Beta Invite Templates

for Your Best Recruitment Ever



centercode

Table of Contents

INTRODUCTION 1

ANATOMY OF A BETA INVITE 2

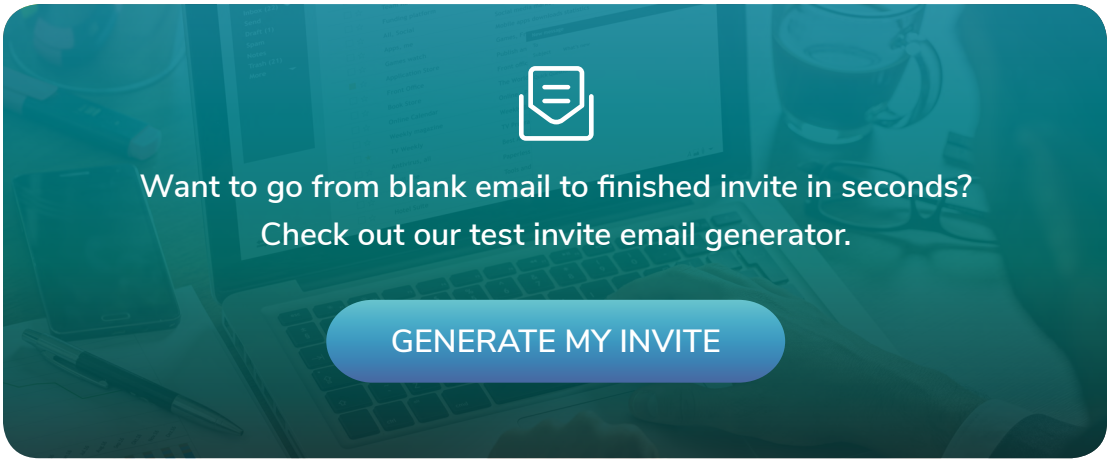
HOW TO WRITE SUPER-CLICKABLE BETA INVITES 3

- Start With the Subject Line 3
- Ponder Your Preheader 4
- Build Out Your Body 6
- Close With a Call-to-Action 8
- Lastly, It's Not *Just* About the Writing 9

BETA TEST INVITATION EMAIL TEMPLATES 12

- Target Market Invite Template 1 12
- Target Market Invite Template 2 14
- Existing Customer Invite 15
- Employee Recruitment Email 17

CENTERCODE'S DELTA TESTING SOLUTIONS 20



Introduction

In order to throw an amazing party, you need to invite amazing people. Your beta, field, user acceptance, and other user tests are no different. But unlike sending a group text or a quick calendar invite, sending a message that attracts potential test candidates (and actually gets them to apply) can be tricky.

In over two decades of helping companies run their beta tests, we've learned a slew of best practices from our beta testing, product, and marketing teams for attracting qualified testers. Now, we've taken all that knowledge and turned it into guidelines, templates, and an email generator for test managers like you. 🎉

Built like a MadLib, the templates and email generator in this kit guide you through customizing your emails for your audience and product so you can simply copy and paste ready-to-send invites into your email client. Meanwhile, the best practices will help you understand how to construct highly engaging emails, so you've got a foundation for avoiding common pitfalls and increasing the effectiveness of your beta invites and recruitments.

Email invites are cool and all, but I need more.

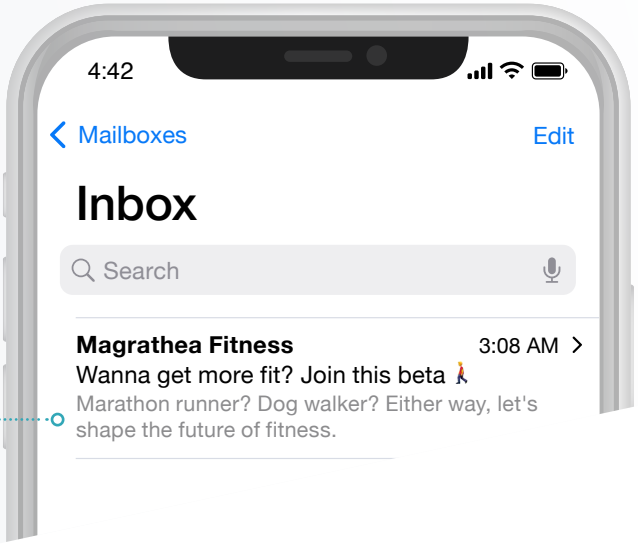
We hear you. Recruitment is one of the toughest aspects of user testing, especially without user testing automation or a fully stocked tool at your disposal. If you're interested in automating your processes, the Centercode Platform streamlines community building, recruitment, tester engagement, and feedback prioritization — which sets you up to start building and improving your processes overnight.

If you need support in other areas of recruitment, like tips for identifying your ideal testers, building a list of core requirements, finding qualified candidates, and onboarding them into your test, check out the templates and best practices inside the Recruitment Kit.

centercode

Anatomy of a Beta Invite

Here's how to optimize the working parts of your beta invite to attract testers.

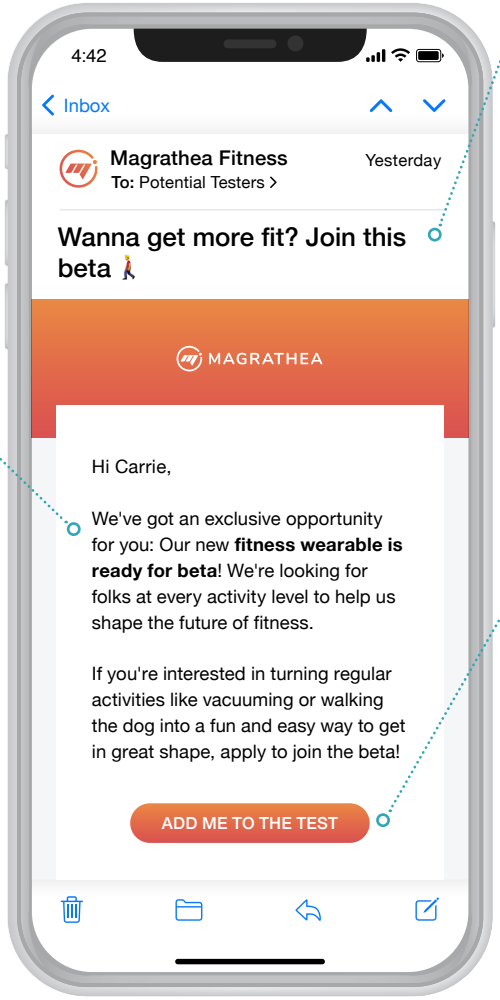


YOUR PREHEADER

- A.K.A. preview text
- Compliment the subject line
- 30-80 characters

24% will read the preview text first

(Source: Litmus)



YOUR SUBJECT LINE

- 50 characters or fewer
- Make it catchy, but avoid CAPS and !!!
- Tell readers what's in it for them

47% will open emails based on the subject line

(Source: OptinMonster)

YOUR BODY TEXT

- Get to the point
- Choose what to emphasize wisely
- Be clear, concise, and friendly

79% of users scan, while only **16%** read word-for-word

(Source: Nielsen Norman Group)

YOUR CTA

- CTA is short for "call to action"
- Tell readers what you want them to do
- 5 words or fewer

Adding a button increases clickthrough by **28%**

(Source: Campaign Monitor)

How to Write Super-Clickable Beta Invites

A compelling, clickable beta invite is like a chariot: the horse, the cart, the axel, and the wheels are all working together to move the rider forward. Here's a breakdown of the moving parts you're dealing with and how they form a highly effective email, whether you're adapting a template or starting from scratch.

Start With the Subject Line

You can't judge a book by its cover, but potential testers will most definitely judge your email by its subject line. The average email user receives 147 messages every day, and a good chunk of those (around 50%) end up in the trash. Your subject line is your first, and often your only, shot at piquing the interest of test candidates.

But don't worry — to hook potential testers, all you need is the right bait. Here are the cliff notes for writing subject lines for your beta invitation.

BEWARE OF SPAM

According to Convince and Convert, 69% of email recipients report email as spam based solely on the subject line. That spam folder is the absolute last place you want your emails to end up. What constitutes a spammy subject line can be hard to put your finger on but, to take a cue from a former justice of the Supreme Court, you know it when you see it. Luckily, there are tons of free resources for testing (and fixing) the spamminess of your subject lines.

LEAD WITH WHAT'S IN IT FOR THEM

You might think that the opportunity to test your product for free is a privilege anyone would be lucky to have, but potential testers might not see it like that (not at first, anyway). Lead with the benefit they'll get by opening your email and checking out what's inside. If you're stuck, start with the benefits of the product you're planning to test and jot down ideas based on that.

KEEP IT SHORT (50 CHARACTERS OR FEWER)

A good chunk of today's users primarily check their email from their mobile devices. Keeping your subject line under 50 or so characters ensures they'll get your full message no matter what platform they're reading on.

GET CREATIVE (DUN DUN DUN!)

You don't have to identify as a "creative type" to think outside of the box on ways to make your email stand out. We'll have plenty of examples you can use in the templates, but here are some more simple ideas to try if you want to personalize your subject line even further.

- Ask a question
  Like productivity? You'll love this beta test
- Stress exclusivity
  Try this smart speaker before it's in stores
- Give it a sense of urgency
  Your beta invite expires tonight
- Stick an emoji at the end 😀
  This beta is perfect for dog lovers 🐶

AVOID ALL CAPS AND EXCESSIVE PUNCTUATION!!!!

Excessive punctuation (more than one !) and capitalization will send your email to the spam folder before your potential testers ever lay eyes on it. Also, THERE'S NO NEED TO YELL!!!!! Our recommendation? Sentence case ("Check out this beta test") is the most readable and effective.

Ponder Your Preheader

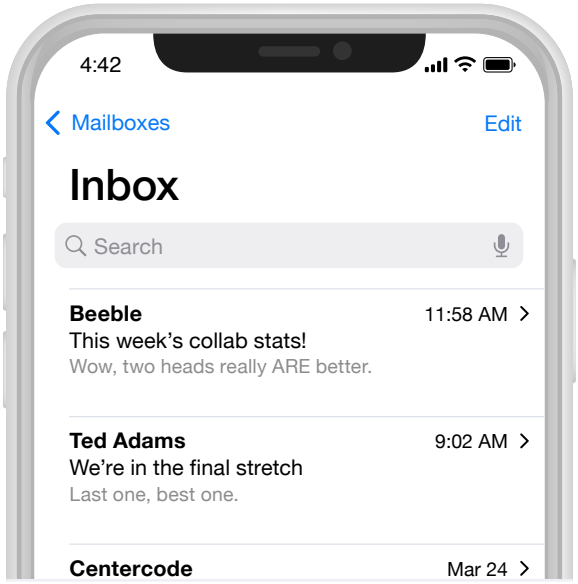
The preheader is the little preview text that shows readers what's inside your email before they open it. It looks a little different depending on where you're checking your email, but you can generally find it below the subject line (on your phone) or just after the subject line (on your PC).

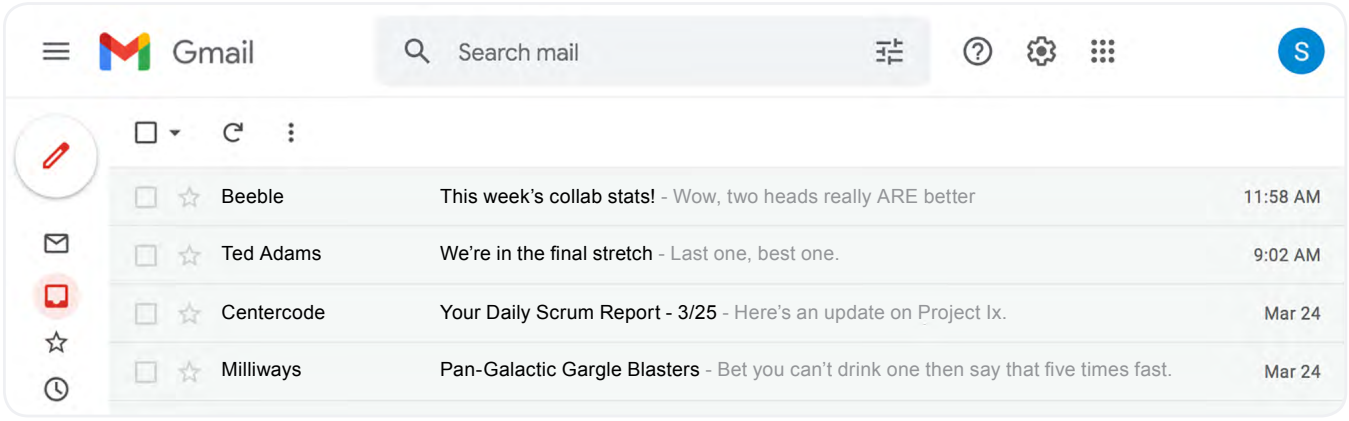
It's worth noting that not every tool you use to send out emails to potential testers will allow

you to edit your preheader text. In those cases, the email client will create one using the first sentence of your email.

If you *do* have the option to write your own preheader text, you'll want to **differentiate it from your subject line *and* the body copy**. (Yup, more writing. But have no fear, this one is pretty straightforward.)

Here are a few best practices for writing a persuasive preheader.





KEEP IT SHORT (30 TO 80 CHARACTERS)

As you can see from the example, the amount of preheader text that'll show depends heavily on the reader's email client and device. You can't read the preheader once you click into the actual email, so keeping it short will give you the best chance at making the text clear and effective.

COMPLIMENT YOUR SUBJECT LINE

Since it's only visible before you open the email *and* you're working with a very small character count, it's best not to give any vital or additional information in your preheader that could be lost

forever. Instead, use that space to enhance your subject line and persuade potential testers to open the email.

Here are some preheader examples using the subject lines from before.

- **Like productivity? You'll love this beta test**
  Get ready to become an organizational superstar.
- **Your beta invite expires tonight**
  Don't let this opportunity to test products early go to waste!

IF YOU'VE GOT IT, USE IT!

Is preheader text absolutely necessary? No. But using it effectively has been proven to increase open rates on emails by 8%, so if you have the option, you should take it.

Build Out Your Body

Now we're digging into the main course of the email: your body copy. If the idea of writing (shudder) full paragraphs feels daunting, remember that, before anything else, a great email is easy to understand.

By reading your email, your potential testers should be able to easily tell:

- Who you are (a company/test manager)
- Who you're looking for (testers who fit your ideal tester profile)
- Why you're reaching out (invitation to test your product or service)
- What's in it for them (a benefit, like the chance to try your product before anyone else)
- How to take next steps (apply for the beta test) ← This is your call-to-action. We'll cover it in the next section!

If your email gets these messages across, everything else is just icing on the cake. 🍰

Here are some best practices for ensuring your body copy is clear (and clever and compelling to boot).

GIVE DETAILS, BUT CHOOSE WISELY

You want to give enough detail to pique your audience's interest, but not so much that you'll set their expectations too high, or that they'll get overwhelmed and check out. Here are the most common places where you'll need to exercise this practice.

- **Your product description**. A simple description of what the product or feature is will suffice. No need to list the specs or model numbers.
- **Your ideal tester profile**. A brief description of your ideal candidates encourages potential testers to self-select. Since you'll most likely be recruiting people in your target market, you can use language from your marketing materials.
- **Your core requirements**. It's important to keep your core requirements (i.e., the characteristics a tester *needs* to have in order to provide relevant feedback) in mind. For example, if you're testing a service specifically for developers, make sure to mention that you're looking for developers.

FOCUS ON THE BENEFIT TO YOUR TESTERS

It probably goes without saying, but the reason *you* need beta testers is different from the reason your audience would want to be part of your beta test. As you're writing your body copy and subject line, try and appeal to the latter. What would a potential tester enjoy most about joining your beta? It could be the chance to get their hands on your product before anyone else or to influence a feature that's really important to them. It might be a fun, helpful, or novel experience. Whatever the benefit, make sure it appeals specifically to your audience and the potential candidates you want to attract.

DON'T SKIP OUT ON COMMON COURTESIES

Sounds obvious, right? It's surprisingly easy to forget greetings and thank yous when you're focused on working the other stuff into your email. But showing friendliness is essential to the "persuasion" element of your message. Opening with a salutation and closing with gratitude (where appropriate) is a subtle but effective boost. A little politeness goes a long way.

ON MENTIONING INCENTIVES

Centercode's Recruitment Manager Ulysses Quintanilla puts it beautifully:

"Many testers sign up for the chance to get a sneak peek at your product. But mentioning incentives in your email invite might attract people who are only looking to make a quick buck and aren't as invested in testing your product. While we always want testers to feel rewarded for their time and effort, telling them exactly what they'll receive as a thank-you gift could negatively influence the amount and quality of their feedback during your test."

Close With a Call-to-Action

Last but certainly not least, your call-to-action (or CTA) will direct your potential testers to the most important part of this whole process: your beta test application. Here are a few tips for making sure they get there.

MAKE IT STAND OUT

Your CTA should be highly visible and easy to find. Here are some tactics that will make moving on to the next step readily obvious to readers.

- **Let it shine**. Use a bright color, and make sure the text is clearly visible and easy to read. This is the only place in your email where all-caps are acceptable and encouraged.
- **Pick the best place**. Stick your CTA on the top half of your email so readers don't have to scroll down to find it.
- **Push all the buttons**. If you have the ability to turn your CTA into a button instead of plain text, so much the better! Buttons increase clickthrough by 28%.

PICK "ME!"

Instead of "you this, you that" language, help potential testers identify with what you'd like them to do (i.e., apply for your test) by using *me* or *I* in your CTA.

USE SPECIFIC, ACTIVE WORDS

Being specific and using active verbs will also increase the likelihood of potential testers applying for your test. Try shaking it up like these active examples do.

INSTEAD OF...		TRY...
Learn More	→	Tell Me About It
Apply Now	→	I Want to Test This
Join the Beta	→	Make Me a Tester

5 WORDS OR FEWER

Calls-to-action are meant to be punchy and quick. Too many words will encourage your readers to pause when what you want them to do is take that crucial next step. So keep your CTA short and sweet: no more than four or five words, including little guys like “a” and “the.”

Lastly, It’s Not *Just* About the Writing

Is the writing crucial? Absolutely. Is it the only tool in your toolbox for convincing potential testers to join your beta? Nope! There are other factors to consider and tricks you can use when it comes to creating a compelling and effective beta invite.

SPELL CHECK IT!

Using proper grammar increases the clarity, legitimacy, and professionalism of your invitation overall. Misspellings, grammatical errors, and formatting issues will make your invitation look like a phishing email.

BRAND IT!

Branding lets your testers know in a single glance that you’re the real deal. By asking testers to apply to your beta, you’re asking them for sensitive information, like their phone numbers and/or home addresses. Branding is a way to increase their trust and willingness to cooperate,

especially if you're reaching out cold. This can be as simple as ensuring you're using company colors (with their correct hex codes) and a high-quality, unwarped logo. We've got a ton of tips for incorporating branding throughout the tester experience in this webinar.

TIME IT!

When you send your email can influence how likely potential testers are to engage with your invitation. The "perfect" time will depend on your audience. Looking for business professionals? You might try early in the morning. Busy parents? Maybe after the kids go to bed. Research your target audience, experiment with different times, and pay attention to any patterns you find to figure out what works best.

REPEAT IT!

It normally takes a few touches to get the response you need from the testers you want. For example, when marketers look to get leads to engage, it takes an average of 6 to 8 touches! You might be self-conscious about spamming potential candidates (and that's a valid concern), but don't be shy about sending a reminder or two after you initially reach out to get traction. Just make sure to switch up your messaging a little bit each time.

MARKET IT!

Email isn't the only way to reach your audience! Those 6-8 touches marketers use to engage their audiences don't all happen via email. Take some tips (or better yet, contact someone) from your marketing team and cast a wider net by diversifying your outreach. Your company's website, social media, newsletter, customer forums, and ads are also great channels for inviting potential testers to the party.

AND LASTLY, WATCH IT

Privacy law compliance is a big deal, and it can be especially tricky to navigate when you're cold-emailing users about joining your beta opportunities or community. We're not lawyers, and we won't be going into GDPR, CASL, or other regulations. But what we *can* tell you is you need to cover your bases. Make sure you include your company's address and a

working unsubscribe link in every email you send, and that you touch base with your legal department if you have any questions.

Next Steps

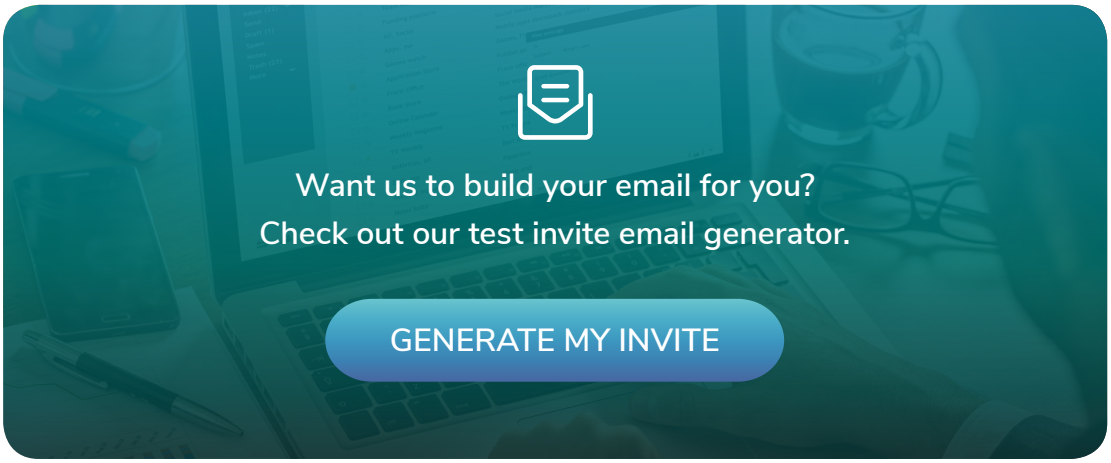
Your beta invitation is a big part of your beta recruitment initiative. But it's just *one* part — and by now, you're already thinking of the next to-dos on your checklist.

If you're looking for more guidance and best practices, make sure to check out these other resources for recruiting enthusiastic, target market testers.

- To figure out how many testers you need to recruit, use our free Test Size Calculator
- For more details on how and where to find testers, how to design your ideal tester team, and tips for writing qualification surveys to identify best-fit candidates, use the templates and worksheets inside our Recruitment Kit
- If automating your user testing processes (including filter-and-go recruitments) sounds like music to your ears, get a live demo of Centercode

Beta Test Invitation Email Templates

These templates are a great starting point for writing effective, engaging beta invitations. Each one comes with examples you can either apply directly to your own emails or take inspiration from as you tailor the messaging to your audience and products. Make it your own by mixing and matching subject lines, preheaders, body copy formats, and CTAs!



Target Market Invite Template 1

Use this template to invite existing customers or new members of your target audience to apply for your project.

EXAMPLE

Subject:

Wanna get more fit? Join our wearable beta 💪

Preheader:

Marathon runner? Dog walker? Either way, let's shape the future of fitness.

Body Copy:

Hi Dara,

We've got an exclusive invitation for you: **Our new fitness wearable is ready for beta**! We're looking for folks at every activity level to help shape the future of fitness. If you're interested in turning regular activities like vacuuming or walking the dog into a fun and easy way to get in great shape, apply to join the beta!

ADD ME TO THE TEST

TEMPLATE

Subject:

TARGET AUDIENCE BENEFIT? Join our *PRODUCT* beta (OPTIONAL EMOJI)

Preheader:

DESCRIPTIVE TRAIT? *DESCRIPTIVE TRAIT*? Either way, let's shape the future of *GENERIC PRODUCT TYPE*!

Body Copy:

Hi *NAME* (default: there),

We've got an exclusive invitation for you: **Our *GENERIC DESCRIPTION OF PRODUCT YOU'RE TESTING* is ready for beta**! We're looking for *DESCRIPTION OF YOUR TARGET AUDIENCE* to *BENEFIT TESTER GETS BY TESTING*. If you're interested in *BENEFIT TESTER GETS BY USING YOUR PRODUCT*, apply to join the beta!

CTA: ADD ME TO THE TEST

Target Market Invite Template 2

Here's another template for getting existing customers or new members of your target audience interested in your project.

EXAMPLE

Subject:

TV lovers wanted: Test this new product!

Preheader:

You supply the couch — we'll supply the entertainment.

Body Copy:

Hey there, Ji-hoon,

Always got the television on in the background? Or maybe your favorite part of the day is winding down as you catch up on your favorite shows? If you identify as an avid TV lover, film buff, or binge-watcher, **you're invited to beta test some unreleased features for our streaming service.**

Joining this beta helps us make sure you're getting uninterrupted, hi-def viewing experiences of the shows you love. Plus, it comes with some top-secret perks!

Interested? Apply below!

MAKE ME A TESTER

TEMPLATE

Subject:

SHORT AUDIENCE DESCRIPTION wanted: Test this new *PRODUCT OR SERVICE*!

Preheader:

You supply *THIS*, we'll supply *THAT*.

Body Copy:

Hey there, *NAME* (default: friend),

TARGET AUDIENCE BEHAVIOR OR COMMON PROBLEM YOUR PRODUCT SOLVES? If you identify as *2 OR 3 DESCRIPTIVE TRAITS OF YOUR TARGET AUDIENCE*, **you're invited to beta test *GENERIC DESCRIPTION OF PRODUCT YOU'RE TESTING*.**

Joining this beta helps us make sure you're getting *BENEFIT OF USING YOUR PRODUCT OR SOLUTION*. Plus, *BENEFIT TESTER GETS BY TESTING*!

Interested? Apply below!

CTA: MAKE ME A TESTER

Existing Customer Invite

Use this template to invite existing customers to your testing community or upcoming project.

EXAMPLE

Subject:

Dolphin Users: Enhance your payroll experience

Preheader:

Unlock even more payroll functionality by joining our delta testing program.

Body Copy:

Hi Alex,

As a Dolphin customer, you can always expect a secure and user-friendly platform for managing payroll at your company. Now, we're giving you a chance to unlock even more features to enhance (and improve) your HR experience: **You're invited to join the Dolphin Delta Testing Community**.

As a Dolphin Community Member, you'll have ongoing access to premium features and increased functionality that make managing your day-to-day even easier. It's a prime opportunity to show us how you're using the platform and what we can do to make it even better.

Join the community now and let your voice be heard!

COUNT ME IN

TEMPLATE

Subject:

AUDIENCE: Enhance your *SOLUTION*

Preheader:

Unlock even more *WHAT YOUR PRODUCT OR SOLUTION DOES* by joining *NAME OF YOUR TEST/PROJECT/PROGRAM/COMMUNITY*.

Body Copy:

Hi *NAME* (default: there),

As a *CUSTOMER/CORE AUDIENCE MEMBER*, you can always expect *A BENEFIT OF USING YOUR PRODUCT OR SOLUTION*. Now, we're giving you a chance to *VERB - BENEFIT TESTER GETS BY TESTING*: **You're invited to join *NAME OF YOUR TEST/PROJECT/PROGRAM***.

As a *TESTER/PROGRAM OR COMMUNITY MEMBER*, you'll have *ANOTHER BENEFIT TESTER GETS BY TESTING*. It's a prime opportunity to show us how you're using *YOUR PRODUCT OR SOLUTION* and what we can do to make it even better.

Join the *PROJECT/BETA/COMMUNITY* now and let your voice be heard!

CTA: COUNT ME IN

Employee Recruitment Email

This template will help you invite your colleagues to participate in your alpha, Customer Zero, dogfooding, or other internal testing projects.

EXAMPLE

Subject:

> You're our first and best customer

Preheader:

> User experience starts with U.

Body Copy:

Hey Sol,

Every day at Beeble, we're transforming collaboration and productivity for millions all over the world. It takes each and every one of us working together to improve the user experience, enhance performance, and reach larger audiences. That's why we need your help.

In order to keep making Beeble better, **we need more input from you**. Because convincing our customers that Beeble is the best starts with convincing you to love and use our product on a regular basis.

By launching a Customer Zero program, we're making sure that our first and best customers (our employees!) can see and share ideas and improvements as they develop in real time. Join the program and please bring your ideas to the table — our users would love to see them in action!

SHARE MY IDEAS

TEMPLATE

Subject:

You're our first and best customer

Preheader:

User experience starts with U.

Body Copy:

Hey *NAME* (default: friend),

Every day at *COMPANY*, we're *ASPIRATIONAL MESSAGE, SUCH AS MISSION STATEMENT*. It takes each and every one of us working together to *3 CRITICAL COMPONENTS TO YOUR COMPANY OR PRODUCT'S SUCCESS*. That's why we need your help.

In order to keep making *COMPANY* better, **we need more input from you**. Because convincing our customers that *COMPANY* is the best starts with convincing you to love and use our product on a regular basis.

By launching *NAME OF YOUR PROGRAM*, we're making sure that our first and best customers (our employees!) can see and share ideas and improvements as they develop in real time. Join the program and please bring your ideas to the table — our *USERS OR CUSTOMERS* would love to see them in action!

CTA: SHARE MY IDEAS

centercode

Delta Testing Solutions

Leading product ops teams use Centercode to identify real-world issues to fix, areas to improve, and what their users love in order to build amazing products.



Centercode's delta testing platform is built on decades of experience user testing the world's most successful products. Our platform equips you with the automation, best practices, and processes you need to get actionable user insights for any use case.

PRODUCT LAUNCH

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

USE CASES:

- Beta Tests
- User Acceptance Tests
- Field Tests

PRODUCT GROWTH

Recruit **Existing Customers** to continuously mature live products and services

USE CASES:

- Progressive Delivery
- Early Access
- Customer Advisory Boards

CUSTOMER ZERO

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

USE CASES:

- Alpha Tests
- Dogfooding
- Employee Tests

COMPETITIVE EDGE

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

USE CASES:

- Competitive Intelligence
- Market Testing
- Comparative Research

DELTA TESTING PLATFORM

Get a live demo of Centercode to experience the easy way to run your user tests, including:

- Auto-generated test designs
- Ted, your tester engagement bot
- Smart feedback prioritization
- Instant KPIs and dashboards

SCHEDULE A DEMO

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