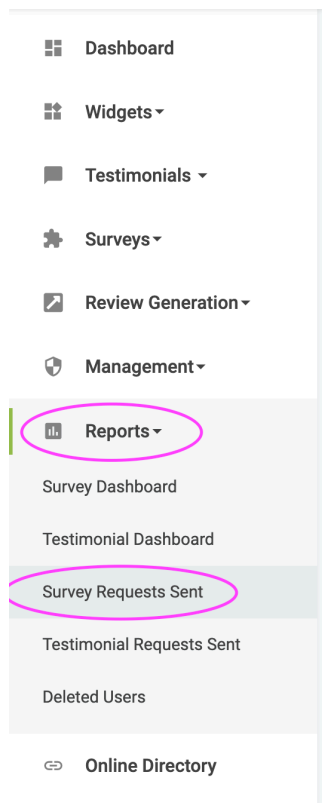
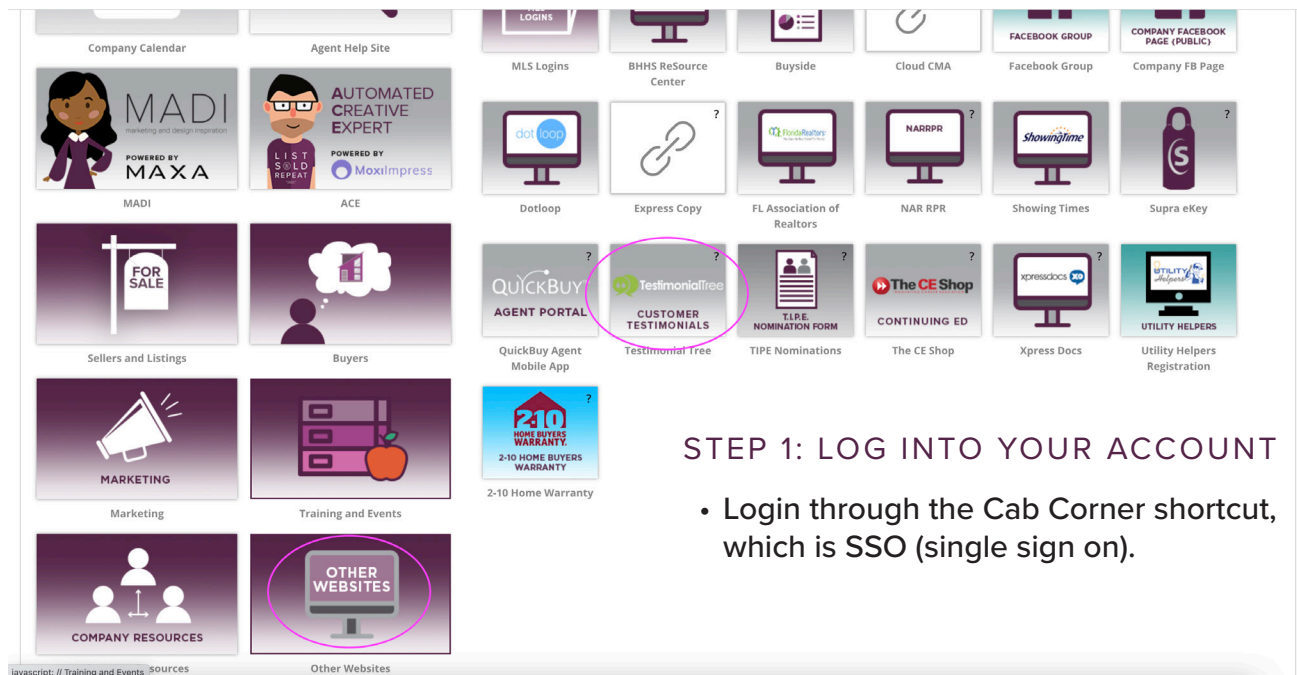


# HOW TO: COLLECT TESTIMONIALS THROUGH TESTIMONIAL TREE

We have built in email and text messages that you can send to clients asking for a testimonial. You can then track if they responded and resend using Testimonial Tree.



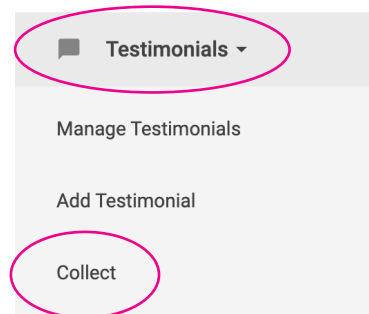
## STEP 2: CHECK YOUR SURVEY REQUESTS

- On the left hand side of your dashboard, navigate to Reports > Survey Requests Sent
- Do this at least once a quarter since it's on a 90 day rolling calendar
- You'll be able to see a timestamp of when the survey was sent and to which email and if the survey was "captured" which means completed.
- **Make note of the customers who have a "No" in their captured field.**
- Instead of using the "resend" button, follow on to the next steps for a better way to engage with your customer. *We suggest this over the resend button because it'll be an email from your email address, one they are more familiar conversing with!*

Resend	View	Client Email	Client Phone	Client Name	Survey ID	Sender	Date & Time Sent	Status	Recording User	Captured
		[REDACTED]@gmail.com	[REDACTED]	[REDACTED]	41287	BHHSFloridaProperties	10/8/2022 12:12:13 PM	Sent	[REDACTED]	No
		[REDACTED]@yahoo.com	[REDACTED]	[REDACTED]	41287	BHHSFloridaProperties	10/8/2022 12:12:11 PM	Sent	[REDACTED]	No
		[REDACTED]@gmail.com	[REDACTED]	[REDACTED]	41287	BHHSFloridaProperties	10/8/2022 12:12:10 PM	Sent	[REDACTED]	No

### STEP 3: COLLECT A TESTIMONIAL

- Navigate to the Testimonials > Collect button on the left hand side of your dashboard



### STEP 4: COPY THE LINK AND EMAIL

- Using the list you compiled from Step 2, open your email browser (Gmail, Outlook, etc.) and send an individual email to your customer.
- You will copy the unique link found on the Collect a Testimonial page (seen to the right circled in pink) along with a personalized message such as:
- “It was a privilege to do business with you. I’d truly appreciate a testimonial if you’re willing to provide one. <Paste link here>”

#### Send A Request From Testimonial Tree

Use these forms to quickly and easily send a testimonial request to a customer. The email or text message that is sent will contain a link to your unique testimonial collection form, so they can submit a testimonial for you. If you'd like to see how it looks, feel free to send yourself one.

Send Via Email

Send Via Text Message

#### Send A Request From Your Email

Using your own email address, you can send a customer a more personal message with a link to your unique collection form. Just use the email service you normally would, such as Gmail, Yahoo, Apple Mail, Outlook, etc. and link to the following URL:

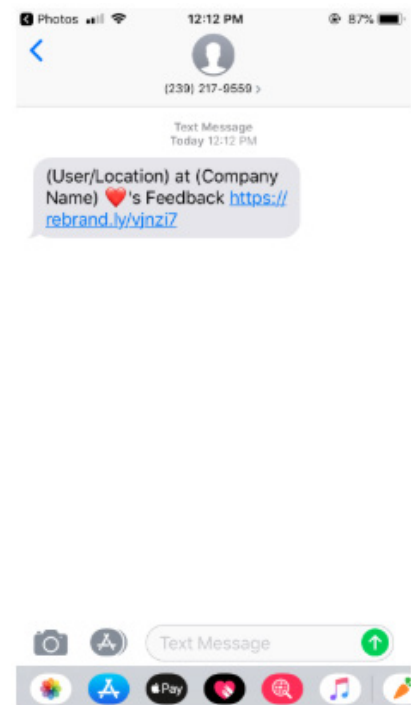
<https://testimonialtree.com/?uid=239134>

If your email service supports rich links, you can format a link to display custom text while still linking to the same URL seen above. Here is an example of how a rich link looks:

Click Here to Submit a Testimonial!

### STEP 5: GET YOUR TESTIMONIAL

- Once a client opens the email or text message, they will select the link to display your personal testimonial collection page with your inputted information pre-filled.
- Once your client has filled this form out, the results will automatically be recorded to your Testimonial Tree account.

A screenshot of the Testimonial Tree website's collection form. The header has the 'TestimonialTree' logo. The main heading is 'What was your experience with Demo Account?'. Below this is a rating section showing 'Rating: Excellent (5 stars)' with five stars, the first four of which are filled. The 'Testimonial:' field contains the text 'I really appreciated working with Demo Account because...'. At the bottom, there is an 'Image or Video:' section with a note: 'We would love to hear you give your testimonial with your own words and see any related pictures that would like to share. Suggested File Types: - image: GIF, JPG, JPEG, PNG - Video: AVI, MOV, MP4, MPEG, QT, WMV'. There is a 'Choose File' button and a note 'You can't upload more than 10 MB'.