

Social Proof & Review Marketing — Workbook

This workbook turns the Social Proof and Review Marketing course into a working system. You will audit the proof you already own, build an automated review request flow, pick and claim the right platforms, run testimonial interviews, and place proof where it lifts conversion. Work through one section per module, then use the templates to run and measure your review engine month after month.

Why Social Proof Works and What Counts as Proof

Ground yourself in the psychology, map the proof formats, and inventory what you already have.

Exercise: Find the Praise You Already Earned

Spend 30 minutes searching your inbox, support logs, and social mentions for customer praise using phrases like thank you, love, and life saver. Capture every quote you can use, with the source and whether you have permission to publish it.

- Which inbox or tool surfaced the most usable praise?

- What is the single strongest quote you found, word for word?

- Which quote describes a specific, measurable result you could grow into a case study?

- For which quotes do you still need the customer's permission to publish?

Worksheet: Proof Format Audit

For each proof format, note how much you currently have and where the gaps are. Use this to decide what to collect first.

Reviews (platform + approximate count)

Testimonials on your own site (count)

Case studies (count + topics)

Average star rating today

User-generated content (photos/videos)

Trust signals (logos, awards, user counts)

Biggest gap to fill first

Checklist: Proof Inventory Checklist

- Searched email for praise keywords and saved quotes
- Scanned support and chat logs for moments of delight
- Checked existing Google, Facebook, and industry profiles
- Searched brand name on social channels for mentions
- Logged each item with name, source, date, and exact quote
- Tagged each item with the format it could become
- Noted which items need publishing permission

Building an Automated Review Request Engine

Pin the timing, write a low-friction request, and automate the flow so it runs on every customer.

Exercise: Find Your Moment of Peak Satisfaction

Sketch your customer journey from purchase to outcome and mark the single point where satisfaction peaks. That event, not the moment of sale, is your review trigger.

- What event signals your customer has received the value you promised?

• How many days after that event should the request send?

• What quick satisfaction signal could you use to route happy versus unhappy customers?

• Which moment are you currently asking at, and how far is it from peak delight?

Worksheet: Review Request Copy Builder

Draft your request and reminder, keeping the main ask under about 75 words with one direct link. Fill the character or word count yourself once the copy is final.

Customer first-name token

Specific product or outcome to reference

The single ask (one sentence)

Direct review link

Stated time cost (for example, about a minute)

Subject line

Word count of main request

Reminder copy (sent only to non-responders)

Worksheet: Automation Flow Map

Define each step of your triggered sequence so it can be built in your email or review tool.

Trigger event

Tool sending the request (email/SMS/review software)

Delay from trigger to first request (days)

Delay from request to reminder (days)

Happy-responder destination (public platform)

Unhappy-responder destination (private feedback)

Consent/opt-out handling confirmed (yes/no)

Checklist: Request Engine Launch Checklist

- Identified the peak-satisfaction trigger event
- Wrote a personalized request under about 75 words with one link
- Stated the time cost in the request
- Built the triggered send in an email or review tool
- Added one reminder to non-responders only
- Confirmed SMS consent and opt-out where used
- Confirmed no reward is conditioned on a positive review
- Tested the full flow on a sample order

Platform Strategy and Reputation Management

Choose and claim the right platforms, build a response system, and stay compliant.

Exercise: Pick Your Primary Platform

Match your business model to the platform map from the course. Choose one primary platform and at most one or two secondary, then fully claim and complete each profile.

- What is your business model (local, B2B software, ecommerce, services)?

- Which single platform do your buyers actually consult most?

- Which one or two secondary platforms are worth a presence?

- What is missing from your primary profile (photos, hours, description)?

Worksheet: Review Response Template Sheet

Draft reusable response openings for each scenario so replies are fast and consistent. Personalize the specifics each time you use them.

Positive review response opening

Neutral review response opening

Negative review acknowledgment line

Apology line (where warranted)

Move-to-private contact detail

Target response time (hours)

Process for reporting fake or policy-violating reviews

Checklist: Compliance and Ethics Checklist

- Never write, buy, or fabricate reviews or testimonials
- Never condition any reward on a review being positive
- Disclose material connections such as free product or affiliation
- Do not selectively delete honest negative reviews you control
- Obtained explicit permission before publishing private quotes
- Saved consent records for every published testimonial
- Claimed and fully completed the primary platform profile

From Testimonials to Case Studies to Conversion

Interview customers for specific proof, place it at decision points, and measure the lift.

Exercise: Run a Testimonial Interview

Schedule a 15-minute call with a happy customer and walk them through the problem-hesitation-decision-result arc. Record with permission, transcribe, and pull exact quotes.

- What problem did the customer have before finding you?

-
- What hesitation did they overcome to buy?

-
- What specifically changed, and what number can they attach to it?

-
- Which exact sentence is the most quotable, word for word?
-

Worksheet: Proof Placement Map

Assign the right proof format to each high-intent page or funnel step so proof sits next to the decision.

Landing page testimonial (below headline)

Product page proof (specific reviews/ratings)

Pricing page testimonial (results-driven)

Checkout trust line and guarantee signal

Homepage ratings summary and logos

Key phrase to bold in each testimonial

Reviewer name and photo confirmed (yes/no)

Worksheet: Proof A/B Test Planner

Plan one placement test. Leave the rate and lift cells blank until you have collected the data, and compute the lift yourself from the variant results.

Page being tested

Variant A (with proof block) description

Variant B (without proof block) description

Primary metric (conversion rate)

Variant A conversion rate

Variant B conversion rate

Lift (leave blank until calculated)

Decision (keep, drop, or test next)

Checklist: Convert and Measure Checklist

- Interviewed at least one customer for a specific testimonial
- Got written sign-off before publishing the testimonial
- Placed proof next to add-to-cart, pricing, and checkout
- Bolded the key phrase and showed reviewer name and photo
- Set up monthly tracking of requests, response rate, and rating
- Ran one A/B test of a page with and without a proof block
- Compared conversion lift and kept the winning placement

Your Action Plan

1. Inventory existing praise and log every usable quote with source and permission
2. Map your customer journey and mark the single peak-satisfaction trigger
3. Write a personalized review request under about 75 words with one direct link
4. Build a triggered email or SMS flow that sends the request plus one reminder
5. Choose one primary review platform, claim it, and complete the profile fully
6. Set up a response routine that replies to every review within 48 hours
7. Interview a happy customer and turn the transcript into a testimonial and case study
8. Place proof at the decision points: landing, product, pricing, and checkout
9. Run an A/B test of a page with and without a proof block and keep the winner
10. Review collection metrics and one placement test on a monthly cadence

