



KASASA®

Yelp

Total Yelp Account Creation and Optimization

1 hour and 56 minutes | 2nd Ed. February 2019

Introduction

Introduction

Like a “viral” post, social media has exploded in popularity, becoming a must-have component of any marketing strategy aimed at Millennials. This e-book is part of a series we created to help community banks and credit unions take advantage of the opportunities at your fingertips.

In this guide, you'll find a checklist that will help you optimize your financial institution's Yelp profile and increase your chances of being discovered by local consumers. Here are some recommendations for the guide:

1. Start with the checklist. If you need a refresher or hit a snag, the corresponding section contains a complete walk-through.
2. Be consistent in how you spell your name, address, and phone number across all sites. For example, don't list your address as 111 Banking Drive on one site, and 111 Banking Dr. on another.
3. List the branch's actual phone number, not 800 numbers.

What is Yelp good for anyway?

Yelp isn't just for restaurants. In fact, 25% of Yelp users say they have used it to find a financial institution. In a study commissioned by the Boston Consulting Group, simply claiming the Yelp listing resulted in an average increase of \$8,000 a year in revenue.*

*https://www.yelpblog.com/2013/03/yelp_survey_findings

I Yelp Checklist

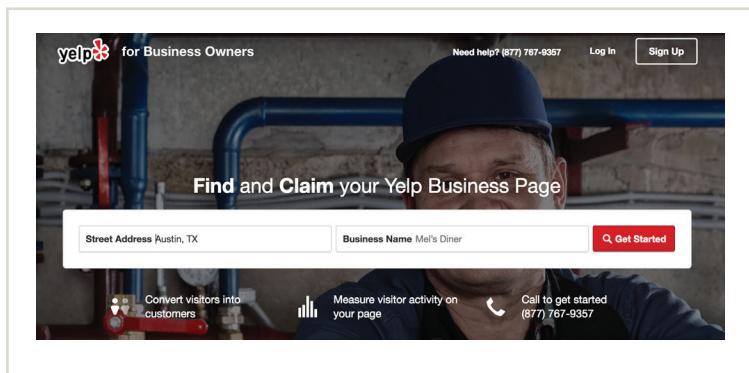
- ☐ Claim your listing(s)
- ☐ Look for and claim duplicate listings
- ☐ Complete all your information
 - ☐ Make sure your categories are correct
 - ☐ Business hours
 - ☐ Specialties
 - ☐ Business history
 - ☐ Add photos
 - ☐ Review badges
- ☐ Optimize your account
- ☐ Encourage reviews

*https://www.yelpblog.com/2013/03/yelp_survey_findings

II Yelp How-tos

Claim Your Listing

- 1 Go to <https://biz.yelp.com/>.
- 2 Enter the name and address of your branch location.

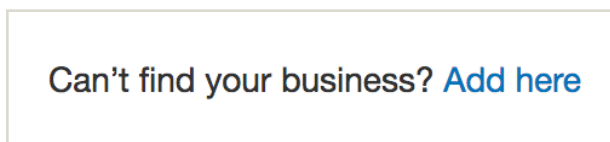


Each branch should have their own Yelp page. This will help you manage and act on feedback.

- 3 If the business is found, click the “Claim this business” button.



- 4 If your business is not found click “Add here.”



Claim your listing

🕒 10 minutes

🔧 Access to the phone that is associated with your business

II Yelp How-tos

- 5 Fill out the form to add your business to Yelp.

Add Your Business

Add information about your business below. Your business page will not appear in search results until this information has been verified and approved by our moderators. Once it is approved, you'll receive an email with instructions on how to claim your business page.

Country
United States

Business Name
Freedom Institution

Address 1
123 Main St

Address 2
Ste 200

City **State** **ZIP**
San Francisco CA 94103

Phone
(855) 555-5555

Web Address
http://www.companyaddress.com

- 6 Regardless of whether you did step 3 or step 4, you will need to create an account. Complete all the required information and use an email address associated with your institution's web URL.
- 7 Yelp will try to verify your account with a phone call and a verification code. Make sure that you have access to the business phone listed.

Look for and claim duplicate listings

In order to create stronger SEO signals, avoid consumer confusion, and minimize reputational risk, you should do a search for each branch location. If you find a duplicate listing, go through the above claiming process.

Once you have ownership of the duplicate Yelp listing, go to the "Edit My Business" section. At the bottom of the page, you will see the option to mark the page as a duplicate listing.

Look for and claim duplicate listings

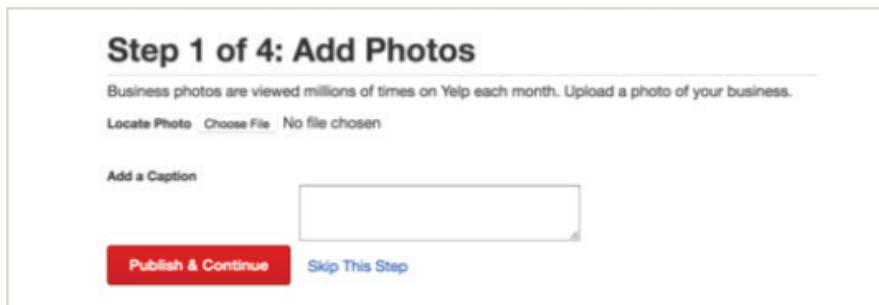
🕒 15 minutes

🔧 Access to the phone that is associated with your business

II Yelp How-tos

Complete all your information

1 Add photos.

A screenshot of the Yelp business profile setup interface, specifically the 'Step 1 of 4: Add Photos' section. The header 'Step 1 of 4: Add Photos' is in bold. Below it, a message states: 'Business photos are viewed millions of times on Yelp each month. Upload a photo of your business.' There are two links: 'Locate Photo' and 'Choose File', followed by the text 'No file chosen'. Below this is a section titled 'Add a Caption' with a text input field. At the bottom, there are two buttons: a red 'Publish & Continue' button and a blue 'Skip This Step' link.

Accounts with photos see visitors stay twice as long. It's also a chance to highlight features of your branch. You should make it a goal to add at least five photos. Here are some suggested photos:

- The exterior of your branch
- Drive-thru
- The lobby
- Teller windows
- Loan officers' desks
- ATM
- Parking lot
- Amenities (coffee, candy, etc.)

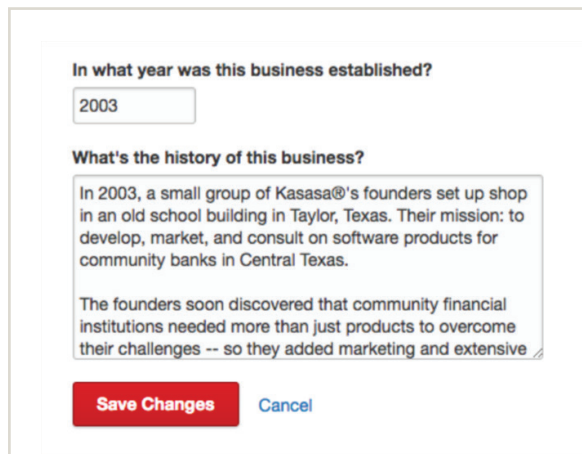
Add Photos

🕒 35 minutes

🔧 At least 5 photos
of your business

II Yelp How-tos

2 Add business history.



Adding your history is important because it positions and enhances your brand's story, while also creating a point of difference. It associates strategic keywords to your account. Make sure you read the Yelp Guidelines when completing your profile.

A good bio should include your brand name, the towns you service, who you help, and notable historical tidbits.

3 Add owner or employee bio.

When you respond to reviews, the response will come from this bio. Keep in mind, you don't have to be the CEO to reply, but if the bio is created for him/her, then the reply might be more meaningful to the consumer.

Add business history

🕒 10 minutes

🔧 A brief history of your institution

Add owner or employee bio

🕒 5 minutes

🔧 A short bio about your CEO that mentions the institution, the town, and some information about positions in the community, i.e. Board member on XX

II Yelp How-tos

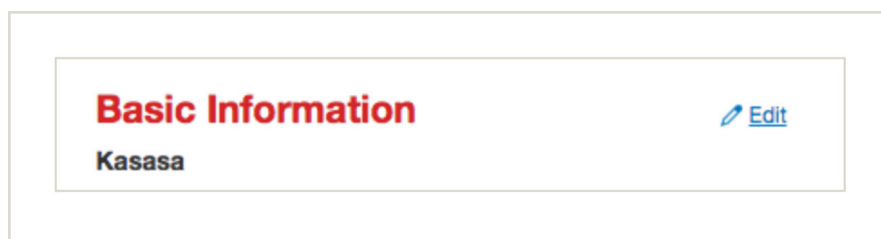
Optimize your account

- 1 Upload more photos.
- 2 Check business information.

Ensure all your info (name, address, phone, website URL, etc.) is accurate. Remember you want to list this information in the same format across all sites. Don't use "Drive" in some instances and "Dr." in others.

- 3 Verify business categories.

Categories will help you get discovered for the correct services. This is what consumers will enter in the search bar. To select or edit your categories, click the "Edit" button.



Scroll down to "Categories." To add a category, click "Add another category." To remove, click "Remove." You can find the correct categories by typing in a service you offer, like "Loans", or the type of institution you are, like "Credit Union." Once you've added your categories, click "Save."

Verify business categories

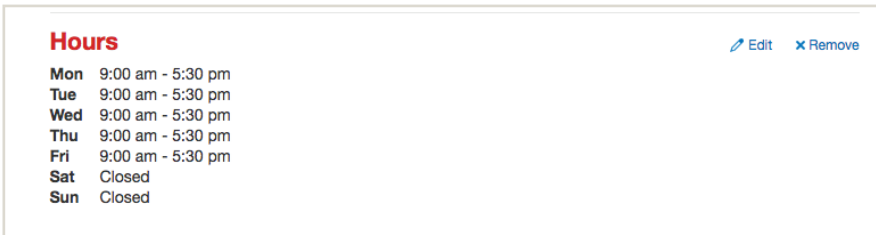
🕒 15 minutes

🔧 None

II Yelp How-tos

4 Add business hours.

To edit, click the “Edit” icon.



Hours	
Mon	9:00 am - 5:30 pm
Tue	9:00 am - 5:30 pm
Wed	9:00 am - 5:30 pm
Thu	9:00 am - 5:30 pm
Fri	9:00 am - 5:30 pm
Sat	Closed
Sun	Closed

5 Add specialties.

If you service a niche demographic, or have additional services that would distinguish you from another community bank or credit union, mention them here. This is a good place to mention specific services consumers might search for, but avoid making a list that's too long.

6 Double check your history.

After the customer reviews, this is the most frequently viewed section of a Yelp page. Make sure it accurately conveys the tone, mission, and services of your institution.

7 Review badges.

Badges are an excellent way to promote your Yelp listing on your webpage or other digital real estate. To find them, click “Review Badges” in the left-hand menu.

Add business hours

🕒 2 minutes

🔧 None

Add specialties

🕒 4 minutes

🔧 None

Double check
business history

🕒 10 minutes

🔧 A brief history of
your institution

Review badges

🕒 10 minutes

🔧 Assistance of a
web developer to
implement your
Yelp badge

II Yelp How-tos

You should see four different options for badges included in the unique code for your page to the right of the image.

Preview	Code Snippet
	<pre><div id="yelp-biz-badge-rrc-Hgbwn7LakZNIIdR-Tj4j57g">Check out Kasasa on Yelp</div><script>(function(d, t) {var a = d.createElement(t);var s =</pre>
	<pre><div id="yelp-biz-badge-rc-Hgbwn7LakZNIIdR-Tj4j57g">Check out Kasasa on Yelp</div><script>(function(d, t) {var a = d.createElement(t);var s =</pre>

Work with your development team to copy this code and deploy it on your website.

II Yelp How-tos

Encourage reviews

Tactic 1: Request a free Yelp window sticker for your branch.

You can request a free sticker [here](#).

Tactic 2: Ask for feedback, not reviews.

Train your frontline staff to encourage happy account holders to leave feedback on Yelp.

Tactic 3: Make it obvious.

Create table tents, shirts, posters, etc. to let consumers who are visiting your branch know you're on Yelp. Take the same approach for digital real estate (website, social media channels, and email signatures).

Tactic 4: Cross promote.

Highlight your great reviews on your other social platforms, like Facebook and Twitter.

Tactic 5: Reciprocate.

Leave reviews for other local businesses, like vendors, partners, and companies you have issued loans to.

Tactic 6: Respond to all reviews.

Responding lets your consumers know that you care. Whether the review is positive or negative, it deserves a professional and thoughtful response.

II Yelp How-tos

In closing

Completing this guide is a great way to establish your brand on Yelp. With a little time and guidance, it doesn't have to be overwhelming. We're passionate about helping community financial institutions develop winning social media strategies.

Ready to create raving fans and loyal account holders with Kasasa? [Contact us](#) to get started.