

MSP TESTIMONIALS

The Testimonial Campaign Kit

A customer has said something kind about you. This is everything you need to turn that into a recorded conversation, and the conversation into three months of marketing and sales material.

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The message to send your customer

Send it within a few days of them saying the nice thing. Small ask, a time on it, clear that it's recorded, and they get the final say.

The reply, on LinkedIn or by message

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That's made my week, thank you. Could I ask a favour? I'd love to hear more of the story behind it. Would you be up for a 30-minute video call where I ask you a few questions about how it all went? I'd record it, and you'd see and approve anything before I used it.

The email version

copy this

Subject: A favour, and it's a small one

Hi [name], thank you for what you wrote about working with us. It meant a lot to the team.

Would you be up for a 30-minute video call where I ask you a few questions about how it's gone, from what things were like before to what's different now? I'd record it and turn it into a short customer story.

There's nothing to prepare, and nothing gets published until you've seen it and said yes. If it helps, I can send the questions ahead.

If they don't reply, one nudge a week later

copy this

No pressure at all on this. If now isn't a good time, I'm happy to come back to it in a month or two, just say.

If they're nervous about being on camera

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Completely understand, most people feel the same. It's just a conversation: I ask, you talk, and we cut out anything you're not happy with. If you'd rather, we can record sound only and I'll use your words in writing.

Later, once it's live: a draft post for them to share

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I sat down with [your name] at [your company] recently to talk about [the project]. It was good to look back at how far things have come since [the before]. Here's the conversation: [link]

The recording checklist

Any video call that records will do. These are the small things that decide whether the clips are usable afterwards.

The day before

- ☐ Calendar invite sent with the link, and a line saying the call will be recorded
- ☐ Questions sent, if they asked for them
- ☐ Recording switched on in your call settings and tested once
- ☐ Their name, job title and company spelt correctly in your notes

Ask them to

- ☐ Sit facing a window, with the light on their face
- ☐ Raise the camera to eye level (a stack of books does it)
- ☐ Use headphones with a microphone if they have them
- ☐ Pick a quiet room and close the door
- ☐ Close email and chat so nothing pings

At the start of the call

- ☐ Two minutes of ordinary chat before you press record
- ☐ Press record, then check it says it's recording
- ☐ Ask for permission on tape (wording below)
- ☐ Tell them they can stop and start again at any point

Afterwards

- ☐ Download the recording and the transcript the same day
- ☐ Save both somewhere the team can find them
- ☐ Thank-you message sent within a day
- ☐ Tell them when they'll see a draft, and stick to it

Permission, said out loud with the recording running

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Before we start, can I just check you're happy for me to record this, and to use parts of it in our marketing once you've seen and approved them?

Approval, by email before anything is published

copy this

Here's what we'd like to use from our conversation: [link or attachments]. Could you reply to confirm you're happy for us to publish these on our website, social media and in our sales material? If there's anything you'd like changed or taken out, just say.

The question sheet

Five questions, in the order the story happened. Print this and keep it beside your screen. The follow-ups matter more than the questions.

1

Who are you?

Tell me about the business, and your role in it. How long have we worked together?

2

What was it like before?

Take me back to before we started. What was a normal week like? Was there a day it went properly wrong?

3

Why us, and what nearly stopped you?

Why did you do something about it when you did? Who else did you look at? What were you worried about before you said yes?

4

What's different now?

What changed? Is there a number that shows it? Was there a moment you knew it had worked? What did that mean for you personally?

5

What would you say to somebody like you?

If someone in your position was thinking about it, what would you tell them? Who is it right for, and who isn't it right for?

The follow-ups

- ☐ **"Take me to that day."** Where were you, what did you see, what did you say?
- ☐ **Repeat their word back** as a question ("Scared?") and then stop talking
- ☐ **Count to five** after they finish. They'll fill the silence
- ☐ **"What did that mean for you?"** after every fact or number

Don't

- ☐ Ask "what do you like about us?" You'll get adjectives
- ☐ Ask two questions in one breath
- ☐ Finish their sentence. If you said it, it isn't theirs
- ☐ Say "brilliant" and move on. Ask another question about it

The test for every answer: did they say the vivid thing, or did I? If it was me, I haven't got it yet.

The cutting list

Read the transcript once with a highlighter and fill in the moments first.
Everything you make gets cut from these.

Mark the moments

The moment	Time	Their words, exactly as said
The day it went wrong		
The worry before buying		
Why they chose you		
The number		
The moment it worked		
What they'd tell a peer		

Then make these

- ☐ **Written case study**, about 600 words: who they are, what was wrong, why you, what changed, what they'd tell a peer
- ☐ **One longer video**, two to four minutes, telling the same story start to finish
- ☐ **Three to five short clips**, under a minute, one point each. The worry before buying is always one of them
- ☐ **Four to six quote graphics**: their words, their name, their role, their face
- ☐ **A quote bank** for sales: every good line in one document, sorted by what it proves
- ☐ **A post for every clip and graphic** (wording on sheet 7)

One rule covers all of it: use their words as they said them. Trim a quote, but never join sentences from different parts of the call into one, and don't polish their phrasing. If you only have a day, do the case study, two clips and the quote bank.

Where each piece goes

Tick them off as they go live. Put the story on the pages where people are deciding.

Website

- ☐ A page for the full story: video, case study, transcript
- ☐ The matching clip or quote on the page for the service they bought
- ☐ The pre-purchase worry next to your contact form or prices
- ☐ Best single quote on the homepage, with name, role and company

Social

- ☐ Longer video posted, customer tagged
- ☐ One short clip a fortnight
- ☐ Quote graphics in the weeks between
- ☐ A draft post given to your customer to share

Email

- ☐ The story sent to your list as the main item
- ☐ Longer video added to your welcome emails
- ☐ A short quote in your email signature

Sales

- ☐ **First message:** name the customer in one sentence, attach nothing
- ☐ **Once they reply:** send the longer video or case study
- ☐ **After a first meeting:** the story in the follow-up email
- ☐ **Deal gone quiet:** the one clip about the worry they share
- ☐ **Proposal:** a quote from the most similar customer, next to the price
- ☐ Everyone who sells can tell the story in 30 seconds without notes

Existing customers

- ☐ Shared at review meetings with customers who buy less from you
- ☐ Sent with a personal line: "this made me think of you"

Inside the business

- ☐ Shown to new starters in their first week
- ☐ Played at a team meeting. People like hearing it

The twelve-week plan

One story, told several ways over a quarter. Most of your audience sees a fraction of what you post, so spacing it out reaches far more of them.

Week	Marketing	Sales
Month one: the launch		
1	Story page live on your website. Longer video posted, customer tagged	Team watches it and practises the 30-second version
2	Email to your list. Best quote on the homepage	Story added to the follow-up email after first meetings
3	Written post telling the story in your own words	Quote bank shared with everyone who sells
4	Quote graphic 1. Clip or quote added to the service page	Quote added to your proposal template
Month two: the clips		
5	Short clip 1: the worry before buying	Same clip sent to deals that have gone quiet
6	Quote graphic 2	
7	Short clip 2: what it was like before	One-sentence mention used in first messages
8	Quote graphic 3	
Month three: into sales		
9	Short clip 3: the result	Story shared at customer review meetings
10	Quote graphic 4. Customer shares their own post	
11	Short clip 4: what they'd tell a peer	Ask the team which story they needed and didn't have
12	Longer video added to welcome emails	Next customer asked for a call (back to sheet 1)

Then record the next one. Two or three stories a year, each run properly for a quarter, and you always have something real to say.

Post and email wording

Write every post for the person who has the problem your customer used to have. They are the reader, and your customer is the evidence.

A post to go with a short clip

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If you're [the situation your customer was in], this is 50 seconds worth watching.

[Customer name] at [company] was in the same place [time] ago. Here's what it was like, in their words.

[clip]

A post to go with a quote graphic

copy this

"[the quote, exactly as said]"

That's [name], [role] at [company]. What strikes me about it is [one honest observation]. If that sounds familiar, the full story is here: [link]

A line for a first message to somebody who doesn't know you

copy this

We recently helped [type of customer] who [the before, in one clause]. Is that something you're dealing with?

A note for a deal that has gone quiet

copy this

Hi [name], you mentioned you were unsure about [their worry]. [Customer name] had the same concern before they started with us, and talks about it for about a minute here: [clip]. Thought it might be useful.

Would you rather hand the whole thing over?

That's what we do for IT companies and technology vendors. I write the questions and run the interview, I choose the moments and write the edit notes, a human editor cuts the film, and people review it before you see it. One conversation with your customer, and the films, case study, graphics, posts and sales pieces back 14 working days later.

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