3 Keys to Effectively Using Customer Forums for Product Enhancement Ideas

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Online customer forums are a good way for product managers to collect new product ideas and validate the business needs at volume, but they are not without their difficulties. Product managers must look to maximize the effectiveness of these tools as part of their voice-of-the-customer program.

Overview

Key Challenges

- Product managers require customer feedback and input to make better informed decisions, but they can easily get swamped due to the volume of data.

- Customers/end users who are using a product in day-to-day life are ideally suited to suggest enhancements and new functionality; however, if the customer’s suggestion is not responded to, customer frustration increases.

- Resource constraints prevent product managers from interacting directly with as many customers as they would ideally like when looking to capture the “voice of the customer” for product planning.

Recommendations

As part of product planning, product managers looking to use online feedback management tools as a component of their voice-of-the-customer program should:

- Create structured templates and a taxonomy that both enable customers and internal stakeholders to categorize ideas and feedback into predefined groupings, thus facilitating the ease of analysis.
Introduction

At first glance, online forums and idea boards to manage feedback appear to be ideal ways for product managers to solicit feedback at volume and crowdsource ideas from their customers. As part of the product manager's overall voice-of-the-customer program, this data can provide invaluable insight into what customers want and expect from products, and thus make the product organization more customer-centric. However, if the system and processes to collect feedback are not properly set up and managed efficiently, then that value can be quickly negated.

Collecting actionable, quality feedback at scale is a particular issue. Asking for feedback can easily create an influx of data that rapidly becomes a full-time job to manage and delivers little value. Subsequent slow response times and a lack of progress also lead to customer dissatisfaction and reduction in engagement levels.

This may explain why, when completing Gartner's Product Management Score self-assessment tool, only 25% of the more than 350 responders indicated that they have such a tool in place. However, by not having a feedback management tool, they are missing an excellent opportunity to capture valuable feedback from those using their products.

Product managers are faced with the dichotomy of needing to cast a wide net to capture meaningful insight, while avoiding the risk of data overload. Before implementing a feedback management tool and process, as shown in Figure 1, and opening the floodgates, they must consider how they capture the data, how to manage expectations and how they will use the data.

This document advises product managers on how they can best leverage online tools to capture both customer feedback, new ideas or both, as part of their voice-of-the-customer program.

- Establish guidelines to set customer expectations by creating a feedback policy that specifies how feedback is used and processed.
- Drive ongoing customer engagement by providing regular status updates on submissions via a feedback management portal.
Figure 1: Crowdsourcing New Ideas using a Feedback Management Tool

**Analysis**

Reduce the Complexity When Processing the Captured Data by Creating Templates and Categories Within a Single Repository

To make its feedback process systematic, the product management team requires a purpose-built tool to run the process. Such a tool can be developed in-house, although it is often better to purchase one from a third-party vendor. There are vendors that specialize in feedback management, such as UserVoice and Canny. There are also product management suites from the likes of Aha! and Pendo that offer similar capabilities, but as part of a wider product rather than as a stand-alone product. Companies that have fairly large product portfolios and are aiming to manage feedback at a large scale should look to deploy an off-the-shelf solution.

Regardless of whether the organization decides to implement a commercially available feedback management product or to create its own solution, the setup and configuration are critically important. When setting up an idea board or feedback forum within a feedback management portal, product managers should determine how they would segment and analyze the submitted feedback and ideas they receive before they ask for it.
At the top level, they will want to know if the customer is providing feedback on the existing product or posting a new idea. They will also want to be able to quickly categorize the submission in terms of whether it relates to the product in general or a particular key module or functionality. Creating structured templates (see Figure 2) and categories that customers will use to raise their ideas or give feedback is a simple but effective way to achieve this. Such templates should be short and simple to use.

**Figure 2: Example New Idea Template**

### Example Online Customer Feedback Submission Form

<table>
<thead>
<tr>
<th>How can we make our product better?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select</td>
</tr>
<tr>
<td>☐ Provide product feedback</td>
</tr>
<tr>
<td>☐ Raise a new idea</td>
</tr>
<tr>
<td>Please describe your idea or feedback in one sentence</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Please select appropriate category</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Improve or add integration</td>
</tr>
<tr>
<td>☐ Improve or add analytics</td>
</tr>
<tr>
<td>☐ Improve usability</td>
</tr>
<tr>
<td>☐ New functionality</td>
</tr>
<tr>
<td>☐ Any other</td>
</tr>
<tr>
<td>Please provide further details (please specify why is the new idea needed and who might need it)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>For new ideas, how quickly is this required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Within a month</td>
</tr>
<tr>
<td>☐ Next quarter</td>
</tr>
<tr>
<td>☐ Three to six months</td>
</tr>
<tr>
<td>☐ Seven to 12 months</td>
</tr>
<tr>
<td>☐ No urgency</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Impact on your business</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Minor</td>
</tr>
<tr>
<td>☐ Medium</td>
</tr>
<tr>
<td>☐ Major</td>
</tr>
</tbody>
</table>

| Your Email Address                          |

| Post Idea |

Source: Gartner

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Product managers should not look to implement a feedback management portal in isolation. The information captured by these tools is also of great importance to other internal stakeholders, such as the customer success and customer experience (CX) teams. As well as capturing product-specific information, the portal can be used to capture additional customer satisfaction data. For example, a number of the feedback management implementations that we have reviewed during this research also take the opportunity to pose customer satisfaction/CX survey questions while they have the submitter’s attention. Many of these ask customers to complete Net-Promoter-Score-style “1 to 10” surveys either as part of the submission or as a secondary option, therefore increasing interaction with the customer. Capturing such feedback and data should be considered, however, before implementing such measures. Product managers should first validate the approach with the cross-organizational CX team or those responsible for CX strategy if such a team doesn’t exist (see “Use Customer Satisfaction Measurements, Including NPS, to Drive Product Management Action”).

There is, of course, the risk that customers end up simply tagging all of their ideas as having a major impact on their business and requiring a very quick turnaround: “Everything is important, and it is needed immediately.” To avoid this situation, product managers should look to implement a mechanism that allows customers to rank their own submissions in order of priority. This priority should then be factored into the weighting applied to the idea when analyzed.

**Reduce Duplication by Allowing Customer to View and Support Existing Ideas**

The fear of receiving multiple variations of the same idea or feedback was a concern to many of the product managers interviewed for this research. To address this concern, together with helping to structure and consolidate the data, product managers should give customers the option to review existing ideas and add their support to it. In an attempt to avoid duplications, many commercially available tools have the ability, much like autocomplete on a Google search, to suggest existing submissions when the customer is typing in the description of their idea or feedback. If a suitable match exists, customers should be able to add their own requirements or needs to the existing entry if required, or simply register that they too support this submission by “voting” for it.

**Consolidate All Customer Feedback Into a Single Repository**
Customer feedback and new ideas will come from many different sources and directions. For example, the sales organization will capture information and ideas from customers during the sales process and ongoing account reviews with the CRM systems. Similarly, the service and support organizations will also be capturing such information and capturing it in their own systems. Collecting all feedback in a single repository is important, as it ensures all stakeholders have a holistic view of customer feedback and ideas, rather than a skewed view as a result of their limited exposure.

Where integration exists between the sales and support/service systems with the customer feedback/new idea tool, product managers should look to ingest this data into the common feedback system. If no such integration exists, sales and support/service resources should be encouraged to submit this data via the customer-facing tool and tag where the information came from (i.e., new idea from account review or input by account lead). This includes feedback from prospects during the sales cycle. Furthermore, sales and support/services should encourage customers to use the online feedback management tool by promoting how customers not only can input feedback, but also can track new ideas through it. They can also use the output from the tool to support future customer interactions, as it enables them to see what is important to their customers and provide feedback on how the feedback is addressed.

By linking categories and the appropriate account information, product managers analyze the look for new ideas as part of their consolidated voice-of-the-customer program. Given the potentially huge volumes of ideas and feedback that may be received, especially with high-volume products in both the B2B and B2C markets, detailed human analysis is not always practical. Product managers should apply analytics to validate the data and deduplicate and look for trends and hot topics. They should also look to identify and consolidate repeated or very similar submissions for the same customer or organization in order to stop overly vocal parties from artificially inflating the prominence of their feedback. This is an area that the suppliers of their chosen toolset can assist with.

Importantly, product managers must not treat all of the feedback as equally valued: To increase the actionability of the customers’ submissions, product managers must be able to correlate the feedback to a customer account or sales prospect. Depending on how customers access the feedback tool, their contact and account details may be automatically attached by the tool to the submission. Alternatively, the submission template should include the customer's company name and the submitter's email address. When analyzing feedback and new ideas, product managers should look to include account details from their CRM systems, such as:

- Customer value (total spend with the provider organization)
Publish a Customer Feedback Policy and Guide to Solicit Support but Manage Expectations

Feedback management tools, particularly customer forums and idea boards, obviously require customer participation, and to be effective, it needs to be at volume. Microsoft, for example, receives many millions of new ideas and feedback via feedback management tools every month.

Many customers will expect that, because they took the time to submit something, their request will be reviewed and acted upon. However, wading through the volume of feedback and new ideas, and providing updates, is both time-consuming and costly. Furthermore, just because a customer has requested something, it does not automatically mean that the customer will get it, or even that the request will be evaluated in detail.

Product managers should actively encourage customer interaction by promoting the feedback management portal and the ability to raise new ideas via email or in application prompts, as well as via the sales and support team. However, they must look to manage customer expectations by publishing a feedback policy and guide that sets out how the feedback will be used and what customers can expect in terms of feedback and updates. The feedback policy should be a clear and concise overview of the process and establish guidelines with regard to when an idea will be reviewed by the product manager and how customers can track progress of their submissions.

For example Okta, provides a full overview of its ideas process, together with definitions of the idea statuses used. It also provides FAQs to address specific issues, such as why an idea hasn't been reviewed. It also establishes clear criteria with regard to the number of votes/points that an idea must get to trigger a guaranteed official product team review and response — but not necessarily approval. Statements such as these not only manage the expectations of the submitters, but also encourage them to review and vote on other ideas that they support in order to move them closer to that threshold. When customers vote for an idea on Okta’s portal, they also subscribe to receiving updates on how the idea is progressing.
The Microsoft Teams User Feedback Forum is another similar approach to drive engagement. Four steps are listed in terms of how to get a customer’s voice heard. The first of these is the vote on existing ideas, which again subscribes customers to receive updates about the idea, and the second is to submit new ideas, one suggestion per post. Effectively, this process forces customers to check that someone has already submitted the same idea and encourages them to vote for that, rather than entering the same idea again. However, it also states that duplicates will be merged if similar ideas do occur.

The approaches used by both Okta and Microsoft demonstrate a commitment to listening to their customers, as well as encouraging customers to enter into further interactions with their organizations. This approach also provides a feedback loop and communication channel between customers and product management, yet also sets the expectations that customers will not always get what they ask for or as quickly as they want. Providing this balance should be a key objective for product management looking to utilize such feedback management portals.

Increase Customer Engagement by Providing Regular and Timely Updates via the Feedback Management Tool

Having captured feedback and ideas from customers, product managers should maintain their side of the bargain by providing updates within the guidelines of the feedback policy. This is one of the areas where adopting one of the commercially available tools, rather than building something yourself, can be very useful. The majority of these products provide a customer dashboard or updates that enable the customer to track the progress of their own ideas, as well as track the progress of ideas they have voted on or are simply following. During our research, it was highlighted that, for many customers, the personal gratification that comes from the validation of their ideas and feedback provides additional benefits to the organization. This feedback from their peers encourages customers to both submit and regularly check into the tool, meaning that it can also be used as a communication channel for updates and upsell opportunities.

Product managers should include submissions that have reached the required threshold in terms of number of votes received, or where the topic is trending, in their product planning activities. These should be considered, along with ideas and requests generated by other means such as internal brainstorming. Where the submission is determined to be worth further consideration or rejected, the status of the submission should be updated on the feedback management portal accordingly. Ideally, such reviews should take place at least monthly or be aligned with the cadence employed by the product management team to assess new ideas for inclusion into the product roadmap.
The feedback given via the tool need not to be too detailed: Its purpose is simply to provide an update to the customer with regard to progress (for example, that the idea is under review, in development or scheduled for release). Similarly, if an idea is declined, then the feedback online may be as simple as “declined; does not align with current product strategy.” However, if the submitter is a key customer, the product manager should provide a more detailed response to the account team or directly explain the decision so as not to increase customer dissatisfaction.

Ideally, customers should be able to track an approved idea from submission through to release via the same portal/online site. Product managers should therefore look to integrate their feedback management portal with other customer-facing and internal product management tools, such as roadmapping and prioritization, as well as software engineering tools, such as backlog management, to facilitate this integration.

Finally, product managers should bear in mind that customer feedback should never be the only source of input for product prioritization: It should be one source among many. On its own, feedback can be a dead end for product evolution. Relying too extensively on customer perceptions and preferences may lead to a situation in which the product organization, to borrow the words of Henry Ford, finds itself building simply “faster horses” — at the expense of anything bold and novel. Customer feedback suits best for incremental evolution of products, but it is less useful for driving transformative, breakthrough innovation. That inherent limitation makes the integration of feedback management and the wider prioritization process, as well as the involved tools, especially important.

**Evidence**

The research for this document leverages:

- Vendor discussions
- Client interactions
- The Gartner Product Management Score Self-Assessment Tool benchmarking data

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