of the most important skills you will develop as you grow in your career is performing an account audit in [AdWords](#), [Bing](#), [Google Analytics](#), and [Google Tag Manager](#). An audit helps you understand what has happened and is happening in the account, where there are opportunities to grow the account, and also cut unnecessary spending.

This advanced guide is going to cover what it takes to perform an audit in your advertising account. We are going to focus on [Google AdWords](#) for demonstration purposes and briefly touch on [Google Analytics](#). However, we wrote this guide to help you understand what you should be looking for and why it is important in any advertising account. We do not want to just focus on one platform. You can take what you learn here and apply it to [Bing](#), [Facebook](#), and other advertising platforms, even if the names of features are different, the outcome and intent could be the same.

When you take over managing an advertising account, you should have an account audit done within the first 48 hours to benchmark performance. If you don't know where you are, then you cannot know if you are doing better than the past in-house person or advertising agency.

What Is An Audit Account?

A paid media account audit is a way to review an account (or multiple accounts) for a brand and understand what is happening in the account: how it currently functions, what the rhythm is, and also the past history of the account.

Why Might An Audit Happen?

There are a variety of reasons why you might want to do an audit. You could be taking over an account from another agency or a brand has hired your agency to manage their account. You could also be doing a yearly audit on your own accounts to make sure everything is in order and you are not missing out on any opportunities. The third reason could be that you are giving the account holder a second opinion on their account and they have hired you for this one-off task.

Why Do I Need An Audit?

The ideal audit should do two things. It will help uncover quick wins in your account that will help you boost your performance. This boost in performance could come in the form of a lower cost per acquisition, a cut in wasteful media spend, or an increase in conversions which could be more sales, signups, or revenue from your current customers.

An audit will also help uncover long-term opportunities that might not be utilized right now. This could be beta features, a/b testing your ads or landing page, and even making sure you are creating mobile content.

Who Should Do My Audit?

This guide is intended for someone who is not new to paid media but wants to make sure everything is working perfectly in their account. You could also be looking to brush up or grow your skills. If you are brand new to paid media and have never looked at an advertising account before, then this guide could be overwhelming for you. You can check out some training on AdWords to start.

Below is how we, at Take Some Risk Inc, always review an account when we take over from another agency or are hired directly from the client. This guide also works if we are building an account from scratch across the main advertising platforms for a client. When we do an audit, we look at every campaign in an account and do not spot check.

How To Start An Audit

There are no right or wrong ways to start an account audit as long as you make sure you have covered all your bases and you do not miss out on any opportunities. A good rule of thumb is to start with your lowest hanging fruit (aka quick wins) and work your way out towards the longer term opportunities that might present themselves in the account. This guide will be written to make it easy for someone to perform an account audit.

AdWords

Account Settings: Preferences - Auto-Tagging

Auto Tagging is a feature in AdWords that automatically tags URL parameters for each keyword and text ad in your AdWords account. The reason you might not want to use this feature is if you are trying to sync up your AdWords data with Hubspot, Marketo or Adobe's Marketing Cloud. A lot of these platforms (and many others) require that your keywords are manually tagged with a URL that tells them the campaign, ad group, and keyword that sent traffic to your site or landing page.

This feature is turned off by default. Check to see what the status of the setting is and unless there is a tracking reason, turn it on in your account. Turning on the feature means that data will automatically flow into your Google Analytics account. Ensure your Google Analytics and AdWords accounts are linked together (see below).

Account Settings: Linked Accounts

Even though Google makes both AdWords and Google Analytics (and a host of other software), if you do not link your two accounts together, then they will not send data between them. You might want to have video data from YouTube flowing into your AdWords account to help with video campaigns and remarketing, which means you will need to link YouTube and AdWords together too.

Making sure you have the data you need to make an informed decision is a key piece of being a successful marketer today.



Google Analytics

Linking your Google Analytics account with your AdWords account will make sure you have all the data you need to make an informed choice. Unless you are sure a property view in Google Analytics will not need AdWords data (including costs and clicks), make sure all properties are linked with your AdWords account. Do this even if you have auto-tagged turned on. The reason for this is because you can then import goals from your analytics account.

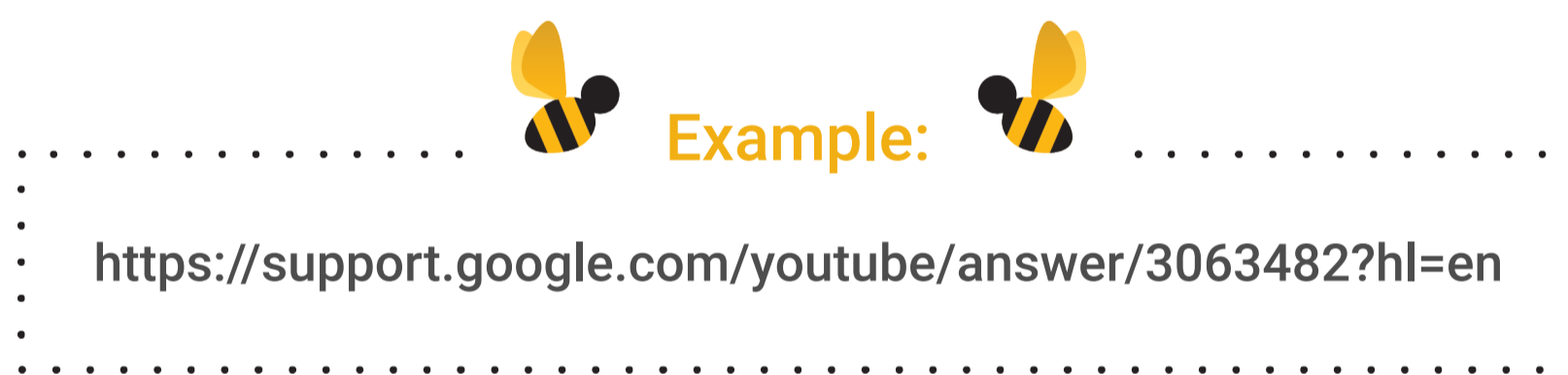
Search Console (formally Webmaster Tools)

When you link with your company's Search Console account with AdWords, you can start to see how ads and organic search listings perform (both alone and together). This will give you a better idea of how you are doing across search overall. This will become important as opportunities around voice, image, and feature snippets become a normal part of our search experience. If you do not have access to your company's Search Console account, talk with the person who does your SEO or who manages the account to help you link them together. If you don't have a Search Console account then look into setting one up.

YouTube

If your company has a YouTube channel, then chances are you are going to do video marketing or remarketing from your AdWords accounts. By linking a YouTube channel to an AdWords account, you can access additional video view statistics, call-to-action (CTA) overlays, and remarketing and engagement statistics such as earned views.

You don't have to link YouTube and AdWords together, but it is highly recommended. Over the last few years, Google has streamlined and integrated YouTube and video marketing fully into AdWords.



Merchant

The Merchant Center is where your product data feed lives if you are looking to run [Google Shopping](#) campaigns. If you want to launch a Shopping campaign then these two accounts have to be linked. You need to have "Administrative Access" to approve the request.

Once the accounts are linked together, the Merchant Centers' product information is available in AdWords for campaign creation. Plus, statistics and data related to clicks from your AdWords campaign are shown in the linked Merchant Center account.

Some important points to keep in mind when you link Merchant Center and AdWords:

- The account owner for your Merchant Center is the only one who can request to link the accounts. New account link requests will appear in your AdWords account on your "Linked accounts" page.
- Either owner of your AdWords and Merchant Center account can remove the link between them at any time. However, neither party can make changes to the others' account.
 - See side note about account management.
- If you remove the account link, shopping campaigns will stop serving ads since they do not have access to the data anymore. You also will not be able to create new campaigns in AdWords based on product data from this Merchant Center account.

Shopping campaigns have become a larger part of paid search over the last few years. They are not easy to run but they can become some of your most profitable campaigns.

One Email To Rule Them All

A good rule of thumb when it comes to running AdWords is to have a Merchant Center or Search Console account. They should all be under one email address whenever possible. A good email is Ads@YourCompany.com

Clients often have two or three different email addresses for different accounts. The challenge is when someone leaves and no one knows the password for the email or how to access the email account. You get locked out and could lose all that data in the account.

Shared Library & Bulk Operations

Shared Library

If there is one part of an AdWords account audit that gets overlooked, it is the Shared Library (and Bulk Operations) in AdWords. This is perhaps because not everyone uses these sections in AdWords with every account they manage, or maybe they forget about it as it is tucked away in an unused part of AdWords. Either way, this is a section that can do the most damage to an AdWords account.

The shared library helps you manage your remarketing list, share budget and bid strategies for different campaigns, and protects your brand by making sure your ads do not appear for searches or on sites you don't want.

Audiences

Does the client have remarketing lists setup? You can now also build remarketing lists in Google Analytics, which is a bit more robust and gives you access to all your data in Google Analytics. Both are great options. It is not an either/or option as you can set up both for your client. However, if your account does not have any audiences then build your audiences in Google Analytics and then import them into your AdWords account.

Making sure you have the main touch points on your site covered under audiences is a good start. Having people who have and have not converted on your site is even better. If you want to take your remarketing to the next level, then you need to dig into Google Analytics and look at what characteristics (device, location, customer journey, etc.) people share that convert and do not convert on your site. Using that data, you can build granular audiences that you can remarket, upsell, and cross-sell to.

Shared Budgets

Are there any campaigns using shared budgets? If so, this could be limiting the potential of one or more campaigns. The best use case for a shared budget is when you have smaller spending campaigns that do not warrant their own budget, or you have a few general campaigns that need help to control their budget. A common practise is to not use a shared budget for campaigns that are your top performers for bringing in revenue, leads, or conversions. Are your shared budgets being used in the right way? If not, then look at removing this from your account.

Campaign Negative Keywords

Similar to negative keywords for your campaigns, you can use Campaign Negative Keywords lists to streamline your process and make sure the right negative keywords are being applied to the right campaigns. You want to check here that your negative keywords are not blocking any ads from showing across your account.

Campaign Placement Exclusions

Your search campaigns have negative keywords. Your display campaigns have placement exclusions lists. Similar to Campaign Negative Keywords lists, check that your placement lists are not blocking any of your display ads from showing on sites you would want. However, there are a lot of low quality sites on Google's Display Network so make sure you do not have ads appear on them or any other undesirable sites.

As a side note, YouTube does not fall under the Google Display Network. If there are any undesirable sites you do not want your brand and content shown next to, add the YouTube channels for these specific sites to your Campaign Placement Exclusions lists.

Bid Strategies

If you want to take some of the heavy lifting and guess work out of managing your campaigns, then bid strategies are for you. Most people would put bids and rules, which we will talk about a bit below, to do the work. Double check that you do not have any bids running in the background that is going to affect how you set up bids (bid modifiers) on your campaigns. This could wreak havoc on your account because your bids could rise CPCs in the background without you knowing.

Bulk Operations

Automated Rules

If your account has rules running, then you will want to check out the attributes that are set for each rule. Having rules run in bulk options and also at the campaign level in your account is counter productive. You will want to have one or the other and not both.

Scripts

Similar to automated rules, you have scripts under bulk operations. [Scripts](#) let you do a host of bulk operations on your account. You can make bids on keywords, pause & start ads, and pull sales data. [Link Checker](#), a very useful script, lets you make sure none of your URLs are broken in your account.

Campaign Settings

The settings for each of your campaigns is as individual as the campaign you have set up. A change in one setting can turn a profitable campaign into one leaking money (or vice versa). Learning why certain settings were picked for an account or a set of campaigns will help you get a better understanding of what is going on in your advertising account. The only goal that matters is the bottom line (Are we making money and are we profitable?).

All Settings

Network

Are we targeting Google Search or Search Partners? It is not an either/or situation, but we want to make sure we are not missing opportunities. Make sure Display is only set for a campaign that should have it. If that setting gets set by accident, it just racks up spend. Running a test to add or remove Search Partners could be a good way to save money in an account.

Location Options (advanced)

Depending on what locations (countries, regions, cities, or DMAs) you are targeting, or even ones you are excluding with location negatives, you want to make sure your "Target" and "Exclude" options are correct based on the following options:

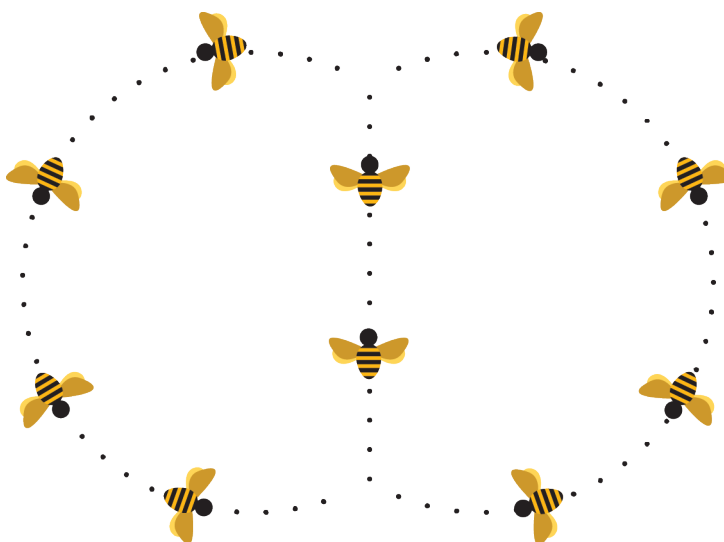
Target Options

- People in, searching for, or who show interest in my targeted location (recommended)
- People in my targeted location
- People searching for, or who show interest in my targeted location

Exclude Options

- People in, searching for, or who show interest in my excluded location (recommended)
- People in my excluded location

Generally it is a safe bet to pick People in my targeted (or excluded) location but that is if you have a simple setup for your campaigns. Generally when targeting the USA or Canada, it is best to break location targeting down by province/state and then have major cities like Toronto, New York and Chicago targeted in each campaign. Knowing how campaigns are performing at the state or city level means you can modify bids with confidence. In the last 6 years, Take Some Risk Inc has never just targeted Canada or USA when setting up a campaign.



Languages

How does Google decide when to show your ad? Answering that question comes down to 3 factors:

1. Your computer's language setting. This setting is the major signal that Google uses to determine what AdWords ads to show you.
2. Your search term. If your computer is set to English but you tend to type a lot of your search terms in French because you are bilingual or maybe your family prefers to communicate in French. There is a chance you will start to see more French ads.
3. Your browser history. The more you surf online, the more Google understands what you are interested in and thus what ads they should show you. If you visit a lot of sites in French and yet have your computer's language setting set to English, you could potentially start to see French ads in the future.

These 3 factors are important to understand because someone may have their computer set to one language but conduct their searches in another. By changing your campaigns to target "All Languages" setting, you can get some increased visibility for your ads without much effort. Is it good to target expats in a country that search in English but have their language on their computer set to their home language/country? That's an important question to ask yourself. These tweaks have been made in accounts as large as \$500,000/month with a result of an increase in performance.

Bid Strategy

If you are new to AdWords, do not have a wealth of knowledge, and do not have tons of account history, then manual CPC bidding is a good place to start.

Budget

Google can spend 100% above your daily set budget. Make sure your budget takes this into account, so that you don't overspend beyond the budget you were given by the client or your boss.

Delivery method (advanced)

You have two options for how your ads are going to be delivered each day:

- 1) **Standard:** This will optimize the delivery of your ads and try to spread your budget evenly over the course of the day.
- 2) **Accelerated:** Accelerated: This will spend your budget more quickly and not optimize the delivery of ads. This may cause your budget to run out early in the day.

A common practice is to put your brand campaigns on "Accelerated" and make sure you do not miss out on anyone trying to find your business. You can also put competitor campaigns under "Accelerated" if they are profitable. Any non-brand campaigns should be on "Standard" delivery unless there is a smart business case to do otherwise. Similar to many of the setting under this section of our guide, you sometimes will need to tweak the setting to fit your unique situation.

Location

Are we targeting the right regions? Or are we excluding regions we want to be targeting? If you follow the advice above about location targeting, then you will have solid data to make the case to modify your bids at a province/state or city level. See Appendix B: shows transaction by location.

Devices

Are we increasing or decreasing our bids on Mobile? Double check Google Analytics to see how conversions performs on mobile, tablet and computers. It is not always 100% cut and dry if people are switching devices while doing their research before buying.

Ad Schedule

Is day parting being used? Is there an opportunity to use it? You may need to create a custom report in Google Analytics that shows this. See screenshot Appendix A for a typical custom report based on transaction/hour for a client. You could build this report to show transactions by day, day of the week, or even by month. You are only limited by the data you have.

Tools & Reports

Conversion Funnel

Are Google Analytics goals importing into AdWords? This will not happen even if you link AdWords and Google Analytics together. You will need to tell AdWords to import goals from Google Analytics. Once you link them together, you should start to see assisted click and impression conversion as well as assisted conversions (assuming conversions have occurred in GA).



Change History

If you ever make a change in your account and want to revert back, or you want to see what changes have been made in the past since the account has been made, the change history feature will be your go-to spot. For most accounts, you can look back at the last 90 days to see what has happened to the account. You can take a longer view with a smaller account. Look for "Change History" under Tools at the top left navigation.



Search Query Report (SQR)

Depending on the size and media spend for your AdWords account, run a Search Query Report (SQR) every 7 - 10 days. You should run one within the first 48 hours of taking over a new account (or doing a one-off audit) to see what negative keywords are missing or see opportunities to add new keywords into the account. Compile a list and set aside for later review.

"Search Exact Match IS"

This is a good report to help you understand how many people are searching for exactly your brand term versus a variation on that term. If the number is low (sub 70%), run a search query report (SQR; see above) for 30 - 90 days and see what comes back in the report. There is potential to add more negative keywords based on the results of an SQR.

Impression Share

How much share of voice are we capturing? The following 4 columns will help you understand how you are performing compared to competitors: Search Impr. share, Search Lost IS (rank), Search Lost IS (budget), and Search Exact match IS

For Brand you'll want 90+% for "Search Impr. Share" as this is mean you are capturing the majority of impressions for your brand name. Anything less and you either have competitors bidding on your brand terms and or you are not spending enough money. The latter of that can be seen by what percents are in Search Lost IS (rank) & Search Lost IS (budget).



Google Analytics & Google Tag Manager

Google Analytics (GA)

GA Tracking Code

Is it firing? Make sure the right UA ID is attached to the right account in AdWords.

All Data View

Each client should have a raw GA View that has unfiltered data passing through. This will help with checking for errors with other GA Views for the client in the future.

Filtered Data View

This View will have filters attached to it. All future GA Views will be based off this one. You can divide Views by country or subdomain (see sidebar); depending how a client structures their site. This will help with sifting through data and looking for trends.

AdWords

Is this linked with GA under Property in the Admin Panel? This will help with passing data between AdWords and GA.

Search Console (formally Webmaster Tools)

Is this linked to AdWords? This will pass data back to GA for campaigns. Will also help with SEO efforts and looking starts around keywords.

Remarketing List

Is this setup? Set up a basic list to start building a database for future use. - e.g abandon cart, transaction complete, people who visit key pages on your site.

Domain VS Subdomain

When you are setting up your Google Analytics account for the first time or if you have taken over an account from another agency or brand, then it is important to remember that Google Analytics only tracks URL after the forward slash (/) in a domain.

If you have created your blog at blog.YourCompany.com. Then Google Analytics won't be monitoring that URL for traffic.

To track your blog, you will need to add a filter in your Google Analytics account.

Google Tag Manager

You should try to get each client setup with Google Tag Manager (GTM). GTM lets you set up tracking code on your website once and never have to touch that code again. The reason for this is because your team can then edit tags, pixels, and other pieces of software in your Google Tag Manager (GTM) container versus on your website. This means non-developers can easily add a new tracking pixel for an advertising platform or even remove one that is not going to be used again. This will help speed up changing tracking code(s) and make sure pixels are firing for each product being used.

Appendix A & B
Appendix A

Edit Custom Report

General Information

Title Transactions / Hour

Report Content

Report Tab x + add report tab

Name Report Tab

Type Explorer Flat Table Map Overlay

Metric Groups

Metric Group

Transactions

+ add metric

+ Add metric group

Dimension Drilldowns

Hour

+ add dimension

Filters - optional

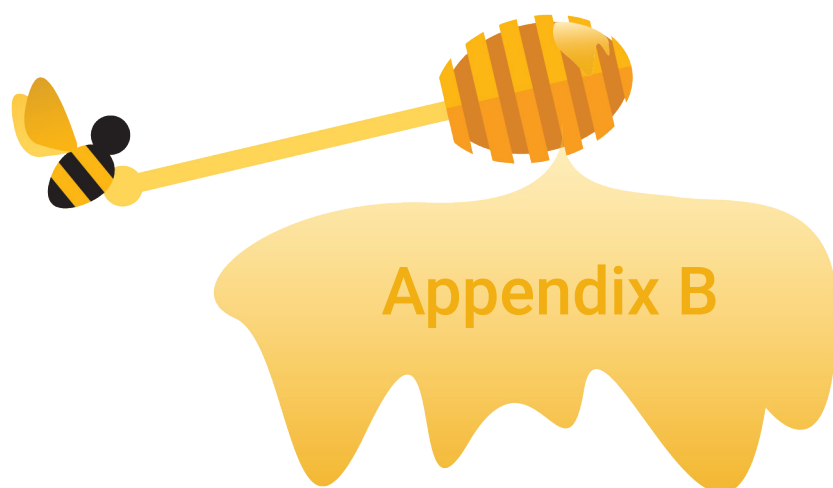
+ add filter

Views - optional

All views associated with this account

Danier New

Save Cancel



Edit Custom Report

General Information

Title Transaction by Location

Report Content

Report Tab x + add report tab

Name Report Tab

Type Explorer Flat Table Map Overlay

Zoom Level Country Canada

Dimension City

Metric Groups

Metric Group

Transactions

+ add metric

+ Add metric group

Filters - optional

+ add filter

Views - optional

All views associated with this account

Danier New

Save Cancel

