AUTOMATED REVIEWS

GETTING STARTED

CLIENT & AGENCY RESPONSIBILITIES

What is required before setup, launch and ongoing operation

PURPOSE

This guide outlines the information, approvals, access and ongoing duties required from the client and Blue Collar Digital before an automated review-request system is implemented.

1 BUSINESS & REVIEW PROFILE INFORMATION

Information the client provides before implementation begins

- Legal business name
- Public-facing business name
- Complete physical business address
- Website address
- Main business telephone number
- Main business email address
- Google Business Profile status and access
- Other review platforms in use
- Name, email and mobile number of the authorized owner
- Services offered and normal service area
- Preferred review platforms to prioritize
- Privacy-policy and terms pages, if available

CLIENT RESPONSIBILITY

The client is responsible for providing complete and accurate business and review-platform information and for confirming that the authorized owner may approve the setup.

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2 CURRENT REVIEW PROCESS

How reviews are requested today and how the automation should work

- Whether reviews are requested today
- Which review sites matter most
- How customer contact details are collected
- Whether there is an existing customer list or CRM
- When a review request should be sent
- Whether requests should go out by SMS, email or both
- Which jobs, invoices or appointments should trigger a request
- Whether reminder requests are desired
- Whether some customers should be excluded
- Whether special rules are needed for repeat customers or high-value jobs

3 STAFF AND ACCESS INFORMATION

Details required for employees who will monitor review activity

- Full name
- Work email
- Mobile number
- Job role
- Permission level
- Whether the employee may reply to reviews
- Whether the employee monitors customer concerns
- Work schedule or availability

ACCESS BEST PRACTICE

The business owner should retain administrator access. Employees should receive only the permissions needed for their jobs.

4 MESSAGE & FOLLOW-UP REQUIREMENTS

Decisions that shape each review request and customer reply process

- Desired tone: friendly, professional, grateful or concise
- Which business name appears in the request
- Whether a direct review link is included
- Whether SMS, email or both are used
- Whether a thank-you follow-up is required
- Whether English, French or another language is required
- Who is responsible for answering customer replies
- Expected response time for concerns or complaints
- How low feedback or customer concerns are handled
- How opt-out and no-contact requests are handled

CLIENT & AGENCY RESPONSIBILITIES

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5 BUILDING THE AUTOMATED REVIEW WORKFLOW

Responsibilities before the system is activated

The workflow should send the right request at the right time, direct customers to approved review profiles and give staff a clear process for replies, concerns and opt-outs.

CONTENT, ACCESS & WORKFLOW APPROVALS

SETUP RESPONSIBILITIES

THE CLIENT

- Provides accurate customer contact and completion data
- Approves review links, message wording and timing
- Confirms which event triggers each request
- Confirms who receives customer replies or alerts
- Reviews consent, privacy and opt-out language

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- Connects the approved review profiles and customer data source
- Builds the trigger, delay, request and reminder steps
- Configures reply routing, notifications and stop conditions
- Adds approved branding, links and message content
- Documents the final workflow and known limitations

6 LAUNCH TESTING & APPROVAL

Checks completed before real customer requests are sent

- Confirms test customer records may be used
- Reviews test SMS and email messages
- Opens and verifies every review link
- Confirms staff receive replies and alerts
- Approves the final launch date

- Tests the trigger, timing and reminder sequence
- Checks delivery, links and mobile formatting
- Confirms duplicate requests are prevented
- Tests opt-out, reply and stop conditions
- Records approval before activating the workflow

IMPORTANT

The automated workflow should remain inactive until the client has approved the message content, review links, trigger rules and test results.

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AFTER-LAUNCH RESPONSIBILITIES

ONGOING SUPPORT

THE CLIENT

- Monitors incoming reviews, replies and customer concerns
- Keeps staff, review profiles and business details current
- Reports delivery, link or workflow problems promptly
- Approves future message, timing or workflow changes

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- Troubleshoots configuration issues within the agreed service scope
- Updates approved links, messages and routing rules
- Tests approved workflow changes before activation
- Documents material changes and known platform limitations

IMPORTANT

Accurate customer data, current review links and clear staff ownership help prevent duplicate requests, missed replies and incorrect follow-up.

7 CLIENT RESPONSIBILITIES AFTER LAUNCH

Ongoing account, operations, compliance and improvement tasks

ACCOUNT & BILLING

- Keep HighLevel and connected services active
- Pay SMS, email, phone and integration charges
- Keep business and billing information current

DAILY OPERATIONS

- Monitor new reviews and customer replies
- Respond to concerns during agreed business hours
- Notify Blue Collar Digital about staff or routing changes
- Report delivery or review-link problems promptly

CONSENT & COMPLIANCE

- Honour STOP, unsubscribe and no-contact requests
- Use customer information only for approved purposes
- Keep privacy and consent language current
- Avoid misleading or unapproved message content

REVIEW & IMPROVEMENT

- Review delivery and response results regularly
- Check for duplicate, mistimed or failed requests
- Keep review profiles and links accurate
- Approve future workflow or message improvements