



# CU Brand Monitor User Guide

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# Dashboard Overview & Navigation

<b>Snapshot</b>	Reviews	Social <b>NEW</b>	Pulse	Media	Listings	Rankings	Workflow
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Tab	What Can I Do Here?
Snapshot	Easily view either overall- or branch-level health with this overview of major performance areas.
Reviews	<ul style="list-style-type: none"> <li>Analyze all reviews across providers, both by overall credit union or branch.</li> <li>Track trends in the sentiment of reviews, check review responses, and view average rating.</li> </ul>
Social	<ul style="list-style-type: none"> <li>Review social media activity: track positive/negative trends, monitor campaigns, compare with competitors.</li> <li>Track total followers, social mentions, and appearances in articles and blogs.</li> </ul>
Pulse	<ul style="list-style-type: none"> <li>Use artificial intelligence to gauge member sentiments by looking at keywords used in review feedback.</li> <li>Identify what you can improve on and what you can promote as success areas.</li> </ul>
Media	<ul style="list-style-type: none"> <li>All pictures and videos geo-coded to your branch locations or shared on your social media accounts.</li> <li>Moderate reputation risk and track the impact of addition of photos and videos. Share across platforms.</li> </ul>
Listings	<ul style="list-style-type: none"> <li>Review all listings from across the web – especially the ones you didn’t know existed.</li> <li>Correct errors, remove duplicates, and optimize with categories all in one place.</li> </ul>
Rankings	<ul style="list-style-type: none"> <li>Track branch-by-branch performance for keywords that members use to find you on the web.</li> <li>Compare to selected competitors and track progress based on the changes you make across all tabs.</li> </ul>
Workflow	<ul style="list-style-type: none"> <li>Follow this streamlined to-do list, which breaks out and prioritizes tasks from each tab</li> <li>Assign and monitor progress via manageable tasks.</li> </ul>

# Dashboard Overview & Navigation

The screenshot shows a dashboard header with a welcome message and navigation links. Below the header is a location selection dropdown menu. Callout boxes provide instructions for each element:

- My Alerts:** Set up your email alerts
- Account Editor:** Manage users, locations, competitors, keywords, and more.
- Welcome, Alix**
- My Alerts** (with envelope icon) | **My Account** | **Logout**
- Location** (with question mark icon) | **All (366)** (with dropdown arrow) | **Settings** (gear icon)
- Help/Tool Tips** (points to the question mark icon)
- Location Selection:** Select All, Groups, or Single Branch Locations

# Snapshot Tab

**Location Selection:**  
Select All, Groups, or Single Branch Locations

**CLICK for Detailed Scoring**

**Snapshot** | Reviews | Social | Pulse | Media | Listings | Rankings | Workflow

Location: All (30)

**REVIEWS**

Last 30 days: **0**

Total: **103**

**SOCIAL MENTIONS**

Last 30 days: **0**

Total: **1,428**

**LISTINGS**

Added in last 30 days: **0**

Locations listed with Google Maps: **50%**

**RANKINGS**

Stores on page 1 on Google Maps: **12**

Stores before page 5 on Google Maps: **43%**

**OVERALL SCORE**

**65** OUT OF 100

☆ 58  
📍 61  
📊 54  
🗨️ 53  
👤 88

▼ -9% in the last 30 days.

**Summary Reports**

Select a single location to see summary reports.

**NEGATIVE REVIEWS**

**Middlesex Savings Bank, Natick, MA**

🔥 YELP ★☆☆☆☆

Also On: 📌

seems MSB is having trouble adapting to the digital age. poor website with questionable security...[more]

**Rose P.** Jun 11, 2017

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**Middlesex Savings Bank, Natick, MA**

📘 FACEBOOK ★☆☆☆☆

After 26 years of banking I'm sad to say because of the way the Ashland branch treated me I'll be...[more]

**Jason Camp** May 12, 2017

---

**Middlesex Savings Bank, Ashland, MA**

🔍 GOOGLE ★☆☆☆☆

Margaret is a rude know it all. Who thinks she is always right. I wonder if she will admit when she...[more]

**rich cook** Apr 22, 2017

[Manage My Reviews](#)

**POSITIVE REVIEWS**

**Middlesex Savings Bank, Natick, MA**

📘 FACEBOOK ★★★★★

Customer service is one of the many things that puts Middlesex a notch above the rest. Nicole went...[more]

**Nick Bliss**

[English](#)

**Performance Summary**

Hover over a region with locations

**CLICK Pin to See Branch Details**

**Most Recent Positive & Negative Reviews**

# Reviews Tab: Summary Report

Two Different Reports: Click to Toggle Between Summary & Branch Comparison Reports

**Competitive Benchmarking:** Shows ratings over time for a set group of hyper-local competitors. You can customize this group under **My Account**.

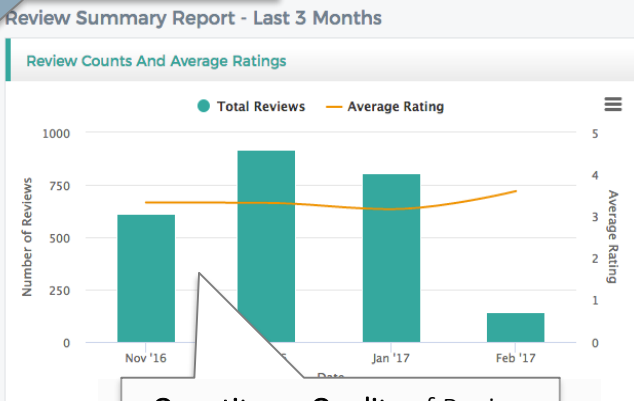
Report: Summary

Date Range: Last 3 Months

Provider: Select providers

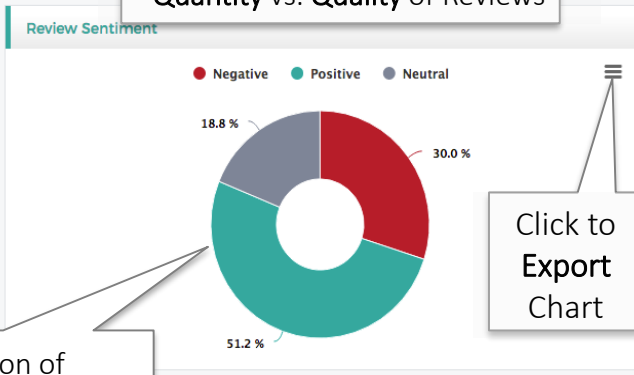
Tag: Select Tags

Rating: Select ratings



Quantity vs. Quality of Reviews

**Review Filters** – Example: filter to see only Facebook reviews below 3 Stars



Click to Export Chart

Distribution of Positive/Negative Reviews

#### Review Details

	You		Local Competitors Average	
	Last 3 Months	All Time	Last 3 Months	All Time
Overall Rating	3.3	3.3	3.6	3.7
Number of Reviews	2,478	14,808	869	7,776
Reviews Responded To	27	96	35	313
1 star Reviews	540	3,175	163	1,269
5 star Reviews	733	4,477	356	3,225

#### Provider Summary

Site	You		Local Competitors Average	
	Count	Rating	Count	Rating
GOOGLE	2013	3.4 ★★☆☆☆	475	3.7 ★★☆☆☆
FACEBOOK	179	3.4 ★★☆☆☆	225	3.8 ★★☆☆☆
BING	102	2.2 ★☆☆☆☆	49	2.7 ★☆☆☆☆
YELP	97	2.3 ★☆☆☆☆	74	3.0 ★☆☆☆☆
YAHOO	78	2.3 ★☆☆☆☆	41	2.8 ★☆☆☆☆
FOURSQUARE	8		2	
YELLOWPAGES	1	5.0 ★★★★★	0	
MERCHANTCIRCLE	0		0	
SUPERPAGES	0		0	
CITYSEARCH	0		0	
INSIDERPAGES	0		0	
REVIEWBUILDER	0		0	

English

# Reviews Tab: Competitor Averages

## How do your branches compare with the local competition?

- Compare your recent and all-time review activity with five local competitors
- In terms of total reviews, responses, and star-ratings
- *You are able to customize this list in your Account Settings area.*

Review Details	You		Local Competitors Average	
	Last 3 Months	All Time	Last 3 Months	All Time
Overall Rating	3.9	3.5	3.5	3.4
Number of Reviews	3,709	39,381	2,238	24,402
Reviews Responded To	1,672	11,484	823	7,593
1 star Reviews	672	8,325	622	6,255
5 star Reviews	2,102	16,765	1,087	9,926

New Reviews  
Added During  
Report Period

Total Reviews  
at End of  
Report Period

# Reviews Tab: Reviews by Provider

## Where are members or potential members reviewing you?

- View the number of ratings by provider (Google, Facebook, etc.)
- Track average rating received for the branch(es) you're currently viewing
- Compare over time, based on your filter selection

Sort By Site,  
Count or Avg.  
Rating

Provider Summary	You		Local Competitors Average	
Site ↕	Count ↓	Rating ↕	Count ↕	Rating ↕
GOOGLE	1689	3.9 ★★★★★	919	3.3 ★★★★★
FACEBOOK	822	4.3 ★★★★★	433	3.9 ★★★★★
APARTMENTRATINGS	364	3.8 ★★★★★	303	3.8 ★★★★★
YELP	269	3.6 ★★★★★	183	3.2 ★★★★★
BING	269	3.3 ★★★★★	165	3.2 ★★★★★
YAHOO	230	3.5 ★★★★★	152	3.1 ★★★★★

Total Number  
of Reviews

Average Rating  
of Reviews for  
Selected Time  
Period



# Reviews Tab: Review Content

Click the photo/provider name to view review on original site

Search for Keywords in Reviews

Download as Excel

Sort By: Date Created ▾ Descending ▾ Display All Reviews ▾ Sort Options 🔍 Search 📄 Download



★★★★★ 6/22/17

Branch Location

📍 Middlesex Savings Bank, 6 Main Street, Natick, MA, 01760, US

Customer service is one of the many things that puts Middlesex a notch above the rest. Nicole went above and beyond helping me with several transactions that I had made complicated with my own poor record keeping. Her patience and expertise are greatly appreciated. Customer service like the kind provided by Nicole is why I will always bank with Middlesex.

Nick B.

✓ service

Review Response

6/22/17 — Comment from Middlesex Savings B. Owner Response



Hi Nick, we are pleased to have been able to help you! We will pass along your comments and make sure that M... gnized fo



View only reviews for this branch	Take Internal Note	Share/Publish Review

## Summary of All Reviews

- ALL the reviews that have been pulled into the interface
- View the ones you want by sorting or filtering
- View how you or colleagues responded to reviews
- Click through to see the original review locations

# Reviews Tab: Responding

- Respond directly to Facebook, Google, and Yelp reviews within the platform
- Create canned templates for responding to reviews
- “Tag” reviews as a way to assign and filter

Callahan & Associates, 1001 Connecticut Ave NW, 1001, Washington, DC, 20002, US

★★★★★ 12/11/16

Really helps Credit Unions think outside the box.

GOOGLE Rosario G.

Thank you so much for your nice review!

Select Template

- Positive
  - Positive Response
- Negative
  - Negative Response

Clear Publish

Madison

English

Callouts:

- Publish your response to Google or Facebook
- Add tags to reviews as a way to assign and filter
- Select a response template or type your response directly into the box

Create/manage templates to quickly respond to reviews

## Manage Review Response Templates

Add New Template

Template Name	Sentiment Type	
Negative Response	Negative	
Positive Response	Positive	

First Previous 1 Next Last

# Reviews Tab: Branch Comparison Report

## How do your branches compare to one another?

The “Branch Comparison” report orders your branch locations by highest/lowest rating, review counts, or number of reviews responded to.

Toggle here to move between the Summary and the Branch Comparison Reports

Download

### Store Comparison

Store Comparison

### Date Range

All Time

### Provider

Select providers

- Compare with Previous Period
- Show Groups

### Store Comparison Report - Last All Time

Location	Rating		Review Count		Responded		Review Type					
	You	Competitors	You	Competitors	You	Competitors	Negative		Neutral		Positive	
Middlesex Savings Bank, 6 Main Street, Natick, MA 01760	3.5	3.2	37	14	10	0	13	35%	3	8%	21	57%
Middlesex Savings Bank, 50 Chestnut Street, Needham, MA 02492	4.4	3.4	8	40	0	0	1	13%	0	0%	7	88%
Middlesex Savings Bank, 2 West Union Street, Ashland, MA 01721	3.3	3.2	6	19	0	0	2	33%	0	0%	4	67%
Middlesex Savings Bank, 657 Main Street, Walpole, MA 02081	5	3.3	6	17	0	0	0	0%	0	0%	6	100%
Middlesex Savings Bank, 81 Main Street, Medway, MA 02053	3.7	4.2	5	26	0	0	1	20%	2	40%	2	40%
Middlesex Savings Bank, 10 Main Street, Hopkinton, MA 01748	2.8	3.8	5	13	1	0	3	60%	0	0%	2	40%
Middlesex Savings Bank, 36A Milliston Road, Millis, MA 02054	4.3	5	4	2	0	0	1	25%	0	0%	3	75%
Middlesex Savings Bank, 830 Washington Street, Holliston, MA 01746	5	2.7	4	20	0	0	0	0%	1	25%	3	75%

Click here to filter for specific providers (Facebook, Yelp)

# Social Tab

Social provides essential tools for managing your social media accounts and presence from one central location! Monitor conversation about your brand on social sites, join the conversation, increase engagement, publish new material, and keep tabs on competitors.



## Social Media Monitoring

Monitor real-time social activity, pinpoint (geo-reference) user locations, and participate in the conversation all from one portal.



## Social Sentiment

Spy on competitors, track themes, find mavens, and learn from leaders in your area.



## Geo-Fence Targeting

Get the noise OUT! Cast a net around a town, region, or entire state and listen to only the relevant conversation within those boundaries.



## Performance Metrics

Easily view the chatter from all of your social media channels, in one convenient location.

# Social Tab: Configuration

Important! SET THIS UP BEFORE YOU BEGIN!

Add the Accounts and Pages You Want to Monitor, Respond, or Publish to on for Facebook, Instagram, and Twitter

The screenshot displays the 'Social Settings' interface. On the left, a navigation menu includes 'Overview', 'Reports', and 'Settings' (highlighted in blue). The main content area is titled 'Social Settings' and features three social media icons: Facebook [1], Instagram, and Twitter. Below these icons are two tabs: 'Accounts' and 'Pages'. The 'Pages' tab is highlighted with a red box, and a callout points to it with the text: 'Add custom page URLs to track, such as competitors'. To the right of the tabs is a blue button labeled 'Add Another Account'. Below the tabs, a card for 'Chip Filson' is shown. It includes a profile picture, the name 'Chip Filson', and a 'delete' link. To the right of the card, under the heading 'MONITORING', there are two toggle switches: 'Include My Posts' (which is turned on) and 'Managed Pages' (which is turned off and has a '2' next to it). A callout points to the 'Managed Pages' toggle with the text: 'Only toggle this if you want to see all posts from all friends/followers!'.

# Social Tab

## Aggregated social media mentions.

Track the number of followers and posts over time, review specific mentions you might want to react to, and understand how people are talking about your branches.

**View the trends of social media interactions over time**

**Total posts, followers, across providers**

Category	Total	Last Week
Followers	4M	0
Posts	269k	+3,503

**Geo Distribution**

**Filter Social by:** Provider (Facebook, etc.), the sentiment of the post/mention, the type of mention (post, page, or own feed), or mentions with notes or replies.

**Live stream** of posts, comments, photos, and more. Respond to posts directly from the Social Tab dashboard.

# Social Tab

Add or remove hashtags you're interested in tracking



Activity Stream LIVE

**Middlesex Savings Bank** Jul 25  
 We are very excited for our friends at Family Promise Metrowest on the purchase of a new home for their day center and offices in Natick!

Live activity feed of mentions across providers, including your own if you link your accounts to CUBrandMonitor

10 Likes

**Ben Kelley** Jul 21  
 replied to Middlesex Savings Bank  
 Olivia Kelley and Cookie Kelley! If you ever need a place to take the kids for something to do on a Friday night!

View sentiment, add notes, and track posts as well as replies/comments that they acquire

**Middlesex Savings Bank**  
 Free Friday Night Fun! Back at the Discovery Museums in Acton. Gather the family and make your way over from 4:30PM - 8:00PM! This free and exciting program is available every Friday night through 5/1/17

# Social Tab: Reports

- Overview
- Publish
- Reports
- Settings

Last Month ▾

763k — Followers

← Previous

DOWNLOAD

2016 - 2017

Sep 01 Oct 01 Nov 01 Dec 01 Jan 01 Feb 01 Mar 01 Apr 01 May 01 Jun 01 Jul 01 Aug 01

Sort By

Location Name ▾

**Store Comparison Report**

LOCATION	COMPETITOR	You		Competitors	
		FOLLOWERS	POSTS	FOLLOWERS	POSTS
<b>333 Pacific</b> 333 N Pacific St Oceanside, CA 92054 US	Il Fornaio ▾	4,259 <sup>^</sup> +0.39%	218 <sup>∨</sup> -2.71%	1,415	874
<b>702 Fifth Ave</b> 702 Fifth Ave San Diego, CA 92101 US	Local Average ▾	N/A	25 <sup>^</sup> +4.17%	21,174 <sup>^</sup> +0.42%	1,542 <sup>^</sup> +0.29%
<b>AD Nightclub</b> 420 W E St. San Diego, CA 92101 US	Local Average ▾	12,149 <sup>^</sup> +0.06%	1,382 <sup>∨</sup> -0.04%	20,917 <sup>^</sup> +0.6%	1,340 <sup>^</sup> +0.7%
<b>Addison</b> Grand Del Mar, 5200 Grand Del Mar Way San Diego, CA 92130 US	Ponsaty's ▾	2,986 <sup>^</sup> +0.1%	101 <sup>^</sup> +1%	7,583 <sup>?</sup>	423 <sup>?</sup>

Pull the blue bar to change your selected date range.

Sorting Options

Follower & Post Counts

Click to select a single competitor or the average across all.

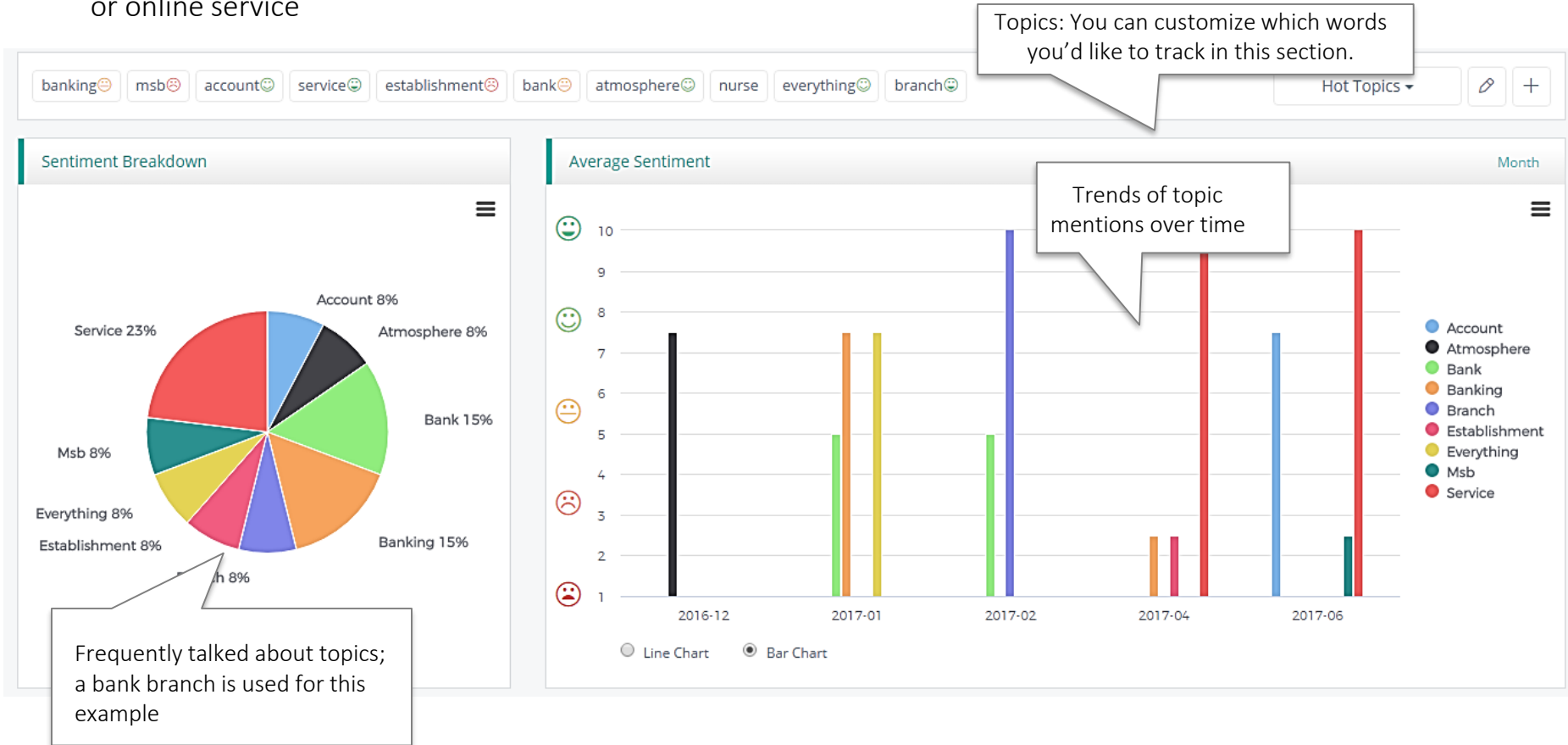
Percentage change compared to the previous period



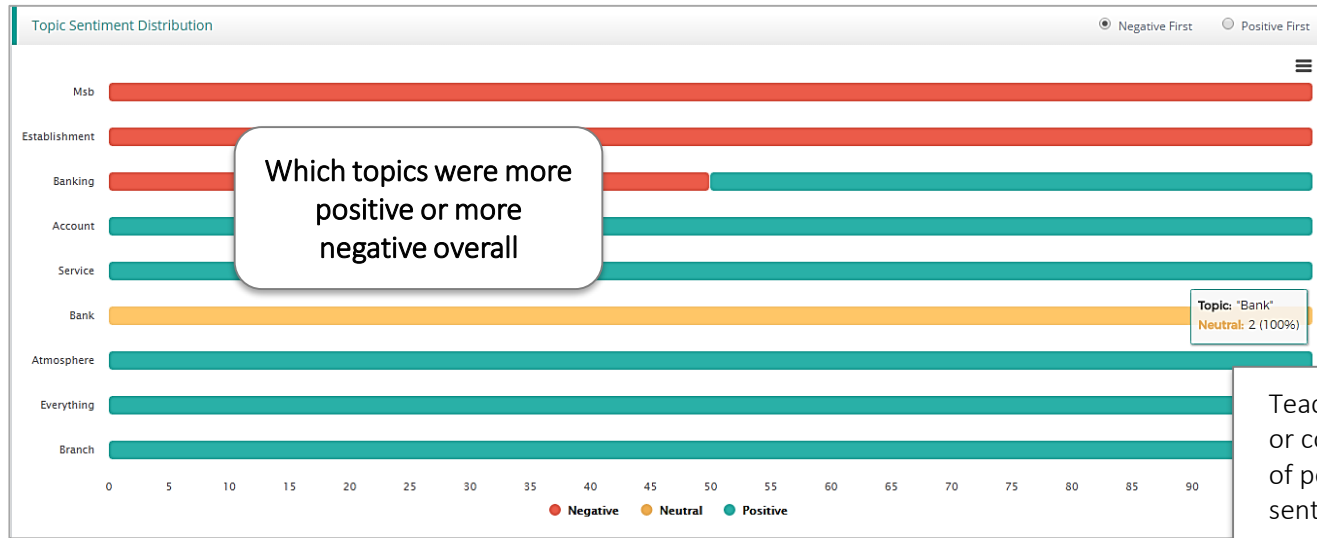
# Pulse Tab

## How do your members feel about your branch?

- Natural language processing technology goes through all reviews and pulls out the major sentiments, in terms of words and topics that match up to emotions
- **Improve customer experience and make informed operational decisions**, such as identifying issues with front-line or online service



# Pulse Tab: Distribution & Statements



Which topics were more positive or more negative overall

Teach the system by changing or correcting the exact degree of positive or negative sentiment you want for a topic.

Statements Found  Show Reviews  Show Hidden Statements

Sentiment	Statement	Review Date
Negative	seems <b>MSB</b> is having trouble adapting to the digital age. Middlesex Savings Bank, 6 Main Street, Natick, MA, 01760, US <b>msb</b>	6/11/17
Neutral	have had an <b>account</b> here many years but its time to move to a modern bank. Middlesex Savings Bank, 6 Main Street, Natick, MA, 01760, US <b>account</b>	6/11/17
Very Positive	The whole <b>atmosphere</b> at this small branch is open and welcoming -- and they just did a remodel -- which looks great! Middlesex Savings Bank, 1208 Main Street, Concord, MA, 01742, US <b>atmosphere</b>	12/29/16

# Media Tab

The Media Tab aggregates all the pictures and videos associated with your branch locations from across the web, using geo-coding, check-ins, and social accounts.

Snapshot | Reviews | Chatter | Pulse | **Media** | Listings | Rankings | Workflow

Location: All (30)

Search Captions

Report

Listing Images

Provider: All

Select providers

Media Filters

Select option

Filter by provider or by the sentiment the images evoke – negative or positive

Search captions for keywords or phrases

- Click the red X to remove the picture from this tab (for irrelevant or unnecessary pics)
- Use the thumbs up, thumbs down, and star to categorize pictures – then filter to just see those!

**Media**

**Middlesex Savings Bank**  
Sudbury, MA

**Middlesex Savings Bank**  
Southborough, MA

**Middlesex Savings Bank**  
Walpole, MA

**Middlesex Savings Bank**  
Walpole, MA

**Middlesex Savings Bank**  
Natick, MA

**Middlesex Savings Bank**  
Natick, MA

# Listings Tab: Summary Report

View every listing for your branches across the web.

- This tab shows you **both** the listings you want and the ones the internet has created for you.
- We've designed this tab to let you figure out which is which and to help you understand what listings are needed

Report  
Summary

Provider  
Select providers

Click here to drill down into more specific reports

Filter by provider to see just one provider, or a combination of providers

Listing Source

### Listing Summary Report

71 Locations Monitored Download

Provider #	Found #	Duplicates #	Claimed #	Mismatched ( phone / address ) #	Categories #	Reviews #	Photos #
Bing	63	18	25	41	N/A	23	25
Citysearch	12	0	1	9	3	1	0
Facebook	62	20	60	33	28	42	57
Foursquare	41	4	7	25	3	17	13
Google	62	12	N/A	39	N/A	32	41
Insiderpages	20	8	1	15	7	0	N/A
Merchantcircle	49	16	19	39	25	4	5
Superpages	25	4	0	18	6	0	2
Yahoo	63	37	0	25	5	12	11
Yellowpages	52	8	52	42	49	7	1
Yelp	25	8	14	18	5	13	9
<b>Total</b>	<b>474</b>	<b>135</b>	<b>179</b>	<b>304</b>	<b>132</b>	<b>151</b>	<b>164</b>

219 Listings Found

Provider #	Claimed #	Photos #	Categories #
YELP Last Updated: 5/26/17 NEW!	0	1	2

**FOUND LISTING:**

Middlesex Savings Bank  
19 Concord Rd  
Sudbury, MA 01776  
(978) 443-7752  
No Website

**CATEGORIES:**  
**DESCRIPTION:** No description found  
**LISTING URL:** https://www.yelp.com/biz/middl...

**EXPECTED LISTING:**

Middlesex Savings Bank  
454 Boston Post Road  
Sudbury, MA 01776  
(978) 443-7752  
https://www.middlesexbank.com/locatio...

Actual listing shown on site

# Listings Tab: Optimization Report

This report shows you **highlighted areas for improving your online listings** –if you click on a highlighted square, the listings that need attention populate instantly below the summary table.

*When you click on the Report drop-down on the left hand side of the Listings tab, you have the option to choose between several different reports.*

Report

Listing Optimization

**Listing Optimization Report** ?

Listing Optimization Download

Provider ^	Not Claimed ⇅	Missing (phone) ⇅	Categories (<2) ⇅	No Reviews ⇅
Bing	0	0	N/A	0
Citysearch	49	6	0	14
Facebook	0	7	50	0
Foursquare	0	8	43	0
Google	N/A	12	N/A	0
Insiderpages	2	2	1	14
Merchantcircle	8	7	2	9

**3 Listings Found**

Provider ⇅

CITYSEARCH

FOUND LISTING:	EXPECTED LISTING:
<p><b>Middlesex Savings Bank</b> 17 Nason St Maynard, MA 01754 (978) 897-1822 <a href="https://www.middlesexbank.com">https://www.middlesexbank.com</a></p> <p><b>CATEGORIES:</b> Savings &amp; Loan <b>LISTING URL:</b> <a href="http://www.citysearch.com/prof...">http://www.citysearch.com/prof...</a></p>	<p><b>Middlesex Savings Bank</b> 17 Nason Street Maynard, MA 01754 (978) 897-3232 <a href="https://www.middlesexbank.com/location...">https://www.middlesexbank.com/location...</a></p>
<p>Claimed ⇅   Photos ⇅   Categories ⇅</p>	<p style="text-align: center;">NO   0   1</p>

Click any box and then scroll down to see full detailed listings results.

# Rankings Tab: Average Rankings Report

This report summarizes the average rankings for a given branch, by keyword, over time. You can modify the keywords and filter by provider, time frame, and local versus overall web search results.

Report

Average Rankings

Ranking Type

Local Web

Date Range

All Time

Provider

Select providers

### Average Rankings Report - All Time

Average Ranking

Keyword	Bing	Google	Yahoo	Yellowpages	Yelp
No Fee Atm (Wayland, MA)	48	>50	>50	>50	46
Mortgage Refinance (Wayland, MA)	49	>50	>50	>50	>50
Investment (Wayland, MA)	49	>50	>50	>50	>50
High Interest Savings (Wayland, MA)	35	40			
Free Checking (Wayland, MA)	39	40			
Credit Card (Wayland, MA)	36	>50			

Choose between Local or Organic search rankings

- Ranking 50+ means virtually invisible
- ~49<sup>th</sup> means max of the 4<sup>th</sup> results page
- Choosing "Local" for Ranking type means the results show a branch's keyword score within the town/city of their location, versus their ranking nationally.

# Rankings Tab: Drill-Down

Click on any **numerical ranking** to bring up a drill-down that shows you the specific ranking for that keyword for each of your branches. This will highlight opportunities – for example, if one branch is trailing for ‘free checking’ you can work to raise that keyword’s performance for that particular branch.

Drill down

Average Ranking

Bank - BING

Sunday, Aug 14, 2016  
Bank - BING: 37

Historical Chart for selected keyword

Average Ranking

Date

Rankings Found

Search Results for specific keyword

Date	Provider	Location	Keyword	Local Area	Rank	Notes
6/22/17	BING	Middlesex Savings Bank, 64 Main Street, Concord, MA, 01742, US	Bank	Concord, MA	>50	
6/22/17	BING	Middlesex Savings Bank, 1208 Main Street, Concord, MA, 01742, US	Bank	Concord, MA	>50	
6/22/17	BING	Middlesex Savings Bank, 899 Edgell Road, Framingham, MA, 01701, US	Bank			

Individual Branch Ranking

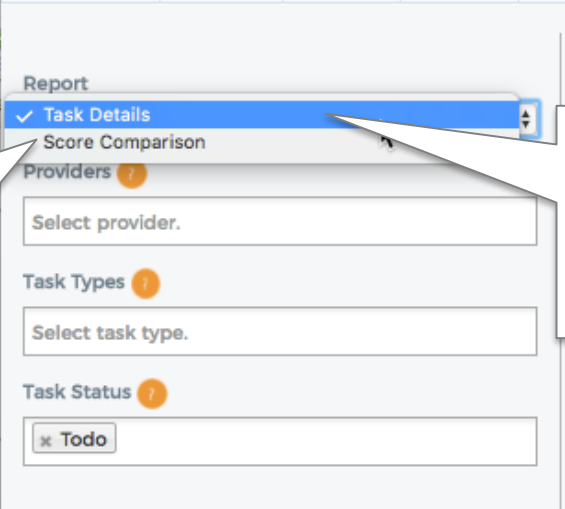
# Workflow Tab

The Workflow tab is designed to provide you with a To-Do List to help improve your local branch reputation and rankings.

## Task Statuses:

- **To-do** – Suggestions for increasing CUBrandMonitor score and overall SEO Value
- **Pending Validation** – Tasks that you or your team have attempted and turned in as complete and are awaiting validation by the system. If a task is stuck in pending, that means either the system is still in the process of validating or the task was not fully completed.
- **Validated** – The system found a task to be completed through its checks and balances

## Report Types:



The screenshot shows a 'Report' dropdown menu with the following options:

- ✓ Task Details
- Score Comparison
- Providers ?
- Task Types ?
- Task Status ?

Below the dropdown are three input fields: 'Select provider.', 'Select task type.', and 'Task Status' with a 'x Todo' button.

**Score Comparison:**  
You can compare your branches with performance scores based on presence and reputation

**Task Details:**  
Shows you an overview of your To-Do List



# Workflow Tab

The Workflow tab is designed to provide you with a To-Do List to help improve your local branch reputation and rankings.

Task Statuses – Allow you to track progress and manage team tasks

Report

Task Details

Providers

Select provider.

Task Types

Select task type.

Task Status

Todo

Todo 0

## 538

Pending Validation 0

## 1

Validated 0

## 358

Download

Date Created	Provider	Status	Task
6/22/17	YELP	Todo on 6/22/17	<p><b>Add listing to Yelp</b> <span style="float: right;">📍 Middlesex Savings Bank, 64 Main Street, Concord, MA, 01742, US</span></p> <p>Add Free Listing to Yelp at <a href="https://biz.yelp.com/">https://biz.yelp.com/</a>. This is free and it will ensure users can quickly find your address and phone number to drive traffic/calls to your business.</p> <p style="text-align: right;">📄 ✓ ✕</p>
6/23/17	YELP	Todo on 6/23/17	<p><b>Add listing to Yelp</b> <span style="float: right;">📍 Middlesex Savings Bank, 267 Hartford Avenue, Bellingham, MA, 02019, US</span></p> <p>Add Free Listing to Yelp at <a href="https://biz.yelp.com/">https://biz.yelp.com/</a>. This is free and it will ensure users can quickly find your address and phone number to drive traffic/calls to your business.</p> <p style="text-align: right;">📄 ✓ ✕</p>
6/23/17	YELP	Todo on 6/23/17	<p><b>Add listing to Yelp</b> <span style="float: right;">📍 Middlesex Savings Bank, 1000 Franklin Village Drive, Franklin, MA, 02038, US</span></p> <p>Add Free Listing to Yelp at <a href="https://biz.yelp.com/">https://biz.yelp.com/</a>. This is free and it will ensure users can quickly find your address and phone number to drive traffic/calls to your business.</p> <p style="text-align: right;">📄 ✓ ✕</p>

Customize your workflow to-do list using filters

Example of a Task to be Completed

# Workflow Tab: Score Comparison

This report shows how your branch locations score across the primary CUBrandMonitor scoring categories. Scores are calculated on the tasks completed for each branch. Segmented by category, they are calculated by a comparison of performance analytics of that branch with its local competitors, including:

- Review quantity
- Review quality
- Review distribution on different sites
- Social media activity
- Listing accuracy
- Rankings

Report	Performance Scores	Overall ↕	Reviews ↕	Chatter ↕	Search ↕	<a href="#">Download</a>
Score Comparison	Middlesex Savings Bank, 291 Main Street, Acton, MA, 01720, US	39	<u>47</u>	<u>17</u>	<u>54</u>	
	Middlesex Savings Bank, 267 Hartford Avenue, Bellingham, MA, 02019, US	26	<u>18</u>	<u>17</u>	<u>45</u>	
	Middlesex Savings Bank, 64 Main Street, Concord, MA, 01742, US	29	<u>0</u>	<u>34</u>	<u>54</u>	
	Middlesex Savings Bank, 2 West Union Street, Ashland, MA, 01721, US	39	<u>65</u>	<u>0</u>	<u>54</u>	
	Middlesex Savings Bank, 1208 Main Street, Concord, MA, 01742, US	46	<u>65</u>	<u>31</u>	<u>42</u>	
	Middlesex Savings Bank, 50 Chestnut Street, Needham, MA, 02492, US	47	<u>65</u>	<u>31</u>	<u>45</u>	
	Middlesex Savings Bank, 31 North Main Street, Sherborn, MA, 01770, US	32	<u>41</u>	<u>17</u>	<u>38</u>	
	Middlesex Savings Bank, 1 Andrew Avenue, Wayland, MA, 01778, US	25	<u>0</u>	<u>31</u>	<u>45</u>	
	Middlesex Savings Bank, 657 Main Street, Walpole, MA, 02081, US	41	<u>41</u>	<u>45</u>	<u>37</u>	
	Middlesex Savings Bank, 186 The Great Road, Bedford, MA, 01730, US	30	<u>0</u>	<u>31</u>	<u>61</u>	
	Middlesex Savings Bank, 278 Washington Street, Wellesley, MA, 02481, US	37	<u>41</u>	<u>17</u>	<u>54</u>	
	Middlesex Savings Bank, 150 Commonwealth Road, Wayland, MA, 01778, US	31	<u>24</u>	<u>17</u>	<u>54</u>	
	Middlesex Savings Bank, 162 Cordaville Road, Southborough, MA, 01772, US	23	<u>0</u>	<u>17</u>	<u>54</u>	
	Middlesex Savings Bank, 36A Milliston Road, Millis, MA, 02054, US	40	<u>65</u>	<u>17</u>	<u>38</u>	
	Middlesex Savings Bank, 160 Littleton Road, Westford, MA, 01886, US	45	<u>65</u>	<u>17</u>	<u>54</u>	

# Snapshot Tab - Admin Guide

## How to add or edit:

- Branch locations and location information
- Locations Competitors
- Users
- Groups

[Snapshot](#)[Reviews](#)[Chatter](#)[Pulse](#)[Media](#)[Listings](#)[Rankings](#)[Workflow](#)

Click to enter  
your account  
admin area

# Admin: Add/Edit Locations

Uncheck this box to deactivate the branch location

Download Location Info into Excel File

"Add New Location" (Only Available to Admin Users Not Standard Users)

Edit a branch location's info

Admin Panel View (Standard users only see "Manage Locations & Competitors")

Manage Email Alerts

Use Binoculars to Edit Competitor Monitoring Information

Active	Location	Review Alerts	Chatter Alerts	Blog Alerts	PDF Reports	
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 1 Andrew Avenue, Wayland, MA, 01778, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 10 Main Street, Hopkinton, MA, 01748, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 1000 Franklin Village Drive, Franklin, MA, 02038, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 112 Boston Road, Groton, MA, 01450, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 1208 Main Street, Concord, MA, 01742, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 150 Commonwealth Road, Wayland, MA, 01778, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 160 Littleton Road, Westford, MA, 01886, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 162 Cordaville Road, Southborough, MA, 01772, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 17 Nason Street, Maynard, MA, 01754, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 186 The Great Road, Bedford, MA, 01730, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Middlesex Savings Bank, 2 West Union Street, Ashland, MA, 01721, US	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# Admin: Add/Edit Location Information

When you set up your account with CUBrandMonitor, you provided these fields for us to upload into the system.

However, a situation might arise where you either want to modify existing information (ex: rebranding changes a website) or add a new location (ex: a new branch opening).

**Alternate Website** is used by our internal **Rank Tracker**, which can look for multiple URLs, if you utilize this field.

**Alternate Phone Numbers:** Enter any additional phone numbers that may be used across the web, such as call center. We use this for matching with online listings.

Provide Facebook and Twitter pages that you would like tracked for each branch.

Edit Location

<b>Business Name*</b>	<input type="text" value="Middlesex Savings Bank"/>
<b>Primary Website</b>	<input type="text" value="https://www.middlesexbank.com/locations/Pages/wayland-center.asp"/>
<b>Alternate Website</b>	<input type="button" value="Add Alternate Website"/>
<b>Primary Category*</b>	<input type="text" value="Bank"/>
<b>Country*</b>	<input type="text" value="United States of America"/>
<b>Street*</b>	<input type="text" value="1 Andrew Avenue"/>
<b>Suite</b>	<input type="text"/>
<b>City*</b>	<input type="text" value="Wayland"/>
<b>State/Province*</b>	<input type="text" value="MA"/>
<b>Zip/Postal code*</b>	<input type="text" value="01778"/>
<b>Main Phone*</b>	<input type="text" value="5083584079"/>
<b>Alternate Phone Numbers</b>	<input type="button" value="Add Alternate Phone Number"/>
<b>Client Location Id</b>	<input type="text"/>
<b>Email Address</b>	<input type="text"/>
<b>Alternate Emails</b>	<input type="button" value="Add Alternate Email"/>

**SOCIAL MEDIA PAGES**

**Facebook Page/URL**

**Twitter Page/URL**

# Admin: Add/Edit Location Information

## CUSTOM BRAND MONITORING

Directory Name Search ?

Social Search ? Search Term (examples: @CocaCola, #justDolt) Remove

Modifier	Matching Text	Remove
Must Include	<input type="text"/>	✗

**Directory Search Name:**  
You can enter a different or shorter business name for us to monitor on social media and check citations. For example, a member might search for "Middlesex" instead of the full "Middlesex Savings Bank."

**Social Search Terms:**  
Enter additional terms (Names, Phrases, Promotions, Hash tags) you want to track on social media in addition to business name

**Modifiers:** Add filters to narrow search results

## ADDITIONAL KEYWORD TRACKING

Examples: "Mexican, Los Angeles, CA" / "Tamale, Downtown LA" / "Take-Out, Downtown Los Angeles"

Keyword	Local Area	Remove
<input type="text" value="Credit Card"/>	<input type="text" value="Wayland, MA"/>	✗
<input type="text" value="Bank"/>	<input type="text" value="Wayland, MA"/>	✗
<input type="text" value="Free Checking"/>	<input type="text" value="Wayland, MA"/>	✗
<input type="text" value="Mortgage Refinance"/>	<input type="text" value="Wayland, MA"/>	✗
<input type="text" value="Best Mortgage Rate"/>	<input type="text" value="Wayland, MA"/>	✗

**Keywords:**  
Search terms for replicating member searches and tracking both local (i.e. Map Apps) and organic search rankings

Enter cities, neighborhoods, or zip codes to replicate a mobile search for your keywords

# Admin: Manage Users

My Account

- Manage Users**
- Manage Groups
- Manage Locations & Competitors

Manage Users only appears for Master and Admin Users

### Manage Users

Download Add New User Search Users

Username	Full Name	Email	User Type	# Of Active Locations	Status	
CTaft1	Charlotte Taft	ctaft@callahan.com	Account Admin	30	Enabled	
PattersonA	Alix Patterson	apatterson@callahan.com	Account Admin	30	Enabled	
TTaylor	Tim Taylor	ttaylor@callahan.com	Standard	0	Enabled	
agekas	Alex Gekas	agekas@callahan.com	Standard	0	Enabled	
mharbin	Madison Harbin	mharbin@callahan.com	Location Admin	0	Enabled	
middlesexmaster	Middlesex Master	mharbin@callahan.com	Account Admin	30	Enabled	

**3 User Types/Roles**

- Admin:** Can Add & Manage all Users, Groups, and Branches
- Master:** Can Add Branches & Manage the Users and Branches Assigned to Them
- Standard:** Read-Only, Limited Access

- Edit user information
- Add/Edit Groups the user has access to
- Add/Edit Branches the user has access to
- View CUBrandMonitor as that user
- Delete User

# Admin: Groups

Groups are used in CUBrandMonitor to support the ability to report and pull data on 2+ locations.

For example, a regional manager might only want to see the data for the branches that fall into their territory, and not every branch location.

**My Account**

- Manage Users
- Manage Groups
- Manage Locations & Competitors
- Configure Reports
- Brand Settings

## Manage Groups

Download
+ Add New Group

Search Groups

Group Name	LBV Report	# Of Active Locations	
Middlesex All	LBV Report	0	✎ 📍 🗑
Middlesex Central	LBV Report	0	✎ 📍 🗑
Middlesex Northeast	LBV Report	0	✎ 📍 🗑
Middlesex Southeast	LBV Report	0	✎ 📍 🗑
Middlesex West	LBV Report	0	✎ 📍 🗑

Previous
1
Next
Last

Create New Group

Local Brand Visibility (LBV) Roll-Up Reports for the Group

- Edit Group Info
- Add/Remove Branches from Group
- Delete Group



# Next Steps for Set-Up

- Confirm full information has been provided to Callahan for upload
- Set up users and branch groups
- Customize your social media tracking options
- Add your Facebook and Google accounts under External Logins in the My Account Section
- Configure your Social settings (Facebook, Instagram, etc)
- Modify branch-level competitors (My Account -> Locations) to accurately benchmark
- Follow *Workflow Tab* recommendations to drive improvement
- Listen, respond, and take action on reviews – you can have them emailed to you
- On *Rankings Tab*, verify keywords (update them under My Account -> Locations)
- On *Listings Tab*, determine process of standardizing NAP listings for each branch

Drive Towards A CUBrandMonitor Overall Score of 80!

39 or less = Poor

40-70 = Average

71+ = Good

# Where Do I Start?

- Claim 3 listings a week initially, also check periodically for any new entries (possibly 3-4 a month). This is typically a long process, so getting started right away is recommended!
- Respond to all reviews submitted, especially new ones. Focus on negative reviews first, then positive reviews to strengthen member loyalty and increase word-of-mouth.
- Build individual Facebook pages for all branches (You can start with NAP information until you are able to drive content to all pages).
- Connect with brand advocates within the chatter section to strengthen member loyalty and increase positive mentions.
- Create optimized landing pages for each branch with unique content per location.
- Create reputation awards around branches with the best online presence. Have best online presence branch used as a case study to set standard for operations .
- Work with social media team and bloggers to create content and promote back-linking/referencing around keywords that are not performing well on our rankings table.

# Support

We're here to help!

Please feel free to contact us with any questions – large or small.

[help@cubrandmonitor.com](mailto:help@cubrandmonitor.com)

1-800-446-7453