



THE PLAIN-ENGLISH

Testimonial Permission Guide

A practical guide to getting, documenting, and keeping customer permission.

IMPORTANT

Territory.io is not a law firm. This guide is general educational information, not legal advice. Have qualified legal counsel review the consent and release process appropriate for your business.

Customer Story Videos for Home Service Businesses

territory.io

WHY THIS GUIDE EXISTS

Start Here

You finally get a happy customer to agree to tell their story. Great. Before you put their face on your website, cut their interview into social clips, or turn their quote into advertising, there is another question worth answering:

Do you have clear permission to use the testimonial?

The goal of this guide

Help you build a simple, repeatable permission process - without pretending there is one magic form or rule that works for every business, state, industry, and situation.

What You'll Learn

- 01 The three different permission questions
- 02 When written permission is worth considering
- 03 What a testimonial permission form should cover
- 04 Editing testimonials without changing the story
- 05 FTC authenticity, incentives, and disclosure basics
- 06 How to keep permission records organized
- 07 A simple seven-step permission workflow
- 08 A 60-second publishing checklist

Use this as a practical starting point. Then ask qualified legal counsel what is appropriate for your specific business.

THE KEY DISTINCTION

1. There Are Really Three Different Permission Questions

One of the easiest mistakes is treating all “permission” as the same thing. It is better to separate three questions.

1. Will the customer participate? The customer agrees to talk about their experience. That is the first yes - but it does not necessarily answer what happens next.	2. Will the customer be recorded? Recording-consent rules can vary by state and circumstance. A simple operating habit is to clearly disclose the recording and get a clear yes before starting.
3. Can you use the testimonial in marketing? Using someone’s name, image, likeness, voice, or statements in advertising can raise separate issues. Document the intended marketing permission.	

The sentence to remember

Consent to being recorded is not necessarily the same thing as permission to use that recording in advertising.

A Simple Pre-Recording Script

Before the interview begins, make recording permission explicit:

Say this before you begin

“Before we start, I just want to confirm that you know we’re recording this conversation and that you’re okay with us recording it.”

Wait for a clear “yes” before continuing. This is a practical habit, not a substitute for getting legal advice about the recording laws that apply to your situation.

PRACTICAL BEST PRACTICE

2. Written Permission: Think “Clear Record,” Not “Magic Form”

There is not one simple nationwide rule requiring every business to use the exact same signed form for every customer testimonial. Requirements can depend on jurisdiction, circumstances, industry, and intended use.

A more useful business question is:

“Do we have a clear record of what this customer agreed to?”

Written permission can help establish:

- Who gave permission and when
- What content is covered
- Where the content may be used
- Whether the content may be edited
- Whether the customer’s name, image, and voice may be used
- Whether paid advertising is included
- Whether anything of value was provided
- Any limits or conditions on the permission

Situations Where Written Permission Is Especially Worth Considering

You plan to...	Practical consideration
Publishing on your website	Consider written permission covering commercial marketing use.
Posting clips on social media	Consider permission that clearly includes social and digital use.
Using the customer’s name, image, or voice	Document permission.
Turning the testimonial into paid advertising	Make intended advertising uses explicit and have your process reviewed by counsel.
Creating multiple edited clips	Address editing, shortening, captions, excerpts, and reformatting.
Providing money, discounts, gifts, or free services	Document the arrangement and consider disclosure requirements.

You plan to...	Practical consideration
Featuring a minor	Do not rely on a generic adult template. Consult qualified legal counsel.
Operating in a regulated industry	Check with legal counsel or your compliance team before publishing.

QUESTIONS FOR YOUR ATTORNEY

3. What Should a Testimonial Permission Form Cover?

There is no single perfect release for every business. A well-designed permission process should make it easy to understand what the customer is agreeing to.

WHO Identify the customer and the business receiving permission. Keep a date and signature or other reliable acknowledgment.	WHAT Consider video, audio, photographs, statements, quotes, voice, image or likeness, name, company, job title, and location as appropriate.
WHERE Identify expected uses: website, social media, YouTube, email, sales materials, print, digital marketing, and paid advertising.	EDITING Address shortening, captions, formatting, excerpts, and creating alternate versions without intentionally changing the meaning.
ATTRIBUTION Clarify whether full name, first name, city/state, company, job title, or photograph may be displayed.	COMPENSATION Document whether the customer received payment, a discount, gift, free service, or another incentive.
DURATION Address how long the permission applies.	WITHDRAWAL Address whether and how permission can be withdrawn and what happens to materials already published or distributed.
AUTHENTICITY Consider confirmation that the testimonial reflects the customer's genuine experience and opinions.	SIGNATURE + DATE Keep a clear record of who agreed and when.

Important

Your attorney may recommend additional provisions based on your business, state, industry, customers, and intended use.

KEEP IT AUTHENTIC

4. Editing: Make the Story Clear, Not Different

Most useful testimonial videos are edited. A 15-minute conversation might become a 60- to 90-second finished story.

You might:

- Remove pauses and repeated thoughts
- Reorder portions of an answer for clarity
- Add captions, music, or graphics
- Add photographs or supporting visuals
- Create shorter social clips
- Reformat horizontal video vertically
- Add the customer's name or the company's branding

The editing rule

Good testimonial editing makes someone's story clearer. It should not manufacture a different story.

Example:

Original meaning

"At first I wasn't sure this was going to work, but after they fixed the problem I was incredibly happy."

Do not creatively edit the interview into something that gives viewers a materially different impression of the customer's actual experience.

Permission Should Match the Editing You Actually Do

If your workflow routinely creates captions, excerpts, social crops, alternate aspect ratios, and paid-ad versions, discuss those uses when your consent process is drafted rather than relying on vague assumptions later.

FTC AND ADVERTISING BASICS

5. Keep Testimonials Real

Permission is not the only issue. Testimonials are advertising. Federal Trade Commission rules and guidance address endorsements, reviews, and testimonials, and advertising generally must be truthful and not misleading.

Use real experiences. The person featured should genuinely have the experience being described.	Don't fabricate testimonials. A fake customer saying wonderful things about your company is fake advertising, not a testimonial.
Don't change the meaning. Editing for length or clarity is very different from editing a customer into saying something they did not mean.	Be careful with claims. A customer saying something does not automatically make an unsupported advertising claim acceptable.

Incentives Deserve Extra Attention

If you give a customer money, a discount, a gift card, free service, a product, or another benefit, document it and consider whether disclosure is required.

One important consumer-review rule

Do not condition an incentive on a consumer review being positive. Review and testimonial programs can raise different issues, so get appropriate guidance before launching an incentive program.

Friends, Family, Employees, and Other Connections

A relationship with the business can matter. Employees, relatives, affiliates, business partners, or compensated participants may have a “material connection” that consumers would reasonably want to know about. FTC guidance generally emphasizes disclosure of material connections that are not otherwise obvious.

RECORDKEEPING

6. Build a Permission Record You Can Actually Find

Getting permission does not help much if nobody knows where the record went. Treat testimonial releases and consent records like business records.

For every testimonial, consider retaining:

- Customer's full name
- Date of the interview
- Date permission was obtained
- Signed release or electronic permission record
- Exact version of the permission language used
- Permitted marketing uses
- Whether the customer's name may be displayed
- Whether compensation or another incentive was provided
- Original source recording
- Final edited video
- Published versions
- Relevant emails and messages
- Any later changes to the customer's permission

Give Files Boring Names

GOOD

smith-jane-testimonial-release-2026-08-31.pdf

NOT SO GOOD

signedform_FINAL-new2.pdf

Now someone else can figure out what happened three years from now. Your future self will thank you.

Keep the Version They Actually Agreed To

If you improve your release later, the new version does not tell you what an earlier customer accepted. Keep either the signed document itself or a reliable record showing the exact language accepted at that time. Do not keep only a link to a webpage that may change.

PLAN BEFORE IT HAPPENS

7. What If a Customer Changes Their Mind?

Your permission process should address withdrawal or revocation before a disagreement occurs. Questions to discuss with counsel include:

- Can permission be withdrawn?
- How does the customer request withdrawal?
- Does withdrawal affect material already published?
- What happens to existing printed materials?
- What happens to ads already scheduled or distributed?
- Is the permission permanent or limited in duration?

Avoid inventing the answer later

Decide these issues intentionally when your release is drafted. That is far better than trying to reconstruct the rules after a customer asks to remove a testimonial.

A Simple Seven-Step Permission Workflow

1

Customer agrees to participate

Explain what you are asking them to do. Do not surprise them.

2

Obtain the appropriate written permission

Use a testimonial release reviewed for your business by qualified counsel.

3

Confirm recording consent

At the beginning of the interview, clearly disclose that you are recording and get a clear yes.

4

Conduct a real conversation

Do not script praise. Ask about the customer's actual experience.

5

Edit without changing the meaning

Remove the boring parts. Keep the truth.

6

Save the permission record with the testimonial

Keep the consent record, source recording, and finished content connected.

7

Revisit unusual new uses

If someone later wants the customer on a billboard, confirm that the permission actually covers that use.

BEFORE YOU PUBLISH

8. The 60-Second Permission Checklist

Run through this list before a customer testimonial goes live:

- ☐ Did the customer knowingly agree to participate?
- ☐ Did we properly address permission to record the conversation?
- ☐ Do we have a clear record of permission to use the testimonial for marketing?
- ☐ Does the permission cover the customer's image and voice?
- ☐ Does it address the customer's name or other identifying information?
- ☐ Does it cover the places we intend to publish the testimonial?
- ☐ If we are running paid advertising, is that use covered?
- ☐ Does our permission address editing?
- ☐ Does the finished edit accurately reflect what the customer meant?
- ☐ Did the customer genuinely have the experience being described?
- ☐ Was the customer given money, a discount, a gift, or another benefit?
- ☐ Is there a relationship with the business that may need disclosure?
- ☐ Have we saved the permission record somewhere we can actually find it?
- ☐ Are there unusual circumstances - such as a minor or regulated industry - that warrant legal review?

If one answer makes you uncomfortable

Fix the issue before publishing.

Five Things We Would Not Do

1. **Secretly record customer interviews.** Make recording obvious.
2. **Rely on "They seemed fine with it."** Document permission.
3. **Assume one use automatically covers every future use.** Think about where the content will appear.
4. **Edit people into saying things they did not mean.** Good editing improves clarity, not reality.
5. **Build the entire legal process from a free Internet template.** A template is a starting point. Ask counsel whether it is the right ending point.

KEEP IT REAL

The Bottom Line

Customer testimonials work because they are real.

A homeowner does not have to take your word for it when you say your company is responsive, reliable, or easy to work with. They can hear it directly from someone who hired you.

A simple operating philosophy

Tell customers what is happening. Get appropriate permission. Document it. Keep the records. Use testimonials honestly. When you are unsure about the legal requirements that apply to your situation, ask someone qualified to answer that question.

That is a much better system than hoping nobody ever asks.

About Territory.io

Territory.io helps home service businesses turn conversations with happy customers into professionally produced video testimonials.

We interview the customer remotely, find the story, and professionally edit the conversation into a polished customer story ready for your website, social media, sales process, and marketing.

No camera crew. No half-day production.

Just a real customer telling a real story.

Learn more at [Territory.io](https://territory.io)

PLEASE READ

Important Legal Disclaimer

Territory.io is a video production and marketing service, not a law firm.

This guide and any accompanying examples, checklists, scripts, forms, templates, or other materials are provided solely for general educational and informational purposes.

They do not constitute legal advice, are not intended to create an attorney-client relationship, and should not be relied upon as a substitute for advice from qualified legal counsel.

Laws and regulations involving recording consent, privacy, rights of publicity, use of a person's name, voice or likeness, advertising, endorsements, testimonials, consumer protection, minors, electronic signatures, recordkeeping, and regulated industries can vary by jurisdiction and circumstance and can change over time.

Territory.io does not represent or warrant that any sample language, process, consent form, release, checklist, or recommendation contained in these materials is legally sufficient or appropriate for your particular business or intended use.

You should consult qualified legal counsel familiar with your jurisdiction, business, industry, customers, and intended uses of testimonial content before adopting or relying on a testimonial consent or release process.

Helpful Resources

[Federal Trade Commission - Endorsements, Influencers, Reviews and Testimonials](#)

[FTC - Consumer Reviews and Testimonials Rule: Questions and Answers](#)

[Reporters Committee for Freedom of the Press - State Recording Guide](#)

[Cornell Legal Information Institute - Right of Publicity Overview](#)

Last updated: August 2026