

# Testimonial & Case Study Request Template

A simple, non-awkward way to ask happy customers for a quote or story.

## When To Ask

Right after a genuine moment of satisfaction: a great result delivered, a compliment given, a positive review left elsewhere. Don't wait months and ask out of the blue.

## Make It Easy

Offer a few specific questions instead of "write something nice":

1. What was the situation before working with us?
2. What changed after?
3. What would you tell someone considering working with us?

Offer to draft something based on their words for them to approve, rather than asking them to write from scratch. Ask permission to use their name, title, and company.

## For A Full Case Study

1. Get permission to share specific numbers or outcomes
2. Ask if they're open to a short call to go deeper than a written response would capture
3. Send them the final version for approval before publishing anywhere

## Simple Tracking

| CUSTOMER | ASKED | RESPONSE | PERMISSION LEVEL    | PUBLISHED WHERE |
|----------|-------|----------|---------------------|-----------------|
|          |       |          | Name/Anonymous/Full |                 |