Customer Testimonial Collection Process

1.0 Policy Objective & Scope

The objective of this policy is to establish a clear, consistent, and legally compliant process for collecting customer testimonials. This ensures that all published feedback is authentic, authorized, and aligned with the company's brand voice while respecting the privacy rights of customers under Canadian law.

This policy applies to all employees, contractors, and third-party agencies involved in the solicitation, collection, review, and publication of customer testimonials for any marketing or promotional material, including but not limited to the company website, social media channels, print collateral, and case studies.

2.0 Roles & Responsibilities

- **Marketing Manager:** Owns the testimonial collection program, sets quarterly targets, and approves final content for publication.
- **Customer Success Team:** Identifies potential testimonial candidates, initiates contact, and collects initial feedback.
- **Legal & Compliance Officer:** Reviews all testimonial consent forms to ensure PIPEDA compliance and approves any use of customer names, logos, or identifying details.
- **Graphic Designer:** Formats testimonials into approved brand templates and prepares final assets for distribution.
- **IT Administrator:** Manages the secure storage of testimonial files and consent records in the company's document management system.

3.0 Core Rules & Guidelines

- All testimonials must be obtained with explicit, written consent from the customer, including permission to use their name, title, company name, and any provided image or logo.
- Consent forms must clearly state the intended use of the testimonial (e.g., website, social media, print) and the duration of usage (not to exceed 24 months without renewal).
- Testimonials must be verbatim or lightly edited for grammar and clarity only; any substantive changes must be re-approved by the customer.
- No testimonial may be published without final approval from the Marketing Manager and Legal & Compliance Officer.
- All testimonial files and consent records must be stored in a secure, access-controlled folder within the company's document management system for a minimum of three years after the testimonial is last used.

4.0 Step-by-Step Procedure / Workflow

1. Customer Success Team identifies a satisfied customer who has expressed positive feedback through a survey, support ticket, or direct conversation.

2. Customer Success Team sends a personalized email invitation to the customer, explaining the testimonial program and requesting their participation.

3. If the customer agrees, Customer Success Team sends a digital consent form (via SwitchDesk or approved e-signature tool) that outlines usage rights, duration, and privacy terms.

4. Customer completes and signs the consent form; a copy is automatically saved to the customer's secure folder in the document management system.

5. Customer Success Team collects the testimonial via a structured questionnaire (e.g., "What problem did we solve for you?") or records a short video interview with the customer's permission.

6. Customer Success Team submits the raw testimonial and signed consent form to the Marketing Manager via a designated SwitchDesk workflow ticket.

7. Marketing Manager reviews the testimonial for brand alignment, clarity, and authenticity; if edits are needed, they are made and sent back to the customer for approval.

8. Legal & Compliance Officer reviews the consent form and final testimonial text to confirm PIPEDA compliance and approves or rejects the submission within 3 business days.

9. Upon approval, Graphic Designer formats the testimonial into the appropriate brand template (e.g., quote card, case study page, video thumbnail).

10. Marketing Manager schedules the testimonial for publication on the designated channel(s) and updates the testimonial tracker with publication dates and URLs.

11. IT Administrator archives the final testimonial asset and consent form in the secure document repository, tagged with the customer name and expiration date.

12. Customer Success Team sends a thank-you note to the customer, including a link to the published testimonial, and adds a note to the customer's CRM record.

5.0 Documentation & Compliance

1. All signed consent forms and final testimonial assets must be stored in the company's secure document management system with access restricted to Marketing, Legal, and IT teams.

2. A master testimonial tracker (spreadsheet or SwitchDesk database) must be maintained, recording customer name, consent date, expiration date, publication channels, and approval status.

3. The Legal & Compliance Officer must conduct a semi-annual audit of all active testimonials to ensure consent is still valid and that no customer has requested removal.

4. Any customer request to withdraw or modify a testimonial must be processed within 5 business days, with all published instances updated or removed and the consent form marked as revoked.

5. All testimonial-related records must be retained for a minimum of three years after the testimonial is last used, then securely deleted in accordance with the company's data retention policy.