

B2B PLAYBOOK



# B2B Testimonial & Case Study Playbook

A complete framework for collecting, creating, and  
deploying client testimonials and case studies that drive B2B  
sales for CMF Doors.

COMPANY

**CMF Doors**

VERTICAL

**Commercial Doors & Hardware**

DATE

**March 2026**

INNLEAD.AI

B2B INTELLIGENCE PLATFORM

## SECTION 01

## Why Testimonials Matter in Commercial Doors & Hardware

The business case for investing in testimonials and case studies as a core sales asset for CMF Doors.

### 92%

B2B BUYERS READ TESTIMONIALS BEFORE PURCHASING

### 67%

MORE LEADS WITH CASE STUDY SECTIONS ON WEBSITE

### 3-5x

HIGHER CONVERSION WITH SOCIAL PROOF

### 73%

PROCUREMENT MANAGERS CONSULT REFERENCES

### WHY COMMERCIAL BUYERS NEED PROOF

- Commercial door projects involve \$10K-\$500K+ orders and multi-year service relationships
- Contractors and building managers must justify supplier choices to project owners and property groups
- Product quality directly impacts building safety, code compliance, and occupant security
- Switching costs are high -- buyers want assurance on fire ratings, hardware performance, and installation quality
- Multiple stakeholders (GCs, architects, owners, property managers) involved in B2B purchasing decisions

### WHERE TESTIMONIALS WIN DEALS FOR CMF

- Website service pages (reduce bounce, increase quote requests)
- Bid packages and project proposals
- RFP/RFQ responses (general contractor requirement)
- Trade show materials and DHI conNextions conversations
- Email follow-ups after site assessments or initial quotes
- LinkedIn company page posts and Google Business Profile

### Current State: Zero Testimonials

CMF Doors' website currently has a "Coming soon" testimonials page. This represents a significant missed opportunity. With 40+ years of industry experience through Norm Schwenker (AHC) and a full-service team, CMF almost certainly has satisfied clients who would provide testimonials -- they just haven't been asked. This playbook provides a systematic plan to collect 10+ testimonials within 12 months.

### B2B vs B2C Testimonials

Unlike consumer reviews, B2B testimonials for commercial doors must speak to procurement concerns: code compliance, fire rating accuracy, installation timeline reliability, warranty responsiveness, and total project cost control. Building managers don't care about "great doors!" -- they need "CMF completed our 85-door fire-rated replacement on time and passed inspection with zero deficiencies."

## SECTION 02

## Testimonial Collection Framework

A systematic approach to requesting, collecting, and organizing testimonials from commercial door clients.

### When to Ask for Testimonials

#### 1 After Successful Project Completion

Within 1-2 weeks of a completed door installation, hardware upgrade, or automatic door project when final inspection has passed. Best for project-focused testimonials.

#### 2 After Repeat Projects or Service Renewals

When a contractor or building manager calls back for their 3rd+ project, or renews an annual inspection contract. Ask for a testimonial about the ongoing partnership.

#### 3 After Emergency Service Calls

If CMF successfully responds to an urgent locksmith call, emergency door repair, or after-hours service, the client will remember your responsiveness. Strike while the relief is fresh.

#### 4 After AAADM Inspections & Annual Reviews

During annual automatic door inspections or scheduled maintenance visits. The face-to-face contact makes this an ideal time to request detailed testimonials or case studies.

### Testimonial Request Templates (4 Client Types)

#### TEMPLATE A -- GENERAL CONTRACTOR

*Subject: Quick favor? Share your experience working with CMF Doors*

*Hi [Name],*

*Thank you for the opportunity to work with [Company Name] on the [Project Name] project. We're glad the door and hardware installation went smoothly and passed inspection.*

*We're building our client success stories and would love to include your experience. Would you be willing to share a brief testimonial (2-3 sentences) about:*

- Why you chose CMF Doors as your door/hardware subcontractor*
- How our team performed on-site (timeline, quality, communication)*
- Whether you'd use us again on future projects*

*Happy to draft something for your approval if that's easier. Thank you for considering this.*

#### TEMPLATE B -- BUILDING MANAGER / PROPERTY DEVELOPER

*Subject: How has CMF Doors been working out for you?*

*Hi [Name],*

*It's been [X months] since we completed the door work at [Building/Property Name]. I wanted to check in and ask -- would you be open to sharing a few words about your experience with CMF Doors?*

*Even a short quote about the quality of our work, reliability, or anything that stood out would be hugely helpful. We'd include your name and title (with your approval) on our website and project references.*

*If you'd prefer, I can send a quick 3-question form instead.*

## SECTION 03

## Client Interview Template

Structured interview questions to extract compelling testimonial content from contractors, building managers, architects, and property developers.

### TEMPLATE C -- ARCHITECT / SPECIFIER

*Subject: Would you recommend CMF Doors to other firms?*

*Hi [Name],*

*It was a pleasure collaborating on the [Project Name] specifications. With Norm's AHC credentials and our team's experience, we aim to make the specification and hardware scheduling process as smooth as possible for design professionals.*

*Would you be willing to share a brief testimonial about our specification writing support, product knowledge, or project delivery? A few sentences would be greatly valued.*

### TEMPLATE D -- FACILITY / PROPERTY MANAGER (ONGOING SERVICE)

*Subject: Thanks for trusting CMF Doors with your annual inspections*

*Hi [Name],*

*As we wrap up another year of AAADM inspections and maintenance at [Facility Name], I wanted to ask -- would you be open to sharing your experience with our service? A brief quote about our reliability, our technicians, or the value of our inspection program would help us enormously.*

*We can use just your first name and role if you prefer to keep it simple.*

## In-Depth Interview Questions (15-20 Minutes)

### BACKGROUND & SELECTION

1. Tell me about your role at [Company/Building] and how you handle door and hardware procurement.
2. What challenges were you facing before working with CMF Doors? (e.g., unreliable suppliers, code compliance issues, project delays)
3. How did you find CMF Doors? What made you choose us over other door contractors in the Niagara Region?

### EXPERIENCE & RESULTS

4. How would you describe the quality of our door and hardware installations?
5. How has working with CMF impacted your project timelines or building operations?
6. Can you share any specific outcomes? (Inspection pass rates, time saved, reduced callbacks, cost comparisons)
7. How would you rate our service -- quoting process, communication, on-site professionalism, post-installation support?

### RELATIONSHIP & RECOMMENDATION

8. What is the biggest benefit of working with CMF Doors?
9. How would you describe Norm and the CMF team's expertise and responsiveness?
10. Would you recommend CMF Doors to other contractors, building managers, or architects? Why?

### DIFFERENTIATORS & COMPETITIVE QUESTIONS

11. What other door/hardware suppliers have you worked with? How does CMF compare?
12. What was the deciding factor that made you choose CMF Doors?
13. Has our in-house metal shop, locksmith, or AHC consulting been valuable to your projects?
14. If you could describe your experience with CMF Doors in one sentence, what would it be?

**Interview Tips:** Record the conversation (with permission) for accuracy. Let them speak naturally -- the best quotes come from unscripted moments. Always ask for specific numbers and metrics. Follow up via email with a written summary for their approval. Select 8-10 questions per interview based on the client type and relationship depth.

## SECTION 04

## Case Study Structure

The proven Challenge - Solution - Results - ROI framework for creating compelling commercial door project case studies.

CHALLENGE	SOLUTION	RESULTS	ROI
What problem did the client face? Failing fire doors? Non-compliant hardware? Outdated access control? Security concerns?	How did CMF Doors solve it? Custom fabrication? AHC-specified hardware? AAADM-compliant automatic doors? Turnkey install?	Measurable outcomes: passed inspections, on-time delivery, code compliance, reduced maintenance calls.	Financial impact: total project cost vs. alternatives, reduced callbacks, extended product lifespan, annual maintenance savings.

### Case Study Page Template

#### HEADER SECTION

- Title: "How [Client/Building Name] Solved [Problem] with CMF Doors"
- Hero image: Completed installation or building exterior
- Key stat callout: "85 Fire-Rated Doors Installed in 3 Weeks" or "Zero Inspection Deficiencies"
- Project profile: Client type, building type, scope, location in Niagara Region

#### BODY CONTENT (600-1000 WORDS)

- **Challenge (150 words):** Specific pain points -- failing doors, code violations, project timeline pressure, security gaps
- **Solution (200 words):** How CMF addressed the challenge -- products supplied, AHC consulting, custom fabrication, installation process
- **Results (150 words):** Measurable outcomes with numbers -- doors installed, timeline met, inspections passed
- **Client Quote (50 words):** Direct quote from contractor, building manager, or property developer
- **ROI Summary (100 words):** Financial impact and long-term value

#### VISUAL ELEMENTS

- Before/after photos of door installations
- Product close-ups (fire-rated labels, hardware, finishes)
- Project scope infographic (number of doors, timeline, building type)
- Client logo and contact headshot
- Pull quote with distinctive styling
- CTA: "Get a Free Consultation" with quote request form

### **HIGH-VALUE PROJECT TYPES**

- Fire-rated door replacement programs (multi-unit residential, healthcare)
- Automatic door installations (retail, healthcare, hospitality)
- Master key / electronic access control upgrades
- Custom metal fabrication projects (unique or non-standard openings)
- Full building specification projects (new construction)

### **TARGET CLIENT TYPES FOR CASE STUDIES**

- General contractors (new builds, renovation projects)
- Property management companies (multi-site maintenance contracts)
- Architects and specifiers (AHC collaboration)
- Healthcare facilities (fire safety + automatic doors)
- Educational institutions (security hardware upgrades)

## SECTION 05

## Video & Written Testimonial Formats

Production guidelines for both video and written testimonials that resonate with B2B commercial door buyers.

### Video Testimonial Process

#### 1 Pre-Production

Schedule 30-minute slot. Send questions in advance. Choose location: completed job site, client's office, or CMF's metal shop/showroom. A smartphone with good lighting is sufficient.

#### 2 Filming (15-20 Minutes)

Interview format with their responses only (no interviewer on camera). B-roll of installed doors, hardware close-ups, building exterior. Capture the work in context.

#### 3 Production

Edit to 60-90 seconds. Add subtitles, name/title/company lower third, CMF Doors logo. No fancy effects -- authenticity matters more than polish in B2B.

#### 4 Approval & Deployment

Send final cut for approval before publishing. Deploy on website, YouTube, LinkedIn, Instagram (@cmfdoors), and include in project proposals.

### Written Testimonial Structure

#### STRONG TESTIMONIAL EXAMPLE -- GENERAL CONTRACTOR

*"We've used CMF Doors on three commercial builds in the Niagara Region over the past two years. Their AHC-certified specification writing saved us two weeks of back-and-forth on our last fire-rated door package, and every installation has passed inspection on the first attempt. The in-house metal shop is a game-changer for non-standard openings -- they fabricated custom frames that would have taken any other supplier 6+ weeks. I won't spec doors without calling Norm first."*

-- [Name], Project Manager, [General Contractor Name] (Niagara Region)

#### STRONG TESTIMONIAL EXAMPLE -- BUILDING MANAGER

*"CMF Doors has been maintaining our automatic door systems and fire-rated doors across three properties for over a year now. Their AAADM-certified inspector catches issues before they become problems, and their locksmith has us on a master key system that actually works. Response time for emergency service calls has been same-day every time. They're the only door company we call."*

-- [Name], Facilities Director, [Property Management Company]

#### ELEMENTS OF A STRONG B2B TESTIMONIAL

- Specific measurable results (inspection pass rates, timeline, cost)
- Named person with title and company

#### COMMON WEAK TESTIMONIAL TRAITS

- "Great company!" (too vague, no specifics)
- Anonymous or first-name-only attribution
- No measurable outcomes or project context
- Reads like marketing copy, not authentic

- Comparison to previous supplier or alternative
- Mention of specific CMF services used (AHC, metal shop, AAADM, locksmith)
- Recommendation to peers in the industry

- Reads like marketing copy, not authentic voice
- No company name, project type, or service mentioned

## SECTION 06

## Permission & Approval Workflow

Legal and professional best practices for getting proper approval to use client testimonials and company names.

### Testimonial Approval Checklist

#### 1 Get Written Permission

Email confirmation is sufficient for written quotes. For video/photos, use a simple release form. A reply saying "looks good, you can use it" is legally valid.

#### 2 Confirm What Can Be Shared

Some clients allow: full name + title + company. Others prefer: first name + role + "commercial property management firm." Clarify upfront -- especially for institutional clients.

#### 3 Send Final Draft for Approval

Always send the exact text/video to be published. Allow 5 business days for review. Accept minor edits gracefully -- the client knows their brand guidelines.

#### 4 Specify Where It Will Be Used

Website, project proposals, bid packages, Google Business Profile, LinkedIn, Instagram, trade show materials. Get blanket approval or channel-specific permission.

#### 5 Offer Right of Withdrawal

Let clients know they can request removal at any time. Builds trust and makes them more likely to participate. Keep a simple tracking spreadsheet of all permissions.

### Where to Deploy Testimonials & Case Studies

CHANNEL	FORMAT	IMPACT
Website Service Pages	Short quote + name/company per service page	Highest
Dedicated Case Study / Portfolio Page	Full case study (600-1000 words) with photos	Highest
Project Proposals & Bid Packages	Relevant case study attachment + reference list	Highest
Google Business Profile	Encourage direct Google reviews (target 25+)	Highest
LinkedIn Company Page	Quote card with project photo	High
Instagram (@cmfdoors)	Before/after carousel with quote overlay	High
Email Follow-ups After Quotes	Case study link in proposal follow-up email	High
Trade Show / DHI conNextions	Banner quotes, video loop on tablet	Medium

### Schema Markup for Reviews

When adding testimonials to cmfdoors.com, implement LocalBusiness structured data with aggregateRating and review schema. This enables rich snippets in Google search results showing your star rating, which dramatically improves click-through rates. CMF's Squarespace platform supports custom code injection for adding JSON-LD schema to specific pages.

SECTION 07

## ROI Documentation Framework

How to document and present the financial impact of CMF Doors' products and services for commercial clients -- the most compelling proof point in B2B.

### Key ROI Metrics for Commercial Door Projects

ROI METRIC	HOW TO MEASURE	CMF-SPECIFIC EXAMPLE
Project Cost vs. Alternatives	Compare CMF quote to competing bids	"15% lower than the next-closest bid for 40 fire-rated doors"
Installation Timeline	Scheduled vs. actual completion dates	"Completed 3 days ahead of schedule on a 2-week install"
Inspection Pass Rate	First-time pass on fire/building inspection	"100% first-pass inspection rate across 85 openings"
Reduced Callbacks / Warranty Claims	Service call frequency post-installation	"Zero warranty callbacks in first 12 months"
Maintenance Cost Savings	Annual maintenance costs vs. previous contractor	"Annual door maintenance reduced by \$8K with CMF's service contract"
Turnaround on Custom Fabrication	Lead time for custom metal doors/frames	"Custom stainless frame delivered in 2 weeks vs. 8-week industry average"

### ROI Summary Card Template

**ROI SUMMARY: [PROJECT/BUILDING NAME] CASE STUDY**

<p><b>Project Scope:</b> [X] doors, [X] frames, hardware for [Building Type]</p> <p><b>Total Project Value:</b> \$[Amount] for supply + installation</p> <p><b>Cost vs. Alternatives:</b> \$[Amount] less than next-closest bid</p>	<p><b>Timeline:</b> Completed [on time / X days early]</p> <p><b>Inspection Results:</b> [X]% first-pass rate</p> <p><b>Annual Maintenance Savings:</b> \$[Amount] with CMF service contract</p>
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**ROI Documentation Best Practice**

Ask clients to share their previous door contractor invoices or maintenance costs as a baseline BEFORE starting the project. This "before" benchmark makes the "after" comparison dramatically more compelling. For ongoing service contracts (AAADM inspections, maintenance), offer to provide a quarterly cost/performance report as part of CMF's service -- clients love data, and it generates case study material automatically.

SECTION 08

# Annual Testimonial Calendar

A 12-month plan to systematically build CMF Doors' testimonial and case study library from zero to 10+ assets.

QUARTER	GOAL	ACTIVITIES
Q1	Foundation (3 written testimonials, 1 case study draft)	Identify top 5 satisfied clients across project types (GCs, building managers, facility operators). Have Norm, Andrew, and Rudy each request 1-2 testimonials from recent successful projects. Replace "Coming soon" testimonials page. Begin first case study interview. Set up review schema on Squarespace.
Q2	Video Launch (2 video testimonials, 1 published case study)	Film first video testimonial at a completed job site (smartphone is fine). Publish first written case study on website. Deploy testimonial quotes on 3 service pages. Post 2 testimonial graphics to Instagram and LinkedIn.
Q3	Expansion (3 testimonials, 2 case studies)	Target different client types (architect, property developer, healthcare facility). Create service-specific case studies (fire-rated doors, automatic doors). Request Google reviews from every completed project. Build case study PDF for bid packages.
Q4	Amplify (2 testimonials, 1 case study, annual summary)	Compile annual project highlights with aggregate client data. Update older testimonials if relationships have deepened. Create "year in review" content for LinkedIn. Prepare testimonial assets for DHI conNextions 2027 booth materials. Target: 25+ Google reviews by year-end.

## Year-End Targets

<p><b>10+</b></p> <p>WRITTEN TESTIMONIALS</p>	<p><b>4</b></p> <p>FULL CASE STUDIES</p>	<p><b>2-3</b></p> <p>VIDEO TESTIMONIALS</p>	<p><b>25+</b></p> <p>GOOGLE REVIEWS</p>
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### Who Should Own This at CMF Doors

Assign testimonial collection as a shared responsibility across the team. Project managers Andrew and Rudy are best positioned to request testimonials at project completion. Norm should handle architect and specifier relationships personally (his AHC credentials carry weight). Austin can request testimonials after successful AAADM inspections. Carol or Wendy can manage the tracking spreadsheet and follow-up schedule. Make it a standing item in weekly team meetings: "Any projects completed this week that deserve a testimonial request?"

### KEY TAKEAWAY

CMF Doors currently has zero testimonials on its website despite 40+ years of combined industry experience and a full-service team. This is the single highest-ROI marketing gap to

close. A single well-crafted case study showing on-time delivery, first-pass inspections, and competitive pricing can influence dozens of bid decisions. Start with your most loyal contractors and building managers, document specific project results, and systematically build your proof library. Aim for representation across client types (GCs, property managers, architects, facility operators) and service lines (fire-rated doors, automatic doors, custom fabrication, locksmith, AAADM inspections).