



The Defining Difference  
BY CINDY ERTMAN

## Top 13 Strategies to Get 5-Star Reviews from Your Clients & Referral Partners



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Marketing yourself in today's competitive market is an art and requires employing some innovative strategies in order to set yourself apart in the marketplace. With all the different channels out there - social media, paid online or print advertising, email campaigns, etc. - one of the most important tools to help you elevate your online presence are client and referral partner testimonials and Reviews.

Reviews serve as social proof and drive consumer action, establish your credibility and inspire trust. They make you more visible and are fresh content that search engines really like, making it easier for prospective clients and referral partners to find you. Reviews also give you a forum to connect with consumers, reinforce positive reviews with thanks, or offer incentives and promotions to reward consumer loyalty.

### Here are a few key statistics on the power of positive reviews:

- 90% of consumers read online reviews before visiting a business
- 88% of consumers trust online reviews as much as personal recommendations
- Consumers will spend 31% more on a business with "excellent" reviews
- 72% say that positive reviews make them trust a business more
- 72% of consumers will take action only after reading a positive review
- 86% will hesitate to purchase from a company with negative online reviews
- Reliability (27%), Expertise (21%), and professionalism (18%) are the most important reputation traits for a business

### These are some of the most popular Review Management Platforms:

- [Experience](#) (formerly Social Survey)
- [TrustPilot](#)
- [Reach150](#)
- [TestimonialTree](#)
- [BirdEye](#)
- [TrustRadius](#)
- [Zillow](#)
- [Facebook](#)
- [Yelp](#)
- [Google](#)



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### Strategies for Capturing 5-Star Reviews:

- 1. Keep it simple.** Focus on using Google and Zillow as your primary review platforms. Social Survey seems to have this process dialed in but requires Enterprise Accounts.
- 2. Ask for reviews at the right time.** Request your review when the CD goes out or within 3 days of closing when you have your borrower's active attention.
- 3. Automate the process so follow up is easy.** Use your CRM to automatically schedule simple email campaigns to request and follow up on reviews. Make sure to write the emails as if you are personally asking, using verbiage such as "Will you do me a quick favor...?"
- 4. Share your reviews on social.** Come up with creative ideas such as "5 Star Friday" to share success stories with your network.
- 5. Give out testimonials to your referral network.** It is a nice gesture to build deeper relationships with them, but they will also often reciprocate.
- 6. Encourage 5-star reviews.** When asking for a review, make it easy for clients and referral partners to leave the best possible rating. Use leading verbiage such as "If you believe we delivered a 5-star experience, please leave your review here..."
- 7. Offer incentives for reviews.** Offer to donate to a charity of their choice or send them a gift card for leaving a review.
- 8. Make sure positive reviews are accessible across the internet.** Add your reviews to your website and post them on your business Facebook page.
- 9. Have a conversation with your client about their experience.** Have an organic conversation with your client about working with you. If it is positive, ask them if you can take notes and use it as a review, or direct them to where they can leave a review themselves.
- 10. Do damage control with poor reviews.** Research the problem and reach out to the client to address their concerns. Offer a gift card and ask for a new review to appease the disgruntled client.



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### Strategies for Capturing 5-Star Reviews:

- 11. Use the closing as an opportunity to ask for a review.** Celebrating the final milestone of the loan process together at the closing table is a perfect opportunity to ask your borrower for a glowing review.
- 12. Request reviews with your closing gift.** Include a handwritten thank you card with your closing gift and provide an easy way to submit a review.
- 13. Send a video text.** Video makes everything more personal. Send a quick ‘thank you, it’s been a pleasure serving you’ video with a link to complete an online review.

### Sample Email Templates for Requesting Reviews:

Dear [Name],

Hi [Name], Congratulations on your new home! We want to thank you for being so wonderful to work with. Please let me know if you have any questions on financing or house related items - we are here for you.

If you believe we delivered a delightful and 5 star experience please click here or go to <https://www.zillow.com/lender-profile/stacia%20weishaar/> to leave us a review.

If you are social follow us @delightfulrefuge.

We’d also love to know if you have a charity or non-profit of choice so we can donate in your name and raise awareness!

With Gratitude,  
Stacia & Team

*\* Courtesy of Stacia Weishaar, Senior Loan Officer, Cornerstone Home Lending*



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### Sample Email Templates for Requesting Reviews:

Hi [Name],

I hope this email finds you well and you are enjoying your new home! I am working hard to get caught up with some of my social media tasks and need a quick favor...

I am asking if you would be able to give me, as your loan officer a 5-star review on Google, Zillow OR LinkedIn? This career is my chosen profession and my livelihood for my family and social proof and word of mouth are the most powerful form of advertising.

I know and understand that life is very busy, but it would be a great boost if someone like you would give me a positive mention (if you feel I deserve it).

The review only takes about 2-3 minutes once you sign in. It's easy...Just click the link below and leave your thoughts. You can choose to be as long or as short as you'd like. Can be as simple as just a couple of words or a few sentences. I will be grateful whatever you decide.

Google: [INSERT YOUR LINK HERE](#)  
LinkedIn: [INSERT YOUR LINK HERE](#)  
Zillow: [INSERT YOUR LINK HERE](#)

If for any reason you were not happy with my service and don't want to leave a positive 5-star review, I would be very interested in hearing from you personally. Then just reply to me and let me know what you think and if I can help with anything. I am always looking for better ways to improve my service and this business and your honest feedback is welcome.

Thanks in advance and I look forward to hearing from you!

As always, if you know of anyone who is thinking about buying, building, renovating or refinancing, please don't keep my name a secret!

*\* Courtesy of Tanya Mace, Branch Manager, Residential Mortgage Services, Inc.*



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### Sample Email Templates for Requesting Reviews:

Hi [Name],

I want to thank you for giving us the opportunity to work with you on completing your mortgage financing. It has been a pleasure serving you. We just created our Google Business Page and because it's so new it currently has few reviews.

We would be so honored if you can leave us a review and share your experience:

Google: <https://g.co/kgs/23xGFW>

Your review will help grow our business by encouraging people to choose [Your Company Name].

Warm Regards,  
Hepzibah Dahl

*\* Courtesy of Hepzibah Dahl, Sales Manager at Dahl Mortgage with Ideal Lending*