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The Feedback Cycle.

A play: when a customer tells us something about the software, the service or the support, Customer Success makes it actionable and answers with options — a short-term option now, a long-term solution on the roadmap, and a recommendation — until the customer agrees the options address their concerns. What it is, when to run one, how to hold the call, give the answer and close the loop, and the clock that keeps it honest. With the log.

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CONTROL

Silence is consent.

A customer who tells you what is wrong is still a customer; the one who stops telling you is leaving. Feedback left unanswered sends a clear message — that the way things are is acceptable. This play is the answer: every piece of feedback heard, made actionable, and answered with options, until the customer agrees.

VERSION	DATE	AUTHORITY	NOTES
1.1	November 2026	Juan Carlos González II	First public edition: four ways in and the survey branches; the Structured Call as the conversation; Evaluate → Analyze → Synthesize; the short-term option and the long-term solution; the detractor and passive scripts, the shipped, planned and not-planned answers, and the monthly round trip to Product written out (new in this edition); the 1-3-7 standard as the clock
1.0	2017 – 2020	Juan Carlos González II	Run as the Feedback Loop in 2017 and 2018 at a hospitality-software company in the Vista Equity portfolio — product feedback guided by Success to Product's roadmap, and survey responses that flagged detractors and neutrals for follow-up automatically; named the Feedback Cycle on the customer journey of a managed file transfer and network management software company in 2018; written into the partnership framework of a financial services software company in 2020

HOW TO USE THIS PLAY

Read pages 4–5 once, for what it is and when to run one. Pages 6–10 are the play in order: the call, the analysis, the answer, the clock, and the surveys. Page 11 is who does what at each touch tier and the round trip to Product; page 12 is how you know the play is working, and the checklist. Then open the log: one row for every piece of feedback, from the day it arrives to the day the loop is closed.

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WHAT A FEEDBACK CYCLE IS

Defined.

A Feedback Cycle is a tactical intervention for a customer who has told us something — about the software, the service or the support: Customer Success makes the feedback actionable, answers it with options, and holds the cycle open until the customer agrees the options address their concerns, and until anything promised for later is delivered and told back.

Three things in that sentence carry the weight. **Makes it actionable:** feedback rarely arrives consolidated. It comes as a score, a complaint in the middle of a call, five tickets about one thing; the first job is to turn it into a problem both sides can name. **Options:** not a partial answer and not a promise — a short-term option the customer can use now, a long-term solution on the roadmap or an honest no, and a recommendation. **Told back:** the cycle is not closed when the customer agrees; it is closed when what was promised for later has shipped and we have said so.

ON THE GRID

Tactical, reactive

Tactical, because the unit is a problem with an answer. Reactive, because the customer speaks first. The answer, though, is strategic in what it uncovers: the business problems our solutions are not yet addressing.

ON THE JOURNEY

Moment 22, milestone 08

On the Customer Journey it is moment 22 — "the customer signals feedback on software, service or support" to "the customer agrees the options delivered address their concerns" — touching milestone 08 of the Operating Model's twelve, feedback cycle. Success owns it; Support and Product are accountable; Services is consulted.

WHAT IT IS NOT

A ticket, or a thank-you

It is not a support case with a nicer subject line, and it is not the automatic thank-you a survey sends. Support resolves the case; the cycle answers the customer. The Voice of the Customer gathers the signal; this play responds to it.

THE ONE SENTENCE

"Feedback Cycles uncover business problems that our solutions are not addressing." Every cycle answers one customer. Together, they tell Product what to build next.

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WHAT A FEEDBACK CYCLE IS

When to run one.

Run one whenever a customer gives us feedback worth an answer — which is all of it. There are four ways in; the first is a signal we ask for, the other three arrive on their own.

WAY IN ONE

A survey answers

A detractor or a passive on the recommend survey, or a low rating after a support case. The score is the signal; the cycle is what it is about. Promoters take their own short branch — page 10.

WAY IN TWO

A request

The customer asks for something the product does not do. Whether it is new, already built, or already decided against, they get an answer, not a ticket number.

WAY IN THREE

Not what we expected

The customer says the service is not what they were promised or expected. The gap is the feedback: name it before anyone defends against it.

WAY IN FOUR

Said in passing

Unconsolidated, unactionable feedback in a call or an email — a frustration, a workaround they mention, a "by the way." Probe it with direct questions until it becomes a problem with a name.

WHEN THE TROUBLE IS REALLY…	RUN INSTEAD	WHY
Many problems at once, cases piling up	The Success Initiative	An operating problem with many parts needs a scope, a signature and a tracker, not one answer.
Use of the product weakening	The Adoption Workshop	A training and value problem; the feedback is the symptom.
A healthy customer asking where you are going	The Business Review	A roadmap conversation, strategic and proactive — on the calendar, not in response.
Legal action, or a lawyer named	Stop; refer to Finance	Every team ceases further communication — the journey's legal lane.

Feedback that changes nothing still deserves the cycle. The customer who is told "here is why not" stays; the one who hears nothing assumes we were not listening, and is usually right.

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THE PLAY

Open: the Structured Call.

Feedback is a difficult conversation more often than not, and my standard for every difficult conversation — "anything that's risky, vague," or emotionally charged — is a structured call. The call flow is the same every time; that is the point of it.

0
PREPARE

Before you dial: the account's recent cases, its health, what it bought and what it pays, and the feedback itself, read twice. Your goal is to arrive with a full picture of the account's current status.

1
SET THE STAGE

"The purpose of this call is to talk about what you told us. At the end of it, we'll agree on what happens next." Gain agreement. Then your role: "As your Success Manager, it's my role to make sure you're getting business results. It's my intention to get us on the same page and lead us to a good outcome."

2
PAST, THEN PRESENT

Recap the story so far, in facts, then ask: "Do you see things the same way?" Let them correct you — that is new feedback, and the best kind. Play it back: "What I hear you say is..." Then the present: "Because of that, the problem in front of us is this." Gain agreement.

3
FUTURE, AND RECAP

What do you need from us, and what can you do on your side? Close on the recap — "We agreed the problem is ___; I'll come back with the options by ___" — and send it by email the same day. The date you give is the clock's second step.

WHY IT IS STRUCTURED

Left unconfronted, a misunderstanding sends a clear message: the existing state is acceptable. Silence is consent. People see things differently, believe what they want to hear, and act on their own version of the facts. The structure deconstructs the vague into parts both sides can agree on — and fully documented, it shows the customer what is in bounds and lets them take ownership of their part.

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THE PLAY

Run: evaluate, analyze, synthesize.

The same three verbs every play on this shelf uses to work a problem. Their goal is the line from my 2018 lesson plan: get the ball back in the customer's court — a decision for them to make, with everything they need to make it.

Evaluate → **Analyze** → **Synthesize**

What is going on? — *What does it mean to them?* — *Options, and a recommendation*

Evaluate: unearth the root issue. Probe unconsolidated feedback with direct questions until you have a short list — pain points, challenges, opportunities, risks — and name the one this cycle answers. Five tickets are often one cause. **Analyze:** in the customer's terms — what it costs them in hours, revenue, or their own customers' patience. **Synthesize:** the answer always has two halves and a recommendation.

NOW

The short-term option

What the customer can do this week: a workaround, a setting, a process change, a credit where one is owed. Never skip it because the real fix is coming; the customer lives in the meantime.

LATER

The long-term solution

What the product or the service will do about it, with its honest status: shipped, planned, or not planned. Page 8 has the answer for each.

OURS

The recommendation

"Here are some options, but here's what we recommend you do, and why." Options give the customer control; a recommendation gives them a reason to choose.

WHAT THEY SAID	THE PROBLEM, CONSOLIDATED	SHORT-TERM OPTION	LONG-TERM SOLUTION
"Your reports are useless at month-end."	The month-end export times out above a year of data	Export by quarter; a saved view set up on the call	Planned: background exports, next quarter
A 4 on the survey, no comment	Three support cases in a month, each closed without a call	A named support contact for ninety days	Not planned in product; a service change instead
"Can it text our customers?"	Customers miss appointment emails	The existing email reminder, sent a day earlier	Shipped last month; shown on the call

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THE PLAY

The answer: shipped, planned, not planned.

Every long-term solution has one of three honest statuses, and each has its own way to be said. Write the answer in the customer's words, send it inside the three days, and call to confirm they received it and accept it. · NEW IN THIS EDITION

SHIPPED

Show them

"Good news: what you asked for is already live. Here is how to use it. I'd like to show your team in fifteen minutes — does Thursday work?"

Many requests are for something the customer has not found yet. Showing it is the fastest close there is.

PLANNED

Give a direction

"It's on our roadmap, aimed at next quarter. That is our direction, not a promise — roadmaps move. Until then, here's what you can do now. I'll tell you when it ships."

Then put it on the log as open. A planned answer is a promise to tell them back.

NOT PLANNED

Tell them no

"I'll be straight with you: it isn't on the roadmap, and I don't expect it to be. Here's why. Here's what I'd recommend instead, and why. I'd rather tell you now than let you wait for something that isn't coming."

Hold it as a structured call, never an email alone.

TELLING THEM NO

To make a customer loyal, we have to be the ones who speak on their behalf — remind them what is important, and why we are here for them. In many ways, that is going to take telling them no. Not because telling them no is the most service-oriented response, but because telling them no is the most success-oriented response.

The words for each are a starting point; the status is not. Never call something planned to soften a no, and never let a no go out without the reason and the alternative.

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THE PLAY

The clock: 1-3-7, and agreement.

The Feedback Cycle is reactive: a customer has spoken, and is waiting to find out whether anyone heard. It runs on the standard I hold every client-facing team to, wherever a customer is waiting on us.

THE 1-3-7 STANDARD

ONE

The same day

Acknowledge the request. Call; if you reach voicemail, call back; then email a recap. Say when you will respond with next steps — a date, not "soon."

THREE

Within three days

A touchpoint that consolidates the feedback and makes it actionable: define the problem, recommend the solution, give the timeline. Then call to confirm they received it and accept it.

SEVEN

Within seven days

A major update, or the complete resolution or action plan. Where the real fix takes longer, the workaround and the options are delivered inside the seven days.

In this play

ONE	The day the feedback arrives: acknowledged by a person, and a structured call booked or held.
THREE	Within three business days: the problem consolidated, and the options delivered — the short-term option, the long-term solution with its status, and the recommendation.
SEVEN	Within seven calendar days: the customer's agreement, or the action plan that gets you to it.

The exit, and the loop

The cycle ends when the customer agrees the options address their concerns — in writing: a reply to the recap, or a confirmation you sent and they did not dispute. Write the date on the log. A long-term solution that was planned keeps its row open after the agreement, and the loop closes only when it ships and the customer has been told. That is the half most teams forget, and the half customers remember.

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THE PLAY

Surveys: detractor, passive, promoter.

A survey response is feedback the customer was asked for, so it is the least forgivable kind to leave unanswered. Each band of the zero-to-ten recommend question gets its own response, and each response is a person, not an autoresponder. · NEW IN THIS EDITION

0–6
DETRACTOR

A structured call, booked the same day. Open with the score, not around it:

> "Thank you for being honest with us. A [score] tells me we have let you down somewhere, and I'd rather hear it from you than guess. What is the one thing that, if it changed, would change your answer?" Then: "What I hear you say is…" and, before you hang up, "I'll come back by [date] with what we can do now and what is on the roadmap."

7–8
PASSIVE

A short email from the Success Manager, never the survey tool, with a call offered:

> **What would make it a ten?** — "Thank you for answering our survey. A [score] says we are doing well, and not yet well enough to recommend. What is the one thing that would make it a ten? Reply here, or pick a time to talk. Either way, I'll come back within three business days with what we can do about it."

9–10
PROMOTER

Thanks, and the ask — at their milestone, not ours:

> "I wanted to thank you for what you said in the survey — I'm really glad [their words]. You said you'd recommend us. Is there someone you have in mind? I'll make the introduction easy."

Comments matter more than the number: a 9 with a complaint in it is feedback, and runs the cycle. Survey by mid-month or earlier, so there is time to follow up before the next one, and never send customers more than one call to action a week.

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RUNNING IT

Who does what, and the round trip to Product.

Success guides the feedback through the loop and back to the customer with options. In 2018 the journey wrote it that way, and it holds: Success answers the customer; Support and Product are accountable for their parts of the answer.

FUNCTION	CODE	ITS PART IN THE CYCLE
Customer Success	R	Acknowledges, holds the structured call, consolidates the feedback, delivers the options and the recommendation, records the agreement, and tells the customer when the loop closes.
Support	A	Triages: new request, or already answered? Finds the short-term option for anything technical, and escalates new and challenged requests to Success.
Product	A	Gives every long-term item an honest status, runs the monthly triage with Success, and joins customer conversations where the roadmap is the question.
Services	C	Consulted where the gap is in how the product was set up or taught, not in the product itself.

DEDICATED

Always a call

Every cycle is a structured call, and the answer can be carried into the next business review, where the roadmap is the start of the partnership conversation.

SHARED

A call where it counts

A call for detractors and requests; an email template for passives and small items, with a call offered. The log is the same.

DIGITAL

Written, and a person

An email template carries most cycles, with a call offered. A detractor still gets a person: that is the line no tier crosses.

The round trip · NEW IN THIS EDITION

EVERY MONTH — Success and Product walk the log's themes together: what customers asked for, how often, and what it is worth. Every open item leaves with a status.

EVERY QUARTER — You asked, we listened: the items that shipped are told back to the customers who asked for them, by name, and shown where it helps.

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RUNNING IT

Is it working, and the checklist.

The best sign of this play is a customer who tells you more, not less. Four measures say whether each cycle worked, and the log's Book tab counts them. NEW IN THIS EDITION

THE CLOCK
1-3-7 kept
The share of cycles acknowledged the same day, answered with options within three, and agreed or planned within seven.

THE ANSWER
Agreement
The share of cycles where the customer agreed the options address their concerns.

THE TURN
Conversion
The share of detractors who are no longer detractors the next time they are surveyed.

THE LOOP
Told back
The share of shipped long-term items that were told back to the customers who asked for them.

OPEN

- [ ] Acknowledged the same day, by a person
- [ ] The right play? Not many problems, not adoption
- [ ] A structured call: stage, past, present, future, recap
- [ ] The recap sent the same day, with a date

RUN

- [ ] The root issue named, in the customer's words
- [ ] The impact stated in their terms
- [ ] A short-term option, every time
- [ ] A long-term solution with an honest status
- [ ] A recommendation, and the reason for it

CLOSE

- [ ] The options delivered within three days
- [ ] Agreement in writing, dated on the log
- [ ] A no held as a call, with the alternative
- [ ] Planned items kept open until told back

EVERY MONTH AND QUARTER

- [ ] The themes walked with Product, every item given a status
- [ ] Shipped items told back to the customers who asked
- [ ] The four measures read for the book

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