

The webinar will start at 9.30am

Vouchedfor

How client feedback can help you market
your business in a post-AI world

25th September 2025

Our panel



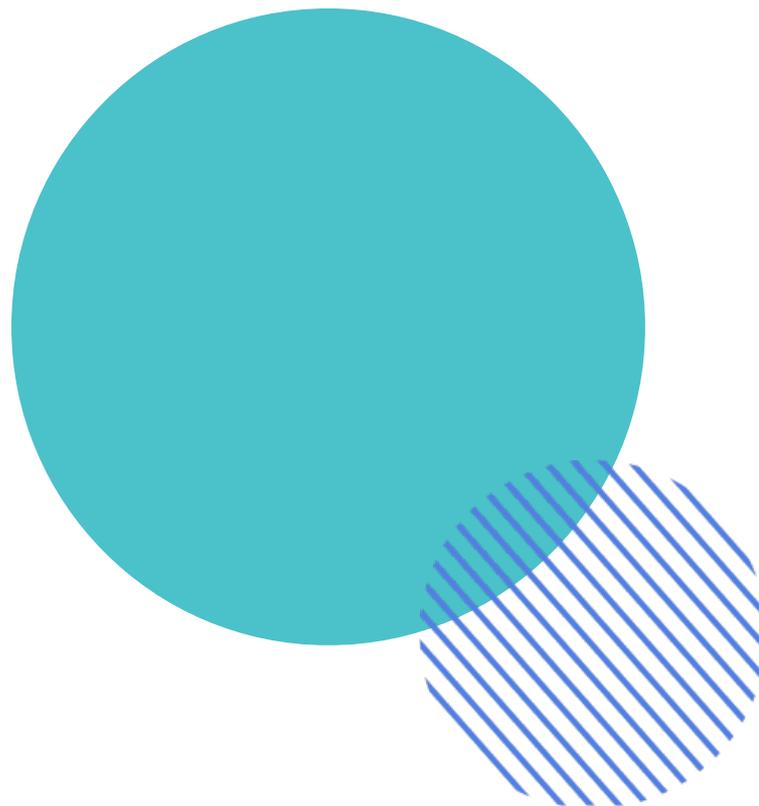
Alex Gibson
Head of Marketing
VouchedFor



Phil Bray
Director and Founder
The Yardstick Agency

What we'll cover

- How AI is changing client search
- Why reviews and testimonials matter more than ever
- Practical steps for advisers to stay ahead
- Questions



How AI is changing client search



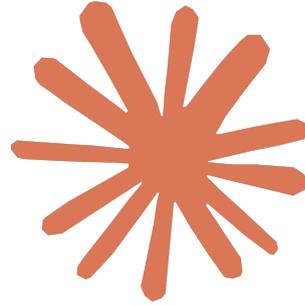
AI has changed the world of search



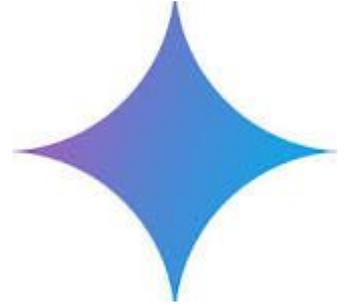
Chat GPT



Copilot



Claude



Gemini

AI has changed the world of search



70-80%
market
share

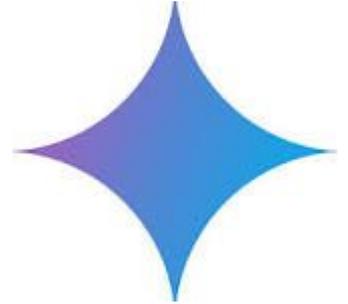
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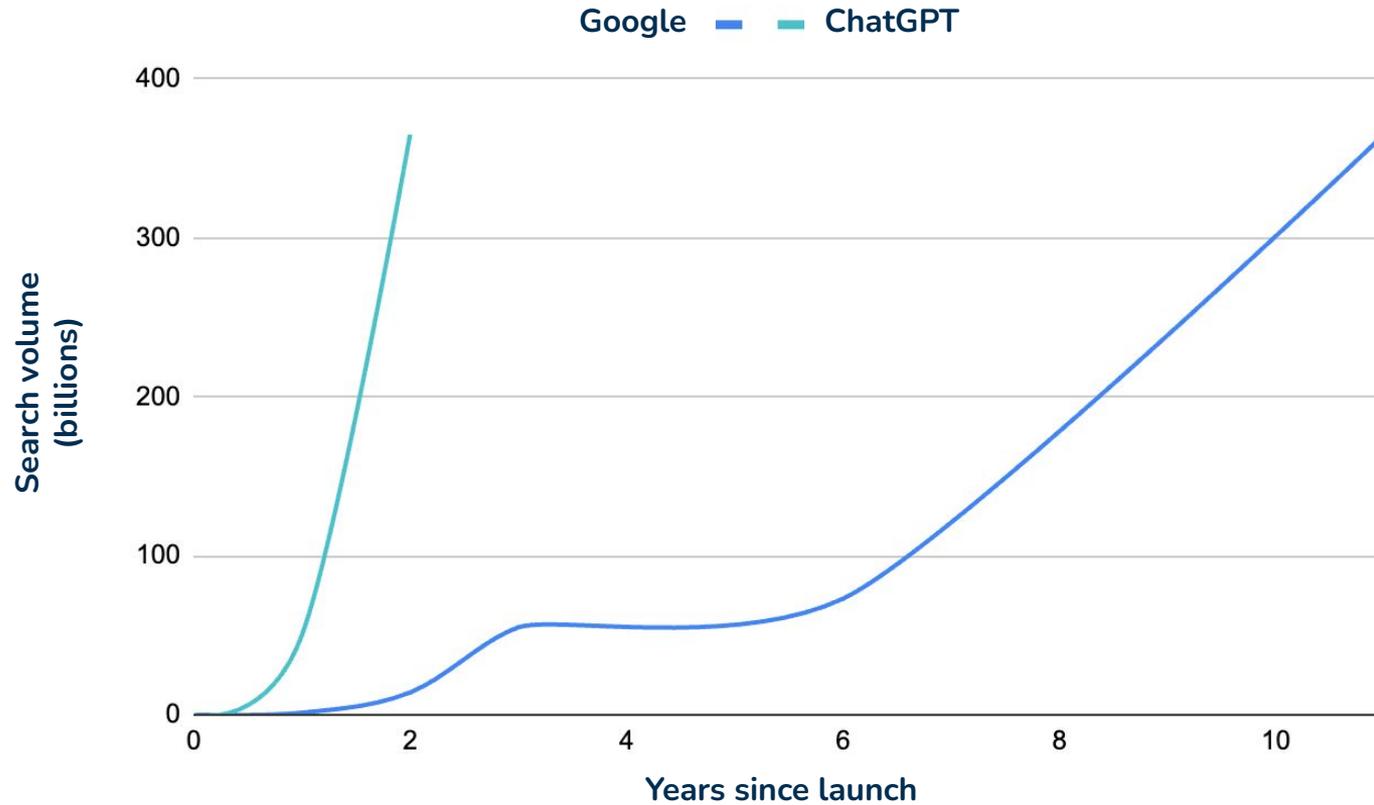


Claude

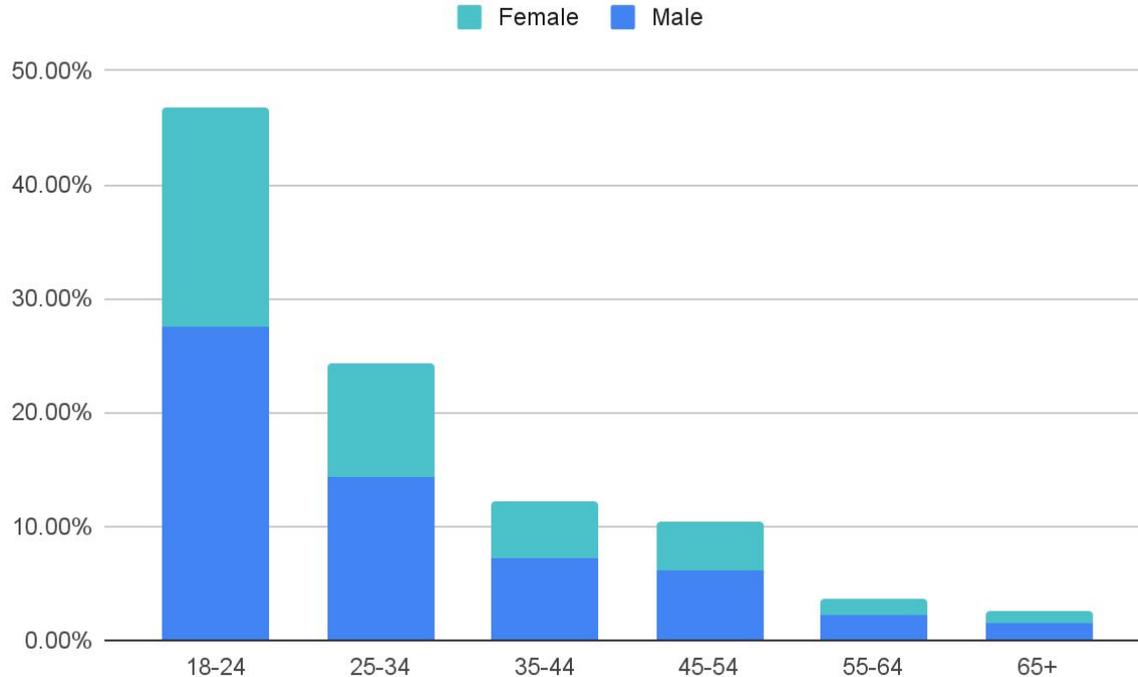


Gemini

Adoption of AI search is growing quickly



Early adoption of AI is predominantly among young people



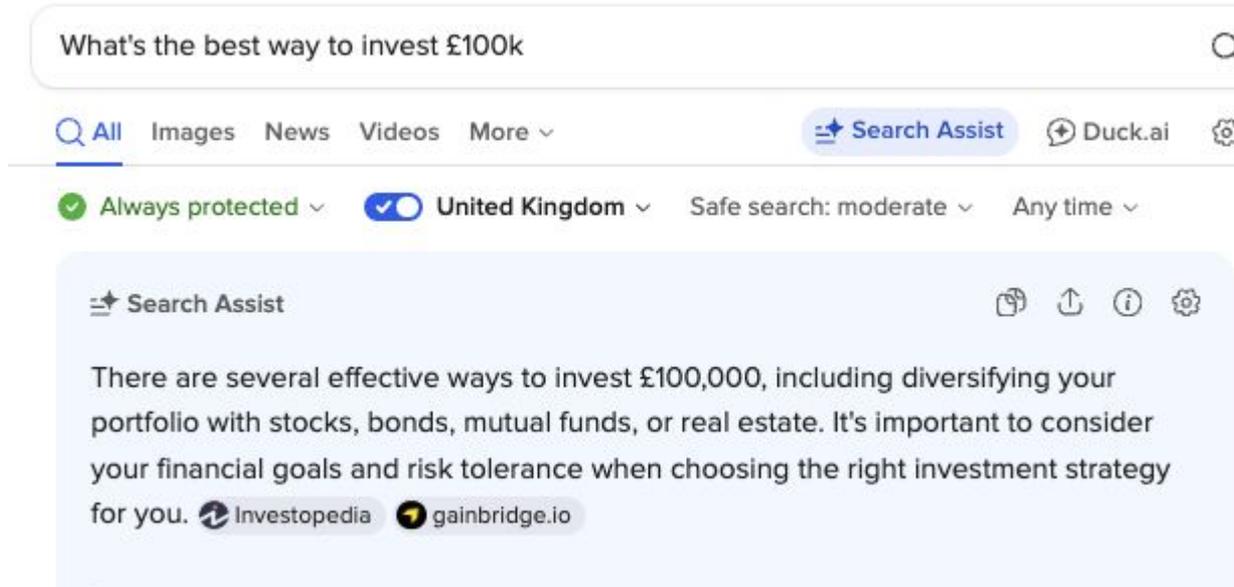
ChatGPT usage by age and gender

More than
45% are
under 25

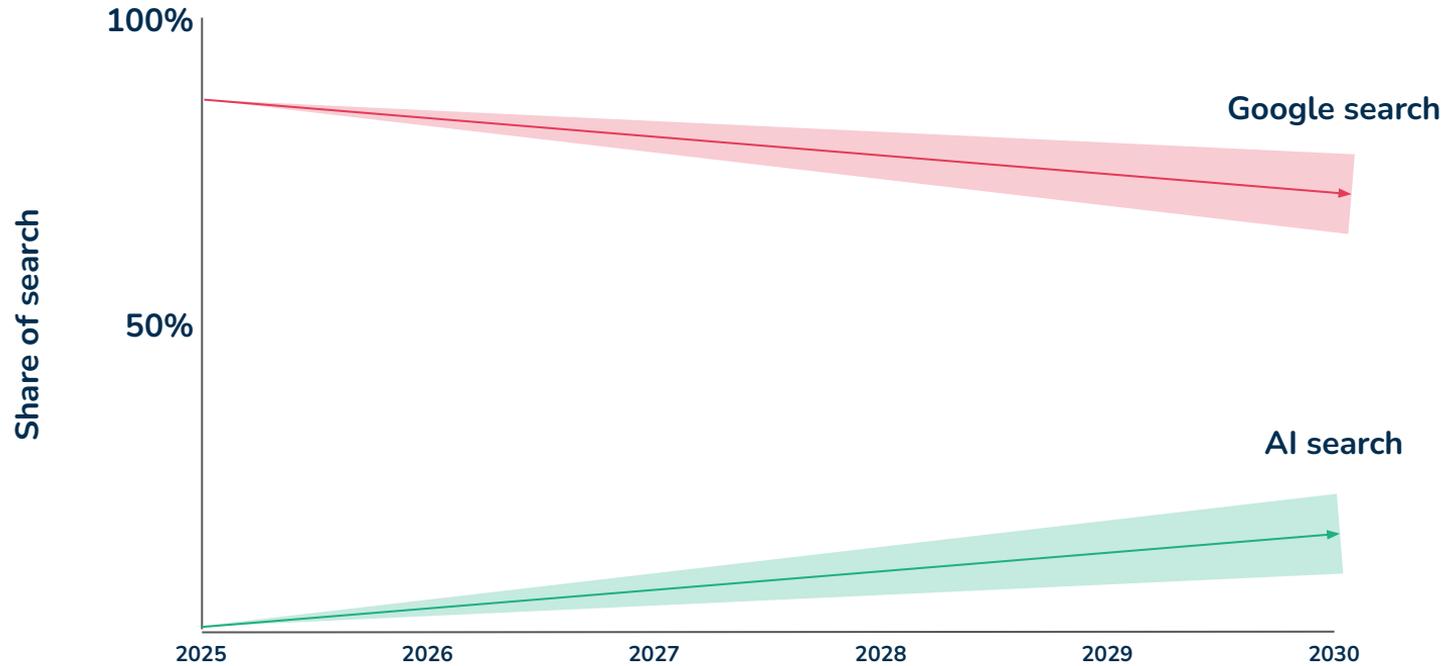
62%
are male

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But it's increasingly integrated into traditional search



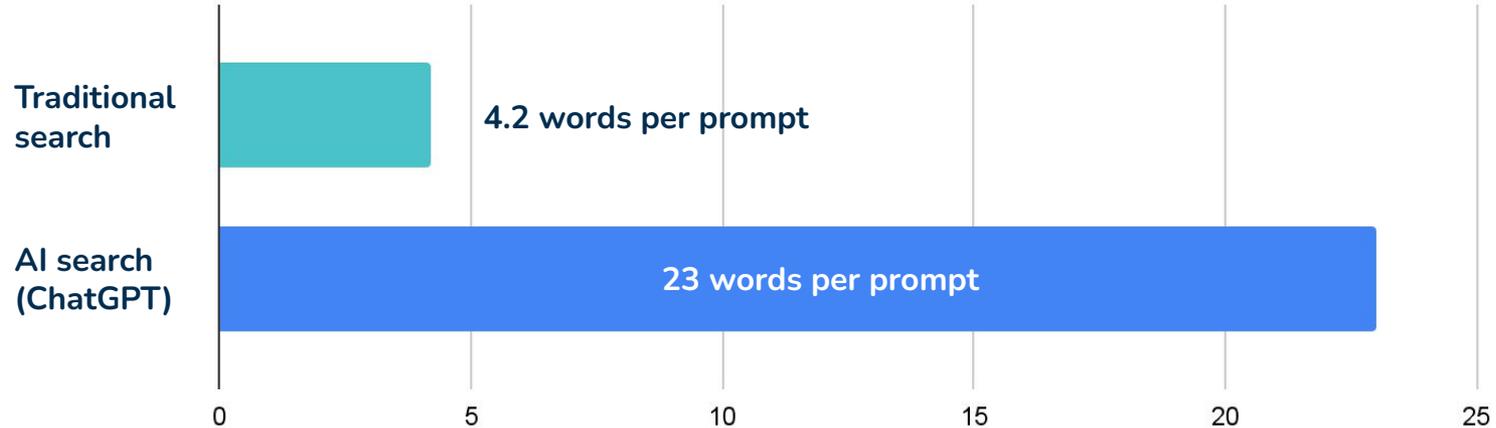
And AI search is predicted to take share from Google



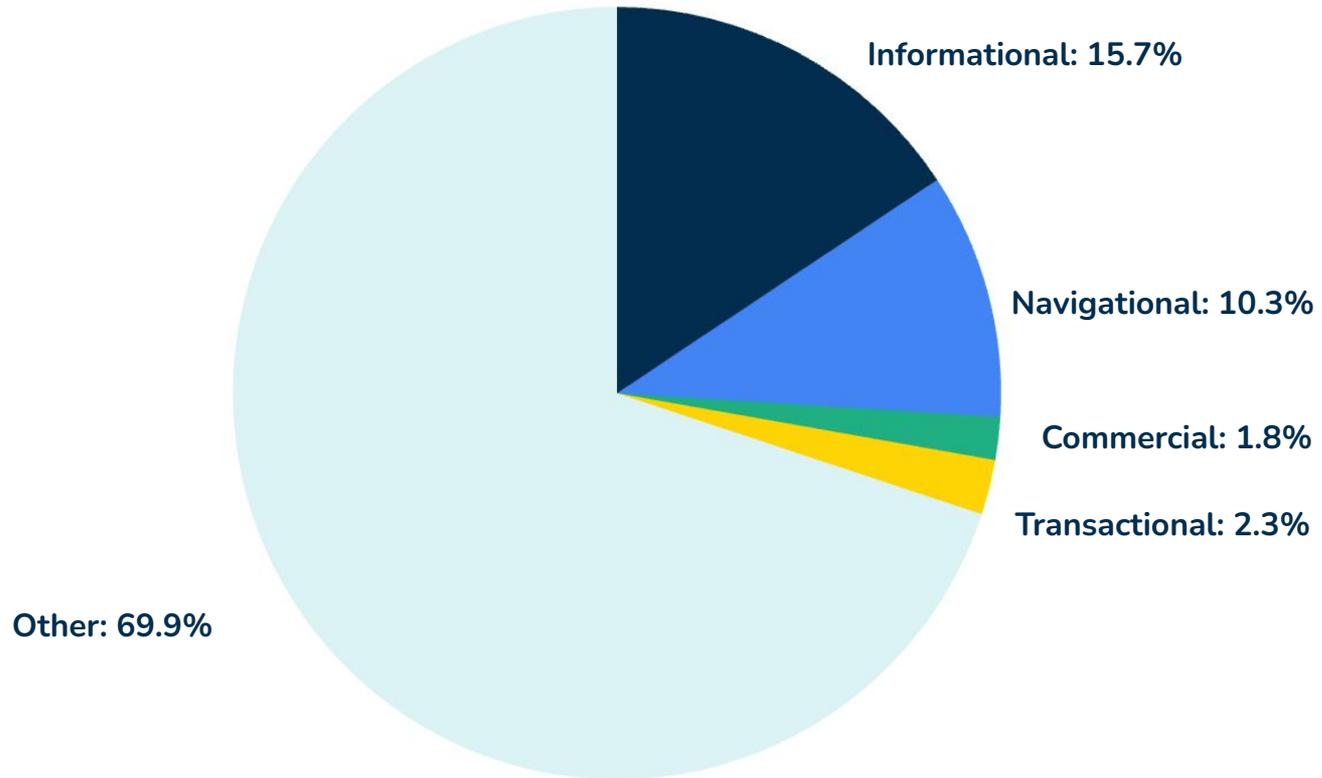
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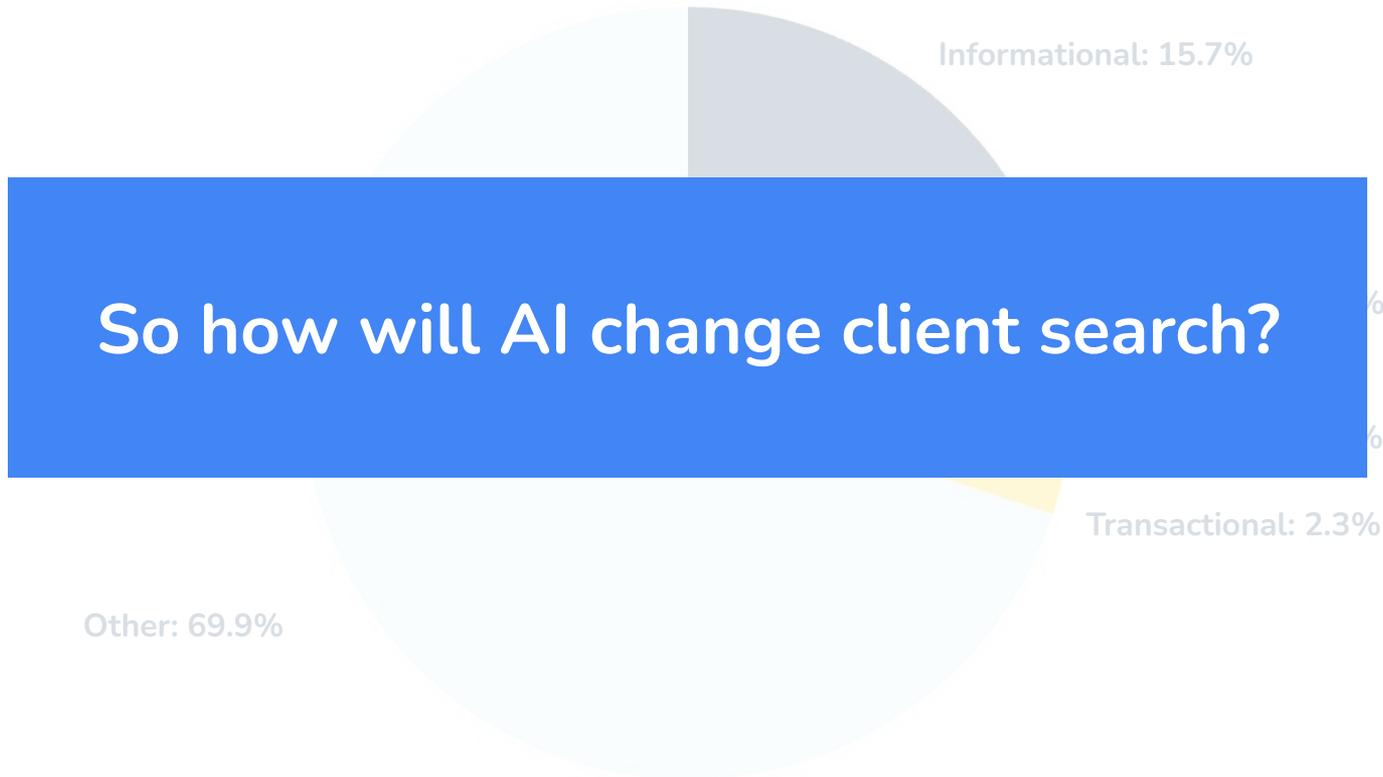
Search behaviour is becoming longer and more conversational



And new categories of search are emerging



And new categories of search are emerging



So how will AI change client search?

Two ways clients find advisers

#1

Researching a
recommendation

#2

Searching according
to their needs

Two ways clients find advisers

#1

Researching a
recommendation

Recommendation(s)

Search by firm/adviser name(s)

Compare Google search results
(website, VouchedFor reviews, etc)

AI consolidates the information available on the internet - and makes a recommendation if asked

My friend's recommended a financial adviser called Charlie [REDACTED]. Is that a good recommendation?



Here's what I found out about Charlie [REDACTED], Financial Adviser in London [REDACTED], and some thoughts to help you decide if he's a good choice. If you want, I can compare with other advisers too, so you can see alternatives.

👍 What looks good about Charlie [REDACTED]

1. Strong reviews

- On *VouchedFor*, he has a 5-star rating. VouchedFor
- He has many verified client reviews and very positive feedback about being responsive, helpful, guiding clients through the process clearly, and getting good mortgage outcomes. VouchedFor +1

2. Regulated / Qualified

- His firm is regulated by the *Financial Conduct Authority (FCA)* in the UK. That's important—it means you have some protection and accountability. VouchedFor +1
- Qualifications are visible/available on his profile. VouchedFor

3. Transparency and clarity

- He provides information on his typical fees. VouchedFor
- The scope of what he deals with is clear (mortgages, financial planning, estate planning etc.) via the Wade Wealth Partners site. [REDACTED]

4. Reputation and longevity

- He's been in operation for several years, with many past clients. That suggests sustained performance and service. VouchedFor +2
- He made "Top Rated Adviser Guide" in 2025 according to his website. [REDACTED]

My view: who might be "better" for most people

If I had to pick one based on general advice, I'd lean toward Scott [REDACTED] if your priorities include long-term planning, investments, ensuring your finances are looked after over decades, not just for a transactional need (mortgage etc.).

Scott seems to have more credentials for holistic planning, more experience, and very strong client reviews around trust and long-term service.

Charlie looks excellent if your needs are more focused (mortgage, purchase, maybe protection) and you want someone who excels there, is efficient, with good service.

Two ways clients find advisers

Search according to need

e.g. 'financial adviser for divorcees'
or 'financial adviser in Teddington'

Reviews Google search results
(website, VouchedFor reviews, etc)

#2

Searching according
to their needs

AI enables a much richer, more detailed search according to specific client needs

“Who are the best financial advisers near me with good reviews?”

“Can you recommend an adviser in London who specialises in retirement planning?”

“I need mortgage advice - who’s trusted and independent?”

“Which financial advisers in the UK have the highest client ratings?”

“Find me an adviser that explains fees clearly and is FCA regulated.”

“What do clients say about [Firm/Adviser Name]?”

I am a 72 year old retiree who has recently inherited £200k. I need advice on how best to invest this to mitigate my inheritance tax liability and leave a legacy for my grandchildren.

Can you help me find a financial adviser near me (Chelmsford) who can help?

Here are several qualified financial advisers/local firms around Chelmsford (Essex) who specialise in estate planning / inheritance tax mitigation, plus things to look out for. I'm not giving personal financial or tax advice, but I can help you find an adviser who *can* help you plan the best use of your inheritance for legacy and tax purposes.

Why reviews matter more than ever



AI offers a different interface, but for now, the core principles of search optimisation remain the same

Good marketing
practice

=

Good practice
AI-optimisation

Expertise indicators + Source information

Client testimonials

= Experience, Expertise, Authority, Trust (E-E-A-T)



Increased visibility

reviews generate fresh content related to your business



Build trust and credibility

reviews build a level of credibility



Improve search relevance

specifics, like type of service, help AI understand your business better, enabling better matching

In a post-AI world, trust is more important than ever
Verified reviews are your differentiator



of consumers are
influenced by
online reviews

Source information



Website

- 'Why choose us' - explain your differentiators on your website
- Location pages
- Fees information



Blogs

Create regular blog content to encourage AI to site you



Google Business profile

Update your profile to explain what you do and who you do it for



LinkedIn profile

Build your company and personal profiles to explain the same

Practical steps to take today



What you can do today



Collect reviews regularly

Ask every client to leave verified feedback - it builds trust and boosts your visibility



Share your reviews in your marketing

Use as LinkedIn posts, add them to emails, showcase them on your website



Boost your visibility

Qualify for the Top Rated Guide to boost your expertise indicators



Optimise your source information

Fees page, location pages, 'Why choose us'; build your LinkedIn profile and Google business profile



Thank you

customer_service@vouchedfor.co.uk

phil@theyardstickagency.co.uk

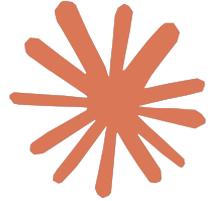
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Use AI to market more efficiently



Making marketing more efficient with AI

- Draft blogs & newsletters faster
- Repurpose client feedback into social posts
- CRM emails or lifecycle flows
- FAQs, product descriptions, support docs



The quality depends on your input: the better the guidance, the better the result.

AI won't replace your authentic voice - but it can save you hours and amplify what clients are already saying about you.

Using AI to create case studies

01

Record your call using Otter AI or Riverside

02

Download the transcript and paste it into your preferred LLM

03

Give it a detailed prompt and start doing section by section

04

Be sure to check it - for example, any quotes

Using AI to write marketing emails

01

Give a detailed prompt

02

Upload data if necessary

03

Ask for multiple options

04

Refine and edit manually

DO

- Give it the necessary parameters and context
- Train your own GPT/Gem or provide your TOV and style guide in the prompt
- Provide examples of what good looks like (e.g. previously published pieces)
- Ask for multiple variations for each prompt (3+)
- Say what to avoid (e.g. phrases like “In the fast-paced world of...”)
- Tweak the temperature (0 - 1)
- Ask it to correct its own work

Give me a one-line description of what changing the temperature does when using an LLM. Write using a temperature of 0.1

Lower temperature makes the model more focused and predictable; higher temperature adds randomness and creativity

Give me a one-line description of what changing the temperature does when using an LLM. Write using a temperature of 0.9

Crank up the temperature and you get weirder, wilder, less predictable responses - like shaking the magic 8-ball and watching it grow a personality

DON'T

- Publish anything without editing it first
- Provide basic one-line prompts and expect it to guess
- Give up after a single prompt
- Publish without double-checking facts or quotes
- Lower your standards