



How to

Automate Testimonial Collection

The image features a man and a woman in a shop-like environment. The woman, on the left, is wearing a grey blazer and is pointing at a tablet held by the man. The man, on the right, is wearing a denim shirt and a dark apron, and is smiling at the tablet. The background shows shelves with various items, possibly in a cafe or a boutique. The entire scene is overlaid with a semi-transparent dark blue circle. On the left side of this circle, there is a large, solid blue circle. On the right side, there are several concentric blue circles of varying sizes, creating a ripple effect.



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About This Guide





1. About This Guide

Testimonials matter. Having quality, credible testimonials can make or break a sale. Prospective customers want to know that you have the experience and the skills to deliver on your promises. For this, they look to testimonials, online reviews, and social proof – do you have past customers who can vouch for and recommend your services?

If you don't have a great collection of testimonials, chances are good that the biggest hurdle standing in your way is simply asking for them. The good news? There is a simple fix! With the right tools, it is quick and easy to automate asking for testimonials so you can start to have a steady stream of praise coming in from your customers.

Our goal with this guide is to show you just how quick and easy it can be to set up an automated testimonial collection process. This step-by-step guide will walk you through a proven process that you can complete in as little as an hour. Then let it run in the background while you watch the praise roll in.



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What You'll Need



2. What You'll Need

There are a couple of tools you'll need to get your testimonial automation process up and running. You'll find the list of categories below with some recommended tools, but there are lots of options out there, and you may even already have all of these as part of the toolset for your organization.

- **A way to automate emails to your customers** – If you have an email marketing platform that supports automation, use that. If not, [Mailchimp](#) is a free or inexpensive option. We use [Hubspot](#), which also works great.
- **A form to collect to testimonials** – Your website should have a way for you to create a form that you can send to your customers for them to submit a testimonial, or you can use Google forms. We use [Boast](#) to create our collection form, so we have a single place for viewing and managing submissions.
- **A platform for organizing and visualizing submissions** – You'll want your collection form to submit to a place where you can view and organize the testimonials you receive. With Boast, we have a dashboard of submitted testimonials, but [Google Sheets](#) or Excel are also options.
- **A way to display testimonials on your website** – Your testimonials won't do much good if prospective customers can't find them. You'll want to create a page on your website where you can showcase your praise. Boast provides an embed code that we use to automatically display new testimonials when they are submitted.



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Asking for Testimonials



3. Asking for Testimonials

The first thing you'll need to automate your testimonial collection is an ongoing way to reach out to you customers and ask them to submit their praise. We use [Hubspot](#) for all of our customer communication, but most email marketing platforms, like [Mailchimp](#) or [Constant Contact](#) will do the trick.

Here are some things you'll need to decide:

- Who will you ask for a testimonial? Will you ask all of your customers or just a select few?
- How will you time the ask? Immediately after they become a customer? Will there be a delay?
- What will you say to get the feedback you're looking for?
- How many times will you ask? Will it be a single ask or will you follow up with multiple emails?

Hey there!

We love showcasing our clients on our website. Could we include you along with a short testimonial?

We'd just need a sentence or two about your experience working with your realtor.

If you're up for it, [here's a form](#) to make it super easy.

Or just reply to this email!

Best,

Stephanie
acmerealfors.com



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Testimonial Collection Process



4. Testimonial Collection Process

We already mentioned that you'll need a collection form or way for your customers to submit their testimonial. You could have customers simply reply to the email to submit their praise, but that can be clunky and difficult to manage. It can also result in inconsistent answers or testimonials without much substance.

For the most automation and best quality testimonials, we recommend creating a form that is linked from the email you send out. Also, make sure to be specific with the questions you ask.

You'll want to ask for basic information like **name, location, product/service, and a photo** to give added credibility. Then think about what questions would elicit the highest quality testimonials. Something like **What was your favorite part about our product/working us?** or **What feature/service was most helpful to you?** Providing specific direction will result in better, more useful testimonials.





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Testimonial Collection Form



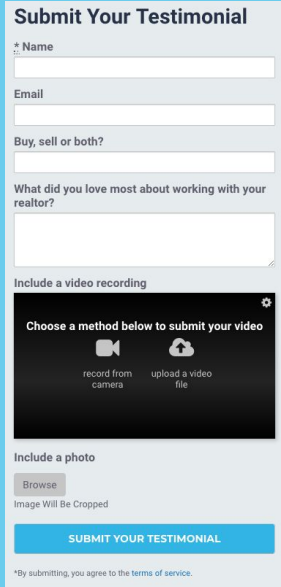
5. Testimonial Collection Form

Once you know what questions you want to ask your customers, it's time to set up your testimonial collection form.

A couple of options would be to create a form on your website with a landing page that explains what you are looking for, or you could set up a [Google Form](#) to send your customers.

We use [Boast](#) for our testimonial collection. This allows us to request a photo and video in addition to the text testimonial and also provides an interface for easily managing and organizing testimonials that have been submitted.

Another useful feature of Boast is [Conditional Thank You Messages](#), which allows us to show a different message based on whether the feedback received is positive or negative. Businesses benefit from this feature by sending happy customers to review sites like Google, Facebook, and Yelp to beef up online reviews in addition to testimonials.



The image shows a screenshot of a testimonial submission form titled "Submit Your Testimonial". The form includes the following fields and options:

- * Name: A text input field.
- Email: A text input field.
- Buy, sell or both?: A text input field.
- What did you love most about working with your realtor?: A large text area for a detailed response.
- Include a video recording: A section with a dark background and a gear icon, containing the text "Choose a method below to submit your video". It offers two options: "record from camera" (with a camera icon) and "upload a video file" (with an upload icon).
- Include a photo: A section with a "Browse" button and the text "Image Will Be Cropped".
- A prominent blue button labeled "SUBMIT YOUR TESTIMONIAL".
- A small disclaimer at the bottom: "*By submitting, you agree to the terms of service."



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Managing Your Testimonials

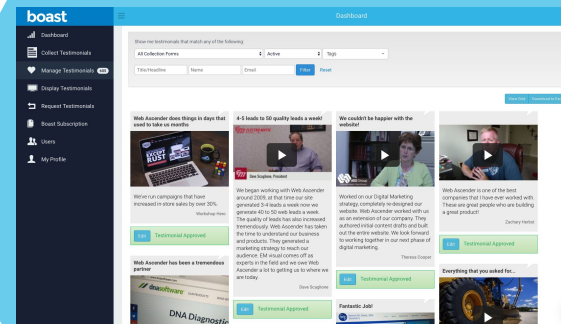


6. Managing Your Testimonials

Lastly, you'll need a place for organizing and managing your testimonials once they start rolling in. This is where you'll keep track of all of your praise so you can use the right social proof in the right places to have the biggest impact on your business.

One option is to keep a spreadsheet. Your form tool may even automatically update a [Google Sheet](#) for you.

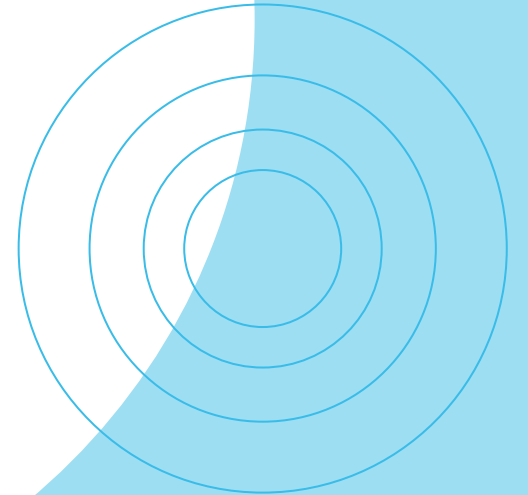
Our team uses Boast to manage our testimonials, which allows us to tag testimonials and approve them to automatically show up on our website. This creates even more automation to save our team time and make sure our testimonials are up to date without having to worry about remembering to update them manually.





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About Boast





7. About Boast

Boast helps businesses leverage happy customers to fuel business growth.

We're on a mission to help businesses collect and share customer stories. One way we do that is with our software tools that allow business owners and marketing teams to manage the collection, management, and display of video testimonials.

More than 5,000 organizations rely on Boast for collecting raving customer testimonials. Join them today!

[TRY BOAST FOR FREE >](#)



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