

Customer Reference Consent Form

This template is general information, not legal advice. Have your counsel review it before use, especially where GDPR, CCPA or other privacy laws apply.

This form records what the Customer and the individual advocate agree the Vendor may do when it presents them as a customer reference. Anything that is not checked or written here is not permitted. Taking part is voluntary, and consent can be changed or withdrawn at any time as described below.

Company granting consent (Customer): _____

Individual advocate (name and title): _____

Company receiving consent (Vendor): _____

Effective date: _____

Permitted uses

Check each use the Customer agrees to. An unchecked box means that use is not permitted.

- ☐ Use of company name
- ☐ Use of company logo
- ☐ A written quote attributed to the individual advocate by name and title
- ☐ A written case study
- ☐ Reference calls with prospective customers
- ☐ A recorded video testimonial

The Vendor will use these items only to describe its work with the Customer to prospective customers. It will not suggest that the Customer endorses anything beyond what the Customer has approved.

Other permitted use, or limits on the uses checked above:

Privacy level

Choose one. This sets who can see that the Customer is a reference.

- ☐ Public: the reference may be shown to anyone the Vendor presents its references to, including on its website and in sales materials.
- ☐ Approval Required: the Vendor asks the Customer each time before it shares the reference with a prospective customer or makes an introduction.
- ☐ Private: the reference is kept in the Vendor's internal records and is not shown to prospective customers unless the Customer agrees to a specific request.

If no box is checked, the reference is treated as Private.

Contact limits

Choose how prospective customers may reach the individual advocate, and set the limits the Vendor will keep to.

- ☐ Prospective customers may contact the advocate directly

[] The Vendor asks the advocate first, and makes an introduction only after the advocate agrees

[] All requests go to the Vendor's team, and the advocate is not contacted by prospective customers

The Vendor will not pass on more requests than the maximum below. The advocate may decline any single request without giving a reason, and declining does not affect the Customer's relationship with the Vendor.

Maximum reference requests per rolling 30 days: _____

Blackout periods when the advocate should not be contacted:

Preferred contact channel (for example email, phone or scheduling link):

Review and approval of content before publication

The Vendor will send the Customer any quote, case study, video or other material that names the Customer or the advocate before it is published or shared.

Nothing is published until the Customer approves it in writing. Email is enough. Silence is not approval.

If the Vendor later makes a material change to approved content, it will ask for approval again.

The Customer may ask for a correction to published material at any time, and the Vendor will make it within a reasonable time.

Person at the Customer who approves content (name and email):

How to withdraw consent

The Customer or the advocate may withdraw consent at any time, for all uses or for any single use, without giving a reason.

To withdraw, write to the Vendor contact named below. Email is enough.

After a withdrawal, the Vendor will stop making new use of the affected material and will stop sending reference requests to the advocate.

The Vendor will remove or stop distributing published material that it controls within the number of business days written below. Copies that are already in the hands of third parties, such as printed pieces or files a prospective customer has downloaded, may not be recoverable, and the Vendor will say so if asked.

Withdrawing consent does not affect any other agreement between the Customer and the Vendor.

Vendor contact for withdrawal requests (name and email):

Business days to remove or stop distributing published material:

Data handling

To manage this reference, the Vendor stores the advocate's name, job title, work email address and employer, any photo, quote, story or recording the advocate provides, the choices made on this form, and a record of reference requests and contacts.

This information is shown only to the Vendor's staff who manage references and, within the privacy level chosen above, to prospective customers. The Vendor will not sell it or use it for any purpose other than managing and presenting customer references.

The Vendor keeps this information for as long as this consent is in effect and for the period written below after it ends.

The advocate may ask the Vendor at any time for a copy of the personal information it holds about them, to have it corrected, or to have it deleted. The Vendor will delete it on request unless it is required to keep a record.

Where reference information is stored (system or provider):

How long information is kept after consent ends: _____

Vendor privacy contact (name and email): _____

Term and renewal

This consent starts on the effective date and lasts for the term written below, unless it is withdrawn earlier.

It does not renew automatically. Before the term ends, the Vendor will ask the Customer whether it wishes to continue, and with what changes.

If the advocate changes role or leaves the Customer, the Vendor will stop presenting them as a reference for the Customer until consent is confirmed again.

Term (for example 12 months from the effective date):

Renewal check-in date: _____

Signatures

For the Customer: name, title, signature, date: _____

Individual advocate: name, signature, date: _____

For the Vendor: name, title, signature, date: _____