# Building a Feedback Machine

## How to Create (and Maintain) a Customer Feedback Process for the Whole Team



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# Introduction

Customer feedback is a driving force behind every product's development; we can use it to make decisions about how we build our products, validate ideas, prioritize roadmap initiatives, and we can even leverage it as a source of ideas when searching for new opportunities to innovate.

However, there's often an unfortunate disconnect between what we know we can do with feedback and how we actually use it. Many product managers only talk to a small group of people to get the data they need to make product decisions. And that small group of people often fails to represent the folks who matter most, the customers themselves.

We surveyed 300 product managers and found a shocking trend across companies both large and small: executives and sales teams dominate influence over strategic product decisions and product roadmap initiatives, even though product managers consistently ranked those two groups as the least valuable sources of product feedback.

Meanwhile, input from actual users and customer support is vastly underrepresented in the decision making process, yet PMs say feedback from those two groups is higher-quality and more trustworthy than input from executives and the sales team.

80% of product managers feel that feedback from customer-facing teams is important, yet only 14% of them have an effective process for getting feedback from sales and support.

The same survey highlighted another surprising trend: while there's a huge desire to incorporate more feedback from users and customer-facing teams into product decisions, the majority of product managers don't have a functional feedback communication process in place.

Relevant, actionable feedback can be worth its weight in gold, (figuratively, of course) but only if you have the structure to gather it. Unfortunately, as our survey found, gathering quality feedback from internal teams is a challenge for even the most experienced product managers at organizations of all stages and sizes.

# What to Expect

This **INTERMEDIATE-LEVEL** guide contains several solutions for product managers struggling to establish an effective, scalable process for collecting, organizing, and communicating quality feedback from customer-facing teams within their organization. It's packed with best practices and actionable advice for defeating the most common challenges organizations encounter while trying to establish an internal feedback system.

# Contents

# 01

# Bridging the Gap

Getting Internal Alignment
with Product Strategy

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One of the first challenges you must tackle when establishing a feedback process is the internal communication gap that often exists between product and customer teams. The disconnect between these groups can be a major source of frustration for both sides: customer teams feel out of the loop and that they have no say in product direction, product gets overloaded with feedback that's not always in line with the product areas they're focused on during a

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"Without any process in place, customer support representatives can feel like they are sending customer feedback and thoughts out into the ether. No team in a company should feel as though their opinions or suggestions are going unheard or, worse yet, are not taken seriously. By implementing a process for suggestions and feedback, Product enables itself to reap the benefits of a bounty of perspectives across the company, and also ensures that the feedback will keep coming. Without that, people can become disheartened or frustrated with the lack of process and stop contributing altogether."



**MERCER SMITH-LOOPER**

Customer Experience Connoisseur

Integrations Manager at Campaign Monitor

given time frame. Fortunately, a little bit of effort can go a long way when it comes to bridging this gap.

Before you can effectively execute any feedback strategy, you must get everyone across your organization (not just stakeholders and product) on the same page and moving in the same direction toward the same goals. You need to get internal buy-in on product strategy so folks will understand the rationale behind your product decisions. This way, they will be better prepared to help you make those decisions by bringing you relevant and current feedback at all times.

There's several ways you can attempt to improve alignment, although every company goes about it differently. However, at the most basic level, alignment starts with better communication. With this in mind, there are two things you need to establish to improve communication across your organization: goals and priorities.

## COMMUNICATING GOALS

It's pretty hard to get somewhere if you don't know where you're going, which is why you must establish where it is that you're headed in the long-term. Start by communicating with the entire organization about high-level goals by directing their attention to your organization's long-term objectives and decision-drivers such as company values, mission, and product vision. These goals should serve as road signs, green arrows pointing everyone in the right direction, keeping each member of your team on track to reach the same shared destination.

Your high-level goals will form a foundational understanding that you can then build on by sharing shorter term objectives such as quarterly Objectives & Key Results (OKRs) that apply across your organization or through regular discussions about features and other initiatives that are in-progress.

It's extremely helpful to ensure that your long term product vision is clear to everyone as a means of maintaining focus. If you're a web design company and your vision is to be the go-to website design

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firm for non-profit environmental organizations, you're most likely not going to start offering specialized services for plumbers as that doesn't align with your vision. Sharing and discussing your vision and overall product strategy will help set everyone's expectations about where you're going and better situate folks to make smart calls on what feedback will be most valuable to you.

## COMMUNICATING PRIORITIES

Once everyone knows where your product and organization is headed, you'll want to share your plans for getting there. Many product teams find sharing an internal-facing product roadmap with the entire organization a great way to provide transparency, display priorities front and center, and show off achievements while keeping requests that don't align with current strategic priorities and objectives at bay.

What's most important is that you're keeping customer teams informed about what your product team is working on and the goals of each initiative. This way, they can share relevant feedback with you that aligns with these goals rather than guessing at what feedback

"One of the most beneficial things that I have found Product teams able to do is make their timeline transparent. By letting everyone in the company see what you are doing, you definitely open yourself up for more questions about reasoning behind your choices, which can be really frustrating. With that in mind, though, you also open yourself up for more discussions about how you might be able to do things better. So, the first step in building a feedback communication and sharing process that works for support and other internal teams would be to just open up your timeline so that everyone is able to access it."



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matters, or worse, only share self-serving feedback. (After all, every team has it's own initiatives and goals: sales wants to close more deals, engineering wants to prevent technical debt, and marketing wants shiny new features to promote.)

"Tell us what you want. If you're thinking (even casually) about a change or new feature, drop us a line and let us know it's on your mind. This means we can keep an eye out for customers that feel strongly about that use case, and start tagging conversations to generate helpful data. If we don't know the direction the product is heading in, it's difficult to contribute."

**SARAH CHAMBERS**

Head of Customer Support at Kavako

## CONTINUE THE CONVERSATION

Merely communicating goals and priorities is just the first part of getting internal alignment on product direction. Once everyone is moving in the same direction, you'll want to keep that momentum going by providing timely updates so no one feels out of touch with the product.

To be truly effective, the conversation must be a continuous one. Ensure there's frequent conversation across your organization about product strategy, goals, and progress toward them. Help your teams help you by sharing regular updates about what you're working on with everyone across your organization. That way, they always know where your priorities are and where cycles are being spent, and can therefore provide you with the most relevant feedback.

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# 02

## Gathering Feedback

Picking a Scalable Communication Method

# Gathering Feedback

## Picking a Scalable Communication Method

If you ever played a game of telephone as a kid (or as an adult), you know all too well what tends to happen when a message is passed verbally through a chain of several people: it either gets shortened and simplified, gets garbled into complete nonsense, or morphs into something completely different (and oftentimes, that "something" is a fart joke). Now think of that in the context of customer feedback: when a customer tells a support agent, "I'm using your

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TWEET
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# Don't turn customer feedback into a game of telephone

product to do...and am frustrated because I'd like the option to customize graphs in the app, because..." the last thing you want is that request to have a chance to morph into something like "your graphs look like crap" by the time it reaches you.

In an ideal world, you'd get this feedback straight from the horse's mouth, but spending your days interviewing customers (or horses, for that matter) is neither practical nor scalable. Giving your customer-facing teams an easy-to-use system for sharing customer feedback with you as directly as possible is the next best thing. Take it a step further and ensure that your process gives you the feedback in a format that's easy for you to organize, utilize, and maintain, and you've got yourself a feedback machine!

"How can I build my own fancy feedback machine?" you ask. Well this is a question that should be directed at yourself and the customer teams within your organization because every company is slightly different. Your process will take some time to get just right,

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but through trial and error you can get there in time. Here are a few considerations to make as you begin establishing a feedback system:

### LEAVING FEEDBACK SHOULD BE CONVENIENT

First and foremost, you need to adopt a system that functions well for everyone, not just your own team. Don't make folks jump through hoops to share feedback with you. Revisiting the telephone analogy, it truly is in your best interest to find the most direct option possible because you want to keep the distance between users and yourself to a minimum while also asking for as little effort possible from customer teams.

"When it comes to developing systems and processes for managing product feedback from internal teams, product managers often adopt the wrong attitude. We act like we work in the payroll department. We think, because the contributors are colleagues, and because they have a vested interest in providing feedback, they can be made to adapt to our collection methods That is to say, we can make them log into our systems, fill out our forms, and provide all the details we decide is necessary. This is a sure way to discourage participation."



**MIKE SAVORY**

Manager of Product Management at Sage

## FEEDBACK SHOULD BE CONSTANT

If you want quality feedback to keep flowing, you must keep the dialogue with customer teams going. Feedback should be an ongoing priority, not just a task that's waiting to be checked off your to-do list. Be sure you're establishing a feedback process that runs on a continuum rather than turning feedback collection into an event. If you want to have teams share feedback reports or hold meetings to discuss feedback, you should also ensure that those aren't the only times and places where folks can bring you feedback.

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"Product managers need to be consistently proactive in asking for feedback. If you simply sit back and wait for colleagues to fill out your feedback form, I can almost guarantee your participation will be limited to a vocal but small minority. When you spend time with Sales & Support and listen to customer calls with them, you can discuss customer feedback in the right context and with all the important details. You'll also hear issues and opportunities arise that your colleagues may not have recognized, but for which they can provide color commentary."

**MIKE SAVORY**

Manager of Product Management at Sage

## FEEDBACK SYSTEMS MUST BE SCALABLE

It's imperative that the system you go with is both easy-to-use (read: practical) on your end, and easy-to-scale. Don't waste your time implementing a system or process that your team will outgrow in 6 months. Spend a little extra time up front to find a solution that can grow with you.

At one point or another, you've likely had someone from support, sales, or marketing stop by your desk to share a piece of feedback or mention a feature request in passing. Obviously this is neither a practical or scalable option because: A. the time you're reasonably able to allocate to these sporadic in-person feedback sharing sessions is limited and B. unless your memory is exceptionally great, the information you get out of an in-person conversation will fade away over time, making it difficult to act on the feedback later.

As a general rule, written feedback is much easier to manage than feedback shared verbally, but in some instances you'll need to continue the dialogue with the colleague or customer who shared it with you. Be sure whatever process you go with allows you to easily reach

the original source of feedback so that you can follow up with more questions, involve them in beta testing (if the source is a customer), or even close the loop with them about any decisions made based on the feedback.

## CAPTURE BOTH QUALITATIVE AND QUANTITATIVE DATA

You need to ensure that you adopt a process that allows you to capture and store both qualitative feedback and any accompanying quantitative data that's shared with you without having to do a ton of extra work. Also, you'll thank yourself later if your system makes it easy for you to organize the feedback you receive in a manner that is easy for you revisit and use to make decisions without having to spend a lot of time searching.

## KEEP ALL YOUR FEEDBACK IN ONE PLACE

Spreadsheets are fantastic for organizing and analyzing data, but oftentimes product managers find themselves drowning in them. If you decide to organize your feedback in a spreadsheet, it's wise to have a single document for all of it because managing feedback

"It's best to keep all your feedback — from customers, partners, and colleagues — in one place. This is how you'll get your customers to validate what your colleagues are telling you. It's also a good internal PR move, because your colleagues can see their ideas have been heard and what priority customers place on them."



**MIKE SAVORY**

Manager of Product Management at Sage

that spans over several spreadsheets can be a major pain when it comes time to actually analyze the feedback.

If you find that you can no longer reasonably keep all your feedback in one easy-to-manage spreadsheet, it may be time to invest some resources into creating an internal database, or better yet, get a specialized tool for feedback.

# Communication Channels for Indirect Feedback

With those considerations in mind, you can start thinking specifics. How do you want your team to share feedback with you? Many product teams rely on a combination of several communication channels, while others find it better to pick one and stick with it--you'll have to make the call on what will work best at your organization. Here's a few common feedback communication channels and a brief look at the pros and cons of each to get you thinking:

## Email & Chat

Have your team share feedback with you via email and use labels or folders to stay organized, or if your organization uses a chat platform internally, create a room specifically for feedback.

**+ PROS:** Convenient for customer teams to use, feedback can be shared virtually anytime, PM can search feedback later.

**+ CONS:** Neither option scales well for the product manager. Chat and email can be distracting, don't aggregate data or provide analytics, and require extra manual work to extract the feedback.
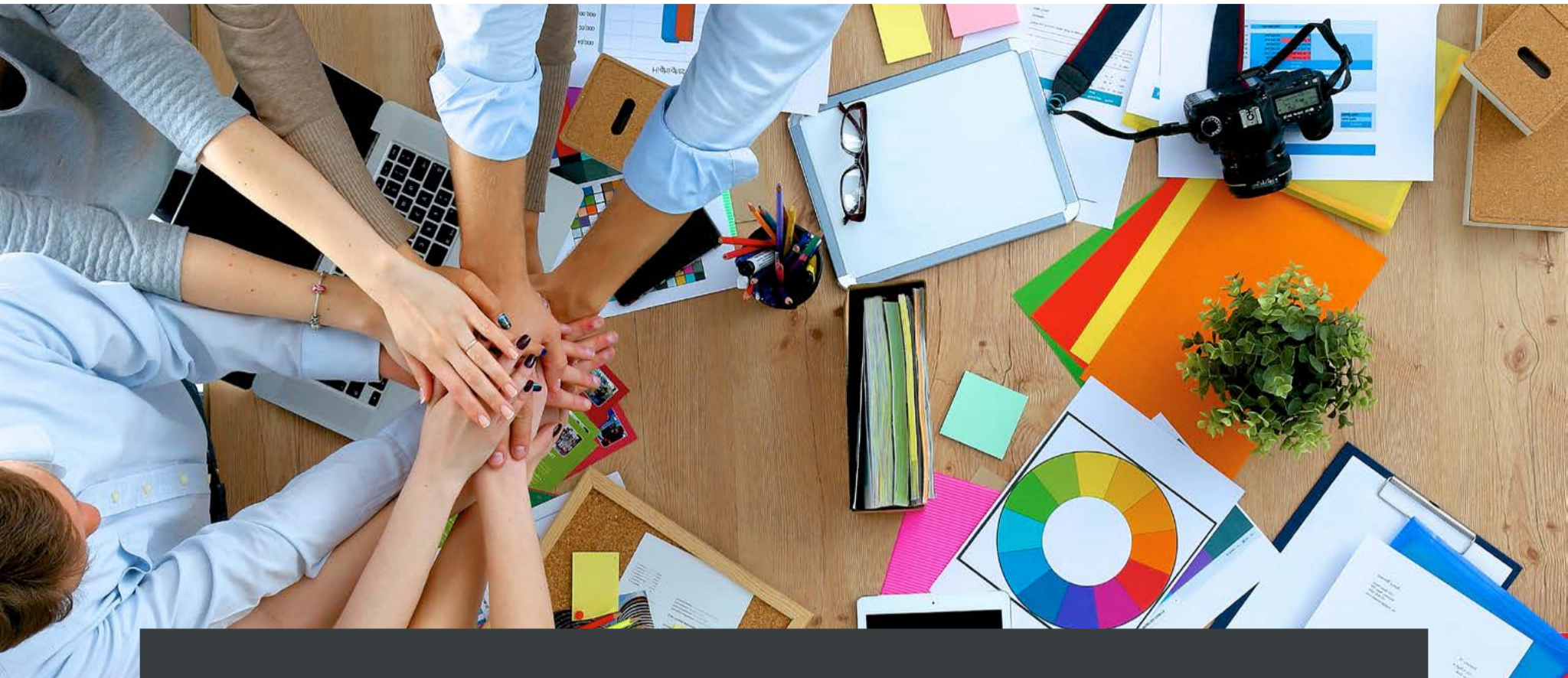
# Team Meetings

Hold bi-monthly or monthly feedback meetings with customer teams to let folks share and discuss what they've been hearing.

**+ PROS:** Also presents an opportunity to provide product updates and share what's up next on the product roadmap.  Allows you to ask follow up questions and clarify feedback.

**+ CONS:** Getting everyone in the same room at the same time can be tricky and possibly somewhat inconvenient, and could lead to a situation similar to a game of telephone if customer teams have to hold onto feedback for a month before relaying it.

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# Feedback Reports

In lieu of (or in addition to) facillitating a feedback meeting, have every team generate a customer feedback report every two weeks or so and share it with your team.

**+ PROS:** Could be useful for the PM, could contain both qualitative and quantitative data.

**+ CONS:** May be inconvenient and/or time consuming for customer teams to produce. Does not look at long-term feedback trends.

# Collaborative Spreadsheets

Ask customer-facing teams to enter feedback directly into a spreadsheet within Google Sheets or a similar tool.

**+ PROS:** Customer teams can share feedback at any time. Good for gathering and storing both qualitative and quantitative feedback.

**+ CONS:** May be inconvenient for customer teams to use, which could result in them sharing less feedback. Also, it's hard for customer teams to know whether the product team is reading the feedback they've shared.

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# Feedback Collection Platforms

Take advantage of software tools designed to collect user feedback and route it to the correct party.

**+ PROS:** Most existing options are highly scalable and can aggregate both qualitative and quantitative data from every feedback source in one place, making it easy for PMs to access and use to make decisions.

**+ CONS:** Cost may be a con if your budget is tight. Customer teams may require a bit of training to help them understand how the system works.

Psst...feedback collection is our specialty here at UserVoice.

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# 03

# Feedback Context

Filling in the Blanks with Data

# Adding Context

## Filling in the Blanks with Data

When product vision, long-term goals, and short-term objectives are well known across your organization, people will know where your priorities are and, in turn, be able to share the most relevant feedback with you. The next step is getting context. Without context, a piece of customer feedback is just a soundbite: a string of words and maybe a few emotions that tell part of a story. It can be difficult to make informed decisions without the full story because, as the old adage goes, the devil is in the details. In this case, the details are data.

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**TWEET THIS**

# Context is key when interpreting customer feedback

It's often easier for sales teams to influence product decisions than it is for support teams because the words "I just lost a huge deal because…" tend to resonate with us more than, "I just spoke to a customer who is unhappy because...:" This is especially true when feedback from sales is accompanied by a large dollar amount, as it gives the feedback a numerical value which can then be used to weigh a decision.

Is it right to give feedback from the sales team priority over feedback from support? Not necessarily, but without a means to quantitatively measure the significance of a request, it can be difficult to make a fair call on how important it is.

Without data backing it, feedback from support often gets lost, but the good news is you can save it. Support's job is to make (and keep) customers happy; when they come to you with feedback, they're doing so as advocates for their customers. Support wants to influence the product roadmap, so for best results, help them help you, (and in turn help your customers).

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## DOES THIS SOUND FAMILIAR?

"I could have closed that $250K deal if only we had shiny feature X!"

Chances are, if you tell customer-facing teams exactly what underlying data you need to know about a customer requests in order to make the most out of it, the majority will have no problem obliging. Help your team think beyond qualitative requests, such as, "Customers are asking for feature X" by explaining what pieces of customer data you consider when prioritizing your product roadmap or making other product decisions.

## Customer Data You May Incorporate into Product Decisions

+ How long they've been a customer
+ How much they spend (i.e. monthly reocurring revenue (MRR), annual contract value (ACV) etc.)
+ Account plan/level or account type
+ Happiness metrics such as Net Promoter Score (NPS)
+ Industry
+ Use case
+ P.S. Don't forget to consider the volume, frequency and intent of feedback

Your feedback "recipe" can be spelled out in training materials, or you can ensure your team sticks to the format by having folks submit feedback by filling out a form that contains fields for each bit of data you need. Or, you can hold brief internal webinars or casual lunch-and-learn sessions where you explain how you make product decisions and highlight the data you use to bring more meaningful context around how you use feedback.

The bottom line is this: if you can get support and other customer-facing teams into the habit of bringing you the full story via "quantified qualitative feedback" -- customer feedback that's tied to the metrics you use while making product decisions -- you're already improving your feedback process. Suddenly, "Customers are asking for feature X" turns into "20 of our most unhappy long-term customers who collectively spend a total of $200k a month on our product are asking for feature X." Now that's more like it.

# Conclusion

**C**ustomer feedback is a guiding force behind smart product development decisions. But without a system to collect, manage, and use customer feedback, many product managers struggle to get the right feedback from the right folks. Fortunately, if you follow the process we've outlined in this eBook, you should be able to turn your team into a first-class customer feedback machine in no time.

## Now, Let's Review...

Here's what to keep in mind as you create a customer feedback process within your organization:

### IMPROVE TEAM COMMUNICATION

Discuss goals and priorities with your team frequently so everyone is on the same page.

### ESTABLISH A SCALABLE FEEDBACK PROCESS

Make it easy to gather feedback from multiple sources without losing data to a game of "telephone." Make feedback easy and constant from your customers.

### GATHER THE RIGHT FEEDBACK

Know the difference between quantitative and qualitative feedback and learn how to gather both (and where to use the information).

### PICK THE RIGHT FEEDBACK COMMUNICATION CHANNEL(S)

There are several ways to gather feedback from your team. Master any or all of them:

- Email and chat - collect feedback directly through personal messages.
- Team meetings - sit down monthly or bi-monthly to have face-to-face conversations.
- Feedback reports - collect customer feedback reports from each team individually.

- Collaborative spreadsheets - customer-facing teams enter feedback into a spreadsheet.
- Feedback collection platforms - designated software to collect and organize feedback.

## GIVE YOUR FEEDBACK CONTEXT

You have the data; now what does it all mean? Put the information to use and make sure it's implemented into your next product development cycle.

## NOT ALL CUSTOMERS ARE CREATED EQUAL

Use the factors above to determine the weight of your customer feedback, including how long they've been a customer, Net Promoter Score, etc.

If you follow each step of this guide, ensure your entire company is on board, and stay true to the process, your new, shiny feedback machine will be a long-lasting, self-sufficient tool that improves your product development process for years to come.

# Collect, Manage, and Quantify Customer Feedback at Scale

+ Reach engaged users for more relevant product feedback

+ Gain insights from beyond just the vocal minority

+ Easily communicate with users who requested a product feature and prove their input isn't disappearing into a black hole.

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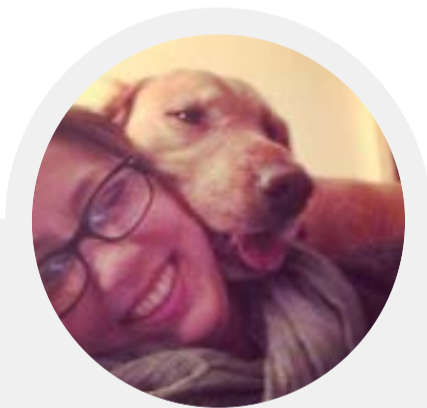
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