

Scenario: Asking for a Customer Testimonial or Case Study

Objective: Get a happy customer to share their success story.

Best Practices for This Email:

1. **Make it about them** – Focus on their achievements, not your company.
2. **Keep it low effort** – Offer to draft a testimonial for them.
3. **Give an incentive (if possible)** – Discounts, features, or exposure.



Email Example: Request for Testimonial or Case Study

Subject: *[First Name], Share Your Success Story?*

Hi [First Name],

I've been thrilled to see the impact [Product Name] has had on [Company Name]! Based on our recent conversations, it's clear that your team has been able to **[specific success, e.g., cut onboarding time by 30%]**.

We'd love to **feature your success story** as a testimonial or case study. It would be a great opportunity to showcase your expertise and how your team has leveraged [Product Name] effectively.

If you're open to it, we can make this super easy:

Option 1: We'll send a few quick questions, and you can reply at your convenience.

Option 2: We'll draft a testimonial based on our conversations, and you can approve or edit it.

Option 3: Let's jump on a **15-minute call** to discuss—schedule here: **[Insert Calendar Link]**

Would you be open to this? Let me know what works best for you!

Best,
[Your Name]

Why This Works?

1. **Celebrates their success** → Makes it feel like an opportunity, not a request.
2. **Removes effort** → Gives options that require minimal work from them.
3. **Flexible CTA** → Allows them to choose their preferred method.