

Customer Feedback Intake Process

INTERNAL — Helix Engineering / CS Operations

OVERVIEW

Customer feedback drives product roadmap. CSMs are the primary intake channel and are responsible for capturing, categorizing, and routing feedback.

FORMS OF FEEDBACK

(1) Feature requests. (2) Bug reports (route to support, not feedback). (3) UX complaints. (4) Pricing or packaging feedback. (5) Sales process feedback. (6) Strategic feedback (positioning, competitive).

INTAKE METHODS

(1) During calls — capture in CRM in real time. (2) Async via Slack #feedback channel. (3) NPS surveys. (4) Post-incident retrospectives.

REQUIRED FIELDS

Customer name. Date received. Verbatim quote (when possible). Categorization. CSM's interpretation of the underlying need. Estimated impact (small/medium/large) on the customer's ability to get value.

ROUTING

Feature requests → product management triage queue. Bug reports → engineering issue tracker. UX complaints → design team. Pricing feedback → revenue strategy team. Strategic feedback → CS leadership for executive review.

FOLLOWING UP WITH CUSTOMERS

Acknowledge receipt of feedback within 48 hours. If the request goes on the roadmap, communicate the timeline. If it doesn't, communicate why (politely) and offer alternatives.

AGGREGATING THEMES

Individual feedback is noisy. Quarterly, the CS team reviews all feedback for emerging themes. Themes with >5 customer mentions and >\$100K aggregate ARR are surfaced to product leadership.