

5 Questions to Ask Your Happy Clients



**TRAINED
ADVISOR**

ATTRACT
NURTURE
CONVERT

If you're reading this, you might be doing testimonials all wrong.

Because most advisors mistakenly think they only need stories from clients who have already achieved the main goal or stories about the product, service, or strategy.

But here's one truth:

There is one key element that will convert more prospects than any freebie, video, calculator, or promise you make them.

And that's real stories, from real people.

The stories that will resonate the most are from:

People who may not have achieved their goal yet but are happy working with you

Think about it: Your potential clients aren't typically at the finish line - they're still running the race...

Seeing others who are still running the race and pushing forward, genuinely happy with their progress working with you, can inspire prospects far more effectively than only showcasing stories from clients who've already "won." (HINT: Do both)

Here's another truth:

Some of the best testimonials will be about you as a person: your supportiveness, genuine care, authority, and the way you think, act, and speak. Prospects will imagine themselves in the shoes of the person giving the testimony, so get as many different videos from as many different people as possible.

Your job? Use these five questions and get a video testimony from every happy client you have, goal achieved or not.



5 Powerful Questions That Will Transform Your Testimonials

1. What was the problem you had before working with me?

- *Prospects immediately see their struggles reflected.*

2. What made you choose to work with me specifically over everyone else out there?

- *This positions your unique value and differentiates you from competitors.*

3. As a result of working with us, what has the outcome been, and how is your life different now?

- *Showcase the real transformation your clients are experiencing right now.*

4. Where do you think you would be right now if you hadn't started working with me?

- *Vividly illustrates the cost of inaction, motivating prospects to act quickly.*

5. To anyone watching this who might be on the fence about working with me, what would you say to them?

- *Direct endorsements reduce skepticism and reinforce your credibility.*

Quick Tips:

- Get authentic stories at every stage - from initial struggles to first wins - you want to show the whole journey.
- To keep the client on track, you may need to rephrase a question or repeat an answer to get clear and decisive responses.
- Emphasize testimonials that reflect who you are and not just what you do.



Final Thoughts

Now that you know exactly how to get powerful testimonials, it's time to take action - today.

Reach out to your clients **right now** and try to schedule a quick 20-30 min conversation.

Let them know you want to ask a few questions, record their answers, and use the video as a testimonial on your website or social channels.

Keep it casual and laid-back. Some clients will feel put on the spot, so make sure they know it's very casual and not something they need to prepare for. We want candid answers.

The faster you capture these powerful stories, the quicker you can leverage them to attract and convert new clients. So, reach out today!

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But what if you don't have any clients? Or maybe you have some but are struggling to scale?

Testimonials alone will not be enough to attract high-quality clients online consistently. **You need a proven plan with proper implementation.**

And that's what we specialize in: Helping advisors like you to effectively leverage testimonials and other marketing assets to drive real growth.

[Schedule your free strategy session today](#), and let's take a peek at what you've got going on right now, we'll try to find gaps - then just show you what we would do. See you on the call!

