# AI Reputation Specialist Setup

## Do-It-With-Me Solution

Have our talented experts to set up your AI Reputation Specialist.

***Note:*** *Reputation AI Premium is required to receive this service.*

## What to Expect Next:

### Fulfillment Form

To ensure a smooth and efficient process, please fill out the fulfillment form with as much detail as possible. This will help streamline the entire experience.

**Timeline:** We'll review the order and start the process within 2 business days.

### Onboarding & Training Call

Our team of experts will lead an onboard call to understand your business needs and how to adjust our reputation workflows to suit you. We will come to the call with your initial Reputation Specialist setup with your branding and customized review response style to adjust during the call. We will refine any additional knowledge sources and/or review response instructions together.

We will also train and walk you through the new workflow. Our team of experts will show you where you can find your reviews, review request emails and SMS templates, and where to modify the AI's review response instructions.

For American businesses, A2P registration is required to validate the business' use of SMS. Please be ready with your business legal information if you'd like to use SMS. Registration for A2P can take up to two weeks to complete.

**Timeline:** An onboard call can be booked in as little as 1 business day, depending on availability.

### AI Reputation Specialist Setup

Using the refinements during the onboarding call, we will finish setting up your AI Reputation Specialist and automations for requesting reviews. We will create a Net Promoter Score (NPS) workflow if desired and we can install a review display widget on your website.

**Timeline:** Your AI Reputation Specialist will be complete in 1 business day after the call.

**Please Note:** We require access to the backend of your website in order to install the review widget if desired.

### 30 Day Check In Call

This call will be used to look at the review responses generated, determine what knowledge or custom instructions need to be updated or refined, and ensure that your AI Reputation Specialist is responding effectively.

**Please Note:** Prior to this call, our team of experts will review 5-10 responses in order to provide recommendations for improvement and point out wins during the call.

**Timeline:** This call is optional and can be booked 3-4 weeks after the completion of your AI Reputation Specialist Setup.

### Monthly Support

With monthly support, we make ongoing refinements to your AI Reputation Specialist as your business evolves. This includes updates to prompts, branding, automations, templates, integrations, and review management beyond Google and Facebook, with an optional approval workflow for negative reviews.

# AI Reputation Specialist Setup
## Integrations and Automation Creation

**Configuring and branding your AI Reputation Specialist**
Responding differently to positive and negative reviews isn't just about tone; it also plays an important role in your online visibility and reputation. From an SEO perspective, review responses signal to search engines that your business is active, trustworthy, and engaged with customers.

5-star reviews are an opportunity to celebrate what's working well. Responses are warm, appreciative, and personal, reinforcing positive keywords, services, and experiences. This helps build credibility with future customers while supporting local search visibility over time.

1-star (or negative) reviews require a more strategic approach. Public back-and-forth conversations can unintentionally amplify negative keywords or issues, which may affect how your business appears in search results. For this reason, responses focus on empathy, professionalism, and briefly acknowledging the concern before inviting the conversation offline. This limits public exposure while still showing care and accountability.

**How we train your AI Reputation Specialist**
To make sure your review responses sound authentic and on-brand, we train the AI using key information from your business, including:

- Your website content, so responses reflect your services, messaging, and voice
- Your branding guidelines, to ensure tone and language stay consistent
- Examples of past review responses, so the AI learns how you already communicate with customers

This training allows the AI to respond in a way that feels natural, aligned with your brand, and true to how you would speak, just faster and more consistent.

**Review platform connection**
We'll connect your Google and Facebook accounts in Reputation AI. We can connect these using your account credentials, or we can walk you through connecting them yourself during the onboarding call.

If you would like reviews responded to outside of Google & Facebook, we will need your credentials for each platform to be able to log in and respond manually on your behalf.

# AI Reputation Specialist Setup
## Integrations and Automation Creation

**Email & SMS review request templates**
We'll create an email and/or SMS template that can be used to send review requests to your customers. These templates will be personalized to match your brand, tone, and messaging, and can be set up to request reviews directly on Google, Facebook, or another preferred platform.

We can also build these templates using Net Promoter Score (NPS) to help you better understand customer sentiment before asking for a public review. Customers are first asked how likely they are to recommend your business. Based on their response, satisfied customers can be guided to leave a public review, while less satisfied customers are given a private way to share feedback.

NPS isn't required, but it's a helpful option for businesses that want more control over the review experience and a clearer picture of how customers feel.

**Point of Sales Connection for automated review requests**
- ServiceTitan
- MindBody
- Dentrix
- Gingr
- Housecall Pro
- Jobber
- Quickbooks
- Tekmetric

We'll connect everything through the Integrations tab in Business App. Most integrations require login credentials, and some may also need an API token to complete the setup. If you're unsure where to find this information, or if you'd prefer to walk through it together, we're happy to help during your onboarding call.

If your platform doesn't integrate directly, no problem. We can set up an automated review request workflow using one of the following options:

**Contact list upload**
- You send us a CSV or Excel file with the contacts you'd like to request reviews from. We'll create a smart list, upload the file, and the automation will automatically send review requests as contacts are added.

**Custom field trigger**
- We add a custom field to your contacts (for example, "Request Review" or "Job Completed"). When your team updates that field to "Yes," the automation is triggered and the review request is sent.

**Pipeline stage trigger**
- When an opportunity is moved to a specific stage in your sales pipeline (such as "Closed Won" or "Job Completed"), the automation automatically sends the review request.

We'll help you choose the option that best fits your workflow and make sure everything is set up smoothly.

# AI Reputation Specialist Setup
## Monthly support

**Ongoing AI & automation refinements**
As your business grows and changes, we're here to help keep your AI setup and automations running smoothly and aligned with your goals. We can make updates and refinements to your existing setup to improve performance, accuracy, and consistency over time.

These refinements may include:
- Enhancing AI prompts to improve tone, clarity, or results
- Updating automations to reflect workflow changes or new features
- Integrating or adjusting POS system connections
- Minor prompt refinements based on performance or feedback
- Branding updates to reflect new messaging or voice
- Updates to SMS and email templates for clarity and consistency

If there are any changes to your business, or if there's anything you'd like adjusted within your automations or AI employee, our team is happy to assist. Simply reach out to your business representative to request an update.

**Please note:** These updates are intended to refine and improve what's already been set up. They focus on adjustments and enhancements to existing prompts, automations, and templates rather than the creation of entirely new systems.

**Ongoing management on reviews outside of Google & Facebook**
Our team of experts can manually respond to reviews on additional platforms beyond Google and Facebook, helping ensure your online presence stays consistent and well-managed.

You may select up to **five** of the platforms below for us to support on your behalf:
- Yelp
- YellowPages
- Better Business Bureau
- TripAdvisor
- OpenTable
- CarGuru
- DealerRater
- Expedia
- CarFax
- Zillow
- And more

**Please Note:** At this time, we're unable to respond to reviews on Indeed or Glassdoor.

**Negative review responses approval workflow**
If you'd like, we can set up an approval workflow for negative review responses so you can review them before they're published. Once a response is drafted, you'll receive a notification to review it, and if we don't hear back within 24 hours, the response will be posted automatically to ensure timely engagement. If you'd like any adjustments made before posting, simply let us know and we'll update the response accordingly.

Once you're comfortable with how your AI Reputation Specialist responds to negative reviews, you can reach out to our team and we'll update the automations to publish responses automatically.

# Requirements
## SMS registration, review widget installation, and POS integrations

**In order to set your business up for success, there are a few requirements that must be met in order to deliver this service efficiently.**

**Completing SMS registration for American buisnesses**
To send review requests via SMS, registration is required. For U.S.-based businesses, this includes **A2P registration,** which helps validate and protect your business's use of SMS messaging.
- Legal Business Name
- Business Category
- Business Type
- Country/Region
- Business Registration Number
- Address
- Website or a Link to an Online Listing

We will also need the following information for an Authorized Business Representative:
- First and Last Name
- Job Position
- Title
- Email
- Phone Number

**Gaining access to the website backend**
To install the review widget on your website, we'll need secure access to the backend, including:
- Hosting provider
- Username/email
- Password

**POS integration**
To set up your POS integration, we'll need:
- Login credentials
- API Keys

Our team will guide you through each step and let you know exactly what's needed, so the process stays simple and stress-free. If you have any questions or would prefer to walk through this together, we're happy to do so during onboarding.

# Frequently Asked Questions

**What is the AI Reputation Specialist Setup service?**
The AI Reputation Specialist Setup is a done-with-you service where our experts configure, train, and launch our AI Reputation Specialist for your business. The service focuses on automating review responses, requesting new reviews, and managing reputation workflows with minimal effort from your team.

**Who is this service designed for?**
This service is ideal for local businesses (and agencies serving local businesses) that want AI-powered review management without spending time on setup, integrations, or prompt tuning.

**What languages does the AI Reputation Specialist respond in?**
Any language that the review is left in, the AI employee will respond in the proper corresponding language. For all reviews outside of Google & Facebook, our team can only respond in English.

**What is A2P and what information do you need from me in order to set it up?**
A2P stands for Application-to-Person messaging, and is required by businesses who send text messages to their customers in the US. We will need the following information from you in order to set it up:
- Legal Business Name      - Business Category      - Business Type
- Country/Region            - Address
- Website or a Link to an Online Listing

We will also need the following information for an Authorized Business Representative:
- First and Last Name      - Job Position            - Title
- Email                     - Phone Number

**I don't have an EIN for my business. Can you still set up A2P?**
Unfortunately, this is a limitation of our SMS provider and we are unable to use a SIN/SSN instead of the EIN at this time. Our team is aware of this limitation and are looking into solutions to ensure you are still able to manage SMS conversations with your customers.

# Frequently Asked Questions

**Is Reputation AI required to use this service?**
Yes. Reputation AI Premium is required in order to receive the AI Reputation Specialist Setup service.

**What happens after I place an order?**
After ordering, you'll complete a fulfillment form and then book an onboarding call. Our team reviews your information, prepares an initial setup, and refines everything with you during the call.

**Which review platforms does the AI employee respond to automatically?**
The AI Reputation Specialist can automatically respond to Google and Facebook reviews using your branded tone and custom instructions. Outside of these platforms, you may choose up to five external sources and our team will respond to on your behalf.

**Does the AI Reputation Specialist handle positive and negative reviews differently?**
Yes. During setup, we configure best practices for responding to different star ratings, including routing negative feedback appropriately and encouraging satisfied customers to leave reviews.

**Can your team request new reviews from my customers?**
Yes. The service includes automated review request workflows via email and SMS, as well as optional Net Promoter Score (NPS) routing to encourage positive reviews.

**Can I change how the AI responds to reviews later?**
Yes. You or our team can update instructions, tone, and templates at any time. Our support also includes prompt refinements and ongoing adjustments as needed.

**Can you install a review widget on my site?**
Yes, as long as we have backend access to your website, our team will install and configure the review display widget for you.

**Can I use SMS and email with the AI Reputation Specialist?**
Yes. Email is available for all businesses, and SMS is available for Canadian and U.S. businesses.

**What kind of support is included after setup?**
Adjustments to prompts, workflow refinements and new feature additions
Ongoing management of reviews outside Google and Facebook