



## Template #7: Client testimonial video request

### Use this template to ask clients to appear in testimonial videos. A few notes to explain more about the template:

- It can be cut and pasted into emails, or used as the basis for a script if you're asking clients over the phone or at a meeting
- Feel free to edit the template to reflect your personality and style of language, but the order of the messages must be retained
- There are two templates; use the first if videos are to be recorded remotely and the second if you're planning to run a face-to-face shoot
- The "further information" section assumes that Yardstick is running the video project for you, but you can easily edit that if you're using an alternative provider
- The text in the template is carefully worded and includes the option to decline at the start. Doing this means your client is more likely to consider - and agree to - the request because they're in control and they know they can decline without it causing any issues.

### Template for remotely recorded videos

#### Template

Suggested email subject line: Can I ask a favour?

<insert salutation>

I hope you're well.

I'd like to ask a favour but, before I do, I'd like to say that it's completely fine if you can't help, and I promise not to ask again.

We are contacting a handful of carefully selected clients to appear in a testimonial video, and I wondered if there was any chance you'd be happy to take part?

The video will be 2-3 minutes long and used in our marketing materials, such as on our website.

It wouldn't include any personal information. Instead, it would focus on our journey together, including the benefits you get from working with us, how we've helped you, and how you feel about your financial future.

A little more information:

- We are using a marketing agency to help us with this project
- The video would be recorded using a combination of your smartphone and Zoom
- The recording session would take around 45-50 minutes
- The video can be recorded while you're at home or work (as long as the room you're in is quiet and well lit)
- If you'd like to, you can see the final video before it's used.

I believe your story would be powerful and show other potential clients the benefits of working with us. If you'd be happy to record a testimonial video, please reply to this email. I'll then be in touch to explain the next steps. If not, please delete this email and forget I asked!

Thank you, I appreciate you taking the time to consider this request.

<insert sign off>

### **Template for face-to-face videos**

Suggested email subject line: Can I ask a favour?

<insert salutation>

I hope you're well.

I'd like to ask a favour but, before I do, I'd like to say that it's completely fine if you can't help, and I promise not to ask again.

We are contacting a handful of carefully selected clients to appear in a testimonial video, and I wondered if there was any chance you'd be happy to take part?

The video will be 2-3 minutes long and used in our marketing materials, such as on our website.

It wouldn't include any personal information. Instead, it would focus on our journey together, including the benefits you get from working with us, how we've helped you, and how you feel about your financial future.

A little more information:

- We are using a marketing agency to help us with this project
- The video would be recorded in our office
- The recording session would take around an hour
- If you'd like to, you can see the final video before it's used.

I believe your story would be powerful and show other potential clients the benefits of working with us. If you'd be happy to record a testimonial video, please reply to this email. I'll then be in touch to explain the next steps.

I believe your story would be powerful and show other potential clients the benefits of working with us. If you'd be happy to record a testimonial video, please reply to this email. I'll then be in touch to explain the next steps. If not, please delete this email and forget I asked!

Thank you, I appreciate you taking the time to consider this request.

<insert sign off>

### We can help

If you'd like to learn more about the benefits of client testimonial videos, or how we can help you run a successful video project please email [hi@theyardstickagency.co.uk](mailto:hi@theyardstickagency.co.uk) or call 0115 8965 300.

☎ 0115 8965 300

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