Customer Evidence Intake & Triage Template

A lightweight working template to capture meaningful customer signals and determine the next evidence-qualified action.

01) CUSTOMER SIGNAL INTAKE	*Completed by Customer Success or another customer-facing team*
Customer & context	*Customer, industry, segment, relevant operating context*
Original use case	*What did the customer initially buy or adopt the product to do?*
New behavior or use	*What is the customer doing differently? Describe the specific workflow.*
Reported outcome	*What changed, according to whom? Include exact language if available.*
Evidence source	*Call / QBR / product data / quote / other; link or reference*

02) PMM TRIAGE & DECISION	*Completed by Product Marketing*
Evidence qualification	*For each claim: Validated / Observed / Hypothesis; note gaps*
Potential market implication	*Buyer, segment, adjacent use case, unmet need, or positioning angle*
Decision	*Activate / Test / Investigate / Hold; brief rationale*
Next action & owner	*Specific follow-up, accountable owner, and target date*
Claim limitation	*What must not yet be asserted externally?*

DECISION OUTPUT

Market hypothesis / finding:

_____

_____

_____

Customer / Account: _____

Owner: _____ Next action: _____ Due: _____

HOW IT WORKS **Capture signal → PMM triage → Activation Canvas (if warranted) → GTM action & learning**

External use requires appropriate verification and permissions.

EVIDENCE QUALIFICATION GUIDE

Validated	Supported by corroborating evidence. Eligible for approved proof points, subject to permissions.
Observed	Customer-reported or documented experience. Useful for learning; not proof of causation.
Hypothesis	Potential explanation or market opportunity requiring further investigation or testing.

Classify individual claims, not entire customer stories.