



## Program Employee & Partner Guide: How to Collect Testimonials

Thank you for helping share the impact of Energy Saver NC! Your support helps us show real results, build trust, and reach more households. This guide walks you through everything you need to know to collect high-quality testimonials.

### Step 1: Identify & Request

Identify a participant who may be willing to share their experience. When requesting a testimonial, you must:

- Clearly explain how the testimonial may be used
- Request a short, plain-language quote (1–3 sentences)
- Encourage authentic, conversational responses
- Avoid technical language or leading statements
- Include consent language for public use

All customer and contractor testimonial requests must use the recommended email templates. For phone requests, modify the script accordingly. English and Spanish templates for both audiences are included on pages 3-4.

### Step 2. Get Consent

Obtain a signed Release Form from participants before taking photos or recording videos. The Release Form is available at [energysavernc.org/digitalmarketingtoolkit](https://energysavernc.org/digitalmarketingtoolkit) as a fillable PDF or printable download.

### Step 3. Collect Testimonial Information

Collect the participant's basic details and their testimonial. You can do this in whatever way is easiest – using the printable worksheet (available at [energysavernc.org/digitalmarketingtoolkit](https://energysavernc.org/digitalmarketingtoolkit)) or by typing directly into the online submission form later.

Be sure to capture:

- Participant name, city, date, and primary language (*please note, name would appear publicly as first name, last initial*)
- Partner/company name and website or social handles (*if applicable*)
- Optional: rebate(s) received or upgrades installed (*if applicable*)
- A short written testimonial (1-3 sentences, in their own words)

#### Step 4. Take Photos (and Video/Audio, if applicable)

These guidelines are recommendations to help ensure high-quality, consistent content for program use. To get the best results, follow these tips:

**Use approved materials:** Use the Energy Saver NC Testimonial Sign whenever possible. Do not modify the sign (no stickers, logos, or marks).

Need a Testimonial Sign mailed to you?

Email us at [energysaverncouthreach@aptim.com](mailto:energysaverncouthreach@aptim.com).

#### Recommended Shots:

- In front of the customer's home
- Participant holding the sign (use the correct language side)
- Installed equipment or installation work, when possible

#### Photos Tips:

- Use natural light where possible; avoid strong backlighting
- Keep faces clear and centered; minimize background clutter
- Avoid visible house numbers or sensitive information
- Make sure photos are in focus and not blurry (tap the screen on smartphones to set focus if needed)
- Take both horizontal and vertical shots when possible

#### Video/Audio Tips:

- Keep clips 30-60 seconds and record a few short takes if needed
- Ask open-ended questions about their experience or benefits
- Frame at eye level (shoulders up)
- Minimize background noise and keep camera steady; use a tripod if possible

#### Step 5. Submit Materials

Submit all materials using the online [Testimonial Intake Form](#). You will need to upload:

- Signed Release Form
- Participant details and testimonial
- Photos and/or videos/audio

If you collected the participant details and written testimonial on paper or using the worksheet, scan or take a photo to upload it with your submission.

Please note that all photos, videos, audio recordings, written testimonials, and related materials collected for Energy Saver NC are the property of NC DEQ. Program partners may share or repost content directly from official Energy Saver NC channels but may not independently publish, distribute, or otherwise use collected content.

**Questions?** Contact us at [energysaverncouthreach@aptim.com](mailto:energysaverncouthreach@aptim.com).

**Customer testimonial requests** must follow the following recommended email templates. If a testimonial request is via phone call, adjust this script accordingly.

**English:**

*Subject: Share Your Experience with Energy Saver NC*

*Hello [Name],*

*We're collecting short testimonials to help share how the Energy Saver NC program supports customers like you. Your feedback may be used in program materials such as our website, reports, or outreach efforts.*

*If you're willing, we're looking for a short quote (1–3 sentences) in your own words. You might share what your experience was like, what stood out to you, or how the program helped.*

*If you're interested in including a photo or video with your testimonial, we would just need you to sign a release form before it can be used.*

*Participation is completely optional, and we'll only use your testimonial with your permission.*

*Thank you for your time and for being part of Energy Saver NC!*

*Best regards,  
[Name]*

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**Spanish:**

*Subject/Asunto: ¡Comparte tu experiencia con Energy Saver NC!*

*Hola [Nombre],*

*Estamos recopilando breves testimonios para mostrar cómo el programa Energy Saver NC apoya a clientes como usted. Sus comentarios podrían utilizarse en materiales del programa, como nuestro sitio web, informes o esfuerzos de divulgación.*

*Si está dispuesto, nos gustaría recibir una breve cita (1–3 frases) en sus propias palabras. Puede compartir cómo fue su experiencia, qué le llamó la atención o cómo le ayudó el programa.*

*Si desea incluir una foto o un video junto con su testimonio, solo necesitaríamos que firme un formulario de autorización antes de poder utilizarlo.*

*La participación es completamente opcional y solo usaremos su testimonio con su permiso.*

*¡Gracias por su tiempo y por ser parte de Energy Saver NC!*

*Atentamente,  
[Nombre]*

**Contractor testimonial requests** must follow the following recommended email templates. If a testimonial request is via phone call, adjust this script accordingly.

**English:**

*Subject: Share Your Experience with Energy Saver NC*

*Hello [Name],*

*We're collecting short testimonials from our participating contractors to highlight your experience with the Energy Saver NC program. Your feedback may be featured in materials such as our website, reports, contractor recruitment efforts, or outreach communications.*

*If you're willing, we're looking for a brief quote, just 1–3 sentences in your own words. You might share what it's been like participating in the program, how it's supported your business, or what stands out about working with Energy Saver NC.*

*If you'd like to include a project photo or video with your testimonial, we would just need a signed release form before it could be used. Participation is completely optional, and we will only use your testimonial with your permission. Thank you for your time and for being a valued participating contractor!*

*Best regards,  
[Your Name]*

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**Spanish:**

*Subject/Asunto: ¡Comparte tu experiencia con Energy Saver NC!*

*Hola [Nombre],*

*Estamos recopilando breves testimonios de nuestros contratistas participantes para resaltar su experiencia con el programa Energy Saver NC. Sus comentarios podrían aparecer en materiales como nuestro sitio web, informes, esfuerzos de reclutamiento de contratistas o comunicaciones de divulgación.*

*Si está dispuesto, nos gustaría recibir una breve cita, solo 1–3 frases en sus propias palabras. Puede compartir cómo ha sido participar en el programa, cómo ha apoyado su negocio o qué destaca de trabajar con Energy Saver NC.*

*Si desea incluir una foto de proyecto o un video junto con su testimonio, solo necesitaríamos un formulario de autorización firmado antes de poder utilizarlo. La participación es completamente opcional y solo utilizaremos su testimonio con su permiso.*

*¡Gracias por su tiempo y por ser un contratista participante valioso!*

*Atentamente,  
[Su Nombre]*