



boast

A Step-by-Step Guide to
**Automating
Testimonial
Collection**



Why We Wrote This Guide

Testimonials Are Impactful

Testimonials improve sales. 72% of consumers say that positive reviews and testimonials make them trust a business.

How does this work? Potential customers want to see the positive experiences of your existing customers and testimonials allow you showcase just that.

Testimonial Collection Doesn't Have to be Complicated

Creating an arsenal of quality testimonials for your business doesn't have to be tricky. Putting in an hour of work up front to automate your testimonial collection and display processes will go a long way toward building a persuasive collection of praise that'll be sure to make an impact on your bottom line.

This guide will walk you through a step-by-step process for automating customer testimonial collection to save your team time and effort.



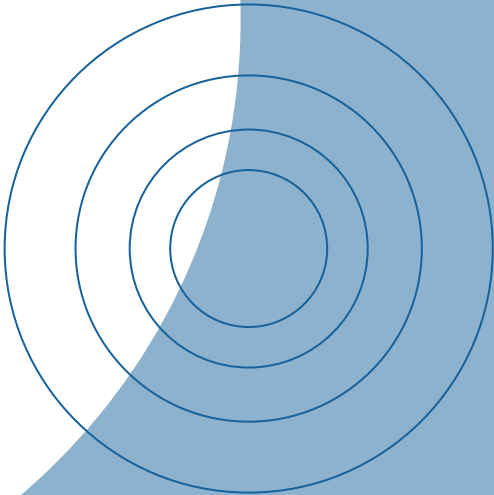
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Step #1

Create an Easy-to-Use Collection Form



Create an Easy-to-Use Collection Form

Creating a collection form is the first step to automating your testimonial collection process. This form should be easy for your customers to fill out and should only capture fields that are crucial to the testimonial. Opting for a form that allows you to collect a variety of text, photo and video testimonials gives your customers options and allows you to collect an impactful feed of testimonials.

Once your form is created, think about placement. Opting for a form that can be embedded will allow you to pick a URL that's easy to remember and type as well as create impactful landing pages. Creating a landing page to house your collection form will help you make the process of submitting a testimonial as easy as possible for your customers while allowing you to provide direction in terms of why they should submit a testimonial and what content they should include.

Easily share your videos, photos & stories

Our Moments & Memories competition has now closed. You can continue to share your photos and videos, but any entries received after 31 December 2016 won't be counted.

Thank you to all our members who have shared their moments and memories. We will be announcing the winners soon!

* Name

Phone

* Email

Your chosen category

Tell us why your moment is special to you

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Include a video recording

Choose a method below to submit your video

record from webcam upload a video file

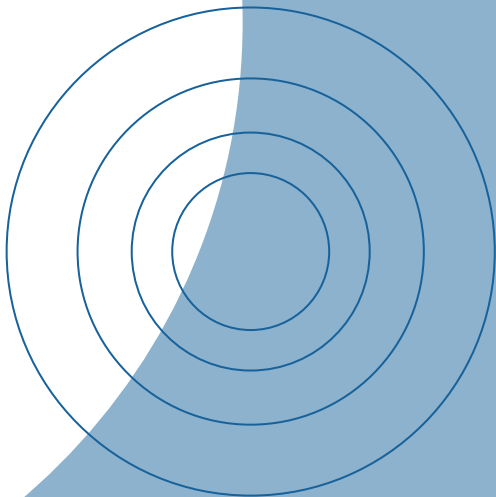
Include a photo



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Step #2

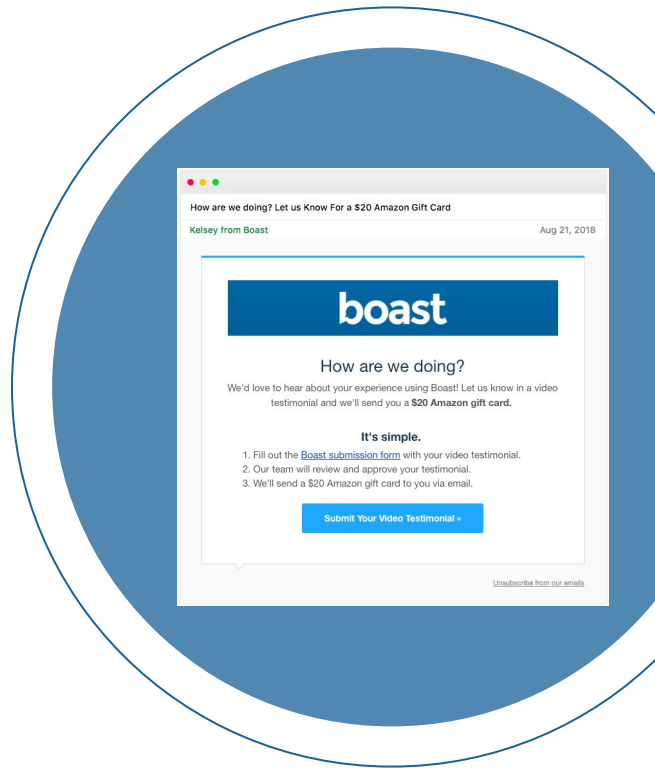
Create Email Workflows



Create Email Workflows

First, in order to create an email workflow for your testimonial collection process, you'll need to pick a platform. It's smart to use a platform that already houses your customer lists. If you don't have an existing platform, choose one, like Mailchimp, that allows you to segment your lists based on past form submissions, sales and other behaviors.

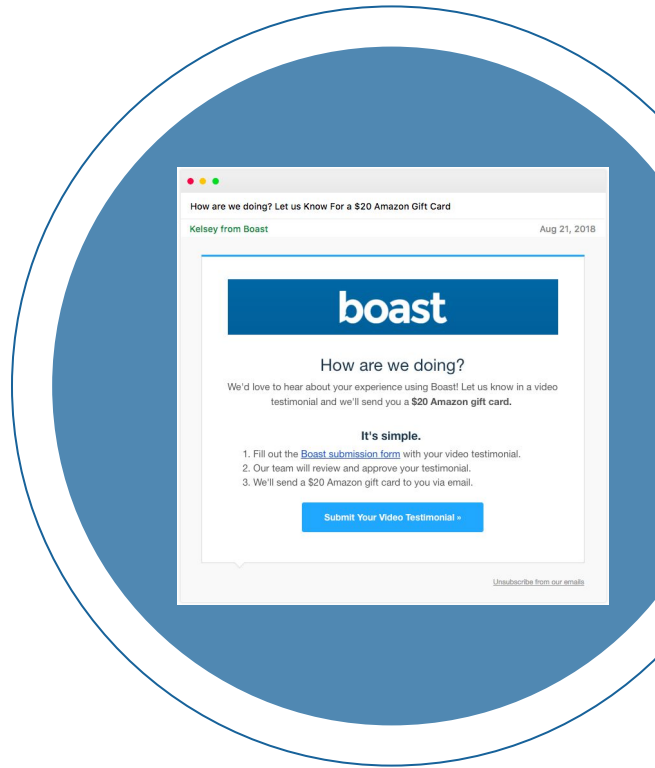
Once you have your platform in place, create a series of emails to nudge your customers to leave you a testimonial. Compiling well-thought-out content will help you influence your customers to submit testimonials. The content they receive should help them feel prepared and understand what you're looking for in a testimonial. These emails could include helpful information like examples of existing testimonials, a refresher about your time working together or an enticing incentive to submit.



Create Email Workflows

All emails will contain a link to the form you created for collection to ensure your customers can get to at each point during the workflow.

Keep it simple. You know your customers and what will influence them. Your goal with this workflow is to increase the chance that they'll leave you a testimonial so word your messaging in a way that makes sense for your customers.

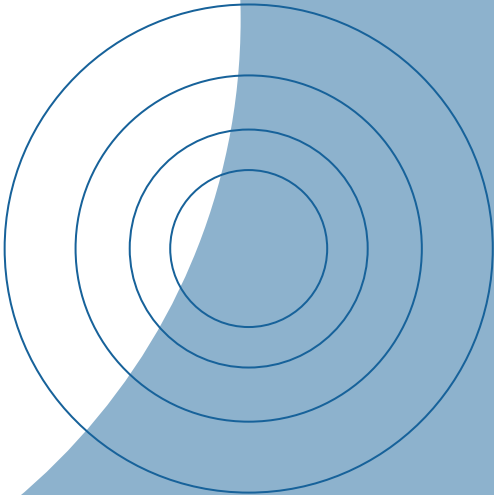




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Step #3

Decide Who to Ask



Decide Who to Ask

Once you have an idea about the workflow messages you'll send, decide which customers to ask and when. Think about how long your customers need to know if they're happy with your business, and use that as a reference for email triggers. Do you offer a service where they could express their thanks immediately after the project is complete? Or do you offer a product that they might need to use for a few months to decide how they feel?

Start with your existing customer list and create segments in your email marketing system for who you want to request a testimonial from. Or use your CRM system as a tool to identify customers as good candidates to ask for a testimonial. Understanding how to use your existing data will help you ask customers who are most likely to leave your company a testimonial.

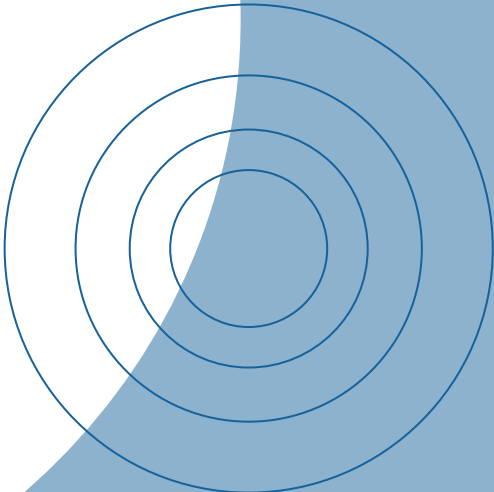




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Step #4

Launch Your Testimonial Workflow



Launch Your Testimonial Workflow

Once your testimonial request emails are created and your enrollment triggers are set up, it's time to launch your workflow. Before you launch, take a minute to do a once-over of your workflows to ensure they're good to go. Follow this quick testimonial automation launch checklist to ensure your workflows are ready to be sent:

- Make sure your segments make sense for the ask
- Confirm your triggers are working properly
- Check the workflow order and timing
- Test all of the links in your emails

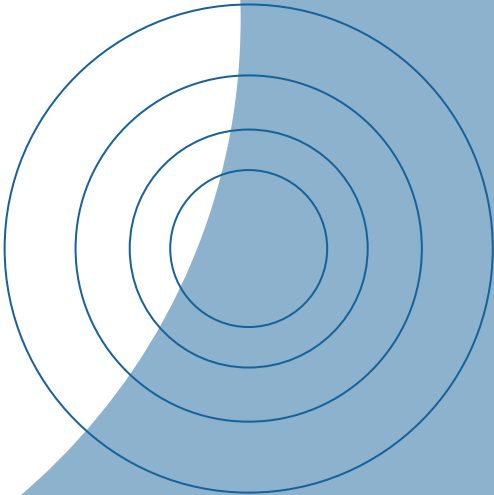




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Step #5

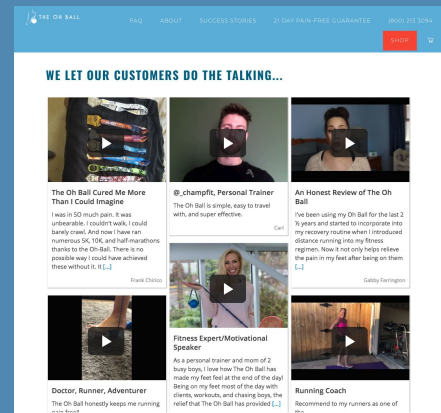
Create a Testimonial Display Page



Create a Testimonial Display Page

Once your workflow is launched and the testimonials start flowing in, decide how you plan to use of all of your testimonial submissions. If you're using a testimonial service, such as Boast, this could be as simple as embedding a code on your website to automatically pull in new submissions. Creating a feed of testimonials that automatically pushes new submissions to a designated page on your website can be a great sales tool to share with prospects. This page can be simple, with a header section and an embedded feed of testimonials.

Once you have a feed created, make sure this page is easy to get to from multiple places on your website. This will be an ongoing tool to not only close more sales for your business, but also to influence more customers to leave their own testimonial.

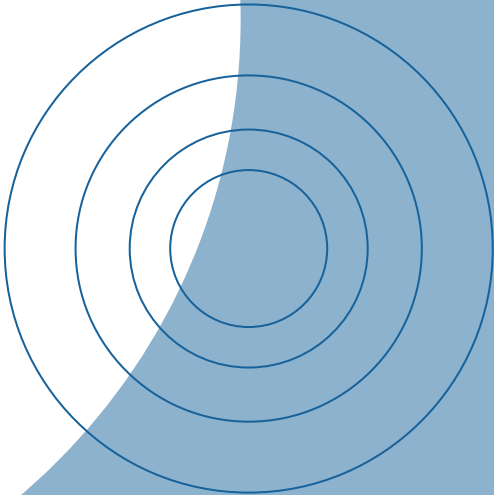




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Step #6

Test and Improve Your Automation Process



Test and Improve Your Automation Process

Like any other marketing effort, your business should continuously improve your automation process to make it as seamless as it can be. Track crucial metrics to ensure that your workflow emails are actually impactful at influencing your lists. These metrics will include open rate, click rate and conversion rate.

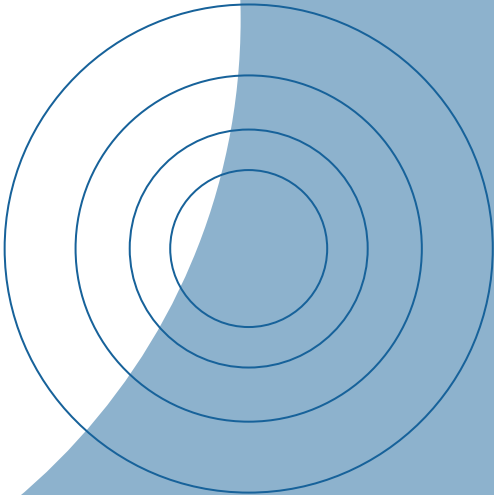
You could also test your testimonial landing page with an A/B test to ensure that it's working to influence your customers.





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Testimonial Collection for Agencies



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Automate Testimonials with Boast

Ready to setup a testimonial automation process for your business?

Boast makes it easy by giving you a testimonial collection form and display widget to quickly get new customer testimonials and showcase them on the fly.

[Try Boast for Free »](#)

Interested in growing your agency's service offerings and increasing revenue with testimonial collection services?

Join the dozens of agencies using boast to manage testimonial collection to provide more value to their clients.

[Inquire about Agency Pricing »](#)