

Manager's Training Checklist

This training checklist helps orient you to the platform for the first time. Use this to define responsibilities and expectations for your team. Refer to the [Starter Kit](#) for more information.

Dashboard

Make sure you know how to:

- Filter the dashboard by date.
- Color map by Reputation Score vs. Rating.
- Identify trends in the Summary dashboard.

You try!

- What was your average reputation score (all locations) for the last year? _____
- Which location had the highest average rep score last year? _____
- What was your average star rating (all locations) for the last year? _____
- Did review volume go up or down from last year to the year before? _____

Discussion What's the difference between "Last Year" and "Previous Year?"

Reviews

Make sure you know how to:

- Filter reviews by source and sentiment (clickable charts).
- Write appropriate responses for reviews ([best practices](#)) and leverage macros.
- Forward a review and use other review options.
- Set review notifications.

You try!

- From which source did the most reviews come last year? _____
- In what month did you get the most reviews? _____
- What percentage of your total review volume was positive last year? _____
- What percentage of your reviews did you respond to last year? _____

Discussion: What is an "updated" review? Can you respond more than once?

Response Management Plan:

- Who will respond to reviews? _____
- What is the expected SLA for responding to reviews? _____
- What is the response goal in the next 6 months? _____% pos | _____% neg
- How far back will you respond to old reviews? _____
- What is the triage process for negative reviews (e.g., dedicated email or phone)?

- How will these policies be communicated (and monitored)? _____
- Remember to download the mobile app!

Operations

Make sure you know how to:

- View “tornado” compare expanded categories to industry.
- Filter the word cloud by sentiment, and click to view individual mentions.
- Drill into sentiment map to compare by location.

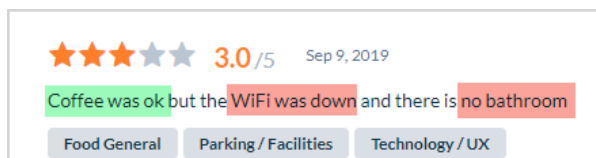
You try! (Explorer)

- In what category do you have the most negative sentiment over the last year? _____
- What sub-category has most negative sentiment? _____
- Why? (Click into word cloud) _____

You try! (Insights)

- What location has the most positive feedback for your most talked about category?
- What are your top 3 strengths? _____
- What are your top 3 weaknesses? _____

Discussion: How is feedback scored in the sentiment map (0 – 100)?



Insights Management Plan:

- How will you share this information? Who should receive insights reports? How frequently?

- How will you use the leaders to train the laggards? _____
- How will you reward / motivate Big Movers? _____

Requests

Make sure you know how to:

- Send a quick request from the web and from the mobile app (using [best practices](#)).
- View the request leaderboard, metrics, and history.

You try!

- Which location (or user) has sent the most requests in the last year? _____
- What's the average CTR for all locations in the last 180 days? _____

Discussion: What method of review request typically has the highest CTR? Why?

Review Request Management Plan:

- What method(s) of review requesting will you use? (Refer to [Checklist](#))

- How will you share this information? Who should receive leaderboard reports? How frequently?

- How will you incentivize top requesters? _____

Social Suite

Make sure you know how to:

- Add assets to the library or create post-ready content.
- Create / schedule / edit posts (location, channels, variables, picture editor, publish times).
- Respond / engage with fan comments in Live Streams.
- View metrics and identify posts that trigger high engagement.
- Set social notifications.

You try!

- What location has the most page engagement on Facebook in the last year? _____
- How many posts need replies? _____

Discussion: Have you been leveraging Google My Business Posts? Consider implementing a strategy to schedule those posts every 7 days for all locations to keep them front-and-center on search.

Social Management Plan:

- Who will be responsible for scheduling posts?

- What guidelines will you have for posting?

- How often should each location post? _____
- Who will respond to social comments? _____
- What is the expected SLA for responding to social comments? _____
- How will these policies be communicated? (Consider leveraging a [Champion's Guide](#).)

- Remember to download the mobile app!

Listings

Make sure you know how to:

- Identify trends in Listing Performance.
- Interpret audit summary and manage publisher suggestions.
- Request changes to source of truth (or make them on your own) when something changes.

You try!

- How many total listing views have you had in the last 12 months? _____
- What percent of listing views are for Google? _____
- What's the most popular day and time of the week that people call you? _____
- How many data points are you currently managing through the platform? _____

Discussion: What does "Pending Update" mean? Do you need to take any action?

Listings Management Plan:

- How will you share this information? Who should receive insights reports? How frequently?

- Who is responsible for making/requesting updates to listings? _____
- Who is responsible for reviewing publisher suggestions? _____

Reputation Score

Make sure you know how to:

- Find help and FAQs on how to influence each thermometer.
- View Reputation Score trend over time and leaderboard reports.

You try!

- Is your reputation score above industry average (average for all locations)? _____
- Which location has the lowest reputation score? _____

Discussion: *What single thing can you do to influence all the top 5 thermometers?*

Reputation Score Plan:

- How will you share your reputation score internally? Externally?

- How will you use reputation score to incentivize performance? _____