



Template #2: Online review request template

This template can be used to request reviews on Google, Facebook, VouchedFor, Trustpilot and LinkedIn.

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

Google

You will 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 will need to create a link which can be included in your email. To do this:

1. Search for your business on Google
2. Find your business listing (the box on the right-hand side of the search results page giving details about your business), click 'Write a review' wait for the review pop-up window to open
3. Copy the URL that you see in your browser. This can then be pasted directly into the template, or if you prefer, you can visit: <https://bitly.com/> to create a tiny URL.

Facebook

If you don't already have a Facebook page for your business, you will need to create one. You can do that by visiting: <https://www.facebook.com/business/pages/set-up>

Reviews and recommendations are turned on by default when you create a company page. However, if they have been turned off or you are unsure of your settings, here's how you can check:

1. On your company page, go to 'Settings' in the top right corner
2. Then select 'Templates and tabs'
3. Click the 'Settings' button next to Reviews
4. Toggle the reviews button to on or off

You will then need to create a link to be included in your email. You can do this by following the above steps and copying the URL under the 'Share Reviews tab'.

VouchedFor

If you don't already have a VouchedFor account you will need to sign up by visiting:
<https://accounts.vouchedfor.co.uk/register>

There are two ways to request reviews; via the VouchedFor dashboard or via your profile.

Via your dashboard

1. Log in and click 'Reviews' on the left-hand menu
2. If you're requesting a review from one client: Click 'Invite one client' enter their first name and email address, then copy and paste the text below (once you have edited it)
3. If you're requesting reviews from multiple clients click 'Invite multiple clients' enter their first names and email addresses, then copy and paste the text below (again, once you have edited it) or use the text suggested by VouchedFor

Via your profile

Before using the template to email your clients directly (rather than through the VouchedFor dashboard), you will need to create a link which can be included in your email. To do this:

1. Navigate to your VouchedFor profile
2. Scroll down and click 'Leave a Review'
3. Copy the URL that you see in your browser. This can then be pasted directly into the template

LinkedIn

Requests for a LinkedIn recommendation can be made simply by sending your profile URL and instructions, using the template below.

Trustpilot

If you don't already have a Trustpilot account for your business, you will need to set one up. You can do that by visiting: <https://business.trustpilot.com/signup>

Once signed up you can create a link which can be included in your email.

Email template

Please edit this template until it reflects your ratings and review collection strategy.

*Delete as appropriate

Instructions are contained in <>

Template

<Insert preferred salutation>

We are working hard to improve our marketing. I ***/<insert the name of the adviser/planner>*** recently asked if you would be prepared to leave an online review.

We use **<insert name of platform>** and **<insert name of platform>** to collect reviews online. I'd be very grateful if you could provide a review for us on one or both of those platforms. To make your life easier please feel free to copy and paste the same review into both platforms.

We know some people find it difficult knowing what to write, you might like to explain:

- The reasons why you needed our services
- How we've helped you (in broad terms only though, there's no need to give any personal information)
- How working with us has benefited you
- Whether you would recommend us to others

To make things easier, here some quick instructions to guide you through the process:

Google*

If you are using a computer:

1. Please click here: **<insert link you have created>**
2. Log in to Google (if you don't have a Google account creating one will only take a minute or so)
3. Click the number of stars you want to award to us and leave your review

If you use your phone or tablet:

1. Please click here **<insert link you have created above>**
2. Click 'Reviews'
3. Log in to Google (if you don't have a Google account creating one will only take a minute or so)
4. Click the number of stars you want to award to us and leave your review

Facebook*

Please click this link to be taken to our reviews on Facebook: **<insert link you have created>** then answer the question: "Would you recommend **<insert name of firm>**" and follow the steps.

VouchedFor*

<If requesting a review directly via your profile> Please click this link to be taken to our reviews on VouchedFor: <insert link you have created> then rate the service by selecting the appropriate number of stars, tick the declaration box and then click 'Next: Your reason for rating.'

LinkedIn*

Please click this link to be taken to my*/<insert the name of the adviser/planner>*: <insert link you have created>. The scroll down to the 'Recommendations' section, click the recommendation button and follow the steps.

Trustpilot*

Please click this link to be taken to Trustpilot <insert link you have created>, then follow the steps to leave your review.

I'd like to thank you for leaving your review, we are very grateful for your time. Of course, if you'd like to provide additional feedback you can always contact us directly by emailing <insert email address> or calling <insert telephone number>.

<insert preferred 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

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