Customer Reviews & Referral Planning Guide

Create a thoughtful process for requesting feedback and welcoming introductions.

WHERE YOUR BUSINESS COMES TO LIFE!

Define the customer experience to review

01 The customer milestone

When is a useful time to ask how the experience went?

02 The request owner

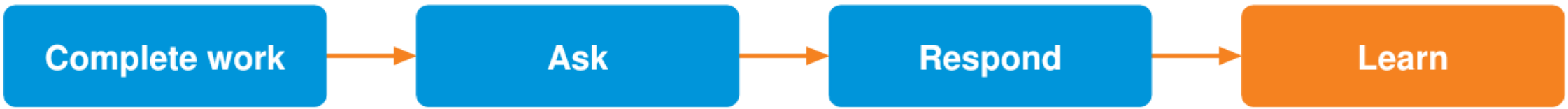
Who sends the request and who handles concerns?

03 The feedback destination

Where should feedback go, and who reviews it?

Type your answers in the fields, then save a copy. You can also print this worksheet.

A practical customer feedback process



Confirm the agreed milestone.

Invite honest feedback.

Acknowledge the response.

Improve the experience.

Use real experiences and accurate wording. Review the destination platform's current rules.

Adaptable customer message templates

Feedback request	Thank you for working with [business]. We would value your honest feedback about the experience. What worked well, and what could we improve?
Review invitation	If you would like to share your experience publicly, you can leave an honest review at [review link]. Thank you for taking the time to share your perspective.
Referral invitation	If someone you know needs help with [service], you are welcome to share our contact details. We would be happy to learn about their project.

Prepare a thoughtful response

Acknowledge the feedback

Thank the customer and address the specific point. Keep the tone professional and avoid revealing private project information.

Assign concerns

Move project-specific concerns to the person who can investigate and respond through an appropriate channel.

Record improvements

Look for recurring questions or friction. Give the team a clear action and review date.

Reviews, examples and referrals

Material	What it does	Preparation check
Customer review	Shares the customer's own experience	Preserve accurate wording and context
Approved work example	Shows a relevant deliverable or process	Confirm permission before sharing
Project story	Explains the need, work and outcome	Support any result you describe
Referral inquiry	Introduces a possible new customer	Record the need and assign follow-up

Your feedback and referral plan

01 Request process

Choose the milestone, request message and owner.

02 Response process

Name who responds and how unresolved concerns are handled.

03 Review and learning

Set a date to review feedback and referral inquiry handling.

Type your answers in the fields, then save a copy. You can also print this worksheet.

YOUR NEXT STEP

Let us help with your next step

Required Marketing Group can help organize your customer communications, approved work examples and inquiry follow-up process.



Request a consultation

www.requiredmarketing.com

mail@requiredmarketing.com