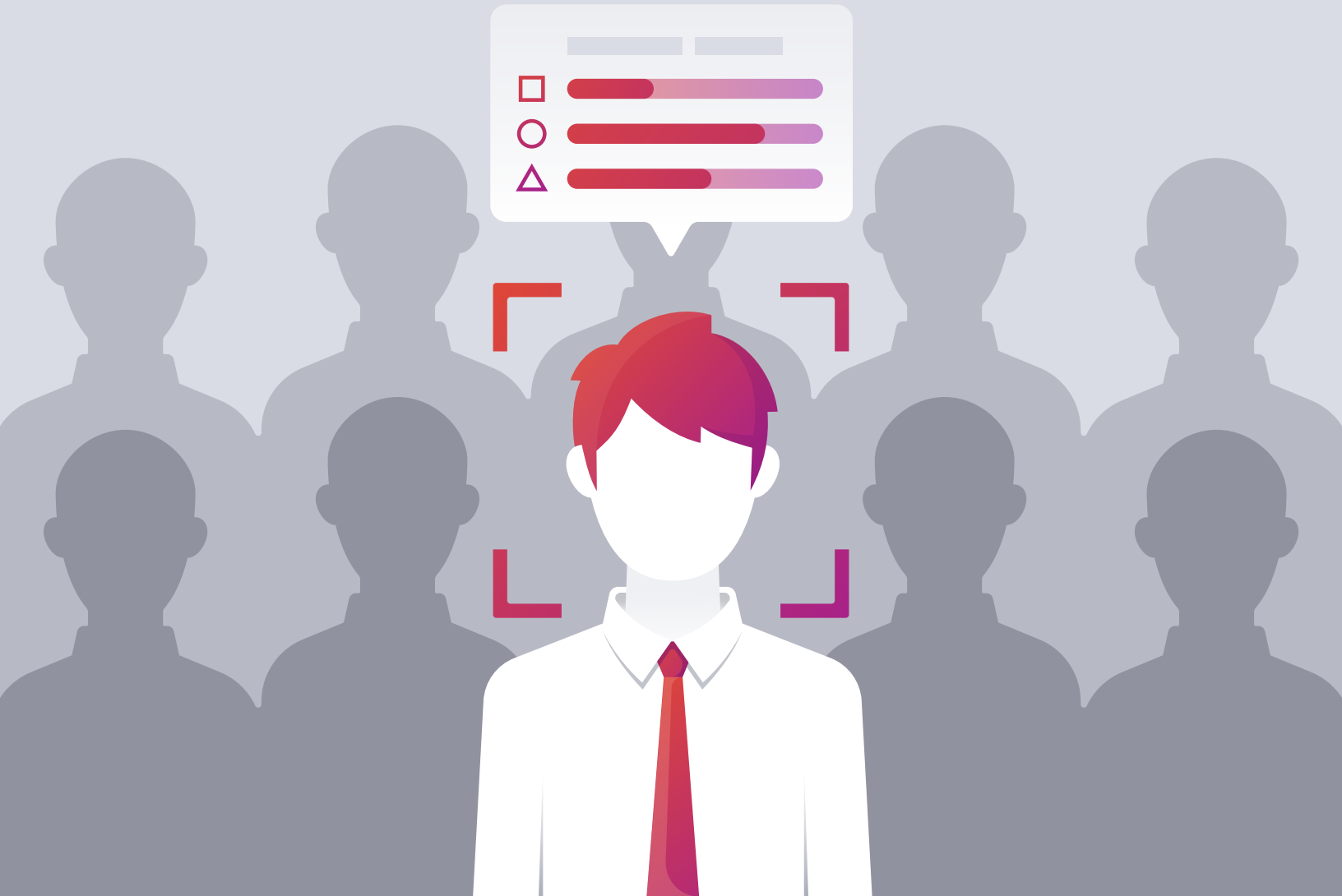
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How to Find and Recruit Quality Beta Testers



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INTRODUCTION

The success or failure of every beta test is heavily impacted by its team of beta testers. With a strong group of quality participants - enthusiastic beta testers from your target market - your project can generate ample amounts of high-quality user testing feedback with a minimal time investment from your team.

Implementing an effective beta test recruitment strategy is crucial for generating relevant, actionable feedback and executing user tests that improve your product and ensure a successful product launch. Without it, you run the risk of spending a lot of time running your project with beta testers who provide minimal value - or worse, misleading information.

Follow along to see how you can:

- Increase your participation rates to over 90%
- Increase quality feedback submissions by up to 30%
- Reduce the time it takes to recruit testers

Is this Resource for You?

This kit is geared towards individuals running private (also known as closed) beta tests for products of nearly any kind, including hardware, desktop software, video games, mobile apps, and websites. This typically includes beta or UAT program managers, product managers, quality managers, and other individuals executing a beta test in preparation for their product launch. If you're looking for guidance on running a public beta test, check out our white paper on **Public Beta Tests as a Launch Tool.**

If you're running an alpha, continuous, or employee product test, a lot of this information will be relevant for you, but you'll want to keep the specific goals of your delta testing use case in mind and make adjustments.

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HOW TO USE THIS KIT

This kit takes you step-by-step through the process of recruiting ideal testers for your beta test, and outlines best practices and pitfalls to keep in mind. We'll also provide answers to these common recruitment questions:

- How many potential beta testers do I need to recruit?
- Where do I find testers?
- How do I ensure that my testers are from my target market?
- How do I motivate people to apply?
- How much do I tell them about my product?
- How do I identify the best testers?

As you go through this guide, you'll complete a series of exercises to outline the information needed for your formal plan of execution. In the final exercise, you'll use that information to complete a detailed Recruitment Plan that serves as a structured guide for a successful recruitment.

Before we dive into the recruitment process itself, let's talk a little more about why enthusiasm is such an important trait of ideal testers and what motivates people to participate in your user tests in the first place.

ENTHUSIASM NOW MEANS PARTICIPATION LATER

Of all the challenges common to running beta tests, one of the most persistently difficult tasks is maintaining consistent engagement from testers. **The average participation rates for beta test projects with unstructured recruitments is less than 30%.** Because of this, many stakeholders have a low level of confidence in their organization's customer testing results and question the ROI of those projects.

A common way to try and counteract low engagement is to simply recruit three or more times the number of testers needed to achieve project objectives. However, as we'll discuss later on, while project costs, risks, and time investments scale as the tester team grows, the value of including multiple times the required testers in your project usually does not.

The most straightforward and effective way to increase test participation rates is to recruit testers who are genuinely excited about sharing their feedback about your product. Their enthusiasm will keep them consistently coming back to your project to provide detailed, useful insights on how to improve your product before launch.

This idea raises a lot of great questions, so keep reading to find out what could motivate someone to participate in your test, how to recruit enthusiastic applicants, and how to recognize them when you see them.

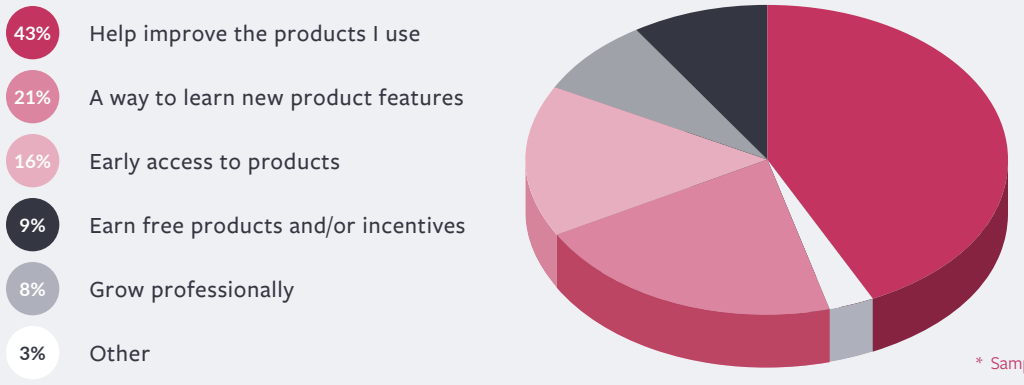
WHY DO PEOPLE PARTICIPATE IN BETA TESTS?

This is a question we hear very often. It seems a little odd that complete strangers would be willing to spend their free time using a product that may or may not work the way they expect it to. It seems even more unbelievable that they would be excited about spending even more time telling you about their experiences when they won't be getting paid for their time, and likely won't be able to keep the product once the test is over.

With so many people excited about testing, and we conducted a survey of over 5,000 volunteer beta candidates from **our tester panel** to find out what motivates them.

CENTERCODE SURVEY

What is your primary motivation for participating in our user testing program?



* Sample size of 5,418 respondents

Although there are many different motivations for participating in beta tests, you might be surprised that the majority (~43%) are just genuinely interested in providing feedback in order to help companies improve their products. These individuals are invested in improving the technology in their lives by helping you deliver an outstanding product that solves their specific problems. In some instances, they could be responding to frustrations with issues in similar products that they hope to help improve. In other cases, they actively enjoy the product and want to enhance their experiences and productivity even further. No matter what their motivation, your testers will have a great sense of pride knowing that they contributed to the success of your product.

It's crucial to note that while testers may have a clear interest in participating in the development of new products by providing feedback, there is some effort involved in maintaining their enthusiasm. Expressing a matched level of commitment and enthusiasm about your project - for example, by responding to their feedback - goes a long way in building rapport and making testers feel heard, valued, and motivated to contribute.

Notice the small percentage (~9%) of respondents who are primarily motivated by free products and incentives. While these testers could still provide good feedback, it's usually best to avoid them. Motivating these individuals to meet your participation requirements will typically be costly and challenging. While it's customary to provide an incentive at the end of your beta test, it should always be considered as a means to maximize engagement of properly motivated testers, rather than as the primary enticement to join your test.

An important takeaway here is that there are many different reasons people might be motivated to participate in your user testing project. Understanding those reasons will help you develop an effective recruitment strategy and attract the enthusiastic testers that will increase the value of your beta test.

Why You Shouldn't Only Recruit Customers

Typically, you want to build a beta tester team with both existing customers and fresh faces. Doing so ensures a more accurate representation of the individuals who will be purchasing and using your product, post-launch.

Can We Just Ask What Motivates Our Testers During Recruitment?

Absolutely. Asking beta test applicants about why they're applying for your test provides valuable insight. Not everyone will be honest, but you'll find that most people are. At the very least, it will make it easy to filter out applicants who are only interested in getting free products. We'll talk more about evaluating the motivations of your applicants when we discuss the qualification survey later on in the white paper.

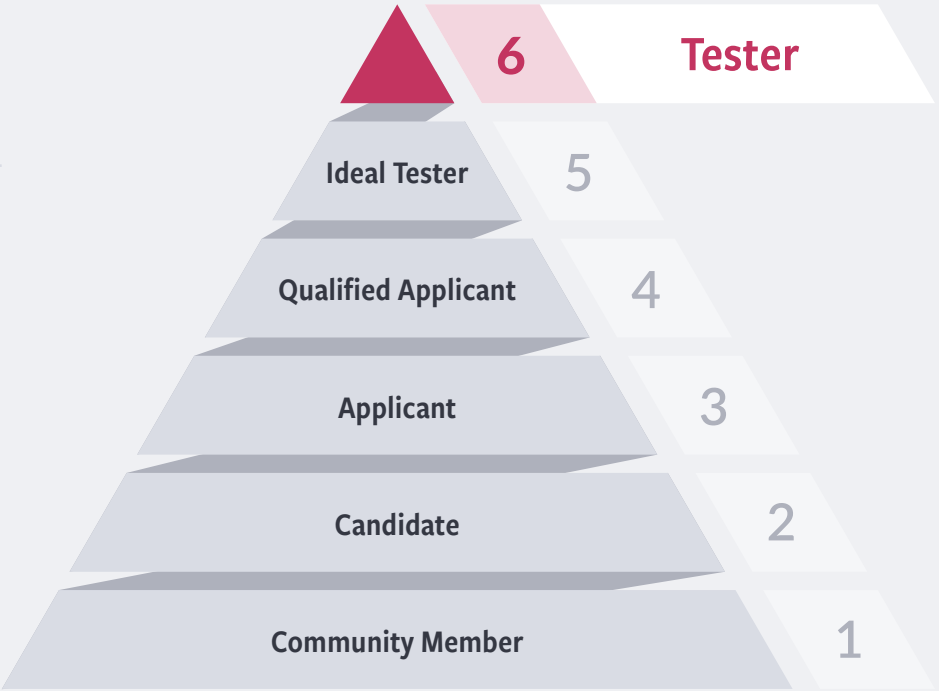
THE RECRUITMENT PROCESS

Using a solid process takes the guesswork out of recruiting for your project and provides a reliable path for executing a successful recruitment. The process starts in the Planning Phase of your beta testing project, when your team is working closely with stakeholders to assess organizational needs, identify test objectives, and agree on a detailed plan of execution. Tester recruitment efforts are also the meat of the Preparation Phase, when your team is making sure all tools, products, and testers are in place and ready to go before opening the Testing Phase and starting to collect feedback. The goal of this process is to move people through the different stages of recruitment and into your project as official testers.

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The Six Stages of Recruitment

Successful recruitment begins with a large group of community members, which is narrowed down as people move through a six-stage process. The result is an optimal group of beta testers who are not only qualified, but also committed to participating in your test.



1 **Community Member**
A general member of your tester community, or if you don't have your own community, this just refers to the individuals you can contact about testing your product.

2 **Candidate**
A community member or other individual who meets the pre-qualification for a test based on any information you have about that person. This could be profile information if they are in your own community, or it could be traits like geographic location if they are a customer or social media follower.

3 **Applicant**
Someone who applies for the test, stating that they are able to meet the requirements and are willing to participate.

4 **Qualified Applicant**
An applicant who has the correct specific traits, demographic profile, and technical equipment needed for the specific project. In other words, they pass the qualification survey.

5 **Ideal Tester**
A qualified applicant who shows characteristics that indicate they will be valuable on the project and has been selected to participate.

6 **Tester**
An ideal tester who has been screened by stakeholders, has signed all necessary agreements, and has been onboarded to the test.

The recruitment process has four steps:

1. Develop a Recruitment Plan based on your target market, core requirements, and test objectives, then review it with stakeholders to make sure it is aligned with organizational needs.
2. Build a targeted candidate pool of individuals that meet your core requirements and open your recruitment.
3. Conduct tester selection to bring ideal testers from that pool into your project, based on their market fit and enthusiasm.
4. Let testers know that they've been selected for participation and begin the onboarding process.

The last three steps in the process are directly related to the stages in the pyramid, but a lot of careful planning needs to happen before you can start moving people through the stages of your recruitment.

DEVELOPING YOUR RECRUITMENT PLAN

Laying out a clear Recruitment Plan ensures that you're able to bring the right individuals into your beta test - the people who will be fully engaged and provide consistent, high-quality feedback. The Recruitment Plan is an authoritative outline of your goals and strategies for the recruitment and serves as a guide for contributors and stakeholders throughout the process.

The exercises in this white paper will guide you through the creation of your recruitment plan, using information from these key activities:

1. Identifying your topics and objectives
2. Determining the size of your tester team
3. Defining your target market and core requirements
4. Building out tester segmentations and selection criteria
5. Developing your outreach strategy
6. Designing a qualification survey
7. Finalizing your Recruitment Plan

Determining Your Timeframe

Depending on your tools, resources, topics, and objectives, recruiting candidates can take anywhere from hours to weeks. For companies and products without an existing pool of candidates, a 2-4 week recruiting period is recommended. The exact time frame depends on the number of testers required and the complexity of your target audience. If you have an existing pool of qualified candidates, the time frame will likely be reduced to under a week. Be sure to consider how much ramp up time you'll need for recruiting testers when planning your broader test schedule.

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1. Identifying Your Topics and Objectives

You'll need to first decide what it is you intend to accomplish with your test, and outline clearly defined goals to set the tone for each phase of your project. The topics and objectives you identify during this portion of planning are key defining factors in who you'll recruit for your project.

As a whole, the objective of beta testing is to evaluate your customers' level of satisfaction with your product, along with their acceptance of its features. Other test aspects - like evaluating product stability or feature adoption - are usually measured using delta testing use cases like alpha or field testing.

On a more granular level, your beta test will have unique goals that are specific to validating key elements of your particular product - called topics - and capturing insights that inform crucial stakeholder decisions. Topics are a way to target the overall objectives of beta testing towards certain areas of your product. You can use topics in tandem with objectives to outline specific project goals, such as gathering customer attitudes (objective) on your product's setup process (topic).

During recruitment, your main objectives and specific targeted topics determine the technical and demographic makeup of your tester team. You'll want to recruit testers whose personal and technical behaviors and needs are solved by the product or feature you're testing.

For example, if you're testing a smart speaker with multi-room playback, you'll need to recruit testers who live in a dwelling with more than one room (no studio apartments) and have an existing need for the multi-room functionality. Testers whose needs relate to the benefits offered by the targeted feature or topic can provide more relevant, market-aligned feedback than someone who doesn't need or wouldn't use the feature without first being asked.

In some instances, the evaluation of your topics may be influenced more by the habits of your target market rather than traits like their type of dwelling or the devices they own. For example, let's say you are evaluating satisfaction with your product's content streaming feature over an extended period of use. Testers that actually use the streaming feature under these circumstances will provide you with more expansive feedback than someone who was coaxed into testing a scenario that doesn't align with their typical behaviors. With this example, the most accurate evaluation will come from testers with specific habits, like binge-watching entire seasons of the latest shows.

FREE RESOURCES



Defining your topics and objectives is crucial to a successful recruitment and also contributes to the overall success of your beta test. Dive into one of our free beta test planning kits for **software** and **hardware** products to get more information on objectives and tester recruitments within the larger scope of planning the strategy for your next beta test.

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EXERCISE #1

Open the **Beta Topics and Objectives Worksheet** provided in this kit, and create a list of your main topics. Think about the ways each topic might influence the types of testers you'll target during recruitment.

Objective	Topic	Description	Related Tester Traits
Evaluate satisfaction	**Hardware Setup**	Initial setup and installation of the hardware in the house	Type of WiFi router; WiFi speed; Mobile operating system
Evaluate acceptance	**Facebook Integration**	Post directly from the application to Facebook	Frequently submits posts or articles to Facebook

Whatever your specific needs, identifying distinct topics and aligning the makeup of your tester team around them forms a solid foundation for your beta test, ensuring that it runs smoothly. Keep the tester traits that are relevant to your goals in mind to use during the next steps in the planning process.

2. Determining the Size of Your Tester Team

Typically, beta tests include about 75-125 testers but ultimately, the size of the tester team is based on your goals and product, as well as the constraints and expectations of your organization.

Goals

Here are the key components of your project goals that would increase the scope of your project and cause you to recruit more participants to ensure full coverage:

- Testing in a wider range of user ecosystems
- Testing with users from multiple target market segments
- Testing in user ecosystems with an increased number of products interacting with yours

Product Type

It's also important to take your product's market, features, and availability into consideration. Because these aspects

of your product shape test objectives and topics, you'll see that the ways they impact the size of your tester team are directly related to the ecosystem and market segment aspects we just mentioned.

MARKET

You're likely to be targeting a few specific market segments. As the number of segments you're seeking feedback from increases, so does the size of your tester team. You'll need to recruit enough testers so that a sufficient sample of each segment is represented in your test.

FEATURES

The features you're testing also play a role in the scope of your test and the number of testers you'll need to recruit to collect enough feedback about each one. As the total number of issues or insights that could be uncovered increases, so does the size of your tester team. This depends on three key aspects of each feature:

- The complexity of the feature can require a larger group of testers to run through the potential test cases.
- The number of different product types, brands, and individual devices each function interacts with can also increase the scope of the test, requiring a larger tester team.
- The product release type can also influence the target number of testers. New features on new products have greater potential for issue and insight discovery than new features on product updates.

AVAILABILITY

Device availability tends to be the ultimate constraint for hardware companies. Sometimes, there just aren't enough pre-production units for large-scale testing. On top of that, the cost of your project increases with each unit that is sent out for testing. Stakeholders are unlikely to send out very expensive test units to more testers than is absolutely necessary. Discussing what is feasible for you and your team while balancing the cost and return on investment is critical.

Company

Because user testing projects produce value for your entire organization, there are many factors that play into your company's influence on this element of your project plan.

BRAND

Working for a big brand-name company might mean you'll need a higher quantity of testers because there's more at stake if something were to go wrong post-launch. At the same time, the increased level of confidence in your results will increase the ROI of your beta test. It's well worth it to engage with more testers when the new insights or features identified by hundreds of users could impact millions after launch.

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SIGNIFICANCE

Some organizations require that you demonstrate a certain level of statistical significance in order for your results to be taken seriously. In those cases, you might need to increase the number of testers in your project to fulfill that requirement. At the same time, you should be aware that this often comes with the trade-off of reaching or passing the threshold of diminishing returns.

You can use this chart of tester team sizes and how they impact the confidence level of your results and your margin of error as you scope your next recruitment.

Tester Sample	Confidence Level	Margin of Error
25	90%	16%
50	90%	12%
75	90%	9%
100	90%	8%
25	95%	20%
50	95%	14%
75	95%	11%
100	95%	10%

PARTICIPATION

Even if your organization doesn't have a required threshold of participation for user testing projects, you likely have a target of how many people you'd like to receive consistent feedback from during your beta test. This target or requirement is your "core" number of testers.

But just like an event marketer does not expect every registrant to show up for their event, you can expect that not every tester you recruit will actually show up when it comes time to test. Because of this, you're unlikely to meet your participation targets if you only recruit the number of testers dictated by your core number.

A good way to make sure your beta test meets the required level of participation is to plan for and recruit a "surplus" amount of testers to make up for any participation drop-off you might encounter. The surplus amount is usually an additional 20%-30% of your core number. While adding surplus testers to your overall recruitment target may influence the actual number of testers you recruit, it doesn't directly influence the goal you set as your core number of participants.

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EXAMPLE

You need 100 testers to participate in your beta test - the core. Your organization's tests have a known drop-off rate of 20%, so you recruit an additional 20 testers - the surplus. Of 120 testers you recruit, only 100 actually participate in your test in a meaningful way. The project has met its targeted core number of participants.

Whatever the influence of your objectives, product, and organizational demands, the key is to recruit enough testers to achieve a good level of confidence in your results, but not so many that you create inefficiencies or limit the ROI of your test.

At a certain point, diminishing returns set in, and the additional testers you recruit don't offer any real value. With too many testers, you'll likely discover redundancies in your data and repetition in the insights testers deliver. For example, it's true that you want to be able to get a feel for the scope and impact of potential product issues by hearing about them from multiple testers. But once you have a representative sample of people reporting on an issue, an extra 100 unique user reports don't typically provide new or useful information to your team. At the same time, an excessively large tester team increases project costs, risks, and demands on your team.

Each additional participant in your beta test increases project costs based on the price of your test units, shipping fees, and incentives. It also takes more effort for your team to keep an enormous tester team engaged and actively participating in your project. You'll often see great participation from a certain groups of testers, with sporadic participation - or worse - from everyone else. Even still, those participating can often submit aggressive amounts of feedback that your team will need time to triage and analyze.

Because many participants in a massive beta test might not even participate, it's important to evaluate the risk of exposing your unreleased product to a larger group of testers than is necessary. While confidentiality concerns are typically put to rest with the implementation of a non-disclosure agreement, it's still good to be cautious with the level of risk you're exposing your product and organization to.

Taking the costs and diminishing returns of excessively large tester teams into consideration when defining your participation and recruitment goals will help preserve the efficiency and positive ROI of your beta test.

Now that you have a good feel for how many testers you want to recruit, let's talk about how to identify who you want to recruit.

FREE RESOURCE



Find out exactly how many testers you'll need to recruit for your next project with the **Test Size Calculator**.

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3. Defining Your Target Market and Core Requirements

Beta testing is designed to help you understand if your target audience is satisfied with your product's features and functions. This makes the relevancy of your feedback one of the most crucial ingredients for beta test success. In order for feedback to be relevant for the objectives you are trying to achieve, it must come from true members of your target market.

Testers who don't share the same demographic and technical characteristics of your target market can provide lots of informative feedback, but their attitudes and behaviors will not reflect the people who might potentially buy your product. To ensure the success of your beta test - and your product - it's essential to target your recruitment towards the very people who have a native understanding of the needs and desires of your target audience. At the same time, recruiting testers that fit extremely specific traits can become very challenging very quickly.

A helpful technique is to identify the most important "must-have" traits, and start recruiting a larger group of candidates who have those characteristics - called core requirements. In the next step, you'll turn any additional characteristics on your wishlist into tester segmentations to make sure your tester team has solid representation of each trait that is important to you and your product team.

Core requirements provide a clear outline for who you'll be targeting during recruitment and which individuals are eligible for consideration for your test opportunity. Reach out to your product or marketing team for detailed information about your audience, and work with stakeholders to prioritize the key characteristics that will be reflected in your core requirements. Here are some aspects to keep in mind:

Demographics

Most products target individuals based on consumer or business-related demographic traits. These demographics include qualities such as age, gender, education, marital status, occupation, economic status/income, home or vehicle ownership, household size, region, and the list goes on. If your product is targeted at businesses, relevant demographics include vertical, company size, organizational structures, etc. If these or any other factors are used in targeting for your product, they should also be considered when creating the core requirements for your beta test.

What About Language or Localization?

If your test spans multiple languages or you're testing localization, incorporate each of these aspects into your core requirements. It's ideal to include multilingual candidates who can communicate feedback in your native language (even if it's their second language), yet still experience the product in their native language. Alternatively, run separate beta tests for each language if your stakeholders are invested in validating in different regions and cultures and resources allow.

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Technology

In today's interconnected world, the performance of your technology product will be impacted by the environments it's used in and the products it interacts with. Making sure that your beta test addresses the variety of technologies and ecosystems your product needs to be compatible with is crucial. With this in mind, you'll want to recruit users with as wide a range of relevant technology products and environments as you reasonably can. This will ensure that you're collecting insights for the environments your product will likely be used in after launch.

Knowledge

This may include specific experience-levels (e.g., certifications or number of beta test participations) or skills (e.g., technical prowess or occupational expertise) you want your testers to have. It's common for technology companies to develop products that reach markets with diverse groups of people, including people with less technology experience or people who are used to interacting with certain types of products. Determining the knowledge-based traits of your target market and recruiting testers with similar skills and experiences helps deliver tangible benefits.

4. Building Out Tester Segmentations

Because core requirements are limited to only a few characteristics, the candidates who are eligible for your test will still represent a broad range of technical and demographic backgrounds. Tester segmentations allow you to zero in on additional characteristics of your target audience and use them to separate your tester team into clearly defined groups.

Much like core requirements, tester segmentations cover more than just one type of characteristic. Demographic segmentations are built around the same type of personal details - such as the user's type of dwelling or status as a customer or prospect - that were outlined in the previous step. Technical segmentations are centered around the details of the user's technology environment, including the other devices and systems found there. For example, it's typical for a test involving mobile software to create a technical segmentation for each of the main mobile operating systems.

> ***Tip***
>
> As you're going through this step of the process, it's helpful to make a list of "nice-to-have" characteristics. You might not be able to reasonably include every trait from your wishlist in your tester segmentations, but you can use those "nice-to-have" items later on as selection criteria that allow you to easily identify the qualified applicants who would make the most ideal testers.

First, single out one or two important technical aspects and a couple of demographic characteristics that you'd like to focus on. For example, you might want to focus on the user's gender and parental status (demographic), as well as their level of computer expertise and their desktop operating system (technical). Then, you'll define the specific traits you want reflected in your tester team. You might be looking for a certain ratio of male to female users, parents to non-parents, Windows to Apple users, and tech gurus to those with limited computer knowledge.

If your organization leverages personas to represent each portion of your target market, identifying the relevant segmentations will come a little easier. Your product and marketing teams have already grouped and defined the technical and demographic traits that are specific to your audience, and you'll use them as a basis for building out your own segmentations. For example, "Betsy" could be a French mom who is a master with Windows 8. You'll pick the most relevant characteristics, adjusting the specific traits or adding them as necessary to align your tester segmentations with your project objectives and topics.

Once you've defined your demographic and technical segmentations, each one becomes a bucket that each individual tester can fall into. Your recruiting goal is to simply fill each of these buckets, mapping the number of testers to the proportional size of your market that the persona represents. Let's take a look at an example below.

Tip

Maintain your tester segmentations throughout your beta test. Not only do segmentations make it easier to ensure successful market coverage from your recruitment, but keeping your testers grouped by segmentation throughout the test will allow you to better understand the context of their feedback. This gives you a great advantage when it comes to making decisions about which feedback to act on.

EXERCISE #2

Use the **Core Requirements and Tester Segmentations Worksheet** included in this kit to map out key target audience characteristics and tester groupings.

Mobile OS	Description / Notes	% of Tester Team	# of Testers
Android Users	Version 4.1 or newer	50%	25
Apple Users	Version 6.1 or newer	50%	25
Computer Expertise	**Description / Notes**	**% of Tester Team**	**# of Testers**
Beginner	Basic knowledge of use, no troubleshooting	20%	10
Intermediate	Limited troubleshooting knowledge	60%	30
Advanced	Independent repair and optimization	20%	10

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5. Developing Your Outreach Strategy

Once you have a solid outline for who you want to recruit, you can turn your attention to how you're going to let people know about your beta testing opportunity. This includes selecting the tools and systems you'll leverage to filter, organize, and communicate with applicants; choosing the channels you'll utilize to promote your test opportunity; and creating the messaging content for each channel.

Selecting Your Recruitment Tools

Every organization has their own unique needs, but when it comes to tools and systems for your recruitment process, generally you'll want to find a solution or set of solutions that helps you:

- Optional: Build and manage a tester community (e.g., Lithium)
- Create target contact lists (e.g., Google Sheets)
- Communicate with candidates and testers (e.g., Microsoft Outlook)
- Collect survey responses from applicants (e.g., SurveyMonkey)
- Filter and manage candidates, applicants, and testers (e.g., Google Sheets)
- Distribute legal documents and collect signatures (e.g., Adobe DocuSign)
- Track and report recruitment progress and success (e.g., Google Data Studio)

The tools and systems you use during recruitment have a huge impact on your team's efficiency and the level of detail you'll be able to include later on when delivering test results. Ideally, your tools will expand the capabilities of your team while simultaneously decreasing their time investment. Here are some options to consider when evaluating what this might look like for your team:

OPTION 1: USE A COLLECTION OF EMAIL, SURVEY, AND SPREADSHEET TOOLS

Examples: SurveyMonkey, TypeForm, SurveyGizmo, Google Forms

With this option, you would use a separate tool for each step of your recruitment process, like Gmail for outreach, SurveyMonkey for building your qualification survey and collecting responses, and Google Data Studio for organizing and distributing data.

Each individual tool you use will have deep functionalities surrounding one or two specific steps of recruitment to help your team get the most out of that portion of the process. The downside is that the tasks you perform and information you gather during each step of recruitment are siloed off, making it time-consuming to combine the full value of each tool throughout your project. For example, your survey tool may help you collect in-depth data about your testers, but without the ability to map that information to tester feedback later on, the value of that data is limited.

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Pros	Cons
+ Free, inexpensive, or already being used in your organization	- Limited ability to support best-practice beta recruitments and user testing projects
+ A wide selection of tools to choose from	- User data, project data, and survey data are in seperate systems
+ In-depth functionalities for specific task sets	- Increased time investment because of task redundancies and data management efforts

OPTION 2: USE A USER TESTING AUTOMATION TOOL

User testing automation tools are designed with the specific processes of beta testing and beta test recruitment in mind. Though there are a few options like this out on the market, some organizations opt for internal development of a tool that is hyper-suited to their unique needs and processes.

These tools provide holistic support during the recruitment process in a way that also provides turnkey value to adjacent and future user testing processes. While they can be costly to develop, there are affordable tools (like **Centercode**) on the market that offer affordable automation for projects and programs of all sizes.

Pros	Cons
+ User data, project data, and survey data are in the same system	- More costly than using existing productivity tools
+ Reduces redundancies and boosts efficiency across adjacent and future Customer Validation processes	- May lack complexity and sophistication in any one area
+ Have feature sets for the entire recruitment process, including community portals, targeted emailing, qualification surveys, user segmentation, and scoring	- Niche offering with few vendor options

Deciding which system is the right option for your project will depend on your budget and the level of functionality you require to collect and manage your data. Once you've selected a system or set of tools, you'll be able to identify a reasonable expectation for how much time you'll devote to managing your recruitment and how complex your recruitment and selection strategy can be.

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Choosing Channels for Promotion

With tool selection behind you, it's time to start thinking about which channels you will use to attract applicants to your testing opportunity. If you're not sure where to find testers that meet your core requirements, a helpful approach is to think about where your target market is spending their time, and then zero in on those particular outlets.

> ***Tip***
>
> Think long term. As you're selecting recruiting sources for your beta test, consider which of those sources might also be useful year-round as you look to continuously build your tester community.

Below are some helpful sources that you can use to attract qualified candidates. Not every recruiting source will work for your product and target market, but by selecting a few different recruiting sources, you'll be able to find the applicants you need.

Your Organization's Website

Creating a landing page for your test opportunity and linking it throughout your company's web domains - including in customer testing overview pages, blog posts, user groups, and forums - is a useful way for existing and potential customers to learn about your test opportunity and start the application process.

Test Promotion Sites

There a number of websites that will promote your beta testing opportunity to their users. Some of these sites charge a fee, while others are free. Each site will have its own process and timeframe, so start your research early. With over 200,000 profiled community members, Centercode's own tester community, **Betabound**, is one of the most popular of these sites.



Request your free test announcement at ***www.betabound.com/announce.***

Social Media

Social networks have millions of users communicating feverishly about cutting-edge, exciting, or simply top-of-mind brands, products, and technologies. Posting your application link to your own company's social feeds is a great way to get people talking about your beta. You can also use resources like **Twitter Search** to look for people talking about your product/industry, or use tools like **TweetDeck** to get real-time updates on people tweeting about your product, company, and industry. Reach out to these users to personally invite them to your beta test and encourage them to share the opportunity with others.

User Forums

There's an internet forum for just about every product category on the planet. They're filled with product enthusiasts who also tend to be great beta testers. Find the forums relevant to your product and target market, and approach the forum moderators about posting your beta testing opportunity.

Blogs

Similar to forums, blogs exist to convey news and knowledge for just about every industry. Bloggers are always seeking new and interesting topics to share and discuss with their readers. They love to be the source of exciting and exclusive opportunities. A great place to begin is by simply making a list of blogs/bloggers that are relevant to your product or market and personally reaching out to them to discuss your opportunity.

Online Advertising

Online ads are best used when you need to target a geographic region, specific device, or type of person. The downside is that they can quickly become expensive, and it's often challenging to make sure you're reaching the right people. When using this channel, it's crucial to invest time into creating great ad copy to avoid being flagged and deleted. With the saturation of illegitimate beta testing opportunities on the web today, it's important to illustrate your legitimacy.

Trial Downloaders

The people who download trial versions of your product are another great group to target during recruitment. If someone is in a trial phase, the chances that they are in your target audience and don't have previous experiences with your product are high. Gathering feedback from this group will add a valuable perspective to the insights you collect from the test participants who have more experience with your product.

Conferences and Trade Shows

Trade shows and conferences are often overlooked, but you can also use these sources to boost your recruitment. Add user testing program information to your booth collateral, send an email blast to trade show leads, or link your customer testing overview page in slide decks and conference programs.

Existing or Previous Testers

Oftentimes, your existing testers and community members are happy to share beta test announcements with their friends and family. Just be careful not to push too hard or set expectations about selection of the people they refer. Also make sure to be clear about which information your testers can share without violating their NDA. A good way to do that is to encourage testers to share anything in the recruitment landing page or emails, but avoid discussing the specifics of their current or previous testing experiences.

To boost the effectiveness of your referral program, you can host a "Recommend a Tester" form on your community or testing interest page. This allows any existing participants to recommend other testers. If you incentivize referrals with gift cards or exclusive opportunities, you may have even more success. You can use a **scoring system** to ensure that these ambassadors of your program get credit for their efforts and rise to the top of your list during your next recruitment.

In-Product Invitations

Another way to encourage your existing customer base to join your community or project is through in-product invitations. You don't want to implement pop-up dialogs that interfere with their use of the product, but a subtle, in-product trigger (for example, in the Help menu) can hit people at just the right time and motivate them to sign up.

Public Feedback or Contact Us Forms

The people providing feedback via these forms on your site are usually good test candidates. In fact, quality testers are typically attracted to these forms because they want their voice to be heard. If they're outgoing and resourceful enough to find these feedback mechanisms on their own, even when you haven't tasked them with testing your product, just think of how helpful they'll be once you have them on your project.

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EXERCISE #3

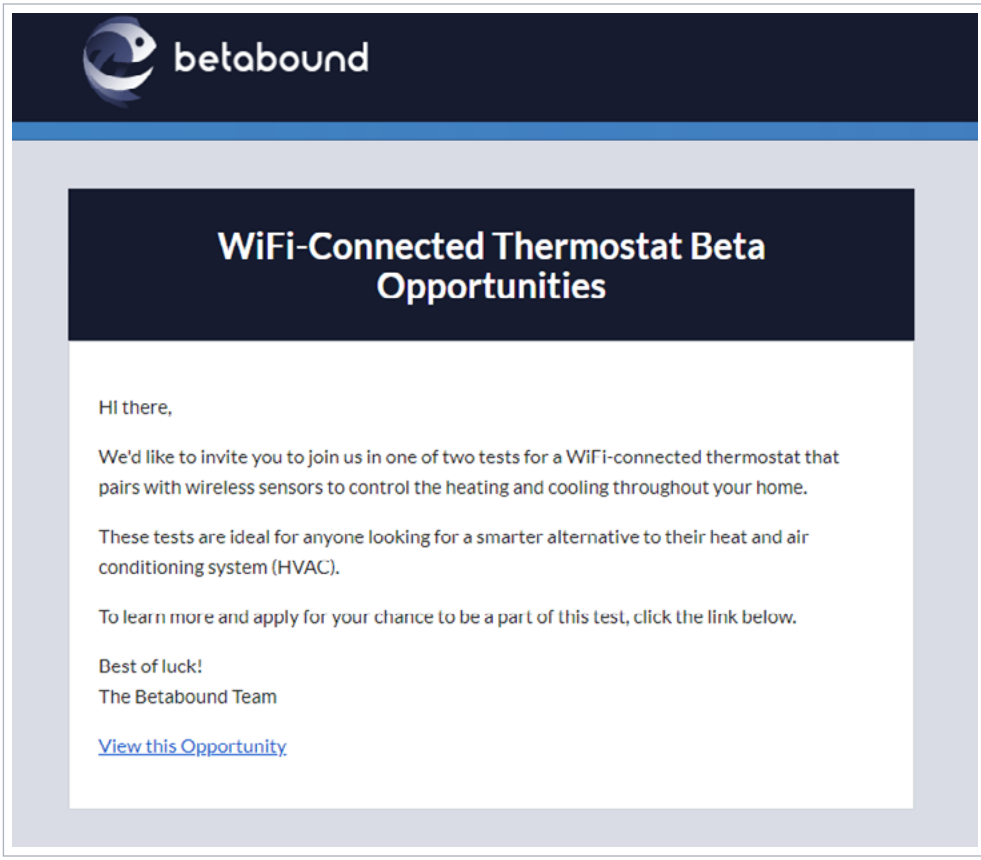
Organize all of the channels that are applicable to your test and make notes on how you will use each one in the **Recruitment Channels Checklist**.

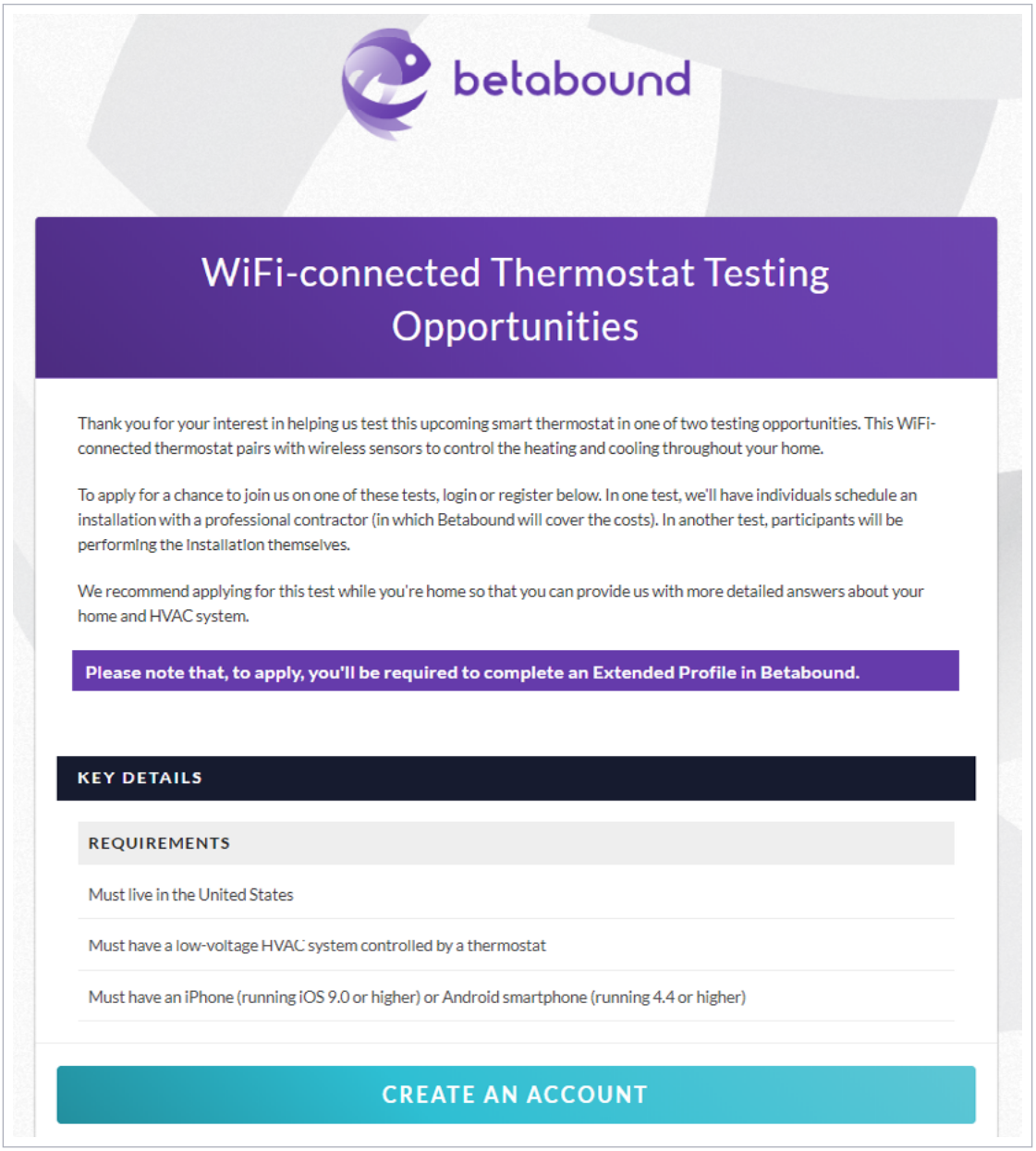
Creating Messaging Content

With a map of the channels you'll be using to promote your test opportunity, you can more easily design promotional content specific to each one. To start, you'll need to write a core recruitment message. Usually it will take the form of an email invitation and/or landing page like the ones shown below.

FREE RESOURCE

Download the **Beta Invite Kit** for email and copywriting best practices, along with invite templates, sample emails, and a free invitation email generator.





Follow these guidelines to make sure your core message is clear, exciting, and honest.

- **Be succinct**
  Your core recruitment message should be simple and concise, otherwise you'll begin to overwhelm your potential applicants 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**

  If details about your company, product, or beta test are meant to be kept confidential, it's important to be careful with what you divulge in your message. 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 applicants.

- **Clearly communicate requirements and expectations**

  While you might want to be a bit ambiguous about company and product details, you'll want to make sure that your candidates understand exactly what you'd be expecting from them during your test. This will increase both the number of qualified candidates applying for the opportunity and your test participation rates. Be sure that your message communicates not only your basic demographic and technical requirements, but also how much time and energy potential testers can expect to invest.

- **Mention incentives with care**

  At the beginning of this white paper, we talked about what motivates testers and how some applicants may be motivated only by incentives and rewards. When you are running stress testing or time intensive tests, it can be useful to mention incentives, but it's generally best not to mention specific rewards in recruitment emails or landing pages. Doing so may attract the wrong candidates with the wrong motivations, which has a negative impact on your project.

Once your core message is in place, you can use it to create content for each channel that you'll be using during your recruitment, from social media posts and paid advertisements, to blog posts and full-on email campaigns. Creating all of these promotional materials in advance gives you the opportunity to confirm alignment with recruitment goals. It also enables you to stage the content across channels, making it easier to take everything live when the time comes.

EXERCISE #4

Create your core recruitment message using the **Messaging Content Worksheet**. Then draft the specific content you will use for each of the channels you selected in the previous exercise.

6. Designing Your Qualification Survey

Including a short screener or qualification survey as a part of the test application process helps you gather enough information about each of your applicants to determine which ones are the best fit for your test. The qualification survey has two parts, each addressing different types of information.

The first portion collects the information you need to determine whether your applicant meets your core requirements, and fits into one of your beta test's demographic and technical tester segmentations. The second section gathers more subjective information that helps you gauge the enthusiasm of the applicant and determine if they will be an effective beta tester.

> ***Tip***
>
> You may need to create separate qualification surveys for different audiences. If you have an existing tester community or pool of customers, then you may already have basic data like their contact information. In that case, you'll only need to collect information specific to this beta test from those candidates. For candidates outside of an existing community, your qualification survey will need to collect contact information along with relevant demographic, technical, and personal information.

Creating qualification survey questions that will help you determine whether or not your applicants meet your basic demographic and technical requirements is relatively straightforward. You can use responses from the first part of your qualification survey during the tester selection process to filter out unqualified applicants. It gets a little more challenging when it comes to designing the subjective questions for the second part of your survey, so here are two approaches you can take:

How Long Should My Qualification Survey Be?

While you don't want to make your qualification survey too long and exhausting, there is value in using it to elicit some effort from your test candidates. The application process is a great opportunity to gauge how much energy a candidate is willing to invest into your beta test. If the candidate isn't willing to put five minutes into applying, then they're unlikely to devote much time to testing your product. Still, you don't want to wear your potential testers out before they're even on your test, so a good rule of thumb is to keep your qualification survey to 20 questions or less.

Indirect Questions

Beta candidates have trouble remaining objective about their own skill sets. For example, if you're looking for testers that are tech novices, it's tempting to ask candidates to rate their own technical knowledge. We've found, however, that a candidate's self-assessment of their own skills isn't always accurate.

Instead, we recommend asking indirect questions or questions in the form of scenarios. For example, you might include a question such as "What would you do if your computer crashed?" and then give candidates a few options to choose from. If your ideal candidates are tech-savvy people, then the answer you're looking for them to choose could

be, “I would research online and fix the problem myself.” If you’re looking for tech novices, you would prefer them to select an answer like “I would ask someone else for help.” Asking about objective scenarios like this tends to provide a more honest and accurate view when it comes to evaluating skill sets.

Open-Ended Questions

Since there’s more to finding great beta testers than just collecting demographic requirements, you’ll need a way to judge your would-be beta testers’ level excitement and motivation. Open-ended questions, such as “Why do you want to beta test this product?” and “What makes you a great beta tester for this product?” give your candidates the opportunity to explain what they plan to contribute to your test. This also gives you a chance to see how they communicate, how much care and detail they put into their responses, and what unique skills or viewpoints they could bring to your beta test.

> ***Tip***
>
> Don’t require answers to all of your qualification survey questions. Make a few (or all) of your open-ended questions optional. This will help highlight the applicants who are willing to take the time to be thorough and complete.

EXERCISE #5

Open the **Qualification Survey Template** included in this kit, then map out the questions you’ll include in your survey to make sure you’re collecting enough information about your applicants to evaluate their fit for your beta opportunity.

7. Finalizing Your Recruitment Plan

You’ve scoped out your entire recruitment process with overall project goals and organizational needs in mind, so it’s time to document your plan of execution. Your Recruitment Plan serves as a guide for your team, giving them all of the information they need for an effective recruitment. It is also useful as a historical document that provides insight into your strategies and tactics. It can be used as a starting-point for future Recruitment Plans in projects involving the same product and target audience.

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EXERCISE #6

Using the information from the resources you created in the previous exercises, fill out the **Recruitment Plan Template** provided in this kit. Use your Recruitment Plan to guide successful execution of your beta test recruitment.

In order to finalize your Recruitment Plan, you'll need to review it with stakeholders to make sure it meets their expectations. Once everyone is aligned on recruitment objectives, topics, scope, and schedules, you can move into the recruitment period.

Tip

When discussing the schedule with stakeholders, keep in mind that the availability of your testers can change if the time between between recruitment, tester selection, and test kick-off is more than a couple of weeks. Coordinate the recruitment period with the availability of test units, bandwidth of your test managers, and other constraining factors to ensure that your ideal testers are still excited and available to commit their time to the project. It will also reduce the risk of compounding scheduling setbacks by having to reopen recruitment to replace testers who can no longer participate because of delays.

BUILDING A TARGETED CANDIDATE POOL AND OPENING RECRUITMENT

With solid targets and a detailed plan of execution, you've set yourself up for a smooth and successful recruitment period. If you're leveraging an existing community of testers, this is when you'll use the profile information collected from users when they joined your community. Filter users based on the core requirements and segmentations of your beta test, and send targeted project announcements (typically via email) to open the recruitment period.

Once you've published promotional content, activated any tool automations, and sent out email invitations, your targeted pool of applicants will start to materialize. Do keep a close eye on the progress of your recruitment and make sure each tester segmentation is being filled. If you notice that you're not getting many applicants for a certain segment, you'll want to adjust some of your messaging or create additional outreach campaigns that are hyper-targeted to that audience.

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CONDUCTING TESTER SELECTION

As soon as your first applicants start rolling in, the tester selection process begins. Hand-picking ideal testers from an already targeted group of applicants ensures high participation rates and a smoother Testing Phase overall. The tester selection process involves three steps:

1. Filtering for the applicants that meet your core requirements to create a group of qualified applicants.
2. Reviewing open-ended responses to identify qualified applicants who are enthusiastic about participating in your beta test.
3. Choosing ideal testers from the enthusiastic group of qualified applicants who also fit into the technical and demographic segmentations that are yet to be filled.

1. Filtering Applicants Based on Core Requirements

Pulling out the applicants who don't meet your core requirements leaves you with a tidy group of qualified applicants who could fit into your tester segmentations based on their demographic and technical traits. If you're using a community tool with profiling capabilities, filtering your applicants will be very quick. Otherwise you can select eligible applicants manually.

2. Reviewing Open-Ended Responses

Next, revisit the open-ended survey responses of each qualified applicant for more subjective clues about whether or not they would make an ideal tester. You're looking for expressions of enthusiasm, but also for thorough, clean, and clear responses.

Seek Out Passion

Enthusiasm and persistence are two tell-tale traits of ideal testers. These are the applicants whose responses have gone above and beyond your expectations. If their qualification survey has three paragraphs about how they use - or would use - your product in their daily lives, consider the high level of passion they're going to bring to your test. If they promoted your test or referred other applicants during the recruitment period, it's good to reward their efforts by carefully considering them for selection. If there is an applicant who is repeatedly reaching out to you (within reason) to be included in the test, give them a shot. It could pay off with an abundance of high-quality feedback and deep insights.

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Look for Detail and Care

Select qualified applicants who provide responses with great detail, limited spelling and grammatical errors, and a good argument for why they should be included in your beta test. These people are likely to deliver similarly detailed, clean feedback during the test. When you see responses that LOOK - LKIE DIS, think about the time your team might have to invest in ironing out the details of messy, incomplete feedback. Candidates who skip questions or give only partial answers are also unlikely to be ideal testers.

Check for Consistency

It's tempting for applicants who really want to participate in your test - whether for the right reasons or the wrong reasons - to try and outsmart your survey by answering questions in a way that they think will increase their chances of being selected, rather than just being truthful. If an applicant says they're an expert on your product category at one point in the survey and then can't even tell you what your product does in another, it's a clear red flag. Applicants that check all of the boxes for a qualification may be trying to game the system. If it's unlikely that a home consumer would have all 15 of the software packages you are looking to test, it's likely that they aren't being truthful. Allowing these applicants to participate in your test could skew your results if they are not truly part of your target audience, or if they continue to provide false information during the test.

3. Choosing Ideal Testers to Fill Tester Segmentations

Sorting your most enthusiastic, clear, and thorough qualified applicants into your demographic and technical segmentations is the last step in selecting ideal testers for your project.

If you have one demographic or technology segmentation that is particularly complex or challenging to fill, select testers that fit that requirement first. Your selection will often become more difficult as you build out your tester team, so it helps to get the tough spots out of the way first. You can also use your list of "nice-to-have" characteristics as selection criteria to help you decide which testers are the most ideal.

Depending on your tools, you can group testers into different sub-teams by segmentation, making it easier to distribute different versions of your product to the right groups and surface trends by segment later on.

EXERCISE #7

Fill out the **Tester Selection Reference List** to keep handy during the tester selection process as a complete overview of your selection criteria.

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> **Tip**
>
> After you've filled your tester team, select some additional applicants as alternates to make up for any testers who might drop out or need to be removed from your beta test. Some people realize that they don't have time to commit to your project, while others may have to be removed for poor performance. Whatever the reason, it's a good idea to have a pool of alternate ideal testers available to avoid the possibility of having to reopen recruitment. It also helps you increase engagement if you're struggling to hit your participation goals or want to extend the testing period.

STARTING THE ONBOARDING PROCESS

After identifying ideal testers for your beta testing, you'll need to have them complete the first part of the onboarding process to reach the last stage of recruitment and become official testers for your project. Email your ideal testers to tell them the good news, and send them your **confidentiality and participation agreements**. Once they have read and signed the agreements, they can be added to your project as test participants.

If testers don't respond right away, it's possible they missed your email. Give them a chance to take action, and if they don't, give them a quick phone call. It's rare that a tester will express interest and then not join a test. Usually if they don't respond, it's because your email simply ended up in their junk or spam folder by mistake.

Other steps in the onboarding process include confirming the shipping address of each tester, distributing the beta build, and inviting testers to familiarize themselves with the project workspace. Completing these steps with a solid group of ideal, NDA-ed testers is the next step in making sure your beta test runs smoothly.

Only Notify Ideal Testers About Selection

Notifying applicants who weren't selected for your test about can often backfire. Oftentimes, applicants feel snubbed because they weren't selected for an opportunity they feel they are qualified for. A good alternative is to use the qualification survey or application follow-up messages to set the general expectation that only those who have been selected to participate in the test will receive notification.

FREE RESOURCE

For more best practices on kicking off your beta test and making sure all of the moving parts are in place when the test opens, check out our white paper on **Getting Ready for Beta Testing**.

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THINKING AHEAD

It's never too early to begin preparing for your next beta test. The process of recruiting great testers can be complex, but iterating on current successes will help reduce the time and energy it takes to ramp up for future tests. Here are a few ways to extend the value of your current beta recruitment to future projects.

Hang On to High Performers

By the end of the testing period, you'll have a solid sense of which testers performed well and which did not. A **user scoring system** that awards each participant a numerical value based on their individual performance during the test helps you identify high-performing testers for future recruitments. That way, your all-stars will be first in line when it comes time for your next beta test.

Continue to Grow Your Community

Cultivating a community of profiled and enthusiastic test candidates will make recruiting testers for your projects faster and easier. You can use many of the recruiting channels outlined in this white paper to continuously grow your pool of potential candidates. For example, include a community sign-up link on the customer testing overview page of your company's website, or post a link inviting users to join your tester community to your company's social media feed.

CONCLUSION

Successfully using beta testing to evaluate customer satisfaction with your pre-release product starts with recruiting the right testers. While taking a structured approach to this part of your beta test can extend the planning period, it will simplify your team's efforts during execution and set them up for excellent recruiting outcomes.

We hope you've found this guide to be helpful as you craft your strategy for identifying, recruiting, and selecting qualified, enthusiastic testers from your target market for your upcoming beta test.



*Have a question? We're here to help! Reach out to us at **info@centercode.com.***



*Check out our **Delta Testing Library** for more resources on beta testing.*

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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

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WORKSHEET

BETA TOPICS AND OBJECTIVES

Fill in each cell in the left-hand column with your objective of beta testing: evaluating satisfaction and evaluating acceptance. In the next column over, record the specific experience title - called topics - of your product that you'd like testers to evaluate. Provide a description of each topic, and brainstorm a list of the demographic and technical characteristics that testers will need to possess in order to evaluate the topic. See page 8 of the white paper for an example of this chart, and watch our **webinar on goal setting** to learn more about identifying project goals.

Objective	Topic	Description	Related Tester Traits

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WORKSHEET

CORE REQUIREMENTS AND TESTER SEGMENTATIONS

Use the first section of this exercise to describe your target market, including the technical and demographic characteristics that might be relevant for your project. Next, identify the traits that are "must-haves" for your tester team based on your target market characteristics and the information from the "Related Tester Traits" column of the Topics and Objectives exercise.

Build out your tester segmentations in the third section by selecting the traits you'd like to segment for, defining sub-groups related to each trait, and assigning a portion of your tester team to guarantee coverage of the segmentation. See page 14 in the white paper for examples.

Target Market

Describe Your Target Market

Core Requirements

	Requirement Description
1.	
2.	
3.	
4.	
5.	

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Tester Segmentations

DEMOGRAPHIC

Segmented Trait 1	Description / Notes	% of Tester Team	# of Testers
Group 1 Name			
Group 2 Name			

Segmented Trait 2	Description / Notes	% of Tester Team	# of Testers
Group 1 Name			
Group 2 Name			

TECHNICAL

Segmented Trait 1	Description / Notes	% of Tester Team	# of Testers
Group 1 Name			
Group 2 Name			

Segmented Trait 2	Description / Notes	% of Tester Team	# of Testers
Group 1 Name			
Group 2 Name			

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CHECKLIST

RECRUITMENT CHANNELS

There are many useful channels available to you during recruitment. Place an "X" in the box next to the channels you plan on using, and fill in the right-hand column with notes or instructions on how you plan to maximize each one. See page 17 of the white paper for more information about each of these channels.

x	Channel	Notes / Instructions
	Customer Testing Overview Page	
	Test Promotion Sites	
	Twitter	
	User Forums	
	Blogs	
	Sales Contacts	
	Support Contacts	
	Existing Testers	
	Online Advertising	
	Referrals	
	Conferences / Trade Shows	
	Trial Downloaders	
	Public Feedback or Contact Us Forms	
	In-Product Invitations	
	Other Sources	

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WORKSHEET

MESSAGING CONTENT

Use the worksheet below to create the core recruitment message for your opportunity email and landing page. Then draft content for each of the channels you selected in the previous exercise.

Make sure to include the various elements specific to each channel, along with any character limits that apply. See page 20 of the white paper for tips on how to craft effective recruitment messages.

Core Recruitment Message

EMAIL

From	community@company.com
Subject	[Product] Beta Opportunity

Hey there,

We'd like to invite you to test [description of product].

This opportunity is ideal for [description of types in market] to provide feedback on this new product.

To learn more and apply for your chance to be a part of this test, click the link below.

Best of luck!

The [COMPANY] Team

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LANDING PAGE

We'd like to invite you to test [description of product].

This is a great opportunity for [description of types in market] to provide feedback on this new product.

If you'd like to apply, click the button at the bottom of this page.

Requirements:

- **ITEM 1**
- **ITEM 2**
- **ITEM 3**

Sign up here [link to qualification survey]

Channel Content

TWITTER POST

Post Text	Character Count	Character Limit
Sign up for our upcoming beta test to make your voice heard on the latest [product name]!	[x]	280

FACEBOOK POST

Post Text	Character Count	Character Limit
Sign up for our upcoming beta test to make your voice heard on the latest [product name]!	[x]	400

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FACEBOOK POST

Headline	[Product] Beta Opportunity
Requirements	• **ITEM 1** • **ITEM 2** • **ITEM 3**

[Product name] is a [description of product] that [description of functionality or benefit].

Apply [button with link to landing page or qualification survey]

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WORKSHEET

QUALIFICATION SURVEY

Use this template to plan your qualification survey and ensure that you're collecting all of the information you need to filter and select ideal testers for your project. The worksheet is organized into four sections: contact information, demographic requirements/segmentations, technical requirements/segmentations, and subjective qualities. Make sure that every core requirement and tester segmentation from your tester profiles worksheet has been covered in this survey, and that you indicate whether answers to each question are required or optional.

Most survey tools will present a few different types of response options:

- Single Selection (dropdowns, radio buttons, rating scales, etc.)
- Multiple Selection (checkboxes)
- Date Picker (calendar)
- Small Text Box (single line of space)
- Large Text Box (multiple lines of space)

Note: In the first three sections we've included example questions. The question listed in the subjective qualities section is one we always ask on our qualification surveys, and you may find it useful for your own survey as well.

Contact Information

Attribute	Question or Prompt	Required?	Reponse Type
Name	Full Name:	x	Small Text Box
Address			
Phone Number			

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Demographic Core Requirements and Segmentations

Attribute	Question or Prompt	Required?	Reponse Type
Age	What is your date of birth?	x	Calendar
Gender			
Home Type			

Technical Core Requirements and Segmentations

Attribute	Question or Prompt	Required?	Reponse Type
Phone Type	What brand and model is your mobile phone?	x	Dropdown

Subjective Qualities

Attribute	Question or Prompt	Required?	Reponse Type
Enthusiasm	What would make you a good fit to test this product?		Large Text Box

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RECRUITMENT PLAN TEMPLATE

[PRODUCT NAME / PROJECT CODENAME]

Topics and Objectives

Objective	Topic	Description	Target Segment(s)

Target Testers

TOTAL

Total
XXX

CORE REQUIREMENTS

All testers must meet the following base requirements to be considered as an eligible candidate for this beta test.

Requirement (all of these must be true)	% of Tester Team

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DEMOGRAPHIC SEGMENTATIONS

Testers will be grouped into the following teams based on their personal demographics.

Group Name	Segmentation Description (one of these must be true)	% of Tester Team

TECHNICAL SEGMENTATIONS

Testers will be grouped into the following teams based on the technology they own or have access to.

Group Name	Segmentation Description (one of these must be true)	% of Tester Team

Strategy Overview

RECRUITMENT CHANNELS

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EMAIL COPY

From	community@company.com
Subject	[Product] Beta Opportunity

Hey there,

We'd like to invite you to test [description of product].

This opportunity is ideal for [description of types in market] to provide feedback on this new product.

To learn more and apply for your chance to be a part of this test, click the link below.

Best of luck!

The [COMPANY] Team

LANDING PAGE COPY

We'd like to invite you to test [description of product].

This is a great opportunity for [description of types in market] to provide feedback on this new product.

If you'd like to apply, click the button at the bottom of this page.

Requirements:

- **ITEM 1**
- **ITEM 2**
- **ITEM 3**

Sign up here [link to qualification survey]

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SOCIAL POST COPY

Post Text	Character Count	Character Limit
Sign up for our upcoming beta test to make your voice heard on the latest [product name]!	[x]	280

BETABOUND ANNOUNCEMENT COPY

Headline	[Product] Beta Opportunity
Requirements	• **ITEM 1** • **ITEM 2** • **ITEM 3**

[Product name] is a [description of product] that [description of functionality or benefit].

Apply [button with link to landing page or qualification survey]

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Qualification Survey

The following is a draft of the survey used to determine which applicants match the recruitment requirements for the beta test. Using these survey results, we will present a list of qualified applicants for your review. All questions will be required unless otherwise stated. Furthermore, all questions will prompt a "Single Choice" answer unless otherwise stated.

1. Single choice question?

Explanation if necessary.

- ☐ Option 1
- ☐ Option 2 (disqualify)
- ☐ Other

  Conditional if "Other"

  1a. Follow-up question?

  Single line wide

2. Multiple choice question?

Select all that apply.

- ☐ Option 1
- ☐ Option 2
- ☐ Option 3
- ☐ Option 4

3. Select something on a scale of 1 to 5.

Rarely				Actively
1	2	3	4	5
(disqualify)	(disqualify)	(disqualify)		

What would make you a good fit to beta test this type of product?

Multiple line large

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REFERENCE LIST

TESTER SELECTION

This reference list is intended to help you during the process of selecting ideal testers for your beta test. Fill in the technical requirements, tester segmentations, and subjective qualifications you're looking for in an ideal tester so you have a singular reference when picking out the best applicants from your pool. See page 12 of our white paper for more information about core requirements and tester segmentations, and page 25 for advice about tester selection.

x	Notes / Instructions
Core Requirements (all of these must be true)	
Tester Segmentations (one of these must be true)	
Subjective Qualifications (all of these should be true)	
	The tester's application was complete and detailed
	The tester's information was consistent
	The tester is passionate about the product and/or test
	The tester communicated well
	The tester went above and beyond what was expected