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Beta Test Planning

Strategy Discussion

Strategy Session

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1. Introduction to the Product
2. Product / User Experience Post Release
3. Target Market / Audience
4. Ongoing Objectives
5. Directed Objectives
6. Test Details
7. Release Schedule
8. Key Stakeholders

1. Product Overview

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What is the product name and description?

What problems does the product solve?

Is the product new or a revision? If it’s a revision, what's new?

Who are the competitors?

What separates your product from the competition?

2. Product Experience

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What is the initial user experience?
(e.g., Install, Out of the Box, Onboarding)

How long *should* it take to have a first impression?

What is the day-to-day user experience?

How much time will users *typically* spend with the product each day?

3. Target Market

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What traits does every customer have?

e.g., region, job position

What different types of people will purchase this product?

e.g., age ranges, income levels

What types of related technology will they have?

e.g., iOS/Android, wifi

Is there anything else we should know about your audience?

4. Ongoing Objectives

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How important are each of these objectives to you?

1. Assess test quality, interoperability, and/or real-world performance?
2. Measure acceptance, prioritize your backlog, and/or generate new ideas?
3. Gather user insight and sentiment and/or study the user experience?
4. Emulate real-world product discussion and/or drive focused collaboration?

5. Directed Objectives

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What would you like your testers to do?

e.g., "Test the onboarding experience"

What questions would you like this test to answer?

e.g., "Do testers like our social integrations?"

What else is keeping you up at night?

e.g., "Will we achieve a positive NPS?"

6. Test Details

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What separates this version from the final version?

What are you most and least concerned with testing?

Is there a known unit availability or any tester restrictions?

Do you intend to deploy iterative updates throughout the test period?

Do you already have a codename in mind?

7. Release Schedule

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Target release date (GTM)?

Estimated test cut-off date?

Estimated test ready date?

8. Key Stakeholders

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Who can make decisions about the test? (Product Owner)

Who can answer questions about the product? (Technical Lead)

Can we leverage our company name in our recruiting efforts?

Will any usage metrics or analytics be captured during the test?

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End