

Quick Guide to Getting Started with Reputation Builder

**Customer Feedback
& Online Review Platform**

Welcome

We're excited you've chosen the Reputation Builder as your platform to manage customer experience through customer feedback and online reviews. This quick guide will help you get your account set-up, so your business can start capturing customer feedback. While this is a very robust platform, this "Quick Guide" was created to have you up and running in about an hour.

This quick guide will show you how to:

- 1) Finish adding your business information, select online review sites, and add your logo and brand colors.
- 2) Choose a Request Mode and customize the steps and content.
- 3) Set your alerts and notifications for your account.
- 4) Add your customer list of emails (or other methods to engage customers).

Building A Better Business

We're excited to work with you and know that our product will help you in your goal to build a better business by listening to your customers. Our platform provides a proven process to gain customer insights and feedback by offering:

- Consistency – Ask all of your customers for feedback
- Simplicity – Once set-up, just add customers and work to improve
- Clarity – Capture Net Promoter Score[®], ratings, testimonials, and reviews

2 Need a helping hand with setup? [Email our support team](#) your questions.

Setting Expectations

First let's look at some baseline expectations and terms that will help you.

1. Our platform makes customer feedback and online reviews easier, it will NOT create 5-star reviews for a business giving 2-star service.
2. Our platform is the engine, but your customer is the “gas” to make it run. You must consistently add emails or mobile numbers to get results.
3. It's a numbers game. Just like email marketing, only certain percentages of your customers will open your emails or click a link. Here is an average process to outline what you should work towards with our platform.

How to get 10 new reviews?

To get 10 new 3rd-party reviews, you need to send 200 requests on average.*



*Numbers in each step will vary based on Request Mode and location's NPS score.

IMPORTANT TERMS:

- **1st-party review:** Customer comments, feedback, testimonials or any text given directly to you, the business.
- **3rd-party review:** Customer comments written at online review sites like Google, Facebook, or Trip Advisor.
- **Net Promoter Score (NPS):** A business metric to help you measure your “word of mouth” growth for your business.

- 3 Need a helping hand with setup? [Email our support team](#) your questions.

1. Complete Your Setup

When you created your account with us, your business location was added to the Reputation Builder, you just need complete all the major details and set-up the tool.

Finish Adding Business Location Details

If you are a 1 location business, then you'll first want to add more business details, your brand colors and logo.

Here are the steps to add more business details:

- Login to [REPUTATION BUILDER](#).
- Click the SETTINGS dropdown on the left-hand menu.
- Select BUSINESS DETAILS
 - Add your WEBSITE URL
 - Select the BUSINESS TYPE that most accurately describes your business, and the BUSINESS SUBTYPE if prompted, as these selections are part of your Review Widget, code installation, and provide SEO benefits.
 - Choose your TIMEZONE
 - Then save by clicking the UPDATE ACCOUNT button

Multi-location Businesses Only: Add Another Location

If you have more than one location, like 3 locations, you will need to Add Another Business in Accounts for each location (this is because each location will have its own data and online review profiles) then login to the tool to add more details.

Here's how to add additional business locations:

4 Need a helping hand with setup? [Email our support team](#) your questions.

- Login to [WHITESPARK ACCOUNTS](#).
- Click CHANGE SUBSCRIPTION.
- Select ADD ANOTHER BUSINESS button.
- Complete the business contact and location information, and SAVE CHANGES.
- Repeat the above steps for all your locations.
- Once you've added all your locations, click the LAUNCH
- Select the BUSINESS TYPE that most accurately describes your business, and the BUSINESS SUBTYPE if prompted, as these selections are part of your Review Widget, code installation, and provide SEO benefits.

If you have multiple business locations, repeat this process and add each location to the platform. If you have more than 20 locations, please contact us so we can provide a bulk location upload spreadsheet.

Add Your 3rd-Party Review Sites, To Ask & To Monitor

In this step, you will select 3rd-party online review websites you want to direct customers to write a review on and which sites you want to monitor for new reviews. Keep in mind you will need to set these review sites FOR EACH LOCATION, as each location will have a different profile link on these sites to leave reviews specific to that location/profile. You can vary review sites per location, you can add or delete review sites at any time, and you can also re-order them at any time (just drag and drop).

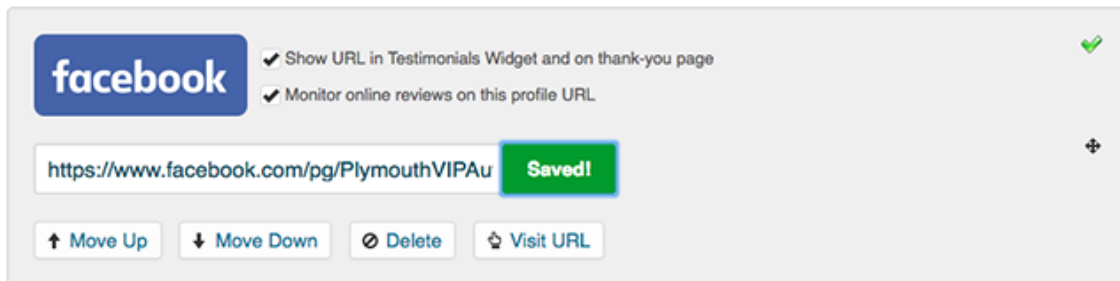
- Select the location you want to add review sites for, unless you have just one location; in this case, then you will already be in that location.
- Select SETTINGS on the main menu and then select ONLINE REVIEW LINKS from the drop-down navigation.
- Choose the review site you want to add from the drop-down on the page and click ADD PROFILE.

5 Need a helping hand with setup? [Email our support team](#) your questions.

- Go a new window or tab in your Internet browser and go to the profile page of your business on that site. You want to copy/paste the URL of that profile/listing into that sites profile you selected.

EXAMPLE: Adding the Facebook profile for Plymouth VIP Auto

Facebook Profile: <https://www.facebook.com/pg/PlymouthVIPAuto/reviews/>



When saved/added you will notice the green check mark as pictured above. You will also notice the checkmarks allowing you to ask for reviews on this site by selecting the “Ask for reviews on this profile URL” line and/or monitor this site for reviews by selecting the “Monitor online reviews on this profile URL” line.

Pro Tip: We have found that a small amount of choice is best when it comes to your selection of online review websites. Try to select between 2 to 4 sites total. Give a few options for the best response rate. Depending on your plan, you can monitor up to 5 or 10 review sites.

Set Your Brand & Colors

Your feedback process will be branded with the look and feel of your organization. This step will help you add your logo, accent color, and an optional banner image to appear on specific templates in your email requests and feedback landing pages.

6 Need a helping hand with setup? [Email our support team](#) your questions.

- Select SETTINGS on the main menu and then select BRAND & COLORS.
- Upload your Logo to the platform using a .JPG or .PNG file format.
- Select your Accent Color for your account. You will want this to be one of your brand/logo colors and it should be a medium to dark color because of how it's used in buttons and in text.
- Select and add your Banner Image to be used on certain landing pages (not emails) in the platform. The banner image is optional, and you can always add it, view your templates, and then delete or change it.

Our email and page templates are designed to be clean, professional and enable the customer to give feedback. You are able to edit any of these settings at any time in our platform.

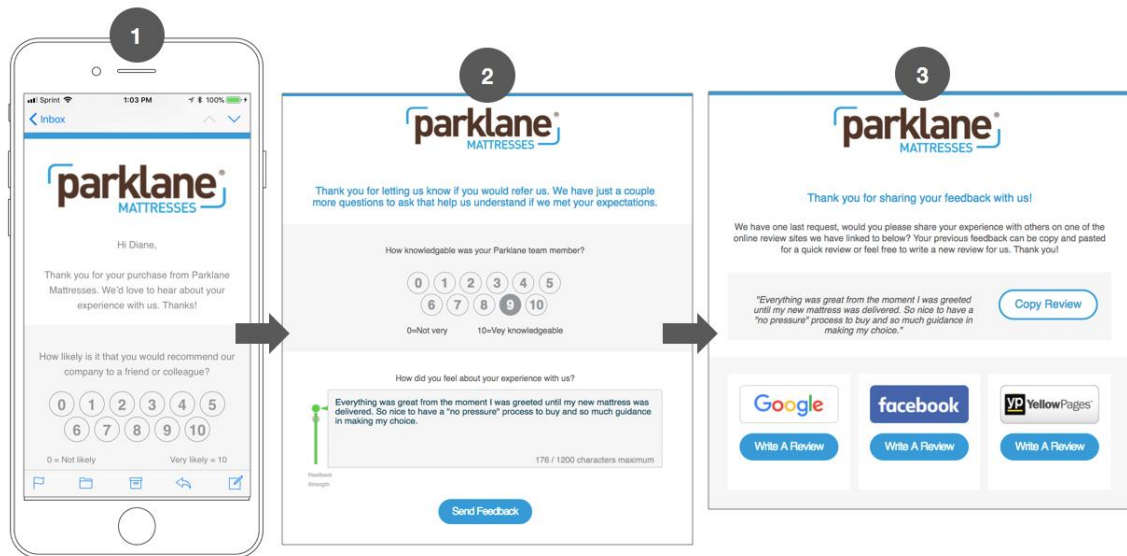
2. Choose A Request Mode

The platform uses a process of emails and landing pages to communicate with your customers called the “Request Mode”. These modes have various options for requesting feedback, capturing Net Promoter Score, gathering 1st-party reviews, segmenting customer experiences (positive or negative), and encouraging 3rd-party online reviews.

Each of our three Request Modes has a primary and secondary focus, allowing you to choose a mode that best fits your goals and then customize the options. Click on REQUESTS and then choose REQUEST MODES from the menu.

7 Need a helping hand with setup? [Email our support team](#) your questions.

Below is an example of the feedback flow for ULTIMATE MODE. The diagram is to give you an idea on the touch points our platform provides for communicating with your customers. It's a combination of email and landing pages.



Ultimate Mode (3-step): Our full offering of customer feedback features

Primary Focus: Customer feedback, generating 1st-party reviews to display on your website with the Review Widget for SEO benefits, option to ask up to five (5) survey questions and capture your NPS score.

Secondary Focus: Encourage 3rd-party online reviews

Review Mode (2-step): A quick path for NPS and to ask for 3rd-party reviews

Primary Focus: Generate 3rd-party online reviews and capture your NPS Score

Secondary Focus: 1st-party reviews to display for SEO benefits on your website

Direct Mode (1-step): Requests 3rd-party and 1st-party reviews right away

Primary Focus: 3rd-party review request without NPS score and segmenting

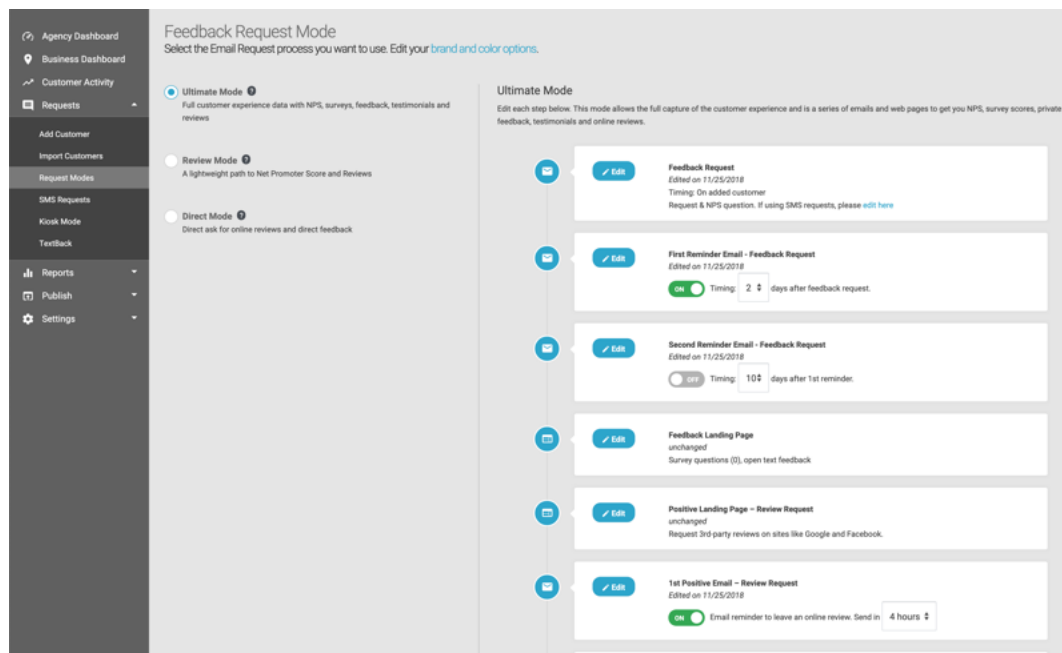
Secondary Focus: 1st-party reviews to display for SEO benefits on your website

8 Need a helping hand with setup? [Email our support team](#) your questions.

Edit the Flow of Your Chosen Request Mode

On the Request Modes page, you will select the mode you wish to use on the left side of the page. Once you have selected your mode you will edit the content, steps and options of that mode on the right side of the screen.

It's important to note that each mode is separate and has its own settings, content and steps to its process. The Request Modes screen is below, with the Ultimate Mode selected.



There are many options to customize including:

- Positive Feedback Page – This page displays for users that rate you a “7” or higher and asks them to write a 3rd-party online review.
- Negative Feedback Page – This page displays for customers rating you “6” or lower and offers an apology as well as a call to action to leave more direct feedback to the business. 3rd-party review sites are also shown here to be in compliance with Google’s Terms of Service.

9 Need a helping hand with setup? [Email our support team](#) your questions.

To edit each step, click the EDIT button. You will then be shown the editor for that step so you can customize and save the content. You will notice some steps have ON/OFF options available and timing settings for automatic delays. Again, each step has its own template, content and options so review them closely.

Feedback Settings

The Feedback settings page has additional options to help you customize the feedback process.

- Click SETTINGS and then FEEDBACK SETTINGS in the drop down.
- Positive Feedback Page Threshold – We set the default at “7”, meaning all customers rating you a “7” or higher will receive the positive experience content, those rating you a “6” or lower will receive an apology and negative experience content. We choose this setting based on the Net Promoter Score levels.
- Feedback URL – This short link can be used to land customers directly on your feedback page. Many businesses include this link on a web page, in their email signature, on printed postcards, or any existing communications they already have going out to your customers.

3. Email Notifications

Notification Settings

Basic settings have been “pre-checked” for you on this page. Let’s cover the ones we have selected by default:

- Click SETTINGS and then NOTIFICATIONS in the menu.

10 Need a helping hand with setup? [Email our support team](#) your questions.

- Under *Feedback Alert Notification Settings*, ACCOUNT OWNER and BUSINESS OWNER have been checked. This determines who receives the emails when your customers leave feedback via the platform. You are the account owner and business owner. (You can set-up additional users in the system for staff/team members)
- Under *Feedback Alert Notification Settings*, our initial recommendation is that you receive all feedback, so BOTH POSITIVE & NEGATIVE is checked.
- Under *Online Review Alert Notification Settings*, SEND NEW ONLINE REVIEW ALERTS is checked. This field is to designate who receives email alerts when we detect new online reviews on sites like Google, Facebook, TripAdvisor, etc. You can add more than one email address to this field, just separate them by commas. BOTH POSITIVE & NEGATIVE alerts are checked by default.
- Under *Performance Report Mailer Setting*, SEND PERFORMANCE REPORT is checked. We deliver your performance report to your email inbox weekly or monthly (your choice). Enter the email(s) you want to receive the report. You can also access this report any time in the platform by clicking on REPORTS menu, and then by clicking on PERFORMANCE REPORT.

4. Add Your Customers

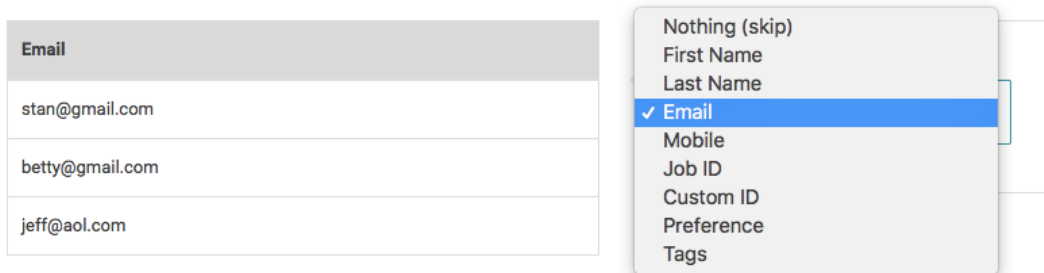
The platform offers many different ways to acquire feedback from your customers. The most common way is to use your customer's email address to proactively ask them for feedback and reviews. Here's how:

Add A Single Customer

- Select Customer Activity from the menu for the location you wish to add a customer to. To add a single customer, click + ADD CUSTOMER. Add their first name, last name, email address (or mobile number) and then check "Send feedback request immediately".

Upload A Customer List

- To upload a list, from the menu go to **Requests > Import Customers**.
- Select the Excel Spreadsheet or CSV file you wish to upload.
- The uploader will show you the columns in your spreadsheet and will auto-assign them to the fields in our platform. You can change the auto-assign as needed. If a column from your spreadsheet is not needed, simply set it to "Nothing (skip)". An example is below.



Sending Your List

- Once you have added a list of emails, you will want to set the requests to be sent automatically. From the Customer Activity screen, in the Request Mode box at the top of the screen, click the small blue arrow to select **Sent Automatically**.
- From the pop-up window, set the number of emails or text messages to be sent per day. If you are uploading your list of new customers once a month, set the emails/texts per day to clear that list in 30 days. If you are uploading a list of 600 customers from 6 months' worth of transactions, you will want to disperse requests over 2 or 3 months. It is BEST to mimic your real-world customer cycle.

Example: Average of 150 customers per month, set to 5 per day.

Average of 450 customers per month, set to 15 per day.

*** DO NOT send out all of your requests in one day (our setting helps regulate this). This approach will hamper the dates on your Review Widget display and can also trigger filtering by the online review sites like Google, Facebook, and Trip Advisor when multiple reviews show up on one day. The search engines and review sites are looking for a natural flow of reviews, otherwise they get suspicious and start filtering them.



Send Yourself A Test

Add yourself and/or other staff members as a customer to the platform and hit send. You can then see the process as your customer does to fine tune anything.

You're Up and Running, What's Next?

We've covered the basics to have you up and running. We're hoping this Quick Start Guide will help you build better relationships with your valuable customers. Following the tips in this guide will help you get 1st-party and 3rd-party reviews to help market your business to new customers and ratings to ensure your current customers love you.

A Few More Pro Tips

- **IMPORTANT:** There are two big “review optimizations” you can make that will GREATLY impact your success with our platform. The first is the “human ask”. Make sure you tell your customers in person you will be asking them for feedback and reviews. This creates a stronger responsibility to respond for the customer and also ensures your email or text isn't a surprise. The second is to ask for feedback as close to the purchase as possible. Adding customers daily or weekly is a must, and even better is an integration to send customers from your CRM or POS to the platform automatically.
- Once customers have provided feedback, install or embed the [Review Widget](#) on your website. This widget displays your 1st-party reviews for a big SEO benefit in the Google search results.
- Share your Performance Reports with your staff to involve everyone in customer satisfaction, Net Promoter Score, and review ratings.