The Ultimate 2019 Review Management Checklist
Review Management Audit Checklist

☐ **1. Create Audit Review Listings Spreadsheet**

☐ **Listings claimed?**
- ☐ Google
- ☐ Facebook
- ☐ Yelp
- ☐ BBB
- ☐ Industry Specific Review Sites

☐ **Review Quantity**
- ☐ Total
- ☐ Last 3 months?

☐ **2. Claim, Set up and Optimized Review Site Listings** (if you're starting from scratch)

☐ **Google My Business**
- ☐ Claim Listing
- ☐ Optimize Listing

☐ **BBB**
- ☐ Claim Listing
- ☐ Optimize Listing

☐ **Yelp**
- ☐ Claim Listing
- ☐ Optimize Listing

☐ **Industry Specific Review Sites**
- ☐ Claim Listing
- ☐ Optimize Listing

☐ **Facebook**
- ☐ Claim Listing
- ☐ Optimize Listing

Attributes to include in review site listings:

- ☐ NAP (name, address and phone)
- ☐ Photos + videos
- ☐ Question and answers and/or FAQs (where relevant)
- ☐ Descriptions (long and short where appropriate)

- ☐ Keywords + tags + categories
- ☐ Hours of operation
- ☐ Website address
- ☐ Booking and/or appointment URLS (if applicable)

- ☐ Tracking details (e.g. discount/ store codes, ad extensions, call tracking phone numbers, labels, etc.)
- ☐ Call to action
- ☐ Website address
- ☐ Balanced reviews

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☐ **3. Create Copy and Audit Top 3-5 Competitors Review**

☐ **4. Set Quarterly Goals**

    ☐ **Set Internal Goals** (5 new 4 or 5 star reviews on 3 different review sites each month). Priortize Google First.

    ☐ **Set Competitor Goals**

        ☐ Can you catch competitors in total quantity on Google? On Facebook? Other sites?

        ☐ Last 3 months?

1. Set Strategy

- [ ] **Decide who is in charge of review management** (support, marketing, owner, agency).

- [ ] **Create review management protocols**
  - [ ] Set up notifications for person managing reviews so they know reviews are coming in

- [ ] **Create employee incentive program**
  - [ ] Will employees get any sort of reward for earning reviews?
  - [ ] What policies are in place to prevent scamming the program?

- [ ] **Create response policy for reviews**
  - [ ] Responding to all reviews? Negative reviews?
  - [ ] Scripts? Tone? Ability/empowered to offer customers service and solve problems?

- [ ] **Set reporting guidelines**
  - [ ] Sharing reviews internally with executives
  - [ ] Sharing positive reviews with all employees (recognition)
  - [ ] Distribute incentives to employees if program for review acquisition is implemented

- [ ] **Set distribution guidelines for incentives**

☐ **2. Review Acquisition Implementation** (Using Vendor for Review Management or Setting up Manually)

☐ **Set up review funnel** (landing page with review site links — make it easy to leave reviews)

☐ **Set up email drip campaigns to automate review requests**

    ☐ Determine email drip cadence

        ☐ How many emails?

        ☐ When will they be sent?

        ☐ Who will the replies be directed to?

    ☐ Write copy for email campaigns

        ☐ Personalize

    ☐ Include links to review sites or review funnel

    ☐ Configure with Mail Service Provider

☐ **Set up SMS campaigns to automate review requests**

☐ **Determine SMS cadence**

    ☐ How many texts?

    ☐ When will they be sent?

    ☐ Write text message (make sure to stay within character limit)

    ☐ Configure with SMS provider

☐ **Set up repeatable routine to upload email address/phone number spreadsheets for review request campaigns** (if not automated)

    ☐ At time of transaction?

    ☐ Weekly?

    ☐ Monthly?

☐ **Train sales and support staff on when and how to ask for reviews**

    ☐ Inform staff on strategy

    ☐ Provide staff with review site links, review funnel link, and email signature snippets for review requests

    ☐ Orientate staff on incentive program if implementing and how they would be tracked and rewarded

☐ **Set up testimonials / review showcase page on website**

    ☐ Implement automated plugin with aggregated reviews

    ☐ If no plugin, create schedule for adding new reviews/testimonials

    ☐ Write up reviews in review schema (or use setting in review stream plugin to include schema data structured markup)

☐ **Set up strategy for social sharing of positive reviews**

Decide on which social media sites you're going to share your reviews

    ☐ Facebook

    ☐ Twitter

    ☐ Instagram

    ☐ LinkedIn

    ☐ Set up automation settings of social sharing if you're using a review management platform

If not using a platform, create a plan for creating social media images

    ☐ When will positive reviews be shared?

    ☐ What ratings will be shared (4 and 5 star? Only 5 star?)

    ☐ How will they be shared?

        ☐ Manually vs. Scheduled

        ☐ Designed as image vs. Review Site Link