



YARDSTICK



TEMPLATE SERIES

Template #4: Google and VouchedFor review request

This template is designed to help you collect reviews on Google and VouchedFor.

It deliberately creates a link between a client leaving a review and the positive effect it'll have on both your team and your business.

The template includes suggested wording for:

- An initial review collection project
- Topping up reviews if you have already run an initial project
- After onboarding a new client/a planning meeting

When you request reviews remember to insert the relevant links into the email, to make it easy for your clients to leave a review. If you're not sure how to get these, please email hi@theyardstickagency.co.uk and we'll explain.

To learn more about the 10 practical ways you can use to collect more online ratings and reviews, read this blog:

<https://theyardstickagency.co.uk/blog/10-practical-things-financial-advisers-and-planners-can-do-now-to-get-more-online-reviews>

Email template for an initial project – to be used when reviews have not previously been requested

<insert salutation>

We're working hard to improve our marketing, including the number of reviews we have online.

Reviews are incredibly important to us. They help us attract new clients, and perhaps even more importantly, give the team a huge boost when they see a positive review appear online.

So, we'd like to ask a favour; could you spare 5 minutes to leave us a couple of reviews? The first on VouchedFor, a website similar to Trip Advisor but for financial advisers and planners. The second on Google, which needs no introduction.

To leave a review on VouchedFor: Please click here. <insert link>

To leave a review on Google: Please click here. <insert link>

As we said, it'll only take you 5 minutes to leave these reviews, but they are incredibly important to us; they showcase the work we do and help us impress new clients. Just as importantly, when a positive review appears online it puts a smile on our team's face.

We'd like to thank you in advance for your support.

<insert sign off>

Email template for a top-up project – to be used when you have previously requested reviews

<insert salutation>

We're working hard to improve our marketing, including the number of reviews we have online.

If you have already left a review on Google or VouchedFor (a website similar to Trip Advisor but for financial advisers and planners) we'd like to thank you again. Your review will help us attract new clients and will have given the team here a boost.

If you haven't left a review in the past could spare 5 minutes to leave us a couple of reviews?

Alternatively, if you have previously left a Google review, could we ask you to spare a few minutes to also leave us a VouchedFor review? And vice versa, if you have left us a VouchedFor review, please spare a few minutes to also leave us a review on Google.

To leave a review on VouchedFor: Please click here. <insert link>

To leave a review on Google: Please click here. <insert link>

As we said, it'll only take you 5 minutes to leave these reviews, but they are incredibly important to us; they showcase the work we do and help us impress new clients. Just as importantly, when a positive review appears online it puts a smile on our team's face.

We'd like to thank you in advance for your support.

<insert sign off>

Email template after onboarding a new client or annual review/planning meeting

<insert salutation>

Following your meeting with <insert name of adviser>, I'm delighted to hear that you're happy to leave us an online review.

Thank you for agreeing to do this, your review will help us attract new clients and will also give the team here a huge boost.

As you may know, we use Google, which needs no introduction, and VouchedFor, a website similar to Trip Advisor but for financial advisers and planners, to collect reviews.

However, if you haven't left a review in the past could spare 5 minutes to leave us a review on both sites.

Alternatively, if you have previously left a Google review, could we ask you to spare a few minutes to also leave us a VouchedFor review? And vice versa, if you have left us a VouchedFor review, please spare a few minutes to also leave us a review on Google.

To leave a review on VouchedFor: Please click here. [<insert link>](#)

To leave a review on Google: Please click here. [<insert link>](#)

As we said, it'll only take you 5 minutes to leave these reviews, but they are incredibly important to us; they showcase the work we do and help us impress new clients. Just as importantly, when a positive review appears online it puts a smile on our team's face.

We'd like to thank you in advance for your support.

We can help If you need any help or guidance with building your online reviews, we're here to help. You can reach us by emailing hi@theyardstickagency.co.uk or calling 0115 8965 300.

☎ 0115 8965 300

✉ hi@theyardstickagency.co.uk

🌐 www.theyardstickagency.co.uk

📍 The Yardstick Agency,
3rd Floor,
3-7 Middle Pavement,
Nottingham, NG1 7DX



YARDSTICK