Online Reputation Management Checklist for Financial

Is your financial institution's online reputation vulnerable? In today's instant-feedback world, a single negative comment or review can erode decades of trust, costing you clients, credibility, and market standing.

This checklist gives you the exact blueprint leading financial institutions use to proactively build a strong online presence, effectively

monitor digital conversations, swiftly manage crises, and maintain an unshakeable foundation of trust.

How to Use These Checklists:
1. Go through each item systematically.
2. Mark "[ ]" if the point is done or applies to your current situation.
3. Mark "[ ]" if the point is not done or needs attention.
4. For "[ ]" answers, note

down specific issues and potential solutions.

5. Prioritize areas for improvement based on their potential impact on your goals.

6. Regularly revisit and update these checklists as your business and strategies evolve.

I. Monitoring & Listening

Brand Mentions:

[ ] Are tools in place to monitor brand mentions across the web (news sites, blogs, forums)?

[ ] Are keywords related to the institution, its executives, and its services being tracked?

Social Media Monitoring:

[ ] Are all relevant social media platforms actively

monitored for mentions and sentiment?

[ ] Are conversations about the institution and financial topics being tracked?

Review Site Monitoring:

[ ] Are financial institution-specific review sites (e.g., Yelp, Google My Business, industry-specific platforms) being monitored?

[ ] Are general review sites (e.g., Trustpilot, Glassdoor

for employee reviews) monitored?

News & Media Monitoring:
[ ] Are alerts set up for news articles and media coverage related to the institution?
[ ] Is a crisis communication plan in place for negative news?

II. Proactive Reputation Building
Online Presence

Optimization:

[ ] Are all official online profiles (website, social media, directory listings) accurate and up-to-date?

[ ] Is consistent branding maintained across all platforms?

Content Strategy:

[ ] Is high-quality, trustworthy, and informative content regularly published?

[ ] Does content highlight

expertise, customer success stories, and community involvement?
[ ] Are thought leadership pieces (e.g., whitepapers, market analyses) being created?

Customer Engagement:
[ ] Is there a strategy for actively engaging with customers on social media and other platforms?
[ ] Are customer inquiries

and feedback addressed promptly and professionally?

Review Generation Strategy:
[ ] Is there a polite and compliant process for encouraging satisfied customers to leave reviews?
[ ] Are review guidelines for staff clearly communicated?

Employee Advocacy:
[ ] Are employees encouraged to be brand ambassadors

online (within compliance guidelines)?

[ ] Is there a social media policy for employees?

III. Responding & Crisis Management

Response Protocols:

[ ] Are clear protocols in place for responding to positive, neutral, and negative comments?

[ ] Are response times defined and adhered to?

Addressing Negative Feedback:

[ ] Is negative feedback acknowledged promptly and empathetically?

[ ] Is there a process for taking sensitive issues offline for resolution?

[ ] Are professional and compliant responses crafted for all public complaints?

Crisis Communication Plan:

[ ] Is a comprehensive

crisis communication plan developed and regularly updated?

[ ] Are key stakeholders identified and their roles defined in a crisis?

[ ] Are pre-approved holding statements and messaging prepared for potential scenarios?

Legal & Compliance Review:

[ ] Are all online communications reviewed

for compliance with financial regulations (e.g., FINRA, SEC, local banking laws)?
[ ] Is customer privacy protected in all interactions?
[ ] Are disclaimers and disclosures used appropriately?

IV. Analytics & Reporting
Reputation Metrics:
[ ] Are key reputation metrics being tracked (e.g., sentiment analysis, number of mentions,

review scores)?
[ ] Is the volume and nature of customer feedback being analyzed?

Competitor Benchmarking:
[ ] Is the institution's online reputation benchmarked against competitors?

Reporting & Insights:
[ ] Are regular reports on online reputation provided to senior management?

[ ] Are insights derived from monitoring used to inform business and marketing strategies?

At Brand Shop, we provide strategic guidance and hands-on support in developing and implementing comprehensive growth marketing strategies.

What We Offer

Growth Strategy and Planning:

- Comprehensive business and marketing audits
- Goal setting and KPIs
- Target audience analysis and segmentation
- Tailored Growth Strategies and Roadmaps

Digital Marketing Expertise:

- Google Search Engine Optimisation (SEO)
- Paid advertising (PPC, Social Ads)
- Content marketing strategy and execution
- Social media growth
- Email marketing automation
- Conversion Rate Optimisation (CRO)

Marketing Technology and Automation:

- Marketing software assessment and recommendations
- Implementation and optimisation of marketing amutomation
- Data and analytics setup (e.g., Google Analytics, CRM integration)
- Performance reporting and insights generation

1:1 Coaching and Workshops:

- Personalised guidance on growth marketing principles
- Training on specific marketing channels and tools
- Team workshops to foster a growth-oriented mindset

Consulting Services:

- Objective analysis and strategic recommendations
- Implementation support and project management
- Performance monitoring and iteration
- Long-term partnership for sustainable growth

Additional Areas of Expertise:

- Customer acquisition and retention strategies
- Marketing analytics and reporting
- Funnel optimisation

If you're ready to move beyond fragmented efforts and build a strategic, data-driven engine for sustainable growth— we'd love to connect.

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