

Testimonial

Toolkit

Client Feedback and Review Generation

Complete Toolkit

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Why Home Care Reviews Are Different

Home care is deeply personal. When families search for care for their aging parents or disabled loved ones, they're not just buying a service - they're trusting strangers to enter their home and care for the people they love most.

This is why reviews in our industry carry extra weight. A glowing review from another family provides the social proof and peace of mind that no amount of advertising can match.

Key Insight

The home care agencies with the most (and best) reviews don't have better service than you - they simply have a system for asking. This toolkit gives you that system.

The Business Impact of Reviews

- **Higher conversion rates:** Agencies with 4.5+ stars convert 270% more website visitors into inquiries
- **Better SEO ranking:** Google prioritizes businesses with more reviews in local search results
- **Reduced marketing costs:** Word-of-mouth from reviews is free advertising
- **Competitive advantage:** In markets with similar agencies, reviews become the tiebreaker
- **Staff recruitment:** Caregivers want to work for well-reviewed, reputable agencies

02 When to Ask for Reviews

Timing is everything. Ask too early, and clients haven't experienced your service. Ask too late, and the emotional connection has faded. Here are the optimal moments to request reviews.

The Golden Windows

1 After a Positive Care Moment

When a family member expresses gratitude, mentions how happy they are, or shares a positive story about their caregiver - that's your cue. Strike while the iron is hot.

Example: "Mom seems so much happier since Maria started coming!"

2 At the 30-Day Mark

After one month of service, clients have enough experience to write a meaningful review but are still in the "honeymoon phase" of appreciation.

3 After Solving a Problem

When you go above and beyond to resolve an issue or accommodate a special request, the client's gratitude is at its peak.

4 During Quality Check-Ins

Your regular supervisory visits or satisfaction calls are natural opportunities. If feedback is positive, transition into a review request.

5 At Service Milestones

3 months, 6 months, 1 year of service - these anniversaries are perfect for reaching out with appreciation and a gentle review request.

⚠ When NOT to Ask

- During or immediately after a complaint
- When the client is stressed or dealing with a health crisis
- If there have been recent caregiver changes
- During billing disputes or payment issues
- When the client seems rushed or distracted

Who Should You Ask?

Primary contacts: Adult children, spouses, or family members who coordinate care

Secondary contacts: The care recipient themselves (if cognitively able)

Referral sources: Hospital discharge planners, social workers, physicians who refer to you

03 How to Ask for Reviews

The way you ask matters as much as when you ask. These proven approaches make it easy for clients to say yes - and follow through.

In-Person Requests

Face-to-face requests have the highest conversion rate. Use these during supervisory visits or when you hear positive feedback.

Script: The Direct Ask

"Mrs. Johnson, I'm so glad to hear that things are going well with Sandra. It really means a lot to us that your mother is in good hands.

Would you be willing to share that experience in an online review? It helps other families like yours find quality care, and it would mean the world to our team.

I can send you a link that makes it really easy - just takes a couple of minutes."

Script: The Soft Ask

"We're always looking to help more families in the community find reliable care. If you ever have a few minutes, a Google review sharing your experience would be incredibly helpful.

No pressure at all - only if you're comfortable. I know how busy you are."

Email Requests

Email allows clients to respond on their own time and makes it easy to include direct links to review platforms.

✓ DO

- Personalize with their name and caregiver's name
- Keep it brief (under 150 words)
- Include a direct link to Google or Facebook
- Make it clear this is optional
- Express genuine gratitude

x DON'T

- Send mass generic emails
- Ask for a "5-star review" specifically
- Offer incentives or discounts
- Send multiple requests in a short period
- Make them feel obligated

Text Message Requests

Text messages have the highest open rate (98%) and are great for quick follow-ups after positive interactions.

💡 Best Practice

Text works best after you've already mentioned a review in person or on a call. Use it as a convenient follow-up with a direct link, not as a cold request.

Making It Easy

- 1 **One click:** Always include a direct link - never make them search for you
- 2 **One platform:** Ask for ONE review (Google preferred) - don't overwhelm with options
- 3 **One minute:** Emphasize how quick and easy it is
- 4 **One reminder:** Follow up once, then let it go

04 Review Request Email Templates

Copy, customize, and send. These templates are proven to convert satisfied clients into enthusiastic reviewers.

Template 1: The Gratitude Email

Subject: Thank you for trusting us with **[Client Name]** 's care

Hi **[Family Member Name]** ,

I wanted to take a moment to thank you for choosing **[Your Agency Name]** to care for **[Client Name]** . It's been a privilege to be part of your family's journey, and we're so glad that **[Caregiver Name]** has been a good fit.

If you have a moment, would you mind sharing your experience in a brief Google review? It helps other families in our community find quality care, and it truly means the world to our team.

Click here to leave a review: **[Your Google Review Link]**

Thank you again for your trust. We're honored to serve your family.

Warmly,

[Your Name]

[Your Agency Name]

Template 2: The Milestone Email

Subject: Celebrating 3 months together!

Hi **[Family Member Name]** ,

Can you believe it's been three months since we started caring for **[Client Name]** ? Time flies when things are going well!

We've loved getting to know your family, and **[Caregiver Name]** always looks forward to their visits.

If our service has made a difference in your life, would you consider sharing your experience with a quick Google review? Your words help other families find the support they need.

Leave a review here: **[Your Google Review Link]**

As always, please don't hesitate to reach out if there's anything we can do.

With gratitude,

[Your Name]

Template 3: The Referral Source Email

Subject: Quick favor - would you recommend us?

Hi **[Referral Partner Name]**,

I hope this finds you well! I wanted to reach out because we truly value our partnership with **[Their Organization]**.

If you've been pleased with how we've cared for the families you've referred to us, would you consider leaving a brief review on Google? It helps other healthcare professionals and families discover our services.

Review link: **[Your Google Review Link]**

Thank you for everything you do to connect families with quality care. We're grateful to work alongside you.

Best regards,

[Your Name]



Getting Your Google Review Link

1. Search for your business on Google
2. Click "Write a review" on your listing
3. Copy the URL from your browser
4. Or use: google.com/search?q=[Your+Business+Name]+reviews

05

Review Request Text Templates

Short, sweet, and easy to action. These text templates are designed for quick responses on mobile devices.

Text 1: After Positive Feedback

Hi **[Name]**! So glad to hear things are going well with **[Caregiver]**. If you have a minute, would you mind sharing your experience? Here's a quick link: **[Link]** Thank you! - **[Your Name]**

Text 2: Simple and Direct

Hi **[Name]**, this is **[Your Name]** from **[Agency]**. Would you have a moment to leave us a quick Google review? It helps us help more families like yours! **[Link]**

Text 3: Follow-Up to Verbal Request

Hi **[Name]**! Here's that review link I mentioned. Just takes a minute and means so much to us: **[Link]** Thank you!

Text 4: After Problem Resolution

Hi **[Name]**, glad we could get everything sorted out! If you're happy with how we handled things, a quick review would really help us out: **[Link]** Thanks for your patience!

Text 5: Gentle Reminder

Hi **[Name]**! Just a friendly reminder about the review if you have a moment. No pressure at all - here's the link again: **[Link]** Have a great day!

⚠ Text Message Guidelines

- **Get permission first:** Only text clients who have opted in to text communication
- **Keep it under 160 characters** when possible (single SMS)
- **Use URL shorteners** to save space (bit.ly, tinyurl.com)
- **Send during business hours** (9am-6pm local time)
- **One reminder maximum** - don't be pushy

06 Follow-Up Sequence

Most people need a reminder. This proven sequence maximizes reviews without being annoying.

The 3-Touch System

● Day 1: Initial Request

Trigger: Positive feedback, 30-day milestone, or problem resolution

Method: In-person, phone call, or email

Tone: Warm, grateful, low-pressure

● Day 3-5: First Follow-Up

Method: Text message with direct link

Tone: Brief, helpful ("Here's that link I mentioned!")

Note: Skip if they've already reviewed

● Day 10-14: Final Reminder

Method: Email (different from initial if email was first)

Tone: Understanding, last-chance ("I know you're busy...")

Note: This is your LAST attempt. After this, let it go.

Sample Final Reminder Email

Template: Gentle Final Follow-Up

Subject: No worries if not - just checking in

Hi **[Name]**,

I know life gets busy, and I completely understand if you haven't had a chance to leave that review. No pressure at all!

But if you do have two minutes to spare, it would really help other families find quality care: **[Link]**

Either way, we're grateful to have you as part of our family. Thank you for trusting us!

Best,

[Your Name]

Tracking Your Follow-Ups

Client Name	Initial Ask	Follow-Up 1	Follow-Up 2	Review?
Johnson Family	3/1 - Email	3/4 - Text	3/12 - Email	✓ Google
Martinez Family	3/5 - Phone	3/8 - Text	-	✓ Google
Williams Family	3/10 - In-person	3/13 - Text	3/20 - Email	Declined

Acceptance Rate Benchmarks

Excellent: 40%+ of asked clients leave reviews

Good: 25-40% conversion rate

Needs work: Under 25% - review your timing and approach

07 Google Review Instructions for Clients

Print this page and include it with your review request. Many clients want to help but aren't sure how. Make it foolproof.

How to Leave a Google Review

Thank you for taking a few minutes to share your experience. Your review helps other families find quality care!

Option 1: Using the Direct Link (Easiest)

- 1 Click or type this link into your browser: **[Your Review Link Here]**
- 2 Sign in to your Google account (or create one free at google.com)
- 3 Click the stars to choose your rating (1-5)
- 4 Write a few sentences about your experience
- 5 Click "Post" - and you're done!

Option 2: From Google Search

- 1 Go to Google.com
- 2 Search for: **[Your Agency Name + City]**
- 3 Find our business listing on the right side (or top on mobile)
- 4 Click "Write a review"
- 5 Select your star rating and write your review
- 6 Click "Post"

Option 3: From Google Maps

- 1 Open Google Maps (app or maps.google.com)
- 2 Search for **[Your Agency Name]**
- 3 Tap on our business listing
- 4 Scroll down and tap "Write a review"
- 5 Rate and write your review
- 6 Tap "Post"



What to Include in Your Review

- How we've helped your family
- What you appreciate about your caregiver
- The quality of communication and support
- Why you would (or wouldn't) recommend us

There's no right or wrong answer - just share your honest experience!

How to Recommend Us on Facebook

Facebook calls reviews "Recommendations" - here's how to leave one for us!

From Your Computer

- 1 Log in to Facebook
- 2 Search for **[Your Agency Name]** in the search bar
- 3 Click on our business page
- 4 Click the "Reviews" or "Recommendations" tab on the left
- 5 Click "Yes" next to "Do you recommend [Agency Name]?"
- 6 Write your recommendation and click "Post"

From Your Phone (Facebook App)

- 1 Open the Facebook app
- 2 Tap the search icon and type **[Your Agency Name]**
- 3 Tap on our business page
- 4 Scroll down to find "Recommendations" and tap it
- 5 Tap "Yes" to recommend us
- 6 Add your comments and tap "Post"

Using a Direct Link

Visit: **[Your Facebook Page URL]/reviews**



Facebook Review Tips

- Facebook recommendations are "Yes" or "No" - there are no stars
- Your recommendation may be visible to your Facebook friends
- You can add tags to help others find your review
- Photos make reviews more impactful (if appropriate)

Need help? Call us at [Your Phone] and we'll walk you through it!

Always get written permission before using client testimonials in your marketing materials. This protects you and respects your clients' privacy.

Testimonial and Media Release Authorization

Client/Family Member Name:

Relationship to Care Recipient:

Care Recipient Name (if different):

I hereby grant [Your Agency Name] ("the Agency") permission to use my testimonial, name, photograph, video recording, and/or likeness for the purposes checked below:

- Website and online marketing materials
- Social media (Facebook, Instagram, LinkedIn, etc.)
- Printed brochures, flyers, and marketing materials
- Video testimonials and promotional videos
- Press releases and media communications
- Internal training and educational materials

I understand that:

- My participation is entirely voluntary
- I will receive no compensation for this release
- The Agency may edit my testimonial for length or clarity while preserving its meaning
- I may revoke this permission at any time by providing written notice to the Agency
- Materials created prior to revocation may continue to be used

Preferred Display Name (how you'd like to be identified):

Examples: "John D., Los Angeles" or "Smith Family" or "Anonymous"

Signature

Date

Printed Name

Phone Number

Received by: _____

10 Video Testimonial Guide

Video testimonials are 2x more effective than written reviews. They build trust faster and perform better on social media. Here's how to capture great ones.

Equipment You Need



Smartphone

iPhone or Android (shoot in 1080p)



Lavalier Mic

\$15-30 clip-on mic for clear audio



Tripod

Phone tripod for stability



Natural Light

Face a window - no overhead lights

Before Recording

- Get signed release form
- Choose a quiet, well-lit location
- Remove distracting backgrounds
- Silence all phones and devices
- Give them questions in advance (don't script answers)
- Do a 10-second test recording to check audio/video

Interview Questions

Use these prompts to guide the conversation naturally:

Suggested Questions

1. "What situation led you to look for home care?"
2. "What were your biggest concerns before starting?"
3. "How has [Caregiver Name] made a difference in your daily life?"
4. "What would you tell someone who's considering home care?"
5. "Is there a specific moment that stands out to you?"
6. "How would you describe our team in three words?"

Recording Tips

✓ DO

- Record horizontally (landscape)
- Maintain eye contact (look at interviewer, not camera)
- Keep it conversational
- Record extra footage for editing
- Capture genuine emotion

x DON'T

- Script word-for-word answers
- Rush the person
- Record in noisy environments
- Use harsh overhead lighting
- Include HIPAA-protected information

Post-Recording

- 1 **Edit for length:** 60-90 seconds is ideal for social media
- 2 **Add captions:** 85% of Facebook videos are watched without sound
- 3 **Include your logo:** Brief intro/outro with branding
- 4 **Get final approval:** Show the edited version before publishing

💡 Budget Video Editing Options

Free: iMovie (Mac/iPhone), CapCut, Canva Video

Low-cost: Adobe Premiere Rush (\$9.99/mo), Filmora

Outsource: Fiverr editors (\$20-50 per video)

11

Case Study Template

Case studies tell the full story of how you helped a family. They're powerful for your website, referral partners, and sales conversations.

Client Success Story

Client Profile (Use pseudonym or initials for privacy)

Name: _____
Age: _____ Location: _____
Care Needs: _____

The Challenge

What situation was the family facing? What were their concerns?

The Solution

What care plan did you create? What services did you provide?

The Results

What changed? Include specific outcomes when possible.

Client Quote

Direct quote from family member:

" _____ "

- Attribution: _____

Case Study Best Practices

- **Always get permission** - Use the release form in Section 9
- **Protect privacy** - Change names, omit specific diagnoses if requested
- **Focus on transformation** - Before/after is compelling
- **Use specific details** - "Reduced hospital visits by 50%" beats "improved health"
- **Include photos** - With permission, images make stories real
- **Keep it concise** - 400-600 words is ideal for web

12 Responding to Negative Reviews

Negative reviews happen to every business. How you respond matters more than the review itself. A thoughtful response can actually improve your reputation.

The Response Framework: HEART

H Hear Them

Acknowledge their experience. Don't be defensive. Show you understand why they're upset.

E Empathize

Express genuine concern. "I'm so sorry you had this experience" goes a long way.

A Apologize

Apologize for their negative experience (not necessarily admitting fault). "I'm sorry we didn't meet your expectations."

R Resolve

Offer to make it right. Take the conversation offline with a phone number or email.

T Thank

Thank them for their feedback. It shows you value all input and are committed to improvement.

Response Templates

NEGATIVE REVIEW ABOUT SERVICE QUALITY

"Thank you for sharing your feedback, [Name]. I'm truly sorry that your experience with our team didn't meet your expectations. This is not the standard of care we strive for.

I would like to understand more about what happened so we can address this properly. Please contact me directly at [phone/email] so we can discuss this further and find a resolution.

Your feedback helps us improve, and I'm committed to making this right. - [Your Name], Owner"

NEGATIVE REVIEW ABOUT COMMUNICATION

"Hi [Name], thank you for taking the time to share your concerns. I'm sorry to hear about the communication issues you experienced - clear, responsive communication is something we take very seriously.

I'd like to personally look into what happened and ensure this doesn't occur again. Please reach out to me at [phone/email] at your earliest convenience.

We appreciate you bringing this to our attention. - [Your Name]"

UNFAIR OR INACCURATE REVIEW

"Thank you for your feedback, [Name]. We take all reviews seriously and want to address your concerns.

Our records show a different account of events, but we respect that this was your experience. We'd appreciate the opportunity to discuss this with you directly at [phone/email] to better understand your perspective.

We're committed to providing excellent care and are always looking to improve. - [Your Name]"

⚠️ What Never to Do

- Never argue or get defensive publicly
- Never disclose private health information (HIPAA!)
- Never accuse the reviewer of lying
- Never ignore negative reviews - silence looks like guilt
- Never offer discounts or compensation publicly (do this privately)

After Resolving the Issue

Once you've addressed the problem offline and the client is satisfied, it's appropriate to gently ask if they would consider updating their review. Many people will modify or remove negative reviews after a positive resolution.

13 Review Tracking Spreadsheet

Track every review request, follow-up, and result. Consistent tracking reveals what works and ensures no opportunity falls through the cracks.

Spreadsheet Template

Review Request Tracker

Client Name	Contact	Request Date	Method	Follow-Up 1	Follow-Up 2	Result	Platform

Column Definitions

- **Client Name:** Family name or primary contact
- **Contact:** Email and/or phone number
- **Request Date:** When you first asked
- **Method:** In-person, email, phone, or text
- **Follow-Up 1:** Date and method of first reminder
- **Follow-Up 2:** Date and method of second reminder
- **Result:** Completed, Declined, No Response, Pending

- **Platform:** Google, Facebook, Yelp, etc.

Monthly Review Dashboard

Metric	Jan	Feb	Mar	Apr	May	Jun
Requests Sent						
Reviews Received						
Conversion Rate						
Avg. Star Rating						
Total Google Reviews						
Total Facebook Reviews						

Key Performance Indicators

10+

Review requests
per month (goal)

30%+

Conversion rate
(target)



Pro Tip: Automate Where Possible

Use tools like BirdEye, Podium, or Grade.us to automate review requests and tracking. These platforms can send review requests at optimal times and aggregate all your reviews in one dashboard.

Congratulations! You now have everything you need to build a powerful online reputation for your home care agency.

Remember: The agencies with the most reviews aren't necessarily the best - they're the ones who consistently ask. Start asking today!

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