

Onboarding Process

Testimonial IQ

1

Check in with compliance

Make sure your ADV is updated and you have discussed P&Ps related to testimonials

Before you get started, it's a good idea to make sure everyone is aligned on how your firm will:

- solicit feedback from clients
- incorporate testimonials in marketing content
- interact with third-party review sites such as Google

2

Sign up!

Schedule an intro call to share your goals with us and then choose between our month-to-month or annual options.

Once you've signed our standard MSA, we'll set up your account for your team and schedule a 30 minute onboarding call. We have a simple fee structure based on number of locations, so feel free to add as many users as you need. Set up convenient automatic payments with Stripe.

3

Customize for your needs

We'll have your account set up and ready to use with pre-built templates based around your branding, but it takes just a few clicks to make changes anytime you need.

Your compliance team can also easily make updates to the approvals workflows or standard disclosures that will accompany your testimonials.

4

Gather feedback

Now you're ready to start sending review requests! Testimonial IQ will generate private, unique links for you to send to clients.

Send to your clients through e-mail, text message, or place links on your website and in your e-mail signature.

5

Monitor your reputation

New testimonials will automatically populate on your dashboard. You'll be able to monitor trends, track performance over time and identify new opportunities for referrals.

Testimonial IQ also links directly to your Google Business Profile so you can see anything shared publicly as well.

6

Share your social proof

We make it easy to create testimonial-based marketing content. Select from testimonials reviewed by your compliance team and build social posts or website widgets with just a few clicks.

Testimonial IQ will automatically embed the required disclosures and maintain records of compliance approval so you can share with confidence.