



BONUS: CUSTOMER TESTIMONIAL PERMISSION EMAIL/TEXT TEMPLATE

Make It Easy for a Happy Customer to Say Yes

Use these templates to invite a customer to participate without making the request feel complicated. Customize the wording to fit your relationship and your business.

EMAIL TEMPLATE

Subject: Would you be willing to share your experience?

Hi [FIRST NAME],

I really appreciate you choosing [BUSINESS NAME]. Would you be willing to share a little about your experience with us in a short customer testimonial?

It would just be a quick conversation - about 10 minutes - and there is nothing you need to prepare. We ask a few simple questions and take care of the rest.

We may use the finished testimonial in our marketing. Before anything is recorded or published, we will make sure you understand the permission we are requesting.

Would you be open to doing that for us?

Thank you,
[YOUR NAME]

TEXT MESSAGE TEMPLATE

Hi [FIRST NAME] - quick favor. Would you be willing to do a short customer testimonial about your experience with [BUSINESS NAME]? It is just a quick conversation, about 10 minutes, and there is nothing to prepare. We handle the rest. Would you be open to it?

GENTLE FOLLOW-UP

Hi [FIRST NAME] - just following up on my note about the customer testimonial. No pressure at all, but we would really appreciate hearing about your experience if you are comfortable doing it. It should only take about 10 minutes. Let me know and I will make it easy.

After they say yes

1. Thank them and explain what will happen next.
2. Provide the appropriate written testimonial release or consent form.
3. At the start of the interview, confirm recording consent on the recording.
4. Keep the permission record with the source recording and final testimonial.

Important: A customer saying "yes" to participating does not necessarily replace permission to record them or permission to use their name, image, voice, likeness, or testimonial in advertising. Use an appropriate consent/release process and have qualified legal counsel review it for your business and jurisdiction.