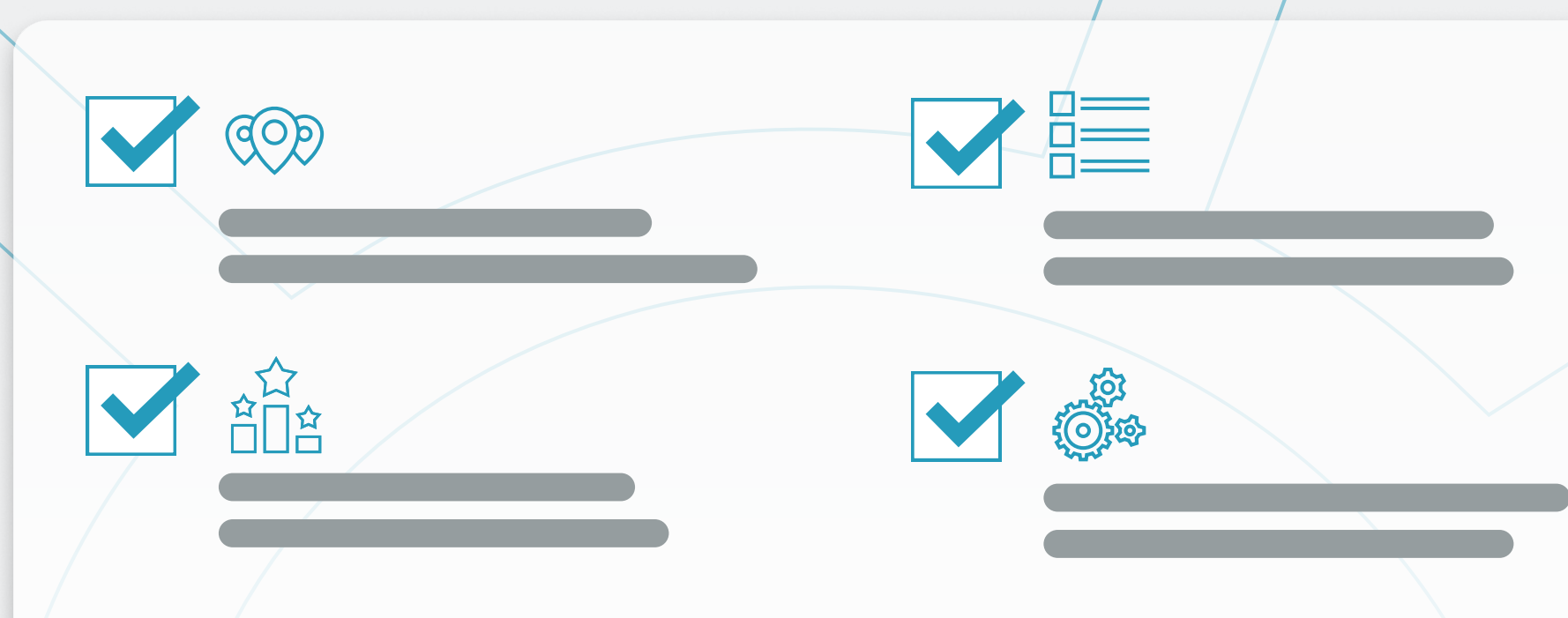




Digital Presence Management for Financial Brands

Use this checklist to create a digital presence management strategy for all your financial entities – nationally, locally, and everywhere in between.



Protect the Reputation of Your Financial Brand

Listings + Reviews

- ☐ Consolidate your listings (like Google Business Profile and Apple Business Connect) & reviews **into one platform**
- ☐ Create **user roles** for the employees on the brand, branch, and financial professional levels
- ☐ Incorporate **pre-approved assets and approval workflows** to ensure compliance with your brand guidelines
- ☐ Use internal data to **develop benchmarks** for listing impressions & review ratings

Listings

- ☐ **Claim all your listings**, including branch and ATM locations
- ☐ Implement a **brand-wide listings management strategy**
- ☐ **Audit your listings** for any branding discrepancies, and suppress any duplicates

Reviews

- ☐ Develop a **brand-approved review response strategy**
- ☐ Enable users with tools that help **write brand-appropriate review responses**
- ☐ **Organize reviews** for easy analysis by category (such as by location, product, sentiment, etc.)

Generate Visibility for Every Location

Listings

- ☐ **Include proper licenses, disclaimers, and your brand's current logo**
Ex: NMLS licenses for mortgage officers
- ☐ **Complete your listings** with relevant information (like name, address, phone number, hours, industry, and ATM locations)
- ☐ **Update your opening hours** during upcoming holidays & closures
- ☐ Make **posts on your listings** for upcoming events and offers
- ☐ Note which keywords drive impressions for your listings, and use them to **optimize your listings for local intent**
- ☐ **Monitor & respond to Q&A** from customers on your listings

Reviews

- ☐ **Create categories** for your reviews
Ex: financial professional, products, and services
- ☐ Designate a representative to **monitor and respond to reviews** with templated responses
- ☐ Create **notifications** for each new review
- ☐ **Respond to reviews** on a regular basis, at least once a week
- ☐ Analyze the **zero-party data** you find in your reviews
- Pro tip: look for reporting & sentiment analysis features in your review management platform
- ☐ **Generate new first-party reviews** for your locations, financial professionals, and products

Empower Individuals with Resources

Listings + Reviews

- ☐ Enable your financial professionals to manage their listings and reviews from **one brand-owned platform**
- ☐ **Compare** financial professionals' impressions and ratings **to your brand's benchmarks**

Listings

- ☐ **Optimize each individual's listing** with location, bios, areas of focus, experience, credentials, and links to book appointments
- ☐ **Remove listings** for professionals no longer associated with your brand, and update any new hires' existing listings

Reviews

- ☐ Encourage your professionals to **use reviews in marketing materials** (in compliance with the SEC Marketing Rule)
- ☐ Encourage your professionals to **request new reviews** from their customers

Every digital touchpoint represents a chance to win or lose a customer. With the Yext platform, you can make meaningful connections all throughout their digital journey.

[Schedule a demo today](#)

