FREE MEMBER RESOURCE

The perfect review request protocol

The agency playbook for generating authentic five-star reviews — for every client you serve, and for your own agency. Built for HighLevel.

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WHAT'S INSIDE

Contents

Reviews are the fastest, most visible win you can deliver a client. This protocol turns them from a favor you hope for into a system you run — mapped end to end in HighLevel.

How to use this guide. Chapters 1–5 give you strategy and scripts. Chapters 6–7 build the system in HighLevel. Chapters 8–11 turn it into a repeatable, billable service.

CHAPTER 01

Why reviews are the easiest win you can deliver

The hardest month of a client relationship is the first one. Ads take time to optimize. SEO takes months to move. But reviews climb in week one — and nothing builds trust in your agency faster than a win the client can see.

The problem is how most businesses ask. Generic "leave us a review!" blasts yield weak response rates, thin reviews and the occasional angry one-star. This protocol replaces spray-and-pray with a system: find the moments customers genuinely want to reciprocate, ask personally, and automate the follow-through in HighLevel.

7×

more responses when the ask lands at peak satisfaction vs a week later

88%

of consumers trust online reviews as much as personal recommendations

Wk 1

when a review system shows visible results — your fastest client retention lever

Two ways to run this protocol

For your clients

Deploy it in each client's sub-account as a reputation management service. It's the most demonstrable deliverable in your stack — and Chapter 10 shows you how to bill for it.

For your agency

Agencies are chosen on proof. Run the same protocol on your own book of clients — a wall of specific, five-star agency reviews closes deals before the sales call starts.

The psychology of the ask

The reciprocity window

People leave reviews when they feel a natural pull to give something back. That pull is strongest in a short window — and four things open it:

Peak satisfaction
The moment a customer feels especially pleased or grateful

Emotional connection
A genuine human interaction that creates a real bond

Value recognition
The customer fully appreciates the benefit they received

Problem resolution
A concern was fixed — and expectations were exceeded

Timing is everything

Response rates fall off a cliff as time passes. The same ask, sent later, produces fewer and shorter reviews:

TIMING OF REQUEST	RESPONSE RATE	AVG REVIEW LENGTH
During peak satisfaction	**35%**	120 words
Within 24 hours	25%	85 words
2–7 days	15%	60 words
Beyond 7 days	5%	45 words

Why HighLevel matters here. Timing at this precision is impossible to run manually across a client base. A workflow triggered by the right event — appointment completed, invoice paid, job marked done — fires the ask inside the window, every time.

CHAPTER 03

Find the golden moments

Every client's business has two or three moments when customers are primed to rave. Find them, then wire a trigger to each one. List every touchpoint from first contact to follow-up and score each 1–5 for emotional impact — the worksheet on the next page walks you through it.

Peak moments by client niche

CLIENT NICHE	GOLDEN MOMENT	HIGHLEVEL TRIGGER
Med spa	Right after results reveal or a compliment at checkout	Appointment status → showed
HVAC / home services	The AC kicks back on — job done, house comfortable again	Opportunity moved to "job complete"
Dental	Post-treatment check-in when pain is gone	Appointment complete + 2h delay
Fitness / coaching	A milestone hit — first goal weight, first 5K, first PR	Tag added: "milestone"
Your agency	A results call where the client sees the numbers climb	Manual trigger after monthly report

Review-ready signals

Train front-line staff to spot these live — each one is a green light to ask on the spot:

- Spontaneous thank-yous
- Praise for a specific person or detail
- Lingering in conversation
- Asking about other services
- Referring a friend or family member

The touchpoint audit

Run this with each client at onboarding (30 minutes, once). List every customer touchpoint, score its emotional impact, and mark which ones get a trigger. Print this page — or rebuild it as a form in the client's sub-account.

#	CUSTOMER TOUCHPOINT	IMPACT (1–5)	TRIGGER?
01		1 2 3 4 5	☐
02		1 2 3 4 5	☐
03		1 2 3 4 5	☐
04		1 2 3 4 5	☐
05		1 2 3 4 5	☐
06		1 2 3 4 5	☐
07		1 2 3 4 5	☐
08		1 2 3 4 5	☐

Rule of thumb. Anything scoring 4+ gets an automated trigger in HighLevel. Anything scoring 5 also gets a trained in-person ask. Two or three triggers per client is plenty — precision beats volume.

CHAPTER 05

The three-part ask

Every high-converting request — spoken or automated — carries the same three components. Miss one and it reads like a form letter:

01 · PERSONAL

Reference their experience

Name the specific interaction, service or detail — proof this isn't a blast.

02 · VALUE

Remind them of the outcome

Surface the benefit they got, so the review writes itself.

03 · IMPACT

Show who it helps

Frame the review as helping people like them — not helping the business.

Scripts by niche

MED SPA · IN PERSON

"Rachel, your skin is glowing after today's treatment — you earned that result. So many people are nervous about trying a med spa for the first time, and hearing a real experience makes all the difference. Would you share yours on Google?"

HVAC · IN PERSON

"Mr. Alvarez, glad we could get your AC back up before the weekend heat. When a system dies, folks around here need to know who'll actually show up same-day. A quick Google review would help your neighbors find us — would you mind?"

DENTAL · IN PERSON

"Dana, you handled that procedure like a champ — and no more pain, right? A lot of patients put off treatment out of fear. Your experience could be the nudge someone needs. Would you share it on Google?"

CHAPTER 06

Build it in HighLevel

Everything in this protocol maps to stock HighLevel features — no third-party review tools, no extra subscriptions for your clients. Here's the build, in order:

1 **Connect the review profiles**

In the sub-account, connect Google Business Profile and Facebook under Reputation → Settings. Store the Google review link as a custom value so every template below can reference it.

2 **Wire the golden-moment triggers**

Build one workflow per golden moment from the touchpoint audit — triggered by appointment status, pipeline stage change or a tag. Add a 1–2 hour delay so the ask lands after the glow, not during the appointment.

3 **Send review requests, not links**

Use HighLevel's native review request action (or the SMS/email templates on the next page) inside the workflow. Personalize with merge fields — first name and the specific service — so it reads like a human sent it.

4 **Add the follow-up branch**

In the same workflow: wait 24 hours → if no review detected, send touch two → wait 48 hours → send the final reminder → end. Three touches max, then stop. Nobody five-stars a nag.

5 **Monitor from the reputation dashboard**

HighLevel's reputation dashboard tracks requests sent, reviews received, average rating and sentiment in one view. Screenshot it into the client's monthly report — it's your proof of ROI.

Build it once, snapshot it forever. Package the finished workflows, custom values and templates as a HighLevel snapshot. Every new client gets the entire protocol deployed in minutes — Nexus Hub members share snapshots like this every week.

Copy-paste templates

Drop these into your workflow's three-touch sequence. Merge fields shown in mono are standard HighLevel fields — swap the bracketed placeholders per niche.

TOUCH 1 · SMS · 1–2H AFTER GOLDEN MOMENT

```
Hi {{contact.first_name}}, it's [staff name] from {{location.name}}. So glad we could
[specific result] today! If you have 60 seconds, a quick Google review helps other [customer
type] find us: {{custom_values.review_link}}
```

TOUCH 2 · EMAIL · +24H IF NO REVIEW

```
Subject: Quick favor, {{contact.first_name}}?

Hi {{contact.first_name}},

It was great taking care of your [specific service] yesterday. Your feedback
helps other [customer type] choose with confidence — and it takes about a
minute: {{custom_values.review_link}}

Cheers,
[staff name] at {{location.name}}
```

TOUCH 3 · SMS · +48–72H · FINAL

```
Hi {{contact.first_name}} — last note from us, promise! If your [specific service]
went well, we'd love a quick review. If anything wasn't right, reply here and we'll fix
it: {{custom_values.review_link}}
```

The safety valve in touch 3 matters. Inviting unhappy customers to reply privately routes problems to the inbox instead of the review page — and Google prohibits review gating, so keep the review link available to everyone.

CHAPTER 08

Train your client's team

Automation handles timing; humans handle the moments automation can't see. A 45-minute session with your client's front-line staff is the highest-ROI hour of the engagement — and what separates you from agencies that just "set up software."

Awareness

Teach the review-ready signals from Chapter 3. Staff should recognize a golden moment the way a server spots an empty glass.

Practice

Role-play the three-part ask until it sounds like conversation, not script. Cover the polite decline too — grace beats pressure.

Documentation

Log every in-person ask — a tag in HighLevel works. What gets tracked gets done, and it feeds the metrics in Chapter 9.

Common challenges, straight answers

CHALLENGE	SOLUTION
Staff won't ask	Make it a tracked metric with a small monthly incentive — recognition works as well as cash
Asks land at the wrong time	Move from memory to triggers — let the workflow own the clock
Low response rates	Sharpen personalization first, timing second, channel third — SMS beats email for most local niches
Reviews are thin ("Great!")	Seed specifics in the ask — name the service and the result, and reviewers echo it back

CHAPTER 09

Measure and optimize

The reputation dashboard gives you most of this out of the box. Track five numbers per client, review them monthly, and put them on the first page of every client report:

Request response rate

Reviews received ÷ requests sent. Healthy: 20–35%. Below 10%: fix timing or personalization.

Average rating trend

Watch the direction, not the snapshot. A climbing 4.3 beats a stagnant 4.6.

Review length and detail

Longer, specific reviews carry more SEO weight and convert more readers. 80+ words is the bar.

Staff participation rate

Share of team members logging in-person asks. Under 50% means the training didn't stick — rerun it.

The monthly optimization cycle

WEEK 1

Pull dashboard metrics for every client

WEEK 2

Find the winning patterns — which triggers, which scripts

WEEK 3

Adjust templates, delays and triggers in the workflows

WEEK 4

Update the snapshot so every future client gets the improvements

Compounding advantage. Because the snapshot improves monthly, client #20 launches with everything you learned from clients #1–19. That's the moat solo operators can't copy.

CHAPTER 10

Productize it — reputation as a service

You now have a system that installs in minutes from a snapshot, runs on automation, and produces a chart the client can watch go up. That is a productized service — price it like one:

STARTER

Setup only

One-time build: profiles connected, workflows deployed from your snapshot, templates customized to the niche. Your foot in the door.

CORE OFFER

MONTHLY

Managed reputation

Setup plus monthly optimization, review responses, staff refreshers and the dashboard report. Recurring revenue with visible ROI.

PREMIUM

Full reputation stack

Everything in managed, plus review widgets on the website, listing sync and quarterly on-site team training.

Why this offer closes

- **Every local business understands it.** You never have to explain what a star rating is — unlike attribution models or pixel tracking.
- **Results show in weeks, not quarters.** It buys you the patience budget for the slower services in your retainer.
- **It compounds into your other services.** More reviews lift maps ranking, ad conversion and website trust — making everything else you sell perform better.
- **Marginal cost approaches zero.** After the first build, every deployment is a snapshot install plus an hour of customization.

The 30-day rollout plan

DAYS 1–2 · FOUNDATIONS

- [ ] Run the touchpoint audit with your pilot client (or on your own agency)
- [ ] Pick 2–3 golden moments and write the matching three-part scripts
- [ ] Connect Google Business Profile in the sub-account and save the review link as a custom value

WEEK 1 · BUILD

- [ ] Build the trigger workflows with the three-touch sequence from Chapter 7
- [ ] Train the client's front-line team on signals and the in-person ask
- [ ] Set up the reputation dashboard view and baseline the current numbers

WEEKS 2–4 · RUN AND TUNE

- [ ] Go live; watch response rates daily for the first week
- [ ] Adjust delays, channels and scripts based on what converts
- [ ] Respond to every review — thank the good, resolve the bad publicly

DAY 30 · SCALE

- [ ] Package the build as a snapshot with templates and custom values
- [ ] Put before/after numbers in the client report — that's your case study
- [ ] Add reputation management to your pricing page and pitch it to every client

The goal was never just more reviews — it's a client whose phone rings more and who renews without a conversation. Build experiences worth reviewing, capture them systematically, and let the results sell for you.

This is one playbook. Members get a new one every week

Nexus Hub is the community for HighLevel agencies ready to scale, optimize and connect. Bring your stuck point, leave with a plan.

- Weekly Q&A sessions with experts who run agencies like yours
- Exclusive snapshots and templates — including this protocol, pre-built
- Premium partner deals on the tools you already pay for
- A private community and comprehensive training library

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Cheers,

Charles Higgins — Founder, Nexus Hub

WHERE HIGHLEVEL AGENCIES GET UNSTUCK.