

Testimonial & Referral Request

Consulting & Professional Services

Document type: Plan / SOP / strategy / guide · Generated 29 Aug 2026

This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Get testimonial and referral request templates to turn happy clients into proof and pipeline — a testimonial-request email with prompt questions, a referral-request email with specific asks, and the best moments to ask. Personalise before sending. Fill in your details below.

Purpose of this tool & output

Turn happy clients into proof and pipeline

How the output is used

Use the tool to turn happy clients into proof and pipeline through testimonials and referrals.

Important cautions

AI-generated templates; personalise before sending.

Companion documents

- Client Onboarding Kit
- Client Relationship Plan
- Client Feedback & NPS Survey
- Account Growth Planner
- Quarterly Business Review (QBR) Kit
- Escalation & Difficult Client Playbook

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.