

Testimonials & Case Studies — Workbook

This workbook turns the course into a working social proof machine you run on every client. Complete each section as you finish the matching module, and by the end you will have a buyer doubt map, a proof inventory and collection calendar, ready-to-send request scripts, a case study interview guide and one-page draft, and a funnel-wide placement map. Use the templates to track every proof request to completion, audit the proof you already own, and turn one client interview into a published case study.

Why Social Proof Decides the Sale

Map the five buyer doubts, audit the proof you already own against them, and set a collection cadence so social proof accumulates on a schedule.

Worksheet: Map Your Five Buyer Doubts

Write each of the five doubts in your buyer's own words, using language you have actually heard on sales calls. Next to each, name the single best piece of proof you already own that answers it, or write GAP if you have none. This becomes the brief for every request and interview that follows.

Competence doubt, in the buyer's words, and the proof that answers it (or GAP)

Results doubt, in the buyer's words, and the quantified proof that answers it (or GAP)

Relevance doubt, in the buyer's words, and the matching-industry proof that answers it (or GAP)

Risk doubt (communication, reliability), and the proof that answers it (or GAP)

Value doubt (worth the price), and the ROI proof or case study that answers it (or GAP)

The single doubt that kills the most deals, ranked first to collect

Exercise: Diagnose Your Last Lost Deal

Think of a recent prospect who did not buy, or who hesitated for a long time. Walk back through where their confidence broke down and what proof, if it had existed, might have changed the outcome.

- What was the last question or objection the prospect raised before they stalled or said no?

- Which of the five doubts was really underneath that objection?

- Did you have any proof on hand that answered it, and was it placed where they would see it?

- What single testimonial or case study, if you owned it, would most likely have closed that deal?

Worksheet: Audit the Proof You Already Own

Dig through email, messaging apps, project tools, reviews, and social for praise you never captured. Log every scrap here, then transfer it into the Proof Inventory template with a permission status. You almost certainly own more proof than you currently use.

Source searched (email, Slack, Asana, Google reviews, LinkedIn, etc.) and what you found

Client name and the exact praise or quote, verbatim

Which of the five doubts this quote answers

Does it contain a number or specific result, yes or no

Permission status: granted, need to ask, or cannot use

Best format for it: short quote, video, review, or case study seed

Checklist: Stand Up Your Collection Cadence

- List your peak moments (result delivered, milestone hit, problem solved, renewal, unsolicited thanks)
- Attach a testimonial request trigger to each peak moment
- Set a monthly reminder to scan inbox and messages for spontaneous praise and ask permission
- Set a quarterly reminder to interview one standout client for a full case study
- Set a quarterly reminder to review the proof inventory against the doubt map and target the biggest gap
- Set a twice-yearly reminder to refresh stale quotes and update outdated numbers

Collecting Testimonials People Actually Give

Write your request scripts, choose your collection tools, and build a gentle follow-up sequence that converts willing clients into permissioned, published quotes.

Worksheet: Write Your Reply-Rate Request Script

Draft the exact message you will send at a peak moment. Keep it specific to the channel the client already uses, supply the three structuring questions, and explicitly lower the effort bar. Save the finished version as a reusable template.

Opening line that references the specific win or their unsolicited thanks

The ask, naming where you want to use it (website, social)

Question 1: the before or problem

Question 2: what changed, with a number if possible

Question 3: the hesitation and who they would recommend it to

The effort-lowering line (no pressure on length, even a few lines helps)

Channel you will send it through and the tool or link you will include

Exercise: Choose the Right Tool per Client

Pick three real upcoming or recent clients and decide how you will collect proof from each, matching the tool to the value of the proof and the client's likely effort tolerance.

- For a high-ticket B2B client, will you use VideoAsk, Loom, or a recorded interview, and why?
 - For a quick-win client, which one-link tool (Senja, Testimonial.to, a short form) keeps effort lowest?
 - For a client who hates writing, will you draft-for-approval or offer a 15-minute call?
 - What permission and attribution will you capture in each case (name, role, company, photo or logo)?
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Checklist: Two-Touch Follow-Up Sequence

- Day 0: send the request at the peak moment with the three questions and an easy link
- Day 4 to 5: send a soft nudge offering an even quicker option
- Day 10: send a final gentle option, even a single sentence by reply is fine
- If still silent, draft the testimonial from their own words and ask only for approval or edits
- Capture written permission to publish, naming the placements
- Record full name, role, company, and a photo or logo for attribution
- Log consent and attribution in the proof inventory

Worksheet: Reviews and Reluctant-Client Plan

Plan how you will steer happy clients to public review platforms and how you will handle clients who cannot give a named public endorsement. Honest, compliant tactics only, no incentives for reviews.

Primary public review platform you will direct clients to (Google, Trustpilot, Clutch, marketplace)

The exact direct review link you will paste into requests

Your personalised review-request line, tied to a peak moment

Fallback for a client whose employer forbids names (role plus industry attribution)

Your draft-for-approval message for the reluctant or busy client

Writing Case Studies That Convince

Run a story-mining interview, draft a one-page before-after-bridge case study, and present numbers credibly with a clean approval workflow.

Worksheet: Run the Case Study Interview

Schedule a 30-minute recorded interview with a standout client (with permission to record). Work through these questions in order to build a natural arc from problem to result, and dig for at least one hard number.

Note timestamps next to any vivid, quotable lines.

Before: what was happening and why it was a problem (with any number)

What they had already tried and why it failed

What made them decide to act, and the hesitation they felt

The turning point, in their words

After: the quantified result, time saved, money made, or stress removed

What they would tell someone in their old situation

Two or three quotable lines, verbatim, with timestamps

Exercise: Dig for the Number

Practise the follow-up questions that turn a vague outcome into believable proof. Use a real client outcome and push it from soft to specific.

- Take a vague claim from a client (things are so much better) and write three follow-ups to quantify it.
 - How long did the key task take before, and how long does it take now?
 - What did the win translate to in revenue, hours saved, or cost avoided, even as a rough estimate?
 - If no number exists, what concrete sensory detail captures the change (for example, stopped waking at 3am)?
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Worksheet: Draft the One-Page Case Study (Before-After-Bridge)

Assemble the interview into a single skimmable page using the four-part layout. Lead with the result, keep paragraphs short, and pull the best quotes out as call-outs. Aim for 400 to 700 words of body plus a stat box. Results-first headline with the single most impressive specific number

Client and result snapshot (name, role, company, one-line outcome)

The Before section with a client quote about the pain

The Bridge: what you did, framed around the problem, with the turning point

The After: quantified result and a strong closing quote

Stat box: before, after, and headline metric

Call to action matching the now-warmed buyer

Checklist: Numbers, Ethics, and Approval

- Show the baseline and raw numbers alongside any percentage
- State the timeframe for every result
- Attribute metrics to the client where possible

- Avoid suspiciously perfect round figures
- Confirm no result is invented or embellished
- Disclose any incentive or material connection (per FTC and ASA rules)
- Send the full draft to the client for edits and confirm the numbers
- Get written approval naming the placements, and log the approval date

Deploying Proof Where It Converts

Build a placement map that pairs each proof with the doubt it answers, reformat one story across every channel, and measure whether your proof actually lifts conversion.

Worksheet: Build Your Proof Placement Map

List every key touchpoint a prospect hits, name the dominant doubt at each, and assign the single best proof you own to answer it. Flag any touchpoint where you have no matching proof and feed it back into your collection targets. Transfer the result into the Placement Map template.

Homepage hero: dominant doubt and the proof assigned

Services or sales page: dominant doubt and the proof assigned

Pricing page: the value or ROI proof assigned (or GAP)

Near the main call-to-action button: the risk-reducing proof assigned

Proposal or sales deck: the matched same-industry case study assigned

Key email in your sequence: the proof point assigned

Touchpoints with no matching proof, flagged as collection targets

Checklist: Repurpose One Story Across Every Channel

- Publish the full case study page on your site, results-first and skimmable
- Pull the headline number into a short social post and a stat slide for your deck
- Clip and caption the strongest 30 to 60 seconds of any video for social and ads
- Drop the best quote into your testimonial rotation near a call to action
- Add a short version to your sales email follow-up sequence
- Keep full attribution (name, role, company, photo or logo) on every version
- File the new proof against the doubt it answers and update the placement map

Exercise: Plan a Proof Conversion Test

Design one simple test to learn whether your social proof actually moves prospects to act. You do not need a lab, just a fair before-and-after or a direct question to buyers.

- Which single page or call to action will you test proof on, and what is its current conversion rate?

- Will you run a before-and-after, an A/B test, or ask new clients directly what reassured them?

- What question will you ask new clients to surface which proof was decisive?

- How will you decide which proof to promote to your highest-traffic placements based on the result?

Checklist: Keep the Library Alive

- [] Replace testimonials older than about two years and update outdated numbers
- [] Retire generic quotes that do not answer a specific doubt
- [] Each quarter, collect proof for the doubt your library still cannot answer
- [] Move the proof prospects actually cite into your highest-traffic placements
- [] Ensure you have proof across every industry and use case you sell into

Your Action Plan

1. Map your five buyer doubts in the buyer's own words and rank them by how often they kill a deal
2. Audit email, messaging, project tools, and reviews for existing praise and log it with permission status
3. Set up your proof inventory and a quarterly collection cadence tied to peak moments
4. Write a reply-rate request script with the three questions and an effort-lowering line, and save it as a template
5. Choose your collection tools (Senja, VideoAsk, Loom, or a form) and run a two-touch follow-up sequence
6. Capture written permission and full attribution for every quote before publishing
7. Interview one standout client on the record and dig for at least one hard number
8. Draft a one-page before-after-bridge case study, results-first and skimmable, and get client approval
9. Build a proof placement map pairing each piece of proof with the doubt it answers across the funnel
10. Repurpose each story across channels, run one conversion test, and refresh the library on a schedule

