



The Ultimate 2021 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 (fill our details — link to optimization articles)

BBB

- Claim Listing
- Optimize Listing (fill our details — link to optimization articles)

Yelp

- Claim Listing
- Optimize Listing (fill our details — link to optimization articles)

Industry Specific Review Sites

- Claim Listing
- Optimize Listing (fill our details — link to optimization articles)

Facebook

- Claim Listing
- Optimize Listing (fill our details — link to optimization articles)

Attributes to include in review site listings:

- | | | |
|--|--|---|
| <input type="checkbox"/> NAP (name, address and phone) | <input type="checkbox"/> Keywords + tags + categories | <input type="checkbox"/> Tracking details (e.g., discount/ store codes, ad extensions, call tracking phone numbers, labels, etc.) |
| <input type="checkbox"/> Photos + videos | <input type="checkbox"/> Hours of operation | <input type="checkbox"/> Call to action |
| <input type="checkbox"/> Question and answers and/or FAQs (where relevant) | <input type="checkbox"/> Website address | <input type="checkbox"/> Website address |
| <input type="checkbox"/> Descriptions (long and short where appropriate) | <input type="checkbox"/> Booking and/or appointment URLs (if applicable) | <input type="checkbox"/> 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). Prioritize. Google First.

Set Competitor Goals

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

___ Last 3 months?



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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



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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



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Set up testimonials / review showcase page on website

- ___ Implement automated plugin with aggregated reviews
- ___ If no plugin, create schedule for adding new reviews/testimonial
- ___ 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 stars?)
- ___ How will they be shared?
- ___ Manually vs. Scheduled
- ___ Designed as image vs. Review Site Link