

Client Testimonial Request Kit — Spec for Google Doc + PDF Generation

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Document Title

Client Testimonial Request Kit — for Coaches

Subtitle: *Everything you need to ask for, collect, and use client testimonials in your coaching practice*

Cover Page

Title: Client Testimonial Request Kit — for Coaches **Sub-title:** 10 templates, 5 email scripts, a questionnaire, and a permission form **Footer:** From Paperbell — the all-in-one platform for coaches | paperbell.com

How to Use This Kit (Intro — 1 short paragraph)

This kit has everything you need to collect compelling client testimonials without the awkwardness.

Start with the request email that fits your situation, include a link to the questionnaire questions, then use the writing templates to turn their answers into a polished testimonial. The permission form at the end keeps everything above board.

Section 1: Testimonial Request Email Scripts

Three email templates for the most common scenarios. Copy, personalize, and send.

Template A: Post-Session Request

Use this right after a session where something clicked.

Subject: Quick favor?

Hi [Client Name],

I loved our session today — you had such a big breakthrough around [topic], and I just wanted to say how much I enjoy working with you.

Would you be open to writing a short testimonial about your experience so far? Even just 2-3 sentences would be amazing. You could share what you were struggling with before, what shifted, and how you're feeling now.

Here's a simple prompt if it helps: "Before working with [Coach Name], I... After our sessions, I..."

No pressure at all — only if it feels good! You can just reply to this email with your words.

Thank you so much, [Your Name]

Template B: End-of-Program Request

Send this when a client completes your program.

Subject: I'd love to hear about your experience

Hi [Client Name],

It's been such a joy working with you, and I'm genuinely proud of everything you've accomplished over these [timeframe] together.

Would you be willing to share a short testimonial? It could follow this simple structure:

The Challenge: What were you dealing with before we started working together? **The**

Transformation: How did our coaching help you move through that? **The Outcome:** What are the results or benefits you've seen? How do you feel now?

Your feedback means a lot to me — and it could help someone else who's considering coaching make the leap.

Thank you so much for your time! [Your Name]

Template C: Lapsed Client Re-Engagement

For past clients you haven't been in touch with for a while.

Subject: Hey, checking in from [Your Name]

Hi [Client Name],

It's been a while! I was recently thinking back on the work we did together around [topic/goal] and wanted to say — it was genuinely one of my favorite coaching relationships.

I'm wondering how things have been since then. Any big wins since we worked together?

If you're open to it, I'd love a short testimonial about your experience — even just a sentence or two

about what changed for you. It would help other people find the support they're looking for.

No worries at all if it's not a good time. Either way, I hope you're thriving! [Your Name]

Section 2: Post-Session Questionnaire

Send this to clients to gather the raw material for a great testimonial. Pick 4-5 questions — don't send all of them at once.

Instructions to client (include this at the top when sending):

Hi [Client Name]! I'd love to feature your experience on my website. These questions take about 5-10 minutes to answer. There are no right or wrong answers — I just want your honest thoughts. I'll use your words to write up a short testimonial and send it to you for approval before using it anywhere.

Questions:

1. How did you find out about my coaching services?
2. What was going on in your life or business when you made the decision to work with me?
What challenges were you facing?
3. What had you already tried before working with me? What happened?
4. What made you choose to work with me over other options?
5. What has been the biggest breakthrough or shift you've experienced in our work together?
6. What specific results have you seen since we started working together?
7. What did you enjoy most about the coaching process?
8. How do you feel now compared to when you started?
9. What would you say to someone who is considering working with me?
10. Is there anything you wish I had done differently? (This stays private — it's just for me to improve.)

Section 3: Writing Templates

Use these to turn your client's questionnaire answers into a polished, publishable testimonial. Fill in the blanks using their actual words.

Writing Template 1: Overcoming a Challenge

Structure: Problem → Solution → New State

[A short sentence about your client's challenges or past experiences, in their words.]

[How your coaching helped them overcome this challenge.]

[What their life looks like now — a specific result or emotional shift.]

Example filled in: *Before working with Tasha, I felt like I was walking through my life without a purpose and wasting my days. Tasha helped me flip everything around and rediscover my deeper why and sense of self. Now I feel like I know exactly where I'm going, all thanks to her!*

Tips: - Use the client's exact words from Q2 and Q6 of the questionnaire for authenticity - Keep it to 3-4 sentences - End on a forward-looking note (what life is like now), not on the coaching process

Writing Template 2: Results-Focused

Structure: Change → Specific Result → Recommendation

"Working with [Coach Name] changed everything for me. Within [timeframe from Q6], I [specific result from Q5/Q6]. The [approach/style] was [how they described it in Q7]. I recommend [Coach Name] to anyone looking to [goal from Q2]."

Example filled in: *"Working with Jordan changed everything for me. Within 3 months, I went from \$2K to \$8K months. More importantly, I stopped second-guessing every decision. If you're serious about growing your business, Jordan is worth every penny."*

Tips: - Specific numbers make this template much stronger — pull exact figures from Q6 if available
- If the client didn't share numbers, use emotional language instead: "completely transformed,"
"finally clear"

Writing Template 3: Personal Journey (Detailed)

Structure: Starting Point → Process → Current State

"Before working with [Coach Name], I was at [starting point from Q2 — e.g., 'a crossroads in my career' or 'struggling to find purpose in my daily life']. Through [coaching process from Q4/Q7 — e.g., 'thought-provoking exercises' or 'consistent check-ins'], I was able to [achievement from Q5/Q6]. Now, [current state from Q8]."

Example filled in: *"Before working with Marcus, I was at a crossroads in my career, miserable in my job but terrified to leave. Through his structured approach and honest feedback, I got clear on what I actually wanted and built a concrete plan to get there. Now I'm in my dream industry, at a \$20K salary increase, and I wish I'd done this years ago."*

Tips: - Best for coaching that involves a full life/career transition - The more specific the "before" and "after," the more powerful the testimonial - Always get client approval before publishing — send them the draft and ask: "Does this still sound like you?"

Section 4: Permission and Release Form

Send this to the client along with their draft testimonial. Keep a copy on file.

Testimonial Permission Form

Hi [Client Name],

Here's the testimonial I've drafted based on your feedback:

[paste testimonial draft here]

If this looks good to you and accurately represents your experience, please reply confirming your permission for me to use it in the following ways:

- On my website (testimonials page, homepage, sales pages)
- In my email marketing
- On social media (Instagram, LinkedIn, Facebook)
- In printed marketing materials

Name to display: [Full name / First name only / Initials only — circle your preference]

Photo: [Yes, I'll send one / No thanks]

Job title or description to include (optional): ____

Please note: I will only edit for minor grammar and clarity. I won't change the meaning of your words.

If you'd like any changes to the draft above, please let me know and I'll update it before using it.

Thank you so much for taking the time to share your experience!

[Your Name]

Section 5: Quick Tips for Using Testimonials

5 reminders for getting the most out of the testimonials you collect.

1. **Ask at the right moment.** The best time to ask is right after a big win or at the end of a program. Don't wait until weeks later when the energy has faded.
2. **Give structure, not scripts.** Sending the questionnaire or a simple prompt ("Before working with me, I... After our sessions, I...") helps clients write something specific without putting words in their mouth.
3. **Draft it for them if needed.** Many clients are happy to share feedback but not to write it up. It's completely fine to draft the testimonial from their questionnaire answers and send it to them for approval. Most will appreciate it.
4. **Keep it specific.** A testimonial with a real number, a real situation, or a real before/after detail will convert better than one with only general praise. When drafting, look for the most specific detail in their answers and lead with it.
5. **Refresh your testimonials regularly.** Your coaching and results evolve — make sure your testimonials reflect your current work. Ask at least one client per quarter, and rotate in fresh testimonials so your website doesn't show 3-year-old quotes.

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