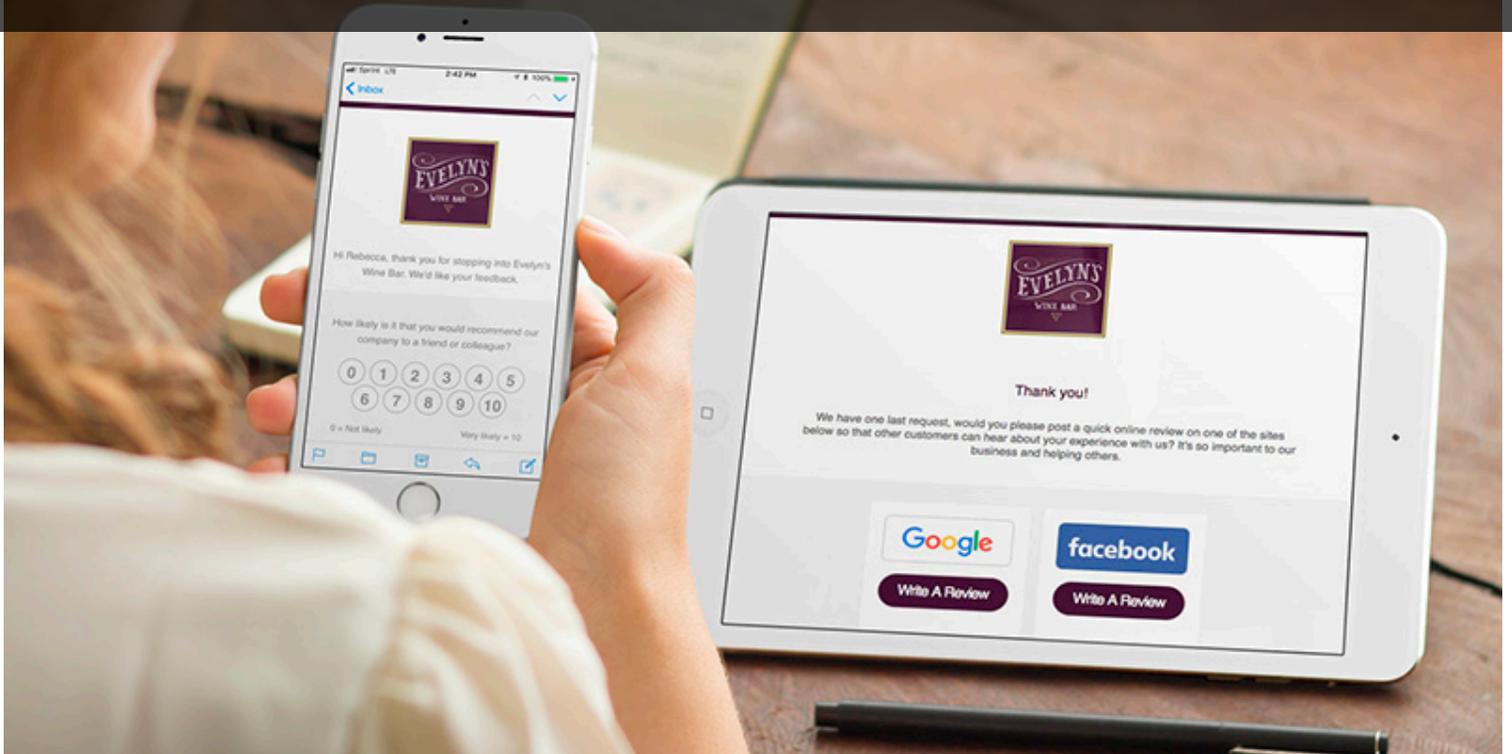


# Quick Guide To Getting Started



# Welcome to GatherUp

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We're excited you've chosen GatherUp as your platform to manage customer experience through customer feedback and online reviews. This quick guide will help you get your account set-up and your business started with gathering customer feedback. While GatherUp 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) Verify you completed the Set-Up Wizard to add your location, online review sites, logo and brand color.
- 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. GatherUp is a proven platform and 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

# Setting Expectations

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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 take a business giving 2-star service and then create 5-star reviews.
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 3<sup>rd</sup>-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:

- **1<sup>st</sup>-party review:** Customer comments, feedback, testimonials or any text given directly to you, the business.
- **3<sup>rd</sup>-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. [Learn more on NPS.](#)

# 1. Verify Your Set-up

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Our Set-Up Wizard covered these steps when you created your account with us, but just to make sure let's look at each step to ensure your account is complete.

## Add Your Business Location

GatherUp starts with creating a profile for a business location. If you are a one-location business, then just adding your location is all you need. If you have 3 locations, you will need to create a business location for each profile (this is because each location will have its own data and online review profiles). Here's how to add your business locations:

- Click ADD BUSINESS button in the upper left of screen.
- Complete the business contact and location information.
- Select the BUSINESS TYPE that most accurately describes your business, and the BUSINESS SUBTYPE if prompted, as these selections are part of your Testimonial Widget and code installation, and provide SEO benefits.

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

To edit an existing location in the platform, make sure you are in that location (clicking from Business Dashboard). Go to ACCOUNT and then select BUSINESS DETAILS from the drop-down menu.

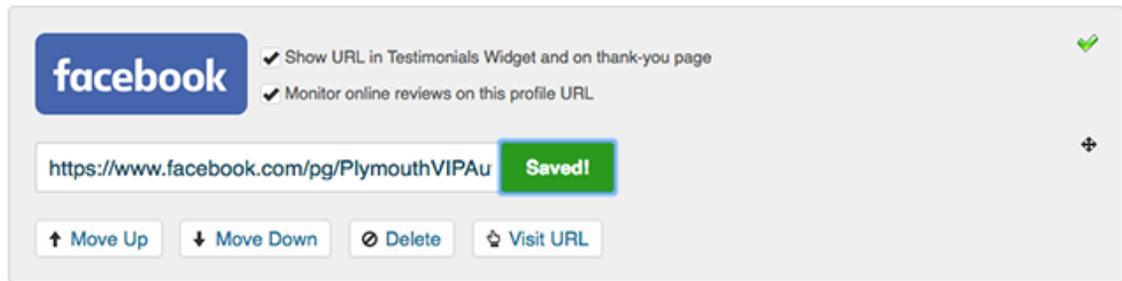
## Add Your 3<sup>rd</sup>-Party Review Sites, To Ask & To Monitor

In this step, you will select which 3<sup>rd</sup>-party online review websites you want to direct positive customers to write a review on and which sites 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 each 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.
- 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 in GatherUp.

**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 “Show URL” line and/or monitor this site for reviews by selecting the “Monitor online reviews” 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 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 emails and landing pages.

- 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. This 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

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GatherUp uses a process of emails and landing pages to communicate with your customers which we call “Request Modes”. Our modes have various options for requesting feedback, capturing Net Promoter Score, gathering 1st-party reviews, segmenting customer experiences (positive or negative) and encouraging 3<sup>rd</sup>-party online reviews.

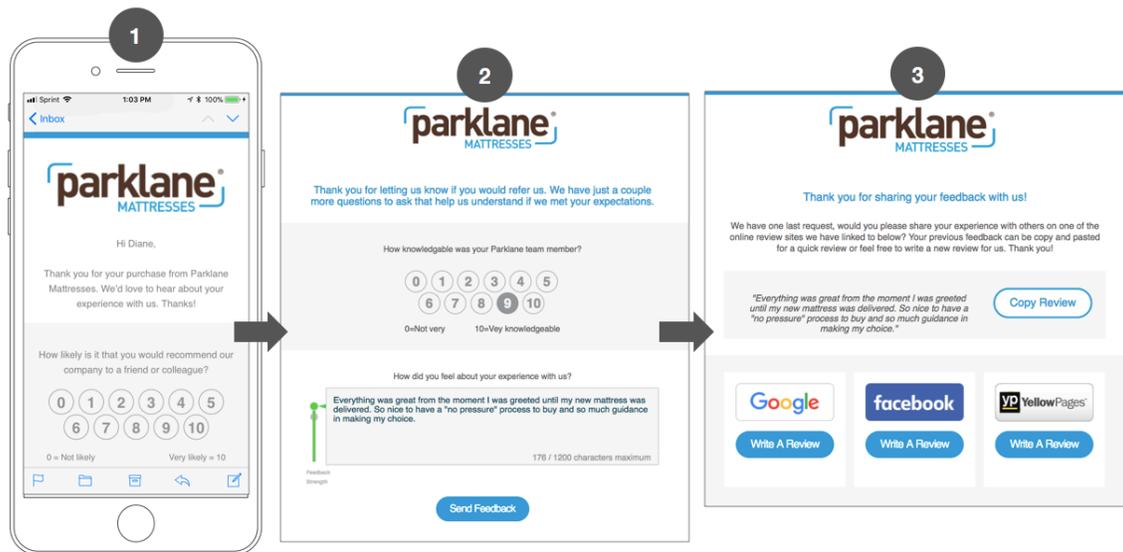
Each of our three Request Modes has a primary and secondary focus, allowing you to choose a mode that best fits your goals and then customize the options. Click on SETTINGS and then choose REQUEST MODES from the menu.

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

Primary Focus: Customer feedback, generating 1<sup>st</sup>-party reviews to display on your website with the Testimonial Widget for SEO benefits, option to ask up to four (4) survey questions and capture your NPS score.

Secondary Focus: Encourage 3<sup>rd</sup>-party online reviews

**DIAGRAM A:** This 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. Below is an example of the feedback flow for ULTIMATE MODE.



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

Primary Focus: Generate 3<sup>rd</sup>-party online reviews and capture you NPS Score  
 Secondary Focus: 1<sup>st</sup>-party reviews to display for SEO benefits on your website

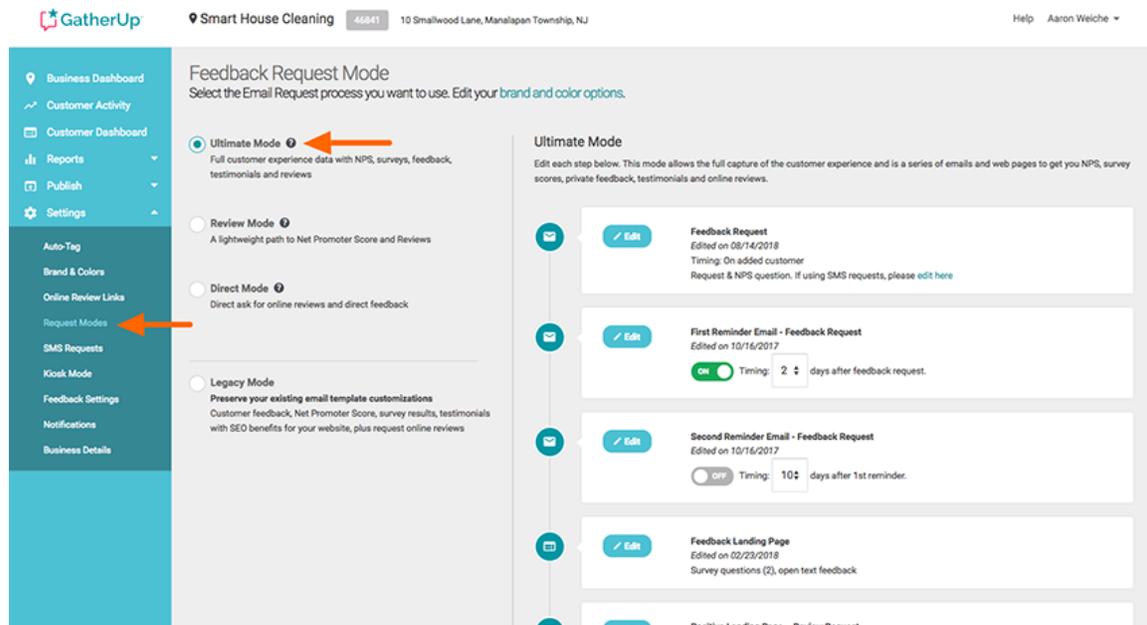
**Direct Mode (1-step): Requests 3<sup>rd</sup>-party and 1<sup>st</sup>-party reviews right away**

Primary Focus: 3<sup>rd</sup>-party review request without NPS score and segmenting  
 Secondary Focus: 1<sup>st</sup>-party reviews to display for SEO benefits on your website.

**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 Mode screen is below, with the Ultimate Mode selected.



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 many options to help you customize the feedback process. This being a Quick Start guide we will not cover them all, but we have already checked the important ones and you are free to review each item on this page more in-depth. Don't hesitate to contact our team at [support@gatherup.com](mailto:support@gatherup.com) with any questions.

- Click SETTINGS and then FEEDBACK SETTINGS in the drop down.
- Include Links To Review sites is checked by default
- Show Descriptive Text Next To Online Review Links is checked by default
- 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.
- Positive Feedback Page – This page displays for users that rate you a “7” or higher and asks them to write a 3<sup>rd</sup>-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. 3<sup>rd</sup>-party review sites are also shown here to be in compliance with Google’s Terms of Service.
- 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

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## Notification Settings

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

- Click SETTINGS and then NOTIFICATION SETTINGS in the drop down.
- Send Feedback Email Notifications – This determines who receives the emails when your customers leave you feedback via the GatherUp platform. You are the account owner and business owner. (You can set – up additional users in the system for staff/team members)
- Which Notifications – Our initial recommendation is that you receive all feedback, so BOTH POSITIVE & NEGATIVE is checked.
- Send New Online Review Notifications – 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.
- Send Performance Report – 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 at anytime in the platform by clicking on REPORTS menu, and then by clicking on PERFORMANCE REPORT.

# 4. Add Your Customers

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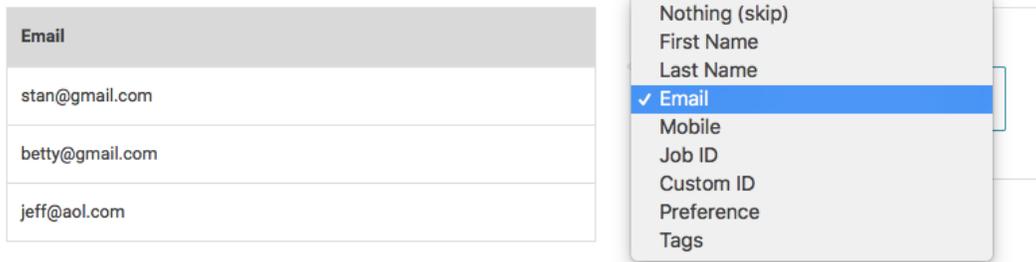
GatherUp offers many different ways to acquire feedback from your customers. The most common way is to use your customer's email address to proactively ask them for feedback and reviews. Let's look at a few ways.

## Add A Single Customer

- To add a single customer, select ADD CUSTOMER from the Customer Dashboard. 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, click the IMPORT CUSTOMERS button.
- 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 **Automatic Mode** to send them out. Click on the COMMUNICATION METHOD link in the upper right of the Customer Dashboard.
- Change the setting from MANUAL to AUTOMATIC
- Set the number of emails or text messages to be sent per day

**Pro Tip:** When setting the AUTOMATIC mode, you may want to consider the normal number of customers you see in a month. 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 drop that out 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?

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We've covered the basics to have you up and running with GatherUp. 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 1<sup>st</sup>-party and 3<sup>rd</sup>-party reviews that help market your business to new customers and ratings to ensure you 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 [automatic integration](#) to send customers from your CRM or POS to us.
- Once customers have provided feedback through GatherUp, [install/embed the Review Widget](#) on your website. This displays your 1<sup>st</sup>-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.

# Our User Guide & News

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## Answers, FAQ's, "How-to Articles", Videos and More

When you are ready to learn more, dig deeper or maybe are in need of further education on our platform visit our User Guide. It is full of how-to articles, video tutorials, best practices, tips and recommendations.

- <http://userguide.gatherup.com/>

## Customer Success

We're here to help and truly care about your experience and satisfaction with our platform. Our Customer Success team is ready to help you succeed with us.

- Email our team: [support@gatherup.com](mailto:support@gatherup.com)

## Community, Knowledge and More

You'll find us actively sharing on our blog, Twitter, YouTube and Facebook.

Please watch your email for news, webinars and updates.

- <http://www.gatherup.com/blog>
- Past and next monthly webinars: <https://www.gatherup.com/webinars/>
- Twitter @GatherUp: <https://twitter.com/gatherup>
- Facebook: <https://www.facebook.com/gogatherup>
- [YouTube channel](#)