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HOW TO FIND AND ONBOARD BETA TESTERS

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BUILDER'S GUIDE: HOW TO FIND & ONBOARD BETA TESTERS

If you build it, they will come, right? Maybe for a baseball diamond in the middle of a cornfield, but it will probably take a little more effort to fill your beta test with awesome beta testers.

In part two of the Builder's Guide series, we'll cover exactly what you need to know to find and onboard beta testers and provide some expert tips and resources to put you in the major leagues.

STEP-BY-STEP GUIDE

There are no tests without testers, so finding eager and enthusiastic testers is one of the most important parts of managing beta tests. Simply recruiting warm bodies won't be sufficient except in extreme cases — each test has unique tester requirements based on the product, the product's target market, and the types of activities that are required to test the product. Developing a strategy for sourcing your beta testers prior to starting your recruitment process will help ensure that you have enough time to review the types of recruitment channels available, develop effective recruitment messaging, and invite the best candidates to your project.

We'll cover the steps for each of these recruitment activities in the following sections to help you find and onboard the best testers for your beta tests.

There are three components to beta tester recruitment and onboarding, and it's important that you **D.O.O.** each of them to help make your recruitment a success:

- **D**efine Your Beta Testers
- **O**utreach to Candidates
- **O**nboard Your Testers

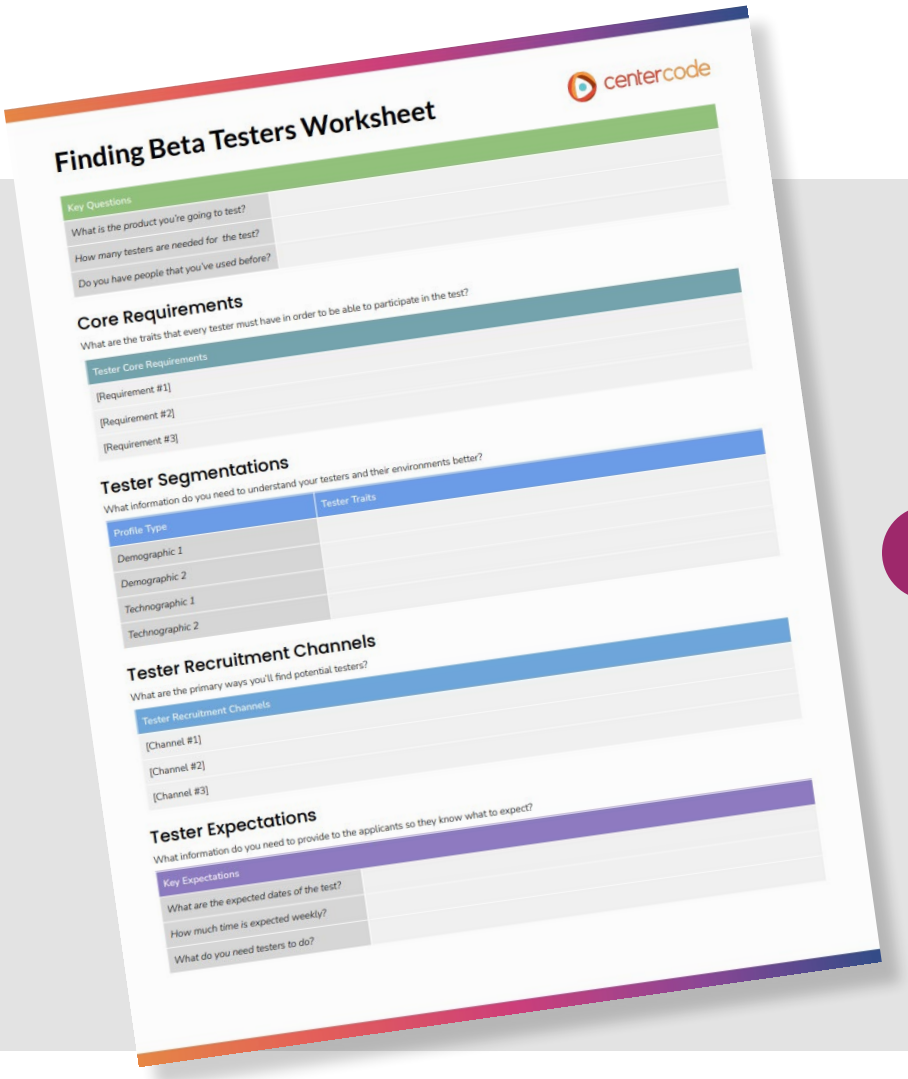
DEFINE YOUR TESTERS

These are the steps you'll complete to define who your testers will be and to prepare for bringing them into your beta test. Let's get started.

STEP 1 DOWNLOAD THE FINDING BETA TESTERS WORKSHEET

The Finding Beta Testers Worksheet is a helpful guide to walk you through defining your recruitment requirements, strategy, and messaging.

Whether you're a seasoned pro or curious novice, everything's easier with a guide! As a first step, grab the resource at this link: Finding Beta Testers Worksheet.



DOWNLOAD THE WORKSHEET

STEP 2 DEFINE THE TESTER REQUIREMENTS

Start by identifying the most important "must-have" traits — called core requirements.

To define the tester requirements, it's helpful to start by listing user traits and technology that are required to use the test product.

Core requirements are the traits that each tester must have in order to be able to participate — for example, if you were testing software that only worked on computers with Windows 10 or later, a core requirement would need to be "Owns and uses a computer running Windows 10 or later."

Builder Tip #1

Consider any product features or tester activities that may necessitate specific tester requirements

Builder Tip #2

If you have a database, it's best to use these requirements as filters to narrow down your audience

STEP 3 CONSIDER YOUR IDEAL BETA TESTER

Now think about the different qualities that make up your group of ideal beta testers.

Once the core requirements are established, you can consider additional traits that you want your testers (or a subset of your testers) to have. These traits are often informed by detailed marketing personas or user stories from early product research and can include demographic, technographic, or geographic characteristics.

Builder Tip #3

Your ideal beta tester profile(s) should closely resemble your target market persona for the product you'll be testing

Builder Tip #4

Keep in mind that the more extensive and/or rigid your requirements list is, the harder the recruitment process will be

OUTREACH TO CANDIDATES

Outreach begins when you've defined who you'd like to recruit for your beta test. Outreach consists of the channels for sourcing beta testers, the messaging you'll use in each of those channels, and where and how testers will be joining your test.

STEP 4 DETERMINE YOUR OUTREACH CHANNELS

Based on your tester requirements and target market, decide on your primary recruitment channels.

Once you know how you'd identify your ideal tester, you'll design your plan to find those tester candidates which includes the sources for recruitment and how you plan to use those sources. Review your tester criteria established in steps 2 and 3 and consider the types of sources where users that meet those requirements might frequent or how to reach those types of users.

Here are some common channels used for sourcing beta testers:

- Dedicated beta test sites
- Internal company tools
- Your company's website
- Social media
- Online ads
- Live events
- Customer lists
- Previous tests

Need access to a dedicated testing community? Centercode Beta can help!

SIGN UP FOR FREE

Builder Tip #5

Don't use every possible channel all at once — you may want to tweak your messaging if your initial outreach misses the mark

Builder Tip #6

Consider using advertisements (such as social media) if your market is hard to reach

Builder Tip #7

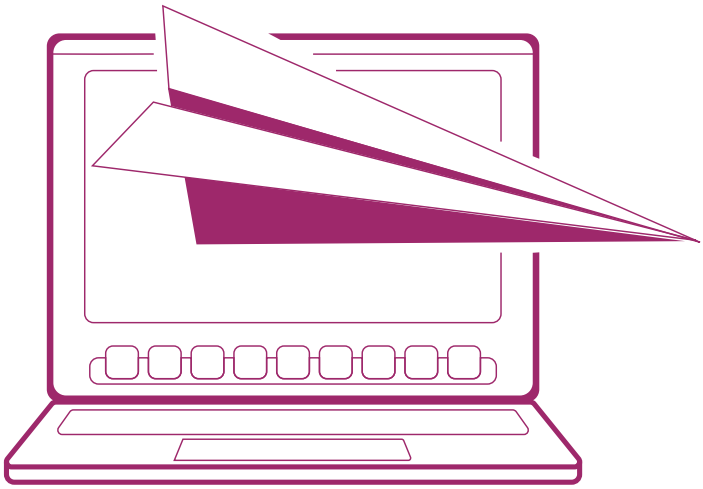
Think long term — consider which channels might also be useful year-round as you are building your tester community

STEP 5 CRAFT THE MESSAGE

Create an enticing message for each channel you plan to utilize during your tester recruitment.

One of the most important aspects of tester recruitment is the messaging used to attract potential recruits to sign up or indicate interest. While the basic message will remain the same, the approach could change depending on the channel.

Here are the keys to an effective message:



Be succinct

Your core recruitment message should be simple and concise, otherwise you'll begin to overwhelm your potential testers instead of excite them.

Stress exclusivity

Reminding candidates of the exclusivity of beta testing gets them excited about the opportunity and lays the foundation for the secrecy you'll expect from them as testers.

Be discreet

Rather than discussing the specific product, talk about the product category and keep those details vague. This will serve in both protecting you and intriguing potential users.

Clearly communicate requirements and expectations

Be sure that your message communicates not only your core requirements, but also how much time and energy potential testers can expect to invest.

Builder Tip #8

Find some help — talk to someone in marketing if you're not sure how to start

Builder Tip #9

While it can help you recruit testers, mentioning potential incentives can also attract the wrong crowd

Builder Tip #10

Use an AI writing tool if you're experiencing writer's block

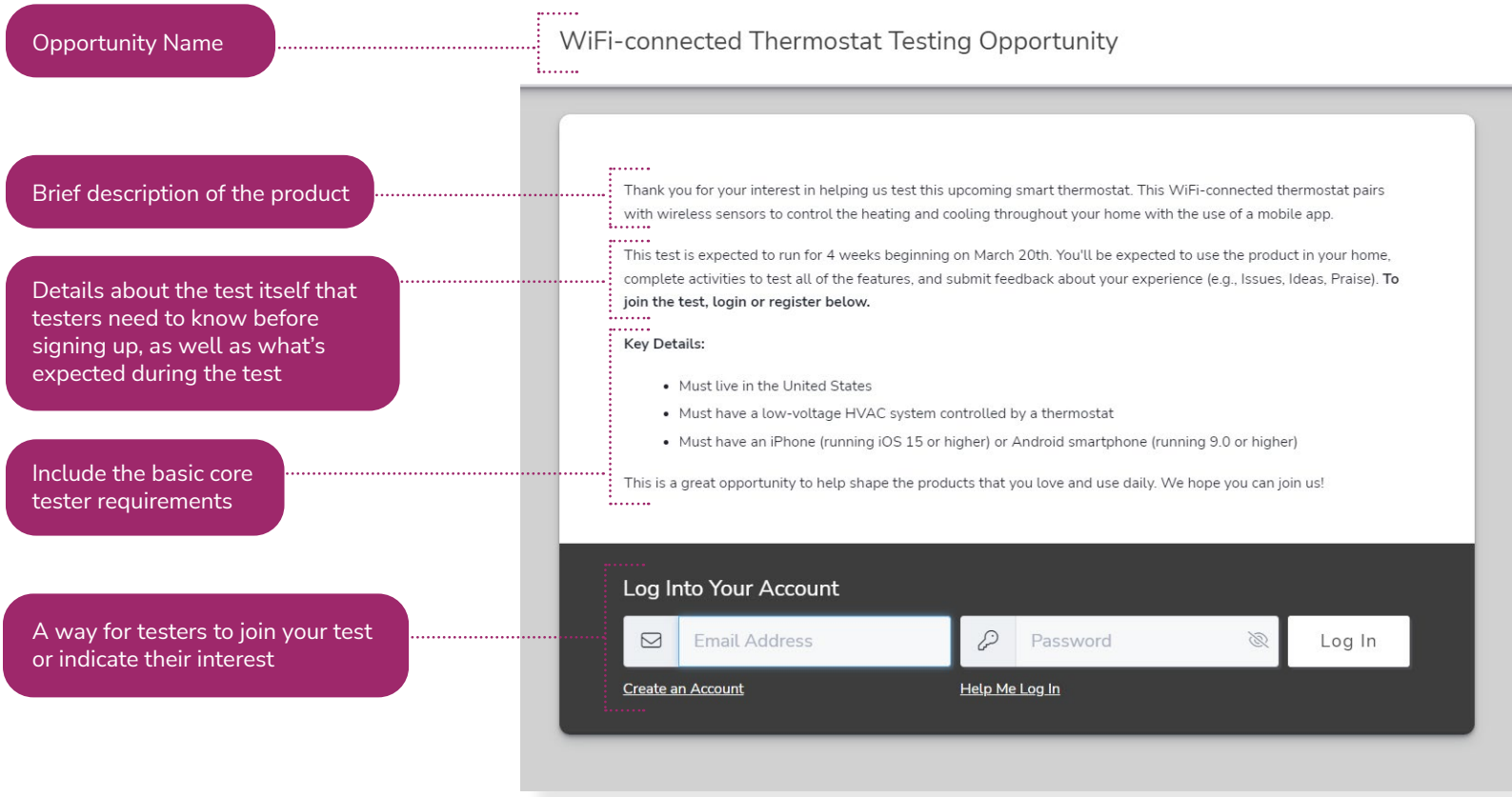
STEP 6 CONFIGURE YOUR BETA TESTER SIGN UP PAGE

Build a landing page where your testers can sign up for your test.

The landing page is the first thing a potential participant sees when they decide they're interested. When you create a landing page for your test, be sure to provide details about the test (using the messaging crafted in Step 5) and provide a way to join for those who want to participate. Review the key components of a landing page below to make sure you've got everything covered:

Not sure where to create a landing page? Centercode Beta edition has you covered

SIGN UP FOR FREE



Builder Tip #11

Don't include too much info or too little

Builder Tip #12

Depending on how intensive your test is, you may need to include an incentive or reward for participating

STEP 7 LAUNCH YOUR RECRUITMENT EFFORTS

Now it's time to find your ideal beta testers.

Starting with the channels you've outlined in your recruitment plan, launch your campaign to begin compiling your list of interested testers.

BONUS Builder Tip:

Qualification or screener surveys are a great tool for ensuring you get the right testers. If you're using a screener survey to qualify your applicants, here are some tips to consider:

DO

1. Order the questions in a way that makes sense
2. Use clear and concise language
3. Specify the context of your questions as necessary

DON'T

1. Ask more than 1 thing in a question
2. Ask questions that lead someone to an answer
3. Use jargon that could confuse your audience

Always read the survey aloud to someone and ask them to respond to the questions. You'll find many obvious problems with this little, simple step.

ONBOARDING YOUR TESTERS

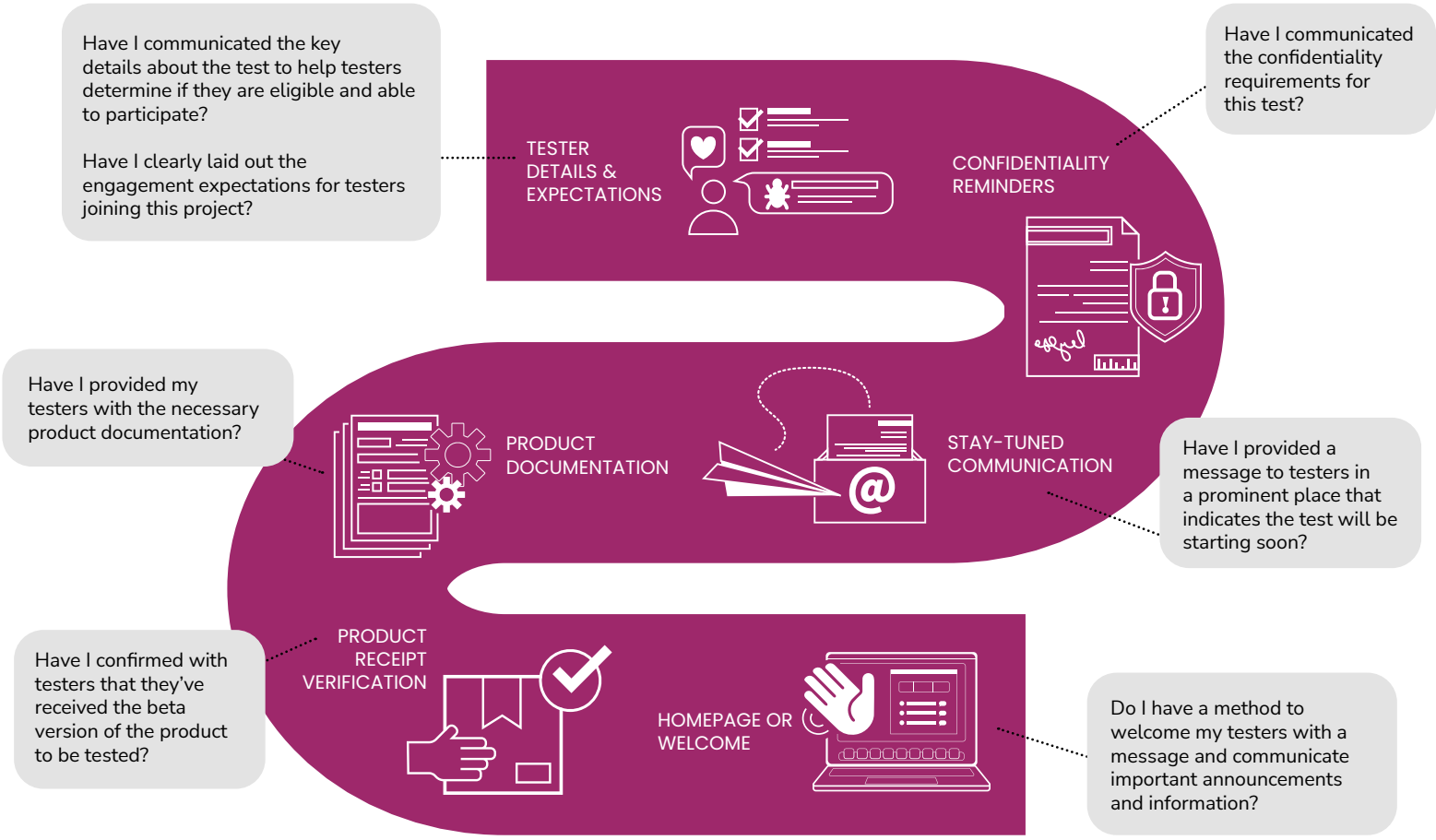
It's exciting to see new people beginning to join your test! Each new sign-up is someone who is eager to test your products. But, before you send them a software key or ship them hardware, it's important to ensure they've completed the onboarding process.

STEP 8 ONBOARD YOUR BETA TESTERS

As testers sign up to participate in your test, they'll complete a set of steps to prepare them to participate.

The onboarding steps will be different depending on your product and test, but their purpose is to ensure testers have the information and resources needed to be great testers. Onboarding your testers is the final step before kicking off your test, and while the overall onboarding for each test will vary slightly, the major steps are repeated each time.

The illustration below shows the major onboarding steps necessary to bring testers into a beta test.



Builder Tip #13

If you're able, include additional testers as alternates to make up for any testers who might drop out or need to be removed from your beta test

Builder Tip #14

Don't recruit too early - avoid having a long gap between recruitment and starting your test (1 - 2 weeks max)

CONGRATULATIONS!

There's nothing left to D.O.O. — you've recruited your first testers and set them up for success!



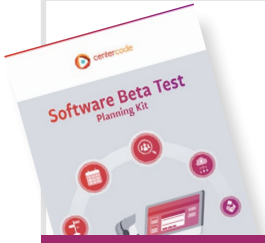
Now it's time to do a happy dance, launch your test, and start gathering feedback.

NEED MORE HELP?



Beta Test Planning Kit

Unify your stakeholders behind a thorough, well-organized test plan with practical tools and best practices in our comprehensive kit.



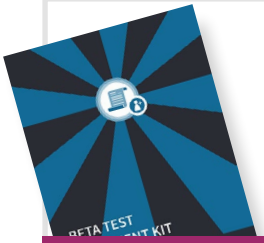
Beta Recruiting Kit

Use these best practices and templates to attract quality testers and speed up the recruitment period. You'll learn a proven process for finding great testers from your market.



Visual Theming Guide

We've gathered a few tips and tricks and example themes here to help you master Centercode's Visual Theme tool to ensure your program reflects your brand.



Beta Agreement Kit

Need beta agreements before you can start testing? This kit provides sample agreements with an explanatory companion document.



Beta Shipping Manual

This whitepaper teaches you how to effectively manage inventory, ship units (domestically and internationally), and handle returns for even your most ambitious tests.



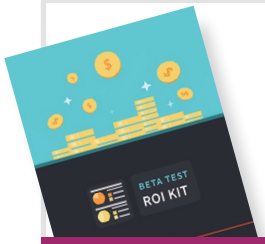
Engagement Pocket Guide

Explore the causes of low test participation and improve the quality and quantity of your customer feedback with this pocket guide.



Beta Test Incentive Kit

This kit includes a comprehensive whitepaper and calculator to help you build a strategy to both incentivize and reward your testers for the hard work they put into your program.



Beta Test ROI Kit

This kit will teach you where the return on investment comes from in beta and help you quickly calculate the value of a single beta test or an entire program.



Guide to Delta Testing

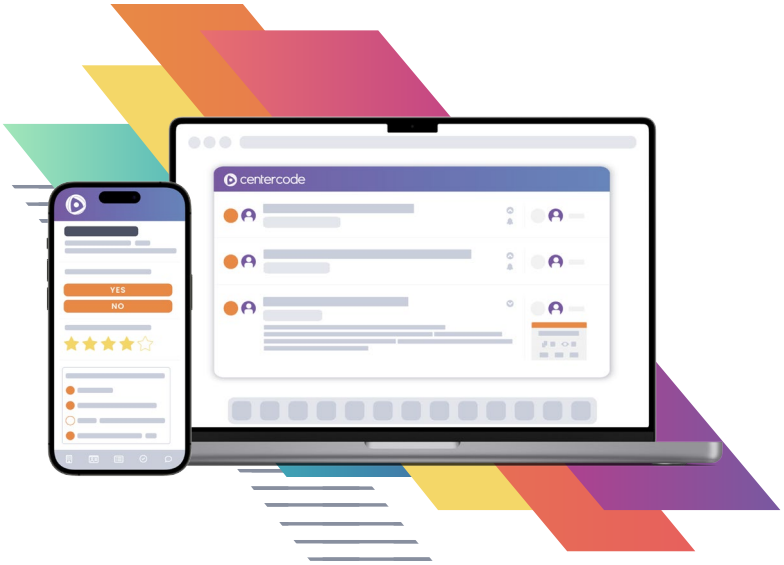
What is delta testing and how are tech leaders using it to deliver customer insights throughout agile development? This guide has all the answers.

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Centercode is the leading platform for managing impactful in-the-wild user tests.

Start for free, scale as your program grows.

COMPARE PLANS



Run real-world user tests with passionate audiences to release amazing products every time.

PRODUCT LAUNCH TESTING

Engage your Target Market to successfully bring new products and services to market

USE CASES:

- Beta Tests
- User Acceptance Tests
- Field Tests

CONTINUOUS USER TESTING

Recruit Existing Customers to continuously mature live products and services

USE CASES:

- Progressive Delivery
- Early Access
- Customer Advisory Boards

EMPLOYEE DOGFOODING

Gather Employee feedback to enhance your products while fostering a product culture

USE CASES:

- Alpha Tests
- Dogfooding
- Employee Tests

COMPETITIVE TESTING

Enlist Competitors' Customers to rapidly gain actionable intel about their products

USE CASES:

- Competitive Intelligence
- Market Testing
- Comparative Research

GET STARTED FOR FREE
OR SCHEDULE A LIVE DEMO TO LEARN MORE

SCHEDULE A DEMO

SIGN UP FOR FREE

WHY CENTERCODE?

Increase Revenue
½ ☆ INCREASE
in product ratings

Release Sooner
50% FASTER
test cycles

Gain Participation
75% INCREASE
in tester engagement

Save Time
40% + DECREASE
in time managing tests