

# 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!

**Experience**

**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.

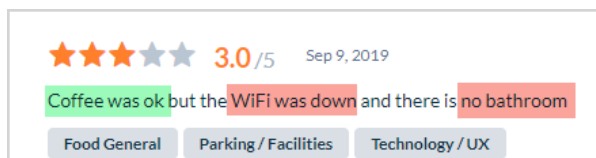
**You try! (Explorer)**

- 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 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.
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### 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 component.
- 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? \_\_\_\_\_