

CASE STUDY & TESTIMONIAL RELEASE FORM

This form is provided by Clientish as a free, editable starting point. Get it signed before publishing a client's name, logo, quote, or results. This template is not legal advice; have it reviewed by a qualified lawyer for your jurisdiction before you rely on it.

This Release is granted on [Date] by:

Client: [Client legal name], represented by [Name, title] ("the Client")

To: [Your agency legal name] ("the Agency")

1. Grant of Permission

The Client grants the Agency permission to use the following material in the Agency's marketing:

Done	Material	Included?
☐	Client name	[Yes / No]
☐	Client logo	[Yes / No]
☐	Written quote / testimonial	[Yes / No]
☐	Project results and data	[Yes / No]
☐	Screenshots / images	[Yes / No]
☐	Video / audio testimonial	[Yes / No]
☐	Representative's name and title	[Yes / No]

The permission extends only to the material marked "Yes" above.

2. Scope of Use

The Agency may use the material in the following channels and contexts:

Done	Channel	Permitted?
☐	Agency website / case study page	[Yes / No]
☐	Social media	[Yes / No]
☐	Proposals and pitch decks	[Yes / No]
☐	Paid advertising	[Yes / No]
☐	Printed materials / brochures	[Yes / No]

[]	Email and newsletters	[Yes / No]
[]	[Other]	[Yes / No]

3. Review and Approval

Item	Detail
The Client has the right to review the material before first publication	[Yes / No]
Review turnaround	[e.g. 5 business days]
If no response within the review window	[treated as approved / not published]

4. Term and Revocation

Item	Detail
This permission is effective from	[Date]
Permission lasts until	[e.g. 3 years / until revoked]
The Client may revoke permission by	[written notice to (email)]
On receiving a revocation request, the Agency will	[remove the material from its controlled channels within (e.g.) 30 days]

5. Compensation

Is any payment or consideration given for this release?	[No / Yes — describe]
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If any consideration is given, it is disclosed above, since an undisclosed paid endorsement may breach advertising rules.

6. Accuracy

The Client confirms that the statements, quotes, and results covered by this Release are true and reflect the Client's genuine experience of working with the Agency.

7. General

- The Agency will use the material in a manner consistent with this Release and will not alter a quote so as to change its meaning.
- This Release is governed by the laws of **[jurisdiction]**.
- This is the entire agreement between the parties on this subject.

8. Signature

By signing, the Client grants the permission set out above.

Client	Agency
Signature: _____	Signature: _____
Name: []	Name: []
Title: []	Title: []
Date: _____	Date: _____

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