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**SOP - Requesting Testimonials - Systems Vault**

**PREREQUISITES**

[Project Management Tool- Teamwork](http://sarahnoked.com/teamwork)

[SN Master: Client Details](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing)

[SN Master: Testimonials](https://docs.google.com/spreadsheets/d/1QT9Tce4Fk5Yjf2PQgXgLEwI2_cJOUpgzxsm7PWa8BrI/edit?usp=sharing)

[SN Template: Questions for Testimonials- Systems Vault](https://docs.google.com/document/d/1GzyDI45419K402TNcArSTLWLtqs1IvMVpcIUoaAz1vQ/edit?usp=sharing)

[SN Template: Requesting Client Testimonial Email- Systems Vault](https://docs.google.com/document/d/1gliPI31Q5ICHOZj99QohOK-nGlLXTWQmSo4Hs8QLvFo/edit?usp=sharing)

**PURPOSE**Asking clients for feedback is the fundamental way that we learn how our clients feel about working with us. This is their opportunity to let us know what we’re doing well and how we can improve. Client feedback has a huge effect on how we continue delivering them the best quality service.

**POLICY**

The request for client feedback is always sent a maximum of 60 days after project or retainer start. A (recurring, every 60-day) task for the Confident OBM is set up at the onset of a client project or retainer in our [Project Management Tool- Teamwork](http://sarahnoked.com/teamwork).

If the client does not create a written or video testimonial at the 30-day mark, the task is moved out 30 days and the Confident OBM verbally requests the feedback form to be filled out by the client at the end of a regular scheduled call.

When the feedback form is filled out by the client, the Confident OBM is notified via email automation.

The form entries are automatically saved here: [SN Master: Testimonials](https://docs.google.com/spreadsheets/d/1QT9Tce4Fk5Yjf2PQgXgLEwI2_cJOUpgzxsm7PWa8BrI/edit?usp=sharing).

**When requesting and reviewing feedback, time is logged as internal (never under the client project or retainer) as this is a non-billable activity.**

**When corresponding with client, always use** [**XXX@company.com**](mailto:XXX@company.com) **email address**

**PARTY**

Confident OBM

**PROPERTY**

Confident OBM

**PROCESS**

Part 1: Request Client Feedback

Part 2: Review Client Feedback and Extract

**PROCEDURES**

**Part 1: Request Client Feedback**

1. Make sure that you are signed in to your @sarahnoked.com email account
2. Access the [Master: Client Details](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing) and find the client email address for correspondence
3. Insert the text and subject from the [Template (Email): Requesting Client Feedback](https://docs.google.com/document/d/1gliPI31Q5ICHOZj99QohOK-nGlLXTWQmSo4Hs8QLvFo/edit?usp=sharing) and personalize it.
   1. Here's a template of questions you can use [Template: Questions for Testimonials- Systems Vault](https://docs.google.com/document/d/1GzyDI45419K402TNcArSTLWLtqs1IvMVpcIUoaAz1vQ/edit?usp=sharing)
4. Create a task due date to 2 weeks from send date to follow up.

**Part 2: Review Client Feedback and Save/Extract**

1. Review Client Feedback in [Master: Testimonials](https://docs.google.com/spreadsheets/d/1QT9Tce4Fk5Yjf2PQgXgLEwI2_cJOUpgzxsm7PWa8BrI/edit?usp=sharing) sheet.
2. Assign follow up tasks to use testimonials for marketing collateral

**Created by:**  Confident OBM

**Department:** XXX

**Date:** XXX

**Revised Date:** XXX

**Revised by:** XXX