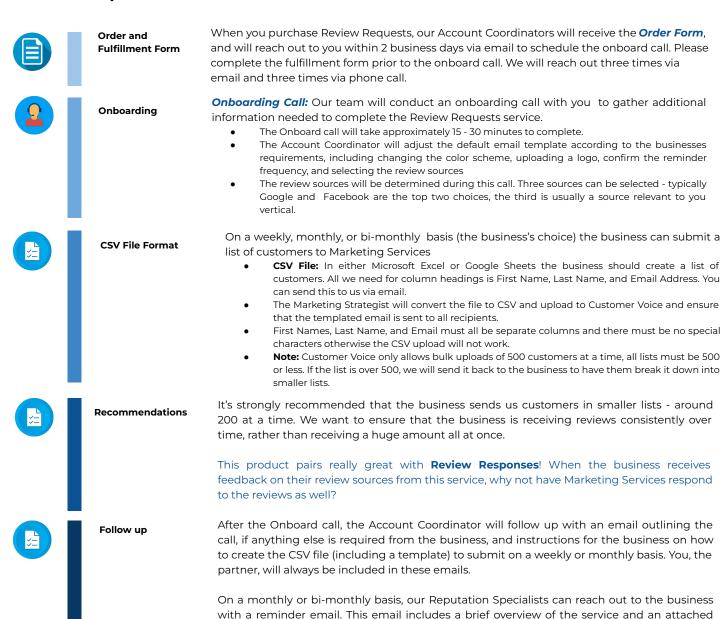# Review Requests
Fully Managed Solution

A complete setup of Customer Voice along with a walk-through of how to submit CSV customer lists on a weekly or monthly basis to the Marketing Services team. We will upload these customer lists to Customer Voice and send Review Request emails to each customer. **Customer Voice** and **Task Manager** are both required products to fulfill this service.

What to Expect Next:

Order and Fulfillment Form

When you purchase Review Requests, our Account Coordinators will receive the **Order Form**, and will reach out to you within 2 business days via email to schedule the onboard call. Please complete the fulfillment form prior to the onboard call. We will reach out three times via email and three times via phone call.

Onboarding

Onboarding Call: Our team will conduct an onboarding call with you to gather additional information needed to complete the Review Requests service.

- The Onboard call will take approximately 15 - 30 minutes to complete.
- The Account Coordinator will adjust the default email template according to the businesses requirements, including changing the color scheme, uploading a logo, confirm the reminder frequency, and selecting the review sources
- The review sources will be determined during this call. Three sources can be selected - typically Google and Facebook are the top two choices, the third is usually a source relevant to you vertical.

CSV File Format

On a weekly, monthly, or bi-monthly basis (the business's choice) the business can submit a list of customers to Marketing Services

- **CSV File:** In either Microsoft Excel or Google Sheets the business should create a list of customers. All we need for column headings is First Name, Last Name, and Email Address. You can send this to us via email.
- The Marketing Strategist will convert the file to CSV and upload to Customer Voice and ensure that the templated email is sent to all recipients.
- First Names, Last Name, and Email must all be separate columns and there must be no special characters otherwise the CSV upload will not work.
- **Note:** Customer Voice only allows bulk uploads of 500 customers at a time, all lists must be 500 or less. If the list is over 500, we will send it back to the business to have them break it down into smaller lists.

Recommendations

It's strongly recommended that the business sends us customers in smaller lists - around 200 at a time. We want to ensure that the business is receiving reviews consistently over time, rather than receiving a huge amount all at once.

This product pairs really great with **Review Responses**! When the business receives feedback on their review sources from this service, why not have Marketing Services respond to the reviews as well?

Follow up

After the Onboard call, the Account Coordinator will follow up with an email outlining the call, if anything else is required from the business, and instructions for the business on how to create the CSV file (including a template) to submit on a weekly or monthly basis. You, the partner, will always be included in these emails.

On a monthly or bi-monthly basis, our Reputation Specialists can reach out to the business with a reminder email. This email includes a brief overview of the service and an attached template for the business to fill out with their customer information. As always, we are here to answer any questions via phone call or email to support the businesses service purchase.

SMS Addon

Marketing Services can send SMS requests for the business if the SMS add-on has been activated and the CSV file contains the customer's phone number.
Note: Please ensure the SMS and email recipients are sent in separate lists (or separate tabs on the same spreadsheet to ensure we are sending the correct format.
The template (SMS content) is similar to the email template, but can be altered if needed.
Restrictions: Only 150 SMS requests can be sent per day—lists exceeding this number will be broken out and sent over multiple days.

Review Requests

Fully Managed Solution
FAQs

Required Products:
- Customer Voice
- Task Manager

Can I send in customer contact information as it comes in?

To keep costs minimal, review requests will only be sent out to customers once a week with each new list you provide.

Will Marketing Services monitor Customer Voice after requests have been submitted?

No, Marketing will not follow up with any customers that have received requests from Customer Voice

Will Customer Voice filter out customers that have previously been sent requests?

No, customer lists are submitted as they are received, unless information is missing that could prevent successful review requests. Customer Voice will keep a list of submitted customers for reference, but it will not filter out customers when sending requests.