



TESTIMONIAL CONSENT RECORDKEEPING CHECKLIST

Keep Your Permission Records Organized and Easy to Find

Use this checklist for each customer testimonial so you can quickly confirm what permission was obtained, how the testimonial may be used, and where the supporting records live.

KEEP THESE ITEMS TOGETHER FOR EACH TESTIMONIAL

Treat testimonial permissions like business records. For each testimonial, keep the consent record, the supporting context, and the actual media connected.

- ✓ Signed release or electronic consent record
- ✓ Customer full name and basic contact info
- ✓ Date the testimonial was recorded
- ✓ Date consent was obtained
- ✓ Exact version of the release or consent language used
- ✓ Permitted uses (website, social media, email, ads, etc.)
- ✓ Approved identifying information (name, city, company, title, photo, etc.)
- ✓ Whether compensation, a discount, or another incentive was provided
- ✓ Original source recording
- ✓ Final edited video or testimonial asset
- ✓ Relevant emails, texts, or messages
- ✓ Any later changes to or withdrawal of permission

Simple file-naming examples

GOOD FILE NAME	BAD FILE NAME
smith-jane-testimonial-release-2026-08-31.pdf	signedform_FINAL2.pdf
smith-jane-testimonial-original-video-2026-08-31.mp4	video-final-new.mp4

QUICK AUDIT CHECKLIST

Before you publish:

- ✓ We can locate the signed or electronic consent record.
- ✓ The permitted uses match how we plan to use the testimonial.
- ✓ We know whether incentives or disclosures apply.
- ✓ The source recording and final asset are stored with the permission record.
- ✓ Any unusual issues (minor, regulated industry, special limitations) have been flagged for legal review.

Important: Recordkeeping helps you prove what happened, but it does not replace legal advice. Laws and best practices can vary by jurisdiction, industry, customer type, and intended use. Have qualified legal counsel review your consent and retention process.