



YARDSTICK



TEMPLATE SERIES

Template #2: Online review request template

These templates are designed to help you collect reviews on the two platforms we recommend advisers and planners use, namely Google and VouchedFor.

You'll find template emails to be sent in the following circumstances:

- An initial booster project
- After review meetings with clients
- After you have taken on a new client
- After you have spoken with a prospect you can't help.

Before using the templates, you'll need to do some preparation. The steps you need to take are explained below for each of the platforms.

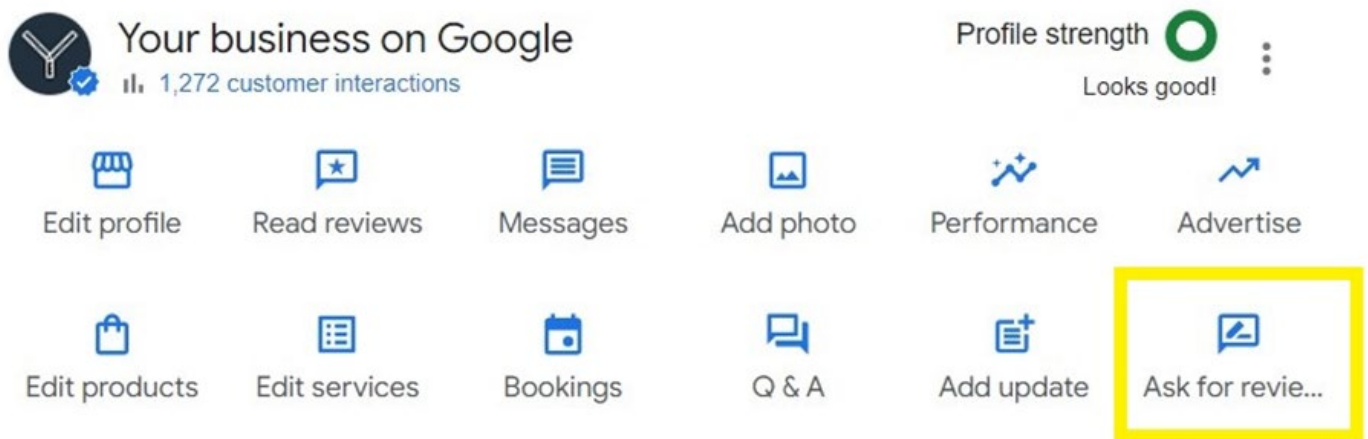
You might also like to read our [definitive guide to help financial advisers and planners collect more online reviews](#) before you start using the templates.

Google

You'll need a Google My Business listing to allow clients to leave a review. If you don't have one visit: https://www.google.com/intl/en_uk/business/ to set it up.

If you already have a listing, or once you have set it up, you'll need to create a link which your clients can follow to leave the review. To do this:

- Log into your Google Business profile, which will look something like the screenshot below
- Click "Ask for reviews"
- Copy the review link you are offered and paste it into your email.



VouchedFor

If you don't already have a VouchedFor account, you'll need to sign up by visiting: <https://accounts.vouchedfor.co.uk/register> and following their instructions.

Then to get the VouchedFor review link:

- Go to your VouchedFor profile (there's no need to log into your account)
- Scroll down the page until you get to the "Client reviews" section
- Click "Leave review"
- Cut and paste the URL in your browser into the email template.

Email templates

Please edit these templates as necessary to suit your business. However, we strongly recommend that you:

- Send one email, with two links
- Send the email through normal channels, do not send it through your online portal
- Make sure the email is wholly, exclusively and only about reviews. Do not include any other information.

Instructions/required edits are indicated by <>.

Email template for an initial booster project

Suggested email subject line: We need your help? Can you spare 5 minutes?

<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 and the second on Google, which needs no introduction.

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

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

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 following review meeting with an existing client (Option 1 – to be sent by the adviser/planner)

Suggested email subject line: We need your help? Can you spare 5 minutes?

<insert salutation>

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

If you've already left a review on Google or VouchedFor (a website similar to Tripadvisor 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, please could you spare 5 minutes to leave us a couple of reviews?

Alternatively, if you've 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've 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 VouchedFor profile>

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

As we said, it'll only take you 5 minutes to leave these reviews, but they're 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 following review meeting with an existing client (Option 2 – to be sent by support team)

Suggested email subject line: We need your help? Can you spare 5 minutes?

<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 Tripadvisor but for financial advisers and planners, to collect reviews.

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

Alternatively, if you've 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've 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 VouchedFor profile>

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

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.

Email template following the onboarding of a new client (Option 1 – to be sent by the adviser/planner)

Suggested email subject line: We need your help? Can you spare 5 minutes?

<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 and the second on Google, which needs no introduction.

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

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

As we said, it'll only take you 5 minutes to leave these reviews, but they're 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 following the onboarding of a new client (Option 2 – to be sent by the support team)

Suggested email subject line: We need your help? Can you spare 5 minutes?

<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.

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 and the second on Google, which needs no introduction.

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

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

As we said, it'll only take you 5 minutes to leave these reviews, but they're 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>

After you have spoken with a prospect you can't help

Suggested email subject line: We need your help? Can you spare 5 minutes?

<insert salutation>

It was good to speak with you a few minutes ago.

Even though our service isn't right for you, I hope you found our meeting valuable and that you now have a better understanding of the options available to you.

As I said when we spoke, there was no charge for our meeting and in return I'd be grateful if you could leave a review for us 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.

We use two platforms, VouchedFor, a website similar to Trip Advisor but for financial advisers and planners and Google, which needs no introduction.

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

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

As we said, it'll only take you 5 minutes to leave these reviews, but they're 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>

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 calling 0115 8965 300 or emailing hi@theyardstickagency.co.uk

☎ 0115 8965 300

✉ hi@theyardstickagency.co.uk

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