




# Video Guide: Marketing and Managing Testimonials

**Gathering testimonials** is important, but it's important to know how to manage and display these testimonials to gain the most exposure for you and your business. You are able to manage and market testimonials individually as they come in or all at a time. We'll review both ways.

## **Individually Managing Testimonials**

When someone gives you a testimonial, they do it on a form like this and then have the option to post it on their social media sites if they gave you a high star rating.










### What was your experience with Testimonial Tree?

Testimonial Tree Inc

Rating: Excellent (5 stars)

Poor Excellent

Testimonial:

Image or Video:

We would love to hear you give your testimonial with your own words and see any related pictures that you'd like to share.

Suggested File Types - Image: GIF, JPG, JPEG, PNG / Video: AVI, MOV, MP4, MPEG, QT, WMV

Choose Files No file chosen

Your Name: \*

Jenny Smith, J Smith, Jenny S

Your company/organization or relationship:

Your title and company, Customer, Director of Marketing at XYZ

Email (Optional):

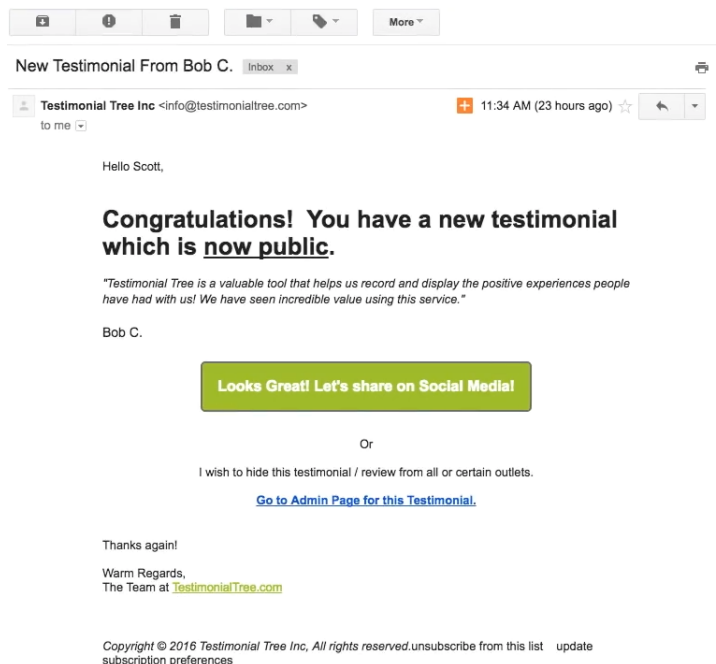
jenny@domain.com

Email addresses will not be shared with any other group or organization.

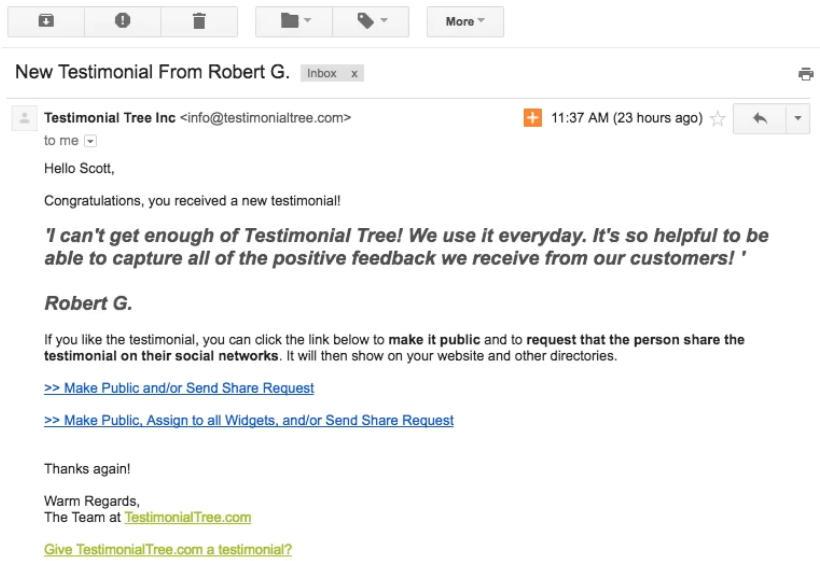
Submit

Once they submit a form you'll receive an email notification that a new testimonial has come in for you. Your account can be set up to automatically post to your website if its been given a high star rating or you have the option to review and approve all testimonials before they're posted.

If testimonials post automatically, you'll receive an email like this prompting you to share it on your social media sites. You can select "Go to Admin Page for this testimonial" if you'd like to remove it from one of your widgets.



If you're set up to review each testimonial, you'll receive an email like this that links to our testimonial marketing page.



Here you'll see all the testimonial information that was inputted. Additionally, you have the ability to promote this testimonial by selecting the "thumbs up" button. It will display this testimonial towards the top within your website widgets. From here, you also have the ability to share the testimonial on your social media sites.

View Testimonial / Review

**Testimonial** Promotion 👍

**B I**

I can't get enough of Testimonial Tree! We use it everyday. It's so helpful to be able to capture all of the positive feedback we receive from our customers!

body

**Video Testimonial URL:**

**Associated Images or Videos:**

Choose Files No file chosen

**Rating: Excellent (5 stars)**

Poor 🌟 🌟 🌟 🌟 🌟 Excellent

Remove Rating

**Name (Testimonial Author):**

**Author's company/organization or relationship with:**

**Author's Email (Optional):**

**Recording Date** 📅

**Recording Time**

**Custom Fields**

As you scroll down, you have the ability to select where you'd like the testimonial to be displayed. I'd highly recommend you always select the *Testimonial Tree Public Directory* to increase your SEO Scores. *CloudCMA* and *Realtor.com* are great syndication options if you're in Real Estate.

**Custom Fields**

**Marketing Sites**

☒ Testimonial Tree Public Directory

☐ CloudCMA

☐ realtor.com Recommendations

**Add to Your Website Widgets**

☒ Employee Page List ☒ Homepage Rotator

☒ Testimonial Page List

**Choose Categories for this Testimonial**

☐ Category 1 ☐ Category 2

**Cancel** **Save**

If you're on an enterprise level account, your website widgets may have been created you or your company to display testimonials on your company page. Lastly, if you have testimonial categories set up, you can categorize the testimonial type as you'd like. If you're on an enterprise account, you may also have the ability to assign testimonials to a number of users. Make sure to save your changes once you're finished.

## Managing Multiple Testimonials

You can return to the testimonial page by selecting testimonials then manage. Here you'll see all the testimonials you have received. If you're an administrative user on the enterprise version, you'll see all the testimonials that have come in for your company. You can filter by user, team, or location. If you're a manager, you'll have access to view your testimonials and the testimonials for any user assigned to you. You're also able to filter by user and team. As an individual user, you'll be able to see all your testimonials. Filter by the content of the testimonial, star rating, testimonials with pictures or videos, or date range.

**Manage Testimonials**

**Add Existing Testimonial** Mass Edit | Transfer Testimonials | Export Data To File

**Filter Testimonials**

Testimonial Content:

Team:

From Date (mm/dd/yyyy):

To Date (mm/dd/yyyy):

Filter By User:

Location:

Rating:

Contains: ☐ Picture ☐ Video

**Search**

55 Testimonials - Page 1 of 2 Next Page >>

Subject User(s)	Testimonials / Reviews	From Survey	Client Shared	Favorited?	Actions
Testimonial Tree	★★★★★				<b>Actions</b>

As you review your testimonials, you'll see who the testimonial was submitted for, the testimonial text and ranking, if it was collected from a survey or not, on what social media sites

the testimonial has been shared, and if you marked it as a favorite.

Subject User(s)	Testimonials / Reviews	From Survey	Client Shared	Favorited?	
• Testimonial Tree	★★★★★ "Thanks for all your help with my recent transaction. The level of professionalism and service you provided was top-notch." 6/28/2016 - Ken H.				Actions▼
• Testimonial Tree	★★★★★ "Thanks for all your help with my recent transaction. The level of professionalism and service you provided was top-notch. Great!" 6/28/2016 - Ken H.				Actions▼
• Scott	★★★★★ "I can't get enough of Testimonial Tree! We use it everyday. It's so helpful to be able to capture all of the positive feedback we receive from our cus..." 6/27/2016 - Robert G.				Actions▼
• Scott	★★★★★ "Testimonial Tree is a valuable tool that helps us record and display the positive experiences people have had with us! We have seen incredible value u..." 6/27/2016 - Bob C.				Actions▼
• Testimonial Tree	★★★★★				Actions▼

The actions button gives you a number of different options. Let's review each of them.

**Share testimonial:** Allows you to share on your social media sites

**Request share:** sends an email to the customer who submitted the testimonial asking them to share what they've written on their social media sites. If they didn't enter an email when they submitted the testimonial, you'll be prompted to edit and add an email if you have it.

**Edit Testimonial:** allows you to edit any information regarding the testimonial or where it is shared. On an enterprise account, you may not have access to this feature. If you'd like to edit a testimonial, then just speak with one of the administrative users on the account.

**Testimonial Marketing:** gives you the ability to choose where you'd like the testimonial to be displayed. You can select which website widgets or marketing sites its displayed on or share it on your social media accounts. From here you can also print testimonial or send a PDF copy via email using the "send report" feature.

**Print Testimonial:** produces a print-friendly page that may be helpful to display testimonials on your office bulletin board or marketing pieces.

**Delete:** allows you to remove the testimonial all together. Note that depending on your access you may not see this option listed.

<https://desk.zoho.com/portal/testimonialtree/en/kb/articles/video-guide-marketing-and-managing-testimonials>