

PRODUCT & DEVELOPMENT · TEMPLATE

Feedback Intake & Triage Template

A working template defining who logs product feedback from sales and CS, how it's tagged, and how often it's reviewed and by whom.

How to use this: Fill in the intake rules and tagging system first, then use the log and review sections on an ongoing basis to route real feedback into product decisions.

Intake Rules

Define exactly where feedback goes and whose job it is to log it, tied to an existing habit rather than a new one.

Single system of record for feedback (tool/doc/sheet):

Who logs feedback from sales calls, and when (e.g. end of call, in CRM notes field):

Who logs feedback from support/CS interactions, and when:

Maximum time it should take to log one item:

Tagging System

Apply these tags consistently to every logged item so the log stays usable at volume.

Tag category	Options	Example
Type	Bug / Feature request / Usability friction / Competitive gap / Pricing objection	Feature request
Source	Prospect / Customer / Churned customer / Internal	Customer
Segment	Small / Mid-market / Enterprise (or your own tiers)	Mid-market
Severity or frequency	One-off / Recurring / Deal-blocking	Recurring

Feedback Log

Each new item gets a row. Keep entries short, as detail can live in a linked call note or ticket.

Date	Logged by	Summary	Type	Source / Segment	Severity / Frequency	Status

Review Cadence and Attendees

Review frequency (e.g. every 2 weeks, every 4 weeks):

Attendee from product:

Attendee from sales:

Attendee from CS/support:

Who facilitates and keeps notes:

Review Meeting Checklist

- ☐ Pull all new items logged since the last review
- ☐ Group items into recurring patterns versus one-off mentions
- ☐ Flag any deal-blocking or churn-risk items for immediate discussion
- ☐ Decide an outcome for each pattern: roadmap candidate, quick fix, documented workaround, or no action
- ☐ Assign an owner to communicate each outcome back to whoever originally logged it
- ☐ Update status on all reviewed items in the feedback log

Closing the Loop

Track that outcomes are actually being communicated back, not just decided internally.

Feedback pattern	Decision	Owner	Communicated back to source? (Y / N + date)