



# **GROWING YOUR FINANCIAL COACHING PRACTICE WITH ONLINE REVIEWS:**

Playbook for  
***Financial Coaches & Counselors***

Last Updated August 27, 2021

This playbook is designed for financial coaches and counselors preparing to add online reviews to their digital marketing strategy to grow their practice. This playbook is for informational purposes only.

# 88%

of consumers said online reviews played a role in discovering a local business.



## The world has changed. Consumer expectations have evolved. *Is your marketing keeping pace?*

Americans have the internet at their fingertips, whether at their desk or in the palm of their hand. And when it comes to deciding where to have dinner or **researching professionals to hire**, online reviews have replaced personal recommendations and word of mouth referrals as the primary source of influence among consumers. In fact, 83% of people in a recent study said they trust online ratings and reviews *more* than personal recommendations, even when it comes to choosing a *doctor*.

As a financial coach or counselor, people thinking about hiring you can make more informed and educated decisions by reading reviews online written by your current clients, peers and other people who know you well. Even a single online review can significantly impact someone's hiring decision.

**If you're reading this, you know your online reputation matters** and reviews are a powerful tool to grow your coaching or counseling business. What you may not know is how to get started. How will you ask your clients to write a review? Beyond current and past clients, should you ask peers and others who know you well to do the same? And how will you promote your reviews to grow your business?

This playbook will help you answer these questions, positioning you to lead the industry in attracting new clients with digital referrals generated from your online reviews. We begin with a quick look at the growing influence of reviews in trust-based professions and the impact online reviews can have on your visibility in Google search results. We'll then guide you through the development of your online reviews strategy with recommendations and resources to help you get off to a strong start.

*A quick note: Throughout this playbook, we'll refer simply to financial coaching for brevity instead of coaching and counseling. The concepts throughout this playbook are relevant and applicable to both financial coaches and counselors.*

# Online reviews offer a human connection to meet the emotional needs of consumers.

**Imagine you're someone in need of a financial coach.** Maybe you're leaving your long-time employer for a new job and want to make smarter financial decisions with your increased take-home pay. Or you're worried you don't have a sufficient emergency fund in place if rumors of imminent layoffs at your current company come to fruition. Or perhaps you need help preparing a family budget with a baby on the way. You're nervous, a little afraid and definitely concerned.

With a couple clicks, you're now online reading reviews written by clients of financial coaches who were once in your shoes. Suddenly, you're feeling much more at ease. Your anxiety begins to subside as you realize other people with circumstances similar to your own gained relief when they found *the right* financial coach for their unique needs. And now it's your turn. Energized and feeling confident based on the reviews you've read, you discover a financial coach who is clearly trusted by their past clients and may be a good fit for you. With one click, you book an introductory call on their calendar.

**People rely on a combination of facts and emotional cues when choosing to hire a financial coach.** As a financial coach, your education, credentials and years of experience are facts that help people judge your credibility. And it's your online reviews that build trust and satisfy the emotional needs of consumers, increasing their confidence in contacting and hiring you.

By investing in your online reputation today with online reviews as an important component of your digital marketing strategy, you're ready to **attract your ideal clients** and set yourself apart from other financial coaches.



# Online reviews are a digital imperative to optimize your ranking in search results.

**Do your online reviews impact how prominently you rank in Google search results?** Thanks to *E-A-T* and *YMYL*, the answer is most definitely YES.

Positive online reviews increase your *E-A-T*, a term used by Google that stands for *Expertise, Authoritativeness, Trustworthiness*, and influences how you rank in search results. And *YMYL (Your Money or Your Life)* is how Google refers to websites that could have a significant impact on the quality of people's lives, including their finances.

As a financial coach, your website is already held to higher *E-A-T* and *YMYL* standards by Google than sites on topics of less importance to people's lives. By incorporating online reviews into your marketing plans, you can join other trust-based professionals like doctors and lawyers whose online reviews send powerful signals to Google's algorithms and human quality raters helping them rank higher in search results.

While it's smart to include reviews from your coaching clients on your own website, it's also important to collect and display reviews elsewhere on the internet as Google instructs its human quality raters to '*look for outside, independent reputation information*' about you and your website. By inviting clients to write reviews on reputable third party websites, you're providing Google's algorithms and human quality raters the signals and knowledge they need to boost your trust score and send more prospects to your website.



# Wealthtender is dedicated to helping consumers find the best financial professionals and educators for their individual needs.

When you collect three 5-star reviews on your Wealthtender profile page and maintain a 4.5-star overall rating, you gain recognition as a **Five-Star Financial Coach** and increased visibility in the Wealthtender **Guide to Top Financial Coaches**.



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# 1. Getting Started with Online Reviews

Before asking for your first review, it's important to think about the big picture. If you've already established goals and metrics for your online marketing strategy, consider the ways reviews fit into your current plan and the new opportunities they offer you to reach even higher. If you're newer to digital marketing or just recently launched your practice, you'll benefit by including online reviews in your marketing plan from the start.

**Answering these questions upfront will help you establish an effective online reviews strategy tailored to your business goals and unique needs:**

- What are the most important goals I want to achieve with online reviews?
  - Attracting new clients locally
  - Increasing digital referrals nationwide
  - Reinforcing confidence among my current coaching clients
  - Ranking higher in Google search results and SEO
  - Improving the effectiveness of my website to attract more clients
  - Gaining recognition as a leading authority in my niche
  - Strengthening my online reputation
  
- Beyond my coaching clients, who else will I ask to write reviews and why?
  - Leaders of local organizations who can speak to my character
  - Professional acquaintances who know my work ethic
  - COIs in my niche who understand the specialized services I offer



## 1. Getting Started with Online Reviews (Continued)

### A. Reviews from Non-Clients

Beyond reviews from your current and past clients, you may want to consider asking for reviews from peers and others who know you well. While your client reviews often help future coaching clients better understand what to expect when working with you, reviews from others who know you well may help people learn more about your areas of expertise and character.

For example, consider the positive impact of reviews written by experts and professionals in your niche who can attest to your specialist knowledge. Or reviews written by leaders of non-profit organizations where you volunteer praising your dedication to the community.

Reviews from non-clients can be especially valuable for financial coaches who recently transitioned into private practice from an employer with former colleagues who can write a review, and younger coaches with few clients, but lots of credible references.

### B. Monitoring for New Reviews

While there are countless general online review platforms making it nearly impossible to know if you receive a review on an obscure website, it's likely your reviews will be posted to well-known online review sites like Google, Yelp and industry-specific platforms like Wealthtender. Each of these platforms allows you to be notified when you receive a new review.

Monitoring for new reviews on these platforms should be fairly straightforward. Regardless, you'll want to consider which online review sites you will proactively monitor and the email address you will associate with your accounts on these platforms to ensure it's an account you check regularly.



## 1. Getting Started with Online Reviews (Continued)

### C. What to Do About Negative Reviews

Let's face it. One of the biggest fears getting started with online reviews is waking up to find a new 1-star review with your name on it. Realistically, it's much more likely your current and past clients will write favorable reviews (or at worst, neutral), and extremely unlikely a non-client you ask to write a review will be motivated to write anything negative.

So what's the best way to overcome a negative review? First, take a deep breath. Next, take another. *Seriously*. Once your emotions subside, you'll be better prepared to determine an appropriate and rational course of action.

#### Consider these suggestions if you receive a negative review:

- Put yourself in the shoes of the reviewer; Try to understand their motivation and what they might be feeling; You may come up with additional ideas to address their concerns.
- Is there a practical remedy to the reviewer's concerns you can offer? If so, try reaching them by phone to humanize the discussion and see if you can reach a positive outcome.
- The best way to overcome a negative review is to earn lots of positive reviews!

A quick note: No matter the online review platform, consumers *own the content they write*, which means they are free to delete or edit reviews they have written, or write a new review. We're sharing this insight for educational purposes only and we're not suggesting you should encourage a reviewer to revisit an existing review, but want you to be aware that's always a reviewer's option.

### D. Review Aggregation

With a reviewer's permission, you can republish their review from sites like Google or Yelp on platforms like Wealthtender or your own website. This is known as *review aggregation*.

By aggregating your reviews on platforms like Wealthtender and your own website where people are looking to find a coach, your reviews become powerful testimonials that help you attract new clients.

★ **In the playbook appendix, you'll find a template you can use to ask for reviewer permission to republish their review.** ([Quick Link](#))

## 2. Choosing the Right Platforms to Collect and Display Your Online Reviews

In this section, we'll compare features and policies of general online review platforms (specifically Google and Yelp), a dedicated industry online review platform (Wealthtender) and your own website.

The table below highlights relevant features and policies you'll want to consider when choosing the platforms you'll use to collect and display your reviews.

Features and Policies (Google, Yelp, Wealthtender, Your Website)				
Search engine optimization (SEO) benefits				
Profile pages are exclusive to you (no competitors shown)				
Asking for reviews is permitted				
Reviews can be displayed anonymously if a consumer prefers				
Website is dedicated to helping consumers find a financial professional				
Earn recognition and an award as a 5-Star Financial Coach				N/A
Reviews collected on other platforms can be imported and displayed				
Ability to cancel account and concurrently remove all reviews				N/A
Turn reviews feature off and still enjoy other platform benefits				N/A

As the table suggests, general online review platforms like Google and Yelp do offer benefits to help you grow your practice. And the price is right since there's no charge to create your account. On the other hand, Wealthtender is dedicated to helping people find the right financial coaches, counselors and advisors for their individual needs, and you'll gain recognition for your reviews to help you attract more coaching clients. Of course, your website is an impactful place to display your reviews as well.

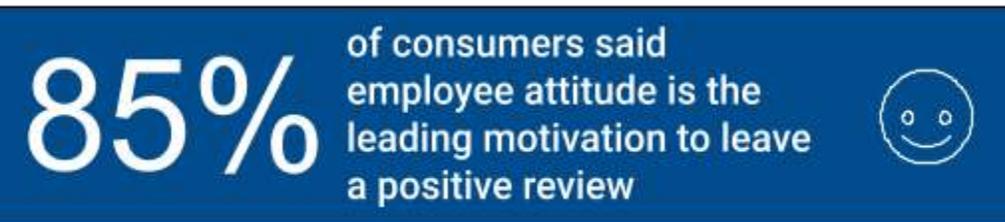


## 2. Choosing the Right Platforms (Continued)

### What About Other Online Review Platforms?

Beyond Google, Yelp, Wealthtender and your own website, you may be wondering about popular social media platforms like Facebook and LinkedIn. There are also reputable websites like the Better Business Bureau among others popular with consumers. Each of these have their own pros and cons. We've chosen to focus on Google and Yelp given their mainstream popularity among consumers.

For social media platforms like Facebook, Instagram and LinkedIn, we believe these platforms offer valuable opportunities to promote your reviews in posts on these sites which we'll discuss later in the playbook.



## 3. Asking for Reviews

Just as other trust-based professionals like doctors and lawyers have incorporated online reviews into their daily routines, you're now ready to do the same.

**Consider these methods and tips for collecting reviews in your daily routine:**

- Update your email signature to include a link to your profile page on an online review platform or your website where clients can write a review
- Add a new section to your newsletter that includes a link to write a review on your profile page of an online review platform and/or your own website
- Create a flyer with instructions on how someone can write a review for you and make it accessible to clients who meet with you in person; If you're on Wealthtender, include the QR code we create that links to your Wealthtender profile page
- Create an area on your website where clients can write a review and read your existing reviews; If you're on Wealthtender, consider embedding our widget on your website to both collect and display reviews
- Create a version of your business card with a QR code linking to your profile page to periodically share with non-clients; Use it to ask for a review at the right moment
- If you offer one-time coaching or project-based services, incorporate a request for a review into your workflow at the conclusion of each project
- If you ask for reviews on general online review sites, don't encourage clients to write a review while they're on your personal wifi network as these platforms could suspect multiple reviews from your own IP address as being fraudulent

★ **In the playbook appendix, you'll find an email template you can use and further customize to ask for reviews from your clients (along with a separate email template for non-clients).** You'll see the templates are intentionally brief to quickly get straight to the point. ([Quick Link](#))

## 4. Promoting Your Practice with Online Reviews

Now that you've begun collecting reviews online, you're all set to turn your reviews into a powerful source of new referrals. And without lifting a finger, the positive reviews you're collecting online are already sending signals to search engines like Google that you're trustworthy and deserving of increased visibility in search results.

People looking to hire professionals in trust-based industries want to know they're making the right decision, and your online reviews offer the social *proof* they need to choose you over another financial coach. In fact, a popular online review platform for lawyers found that those with at least five reviews on their platform achieved **four times the engagement** compared to lawyers with just one review.

If you decide to not make online reviews part of your marketing strategy, another financial coach who has several positive reviews is more likely to get the appointment. But not to worry! With this playbook, you're well ahead of the curve and ready to turn your digital referrals into new clients. And remember, even **a single online review can turn a prospect into a client.**

In this section, we'll offer suggestions to help you promote your online reviews and share several ways your reviews can be republished and repurposed to magnify their client-attracting power.

### Magnify the Impact of Your Reviews on Google and Yelp

While any positive reviews you receive on Google and Yelp offer SEO benefits and increased visibility among people who find them, you'll unlock substantially greater value by employing the *review aggregation* strategy discussed earlier in the playbook.

By aggregating reviews onto platforms like Wealthtender and your own website, you're increasing the likelihood of **reaching consumers who are closer to making a hiring decision.**

60%

of consumers said they are likely to write a review when a business sends an email with a link after a good experience.



## 4. Promoting Your Practice with Online Reviews (Continued)

### Promote Your Reviews on Social Media

When it comes to popular social media sites like Facebook, Instagram, LinkedIn and Twitter, you'll have opportunities to promote your reviews, though the character count limitations and other constraints means you may have to get a little creative.

On this page, you can see an example demonstrating what a review on a social media platform like Facebook could look like.

Twitter may prove to be the most challenging social media platform for promoting your reviews due to their character count constraints, but you'll find Facebook, Instagram and LinkedIn to be much more accommodating.

Since Instagram doesn't allow links in its posts, be sure to type out the link to your full list of reviews, and consider including your QR code to your Wealthtender profile to make it easy for people to read all of your reviews.



**Wealthtender**  
Admin · Just now · 🌐

★★★★★ "I truly enjoy working with [YourName] as my financial coach. She understands my unique financial circumstances and helped me create a budget I can live with. I'm on track to reach my savings goals and grateful for her guidance." - Jane S. 🗨️

**Looking for the Right Financial Coach for You?**

Get to Know [Your Practice Name]

Scan this QR code or click the link in this post to learn what Jane and other clients have to say about working with [Your Name].

**Wealthtender**

👍 Like      💬 Comment



## 4. Promoting Your Practice with Online Reviews (Continued)

### Promote Your Online Reviews Offline

Just because your reviews are written online, doesn't mean they have to stay there.

Consider creating a printed flyer or brochure with a curated selection of your reviews collected online. Include the QR code provided by Wealthtender linking to your profile page to help people easily read all of your reviews. Insert this resource into any materials you give prospective coaching clients and/or encourage your current clients to share it with people they think could benefit from hiring you.

While a business card may lack sufficient space to include your reviews, consider adding a QR code that prospects can scan with their mobile phone to quickly pull up your profile and read all your reviews online. This can turbocharge your business card's effectiveness.

### Repurpose Your Reviews to be Both Seen and Heard

Your written reviews aren't limited to just being read. If you host your own podcast, for example, you can promote your reviews at the start, middle or end of your show.

### Host Community & Online Education Events

If you periodically offer free personal finance education through webinars online or in your community, perhaps at a local community college or financial literacy organization, your reviews can help you instill trust with attendees who may be interested in working with you.

Many people who attend online or in-person educational sessions have little or no relationship with you prior to the event. Your online reviews overcome this headwind by creating an emotional connection that builds trust and offers the social proof consumers need to hire you with confidence.

Use the ideas discussed throughout this playbook to incorporate your reviews into your educational sessions before, during and after the event. For example, you can include a link to your reviews with the event invitation to build credibility; Distribute a flyer at the event showcasing reviews relevant to the session topic with a QR code linked to your reviews online; Send a post-event email linking to your reviews (*which could also serve as a timely opportunity to ask for reviews from event attendees*).

## 4. Promoting Your Practice with Online Reviews (Continued)

### Turn Your Biggest Fans into Powerful Lead Magnets

As the number of online reviews you collect grows, you'll discover who among your reviewers are most enthusiastic about telling the world the value you deliver and the impact you've made in their lives. This is the pond you'll want to fish in to identify clients and non-clients who may be happy to play an even larger role helping you grow your practice.

For example, if you host a podcast, consider inviting a passionate client onto the show as a guest to elaborate on their experience working with you. Or ask if they would be willing to record a video discussing their experience in a Q&A format you can use on your website and social media.



# Financial coaches and counselors who embrace online reviews as a focal point of their marketing plan will lead the industry in attracting new clients for years to come.

**Congratulations!** Building your online reputation to grow your practice is a journey that takes time. By incorporating online reviews into your daily routine, you're on the right path to achieving tremendous results.

Your online reviews establish a human connection with people thinking about working with a coach, demonstrating your trustworthiness and increasing their confidence in contacting and hiring you. But online reviews are just one important part of an effective marketing plan to strengthen your online reputation and attract new clients in today's world.

At Wealthtender, we're dedicated to helping you grow your business with our modern marketing platform that provides the knowledge and reassurance your future clients are looking for online to hire you with confidence and conviction.

Whether you choose to join our growing community of financial professionals and educators on Wealthtender or prefer to grow on your own, we hope this playbook helps you achieve exceptional results with your online reviews for years to come.

Wishing you the greatest success,



**Brian Thorp**

Wealthtender Founder and CEO  
brian@wealthtender.com  
(512) 856-5406



# Appendix: Additional Resources

- 35**      Asking for Reviews: Email Outreach Templates ([Quick Link](#))
  
- 38**      Review Aggregation Email Template ([Quick Link](#))

The resources provided in this appendix are for informational purposes only with hopes of making your life a little easier as you prepare to get started with online reviews to grow your practice.

## **Asking for Reviews:**

### Email Outreach Templates for Financial Coaches and Counselors

Use the templates on the following two pages as a starting point to prepare your email asking clients and non-clients to write a review.

*Prefer this template in Microsoft Word format? Send an email to [yourfriends@wealthtender.com](mailto:yourfriends@wealthtender.com) and we'll send it right over.*

# Email Template 1: Current Clients

**Subject (Suggestions):** How are we doing? | How am I doing?

Hi [First Name],

I'm reaching out to you this morning to thank you for trusting me to help you become more financially fit. It's my pleasure serving you and I appreciate you choosing me as your financial coach.

I would be grateful if you could write a review about your experience working with me as your coach. These reviews only take a couple of minutes and help other people looking for a financial coach decide if we may be a good fit to work together.

Of course, writing a review is completely optional and I appreciate your consideration. Here's a link to my profile page on Wealthtender if you'd like to write a review when you have time:

<https://wealthtender.com/financial-coaches/your-name>

Simply scroll down and click 'Write a Review' and you'll see a form appear with easy to follow instructions.

Thanks again for your consideration and please let me know if there's anything I can do for you.

[Your Name]

## Email Template 2: Non-Clients

**Subject (Suggestions):** Can I ask a quick favor? | Do you have two minutes?

Hi [First Name],

How are you doing?

I'm reaching out with a quick favor to ask. And it's completely optional, of course!

Online reviews help trust-based professionals like me establish a strong reputation that instills confidence in people thinking about hiring me. Even a brief review from people who know me well can make a big impact in whether or not they choose to work with me.

Would you be willing to write a review for me? Given the nature of our relationship [e.g. [volunteering together at \\_\\_\\_\\_\\_](#) / [working together at \\_\\_\\_\\_\\_](#) / [serving our community together at \\_\\_\\_\\_\\_](#), etc. ], I believe you can offer a unique perspective about my [[character](#) / [integrity](#) / [dedication to \\_\\_\\_\\_\\_](#) / [knowledge of \\_\\_\\_\\_\\_](#)] that could help people feel more informed when deciding if we're a good fit to work together.

These reviews only take a couple of minutes and I'd be truly grateful for your help. Here's a link to my new profile page on Wealhtender if you'd like to write a review when you have time:

<https://wealhtender.com/financial-coaches/your-name>

Simply scroll down and click 'Write a Review' and you'll see a form appear with easy to follow instructions.

Thanks again for your consideration. I'd also be happy to return the favor if I can write a review for you or help you with anything otherwise.

[Your Name]

## **Review Aggregation:**

### Email Outreach Template for Financial Coaches and Counselors

Use the template on the following page to ask a client if you can republish the review they wrote on Google or Yelp on an industry-specific platform like Wealthtender or your own website.

*Prefer this template in Microsoft Word format? Send an email to [yourfriends@wealthtender.com](mailto:yourfriends@wealthtender.com) and we'll send it right over.*

# Email Template: Review Aggregation

**Subject (Suggestion): Thanks & A Quick Question**

Hi [First Name],

I'm grateful for the recent review you wrote on [Google / Yelp] sharing your experience working with me.

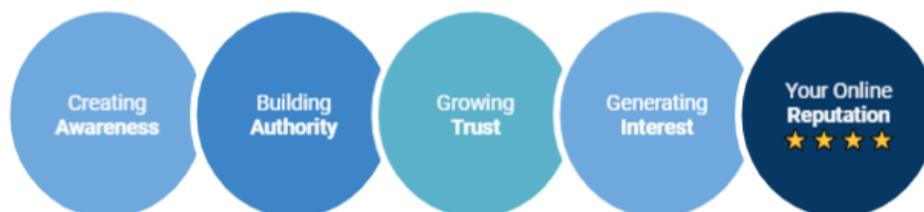
Your review is truly appreciated and helps other people looking for a financial coach decide if we may be a good fit to work together.

Would you mind if I republish your review on my [own website / profile page on Wealthtender]?

Thank you,

[Your Name]

# Modern Marketing for Financial Coaches & Counselors



**Wealthtender** ensures your future clients gain the knowledge and reassurance they're looking for online to hire you with confidence and conviction.

## Increase Your Visibility Online

When you join Wealthtender, you gain visibility with thousands of visitors to [wealthtender.com](https://wealthtender.com) each month who want to improve their financial wellbeing. Your optimized Wealthtender profile page showcases your experience, credentials and areas of specialization to help consumers looking for a financial coach make more informed hiring decisions.

## Build Authority & Grow Trust

By joining Wealthtender, you earn recognition for your 5-star reviews, an opportunity to be featured in our Guide to Top Coaches, and you build trust among consumers looking to hire a coach. You'll gain:

- Optimal visibility to attract your ideal clients at exactly the right time
- Search engine optimization benefits helping your website rank higher
- Opportunities to promote your own content to Wealthtender's consumer audience

**With plans starting under \$1 / day**, you're joining financial coaches on Wealthtender positioned to lead the industry in attracting new clients for years to come.

Get started today at [wealthtender.com](https://wealthtender.com)

