CENTERCODE DELTA '20

How and When to Scale Your CV Program

About Me

Austin Meyer

Product Director, Insights
Centercode

Over 6 years of Customer Validation experience

Ran tests for Fortune 50 companies

Continuing to shape the CV category

✉ austin@centercode.com

in linkedin.com/in/austinjmeyer/

Agenda

1 Is It Time to Scale?

2 Planning & Scheduling

3 Improving Deliverable Efficiency

4 Adding to Your Team

5 Review

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Too Many Pieces to Manage

Managing CV tests isn't easy

Juggling stakeholders, testers, your boss

Need to ensure good data and error-free deliverables

Avoid spiraling out of control

Is it time to scale?

The Gathering Storm

Small team of 3, running projects and supporting testers

At 10 concurrent projects, things felt really busy

Struggling to keep up, felt out of control

Ugly deliverables, angry testers, unhappy stakeholders

Needed data to understand failure points (a window)

Pitfalls of Not Scaling Correctly

Unhappy stakeholders missing actionable data

Angry testers who feel like they're shouting into the void

High levels of stress due to ad hoc nature of testing program

Disappointed leadership asking why things are falling apart

Four Areas for Focus

01 Anticipate and understand client needs

02 Provide engagement activities for your testers and support them

03 Gather thoughtful responses from your testers about your product

04 Provide actionable results for your client

Is it Time to Scale?

Peak performance in 4 areas of focus, otherwise red flag

Initial reaction was to request budget to hire

Scaling the team isn't necessarily the solution
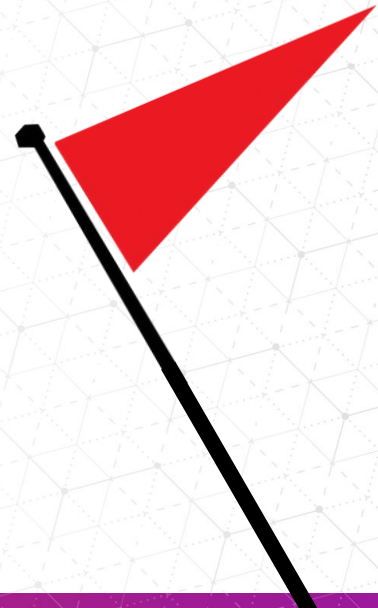
(Even if it was, 3 - 6 month ramp up time)

Address the Red Flags

Poor quality of output (reports, feedback triage, etc.)

Lack of meaningful insights in deliverables

Inability to support or respond to testers

Saying "no" to a reasonable stakeholder request

Not All Solutions Created Equal

Adding a team member is not always the solution...

One of many tools to help "scale" your program

Make changes in other areas to have a greater impact

Smart Scaling

Planning & Scheduling

Improving Deliverable Efficiency

Adding to Your Team

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Planning & Scheduling

"A plan is what, a schedule is when. It takes both a plan and a schedule to get things done."

- Peter Turla

Planning & Scheduling

Concurrent tests can be challenging to manage

Scheduling tests with overlap - be smart about it

Prep and Closure are generally periods of lower workload

SLAs and Planning Variables must be defined

SLAs

Internal - promises to your stakeholders

Setting reasonable expectations

Minimum time required

Need buy-in from higher levels for enforcement

COMMUNICATE THEM

Example: Project Initialization SLAs

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Stage	Initialization	Bus. Days	Notes
Planning	CPM contacted	1 day	Plan required for each "project"; Additional strategy discussions with CPM may be necessary
Recruitment	Project Plan approved	2 days	Length of Recruitment period varies depending on scope
Preparation	Prep Meeting held	4 days	First project will require a longer Prep period; Additional Prep time may be required depending on project complexity
Distribution	Product readiness confirmed	2 days	Dependent on number of devices
Test Start	Testers received product	1 day	Dependent on shipping speed & product team readiness

Planning Variables

Define them early in your process

Testers x Weeks

Consider the work that scales *e.g. feedback*

Sprint cycles

Remember, you are the expert on your program

Build Out & Track Your Schedule

Plan for each stage including recruitment

Delays are *inevitable*

Have a rough schedule 30 - 60 days ahead

Identify your periods of predicted high workload

Example: Lane Tracker

--	Test Type	Total Testers	Hours	Test Stage	Diego	Michelle	Brandon	Doug	Mike	Ryan
TOTAL LANES	-	-		-	1	3	11	4	2	2
Mega	**Beta**	50	10	Closure			2			
Bay	**Beta**	44	15	Test				3		
Lance	**Beta**	30	10	Prep				1		
Fable	**Field**	13	10	Test					1	
Thune	**Beta**	30	10	Test					1	
Celery	**Beta**	44	15	Prep						1
Spout	**Beta**	150	15	Prep						1
Fern	**Beta**	30	10	Test						
Mustard	**Beta**	109	20	Prep						
Cabernet	**Beta**	70	13	Prep						

Improving Deliverable Efficiency

"The combination of hard work and smart work is efficient work."

-Robert Half

Improving Deliverable Efficiency

Templates - spend the time to build them

Identify and document your processes

Reduce your manual work, let your tools work for you

Measure and adjust

Templates

Reduce the time to complete tasks

Allow for work to be handed off

Promote consistency across program

Encourage best practices

Enable self-service

Templates

Processes

Have you documented your processes today?

Definition is a key part of scaling

Enables others to pick up where you left off

Change Them!

Examine each process for inefficiencies

Change processes that cause bottlenecks or delays

Make your tools work for you!

Setup and use automation where it makes sense

Measure & Adjust

Start tracking time

Categorize time across major areas of work (e.g. feedback)

Identify time-sinks and innovate in that area
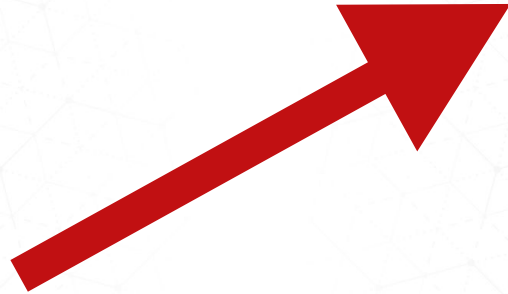
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Adding to Your Team

"Winning in this game is all a matter of understanding how to capitalize on the strengths of each piece and timing their moves just right."

-Bobby Fischer

Is It the Right Solution?

Wrangled your schedule?

Deliverable processes are solid?

Processes efficient and documented?

Still encountering quality issues or lack of time?

Take Care of Your Testers

Without testers, you don't have a test

First hire should ensure testers are well supported

Divide up work by responsibilities, i.e. project manager or tester manager

Traits for Managing Testers

Call center experience

Previous support experience

Writes well

Organized

Hiring - Internal or External?

Internal hire will help reduce onboarding costs/time

Support team or other customer focused teams

Best practice to dedicate an individual(s) solely to CV program

Scale the Right Way

Adding to your team is not always the solution

Other areas of your program might need clean-up first

Set yourself up to scale smartly by...

Smart Scaling

Planning & Scheduling

Improving Deliverable Efficiency

Adding to Your Team

Story Time - Money Meet Mouth

26 projects in test concurrently

Busy - felt like the wheels were coming off any second

Checked for red flags - found none

Busy, but efficient and working as intended

Thank You!

Austin Meyer

✉ austin@centercode.com

in linkedin.com/in/austinjmeyer/