

# How to Get Reviews, Referrals & Testimonials



Client referrals, reviews, and testimonials are the foundation of sustainable growth for accounting firms, with up to 89% of firms attributing the majority of their new business to word-of-mouth recommendations. In an industry built on trust and confidentiality, authentic feedback from satisfied clients provides the social proof that prospective clients need when selecting a firm to handle their sensitive financial matters.

This checklist provides a systematic approach to requesting, collecting, and leveraging client feedback to strengthen your firm's reputation, improve visibility, and create a reliable pipeline of high-quality referrals.

# 1. Foundations: Make It Easy & Timely

## 1. Automate requests:

- Use email templates, QR codes in your office, “Review Us” links in your email signature, and SMS prompts, so clients can review you in one click.

## 2. Catch clients at their happiest:

- Ask shortly after you have delivered value (not when invoicing), when a client is most satisfied.

## 3. Incorporate into workflow:

- Build asking for feedback into your standard client completion or project close process.

# 2. Google Reviews: Steps & Best Practice

## 1. Optimise your Google Business Profile:

- Claim and complete your Google My Business page.

## 2. Share the magic link:

- Use Google’s “Ask For Reviews” link to direct clients straight to your review form; save and reuse it in all outreach.

## 3. Send a friendly, personalised request:

- Be direct but polite, e.g., “We’d love to hear your feedback—would you mind leaving us a quick Google review?”.

## 4. Respond to all reviews:

- Thank reviewers and address concerns for negative feedback. Public responses build trust and demonstrate professionalism.

## 5. Promote on multiple channels:

- Regularly link via newsletter, website, and social media.

## 3. Testimonials: Effective Approaches

### 1. Ask at the peak moment

- Right after delivering a “win” for clients, express appreciation, and ask for a testimonial.

### 2. Make it personal

- Let clients know their testimonial helps others and that their positive feedback is valued.

### 3. Guide content

- Suggest structure or a prompt (e.g., “What was your experience with us? How did we solve your problem?”), and ideally, include the client’s name, company, and permission to use.

### 4. Use testimonials strategically

- Showcase them on your website, LinkedIn, and proposals for maximum impact.

## 4. Referrals: Building Systems & Relationships

### 1. Leverage satisfaction surveys

- Add a referral question at the end of feedback surveys (e.g., “Would you refer us to a friend?”).

### 2. Encourage sharing

- Create content that’s easy for clients to share with their network, such as useful articles or guides with your branding.

### 3. Incentivise referrals

- Consider small “thank you” gifts or loyalty perks (within ethical bounds and firm policy).

### 4. Reciprocate

- Refer your clients’ businesses when appropriate and build mutual trust with partners and referral sources.

### 5. Appreciate and acknowledge referrers

- Always thank clients who refer others, publicly or personally.

## 5. Handling Negative Reviews or Feedback

### 1. Pre-empt issues

- Make it easy for clients to give private feedback, so complaints are addressed before they go public.

### 2. Respond professionally

- View negative reviews as an opportunity to improve; always respond with empathy and a solution.

## 6. Metric-Tracking for Referrals, Reviews & Testimonials

Monitor these key performance indicators (KPIs) to gauge success and inform future action:

### 1. Review Velocity

- Number of new Google reviews/Testimonial submissions per month.

### 2. Average Rating

- Star rating trend on Google or other platforms (aim for 4.3+ average).

### 3. Request Conversion Rate

- Percentage of clients who provide a review/testimonial when prompted (track: requests sent vs. reviews received).

### 4. Response Rate

- Percentage of reviews/testimonials responded to within 48 hours.

## 6. Metric-Tracking for Referrals, Reviews, & Testimonials cont...

### 5. Referral Source Tracking:

- Number and percentage of new clients who cite word-of-mouth or existing client referral as their source.

### 6. Testimonial Use:

- Where and how testimonials are displayed (website, social media, proposals)—track resulting client engagement spikes.

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*"Boma has been awesome to help me with my email newsletters, blogs and social media content! A platform that is easy to use and they send out the new content often so we know what new information we can post or send to clients. Also the team are really helpful! Cheers Boma team!"*

**Stacey Armstrong, Manage My Cashflow**



*"Get into it!!! Boma is SUPER, super easy to use and intuitive, I LOVE IT! It's a timesaver platform for me, incorporating all of our social media (Facebook and LinkedIn) and our newsletter in one platform. Hip Hip Hooray for Boma!"*

**Michelle Fox-Bishop, Rural Accountants**





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