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Tips for Effective
Beta Test Planning



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Introduction

WHO THIS E-BOOK HELPS

Quality Managers

Support Managers

Engineering Managers

Program Managers

Product Managers

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ABOUT THIS E-BOOK

This e-book provides advice for hyper-focused Beta Test planning, based on lessons learned from years of Customer Validation test management. Armed with best practices and a scalable framework that applies to any product, you'll be able to hone your test plan to increase stakeholder buy-in, reduce potential delays, and maximize your resources.

THESE INDUSTRY BEST PRACTICES AND BETA TESTING HACKS FROM THE PROS WILL HELP YOU:

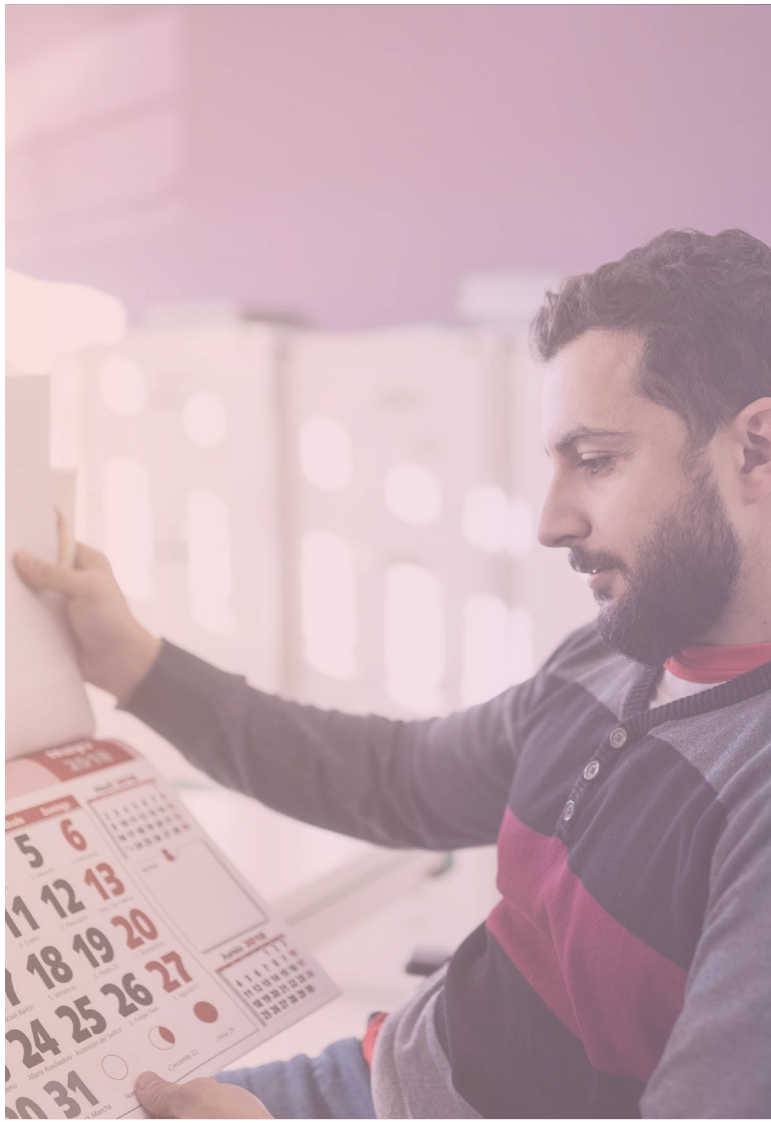
- Save time and money, and gain peace of mind while planning your next test
- Align your stakeholders behind a single document so everyone is on the same page - literally
- Clearly define and organize tasks to prevent key action items from falling through the cracks
- Prove your program's value by creating a clear pathway to insightful product recommendations

On Time, On Budget, with Great Results

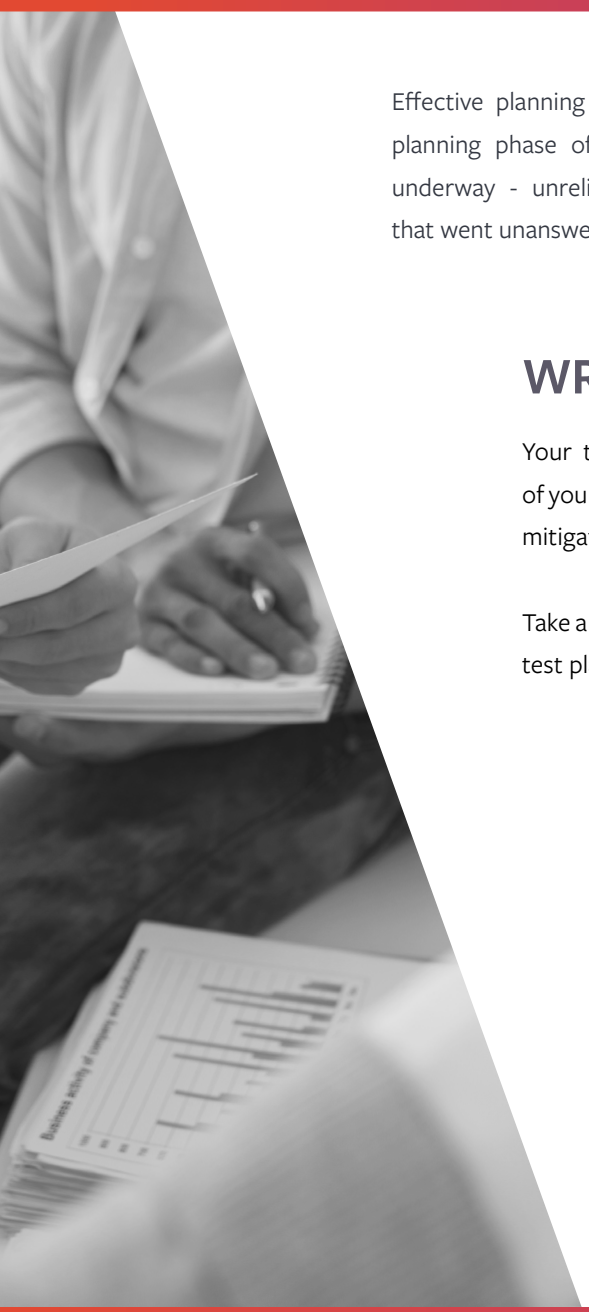
Every successful Beta Test begins with a plan that clearly defines its goals, a reasonable timeline for meeting those goals, and a definition of success your team can agree on. The Standish Group showed in their CHAOS Report that out of 50,000 projects in their study, **71% failed** to meet all three criteria of being on time, on budget, and delivering satisfactory results. The primary culprit? Poor planning. It's common for teams to take an unstructured approach to planning or to skip the planning process altogether. The outcome is a set of vague goals and processes that are prone to unravel as the project continues, causing delays, confusion, inefficiencies and ultimately, unmet objectives.

The information in this kit focuses specifically on optimizing the plan for your **Beta Test** - the phase of Customer Validation that evaluates your customers' level of satisfaction with your product and their acceptance of its feature.

*If you're running an Alpha, Delta, or employee product test, this information will be relevant for you, but you'll want to make adjustments based on the the specific goals of your **Customer Validation test type**.*



How Planning Affects Your Test



Effective planning is the foundation of high-value Customer Validation projects. The effects of the work done (or not done) during the planning phase of your project ripple out through each stage of your test. Many issues that plague test managers once the test is underway - unreliable recruitment, low participation, irrelevant feedback, inconclusive findings - are traced directly back to questions that went unanswered during the planning phase.

WRITING AN EFFECTIVE BETA TEST PLAN

Your test plan gives you a clear overview of your goals and a reliable process for achieving them. It lays out the objectives of your project, along with the scope, resources, tasks, and sequence of events necessary to meet those goals. Creating a solid test plan mitigates delays and blocking issues. This keeps everyone involved with the project on the same page right from the start.

Take a look at the best practice Test Plan Template included in this kit, and follow along in the Companion Guide to create an effective test plan for your next Beta project.

Did you know?

50% of Beta Tests include between 30-120 testers.

80% of Beta Tests surface more than one critical bug.

Your Stakeholders

Your stakeholders are the most influential factor when it comes to shaping your test plan. Charged with delivering on product requirements, their priorities will decide what kind of data gets collected and used. Because of this, they're often the gatekeepers of executive buy-in and the measuring stick of your program's value. After all, you may have found a wide variety of results during your test, but the results that matter most are the ones your stakeholders can understand and implement.

This is precisely why it is so important to involve stakeholders in the test planning process early on. You need to make sure that your test aligns with their needs and priorities. This minimizes the likelihood of unexpected changes in scope once the test is underway, and ensures you're focused on finding answers to your stakeholders' most pressing product questions.

ENGAGING STAKEHOLDERS EARLY IN THE PLANNING PROCESS HELPS YOU:

- Align team efforts toward shared goals to ensure the usefulness of your test results
- Avoid mid-test scoping changes that lead to tester fatigue, resource constraint, and failure to meet test objectives
- Manage expectations about incoming feedback, based on the predetermined scope of the test
- Outline how internal teams will respond to any unexpected blocking issues with the product or the test
- Guide your team through test management activities to avoid missing tasks, goals, or deadlines

Initialization

Initialization refers to the way a Beta Test is requested, as well as when it is requested. While this short phase only has a few deliverables, it influences your test schedule and resource allocation.

Ideally, all of your projects would be scheduled early in the product development process - but this is often not the case. Customer Validation projects are initialized in a variety of ways. Here are the three most common:

PROACTIVE

In mature organizations, you and your stakeholders have pre-planned for a Beta Test and baked the necessary time and resources into the product development plan. You've had ample time to negotiate stakeholder needs, identify required resources, build a budget, and complete each phase of testing within your product's larger development schedule.

REACTIVE

In this situation, a stakeholder makes an informal request for a Beta Test after the product schedule is already set. These projects are more likely to suffer from nebulous scoping and rushed execution. While there is some level of management buy-in, it's harder to negotiate priorities and to manage expectations.

THE HUNT

Not every product manager will independently decide to run a Beta Test. Sometimes, Customer Validation test managers are required to actively target products for testing within their organizations. This happens more often at companies where Customer Validation teams don't have the buy-in they need for their programs. While this situation is not ideal, it can shed light on how essential Customer Validation efforts truly are.

The Strategy Session

The strategy session is the preliminary interview with your stakeholders. It's a key opportunity to gain insight into their perspectives, priorities, and specific needs. Designing the test plan based on their input assures that your efforts line up with the product development schedule and meet stakeholder needs.

TRANSLATING STAKEHOLDER NEEDS INTO TEST OBJECTIVES

During the strategy session, listening is key. Make a clear outline of what your stakeholders care about - the features they're focused on, which scenarios need testing, and the use cases they'd like to see played out in real environments. Their comments and concerns will serve as the basis for your test's topics and activities. For more guidance, use the Strategy Session Guidelines included in this kit.

A WORD OF CAUTION AGAINST HAVING TOO MANY TEST OBJECTIVES

Stakeholders may pressure you to incorporate multiple objectives into a single test. In reality, using one test to assess two separate objectives waters down your feedback and overworks your testers. The clearer and more unified your objectives are, the more focused your testers will be, and the more high-quality feedback you'll receive.



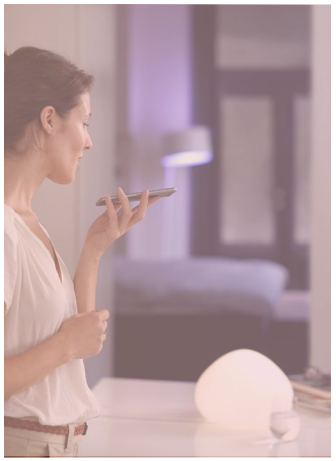
Topics and Activities

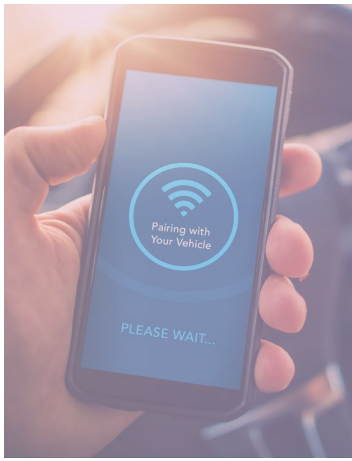
It's typical for each week of Beta Testing to focus on evaluating three or four specific areas or features of your product, or to answer a few definitive questions. To make sure that testers address these key aspects during your test, you'll need to break your product down into testable areas, or **topics**.

Topics are the features, functions, or product experiences that your testers will evaluate during your project. Topics directly reflect the questions, goals, and interests of your stakeholders, and provide testers with a structured way of helping you meet test objectives. A brief description of each topic and a set of corresponding **activities** keep internal teams on the same page and guide testers through their product evaluation. Using activities gives testers a set sequence to move through, ensuring they provide feedback on your focus areas..

You'll also want to assign each topic a **weight** that is directly related to the test's priorities. This will help you understand the impact of each topic on overall product performance and prioritize issues later on. If you'd like to learn more about the process of impact scoring to save time during feedback triage and focus your product improvement efforts, download the Beta Feedback Playbook. In addition to assigning a weight, projecting the topic's **size**, or how much time you expect testers to spend completing each task, provides helpful context during scheduling.







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How Many Testers Do You Need?

Half of all Customer Validation projects include a tester team with between 30 and 120 testers. However, internal factors like the complexity of your product and objectives will ultimately dictate the number of testers you'll need in order to deliver comprehensive results.

In a market with a large audience, such low numbers might leave your stakeholders asking what they could possibly get out of a test with so few testers. For smaller markets, they could be wondering how in the world you're (your stakeholders won't be the ones finding those testers, lucky them) supposed to find 120 testers. The difference in attitude goes to show how the "right number" of testers changes from one situation to the next.

HOW TEST OBJECTIVES IMPACT THE SIZE OF YOUR TESTER TEAM

Your test objectives directly influence the number of testers you need to recruit. The same is true whether your goal is to identify issues, capture attitudes, stress test with real users, or enhance machine learning with a subset of your user base.

HOW TEST OBJECTIVES IMPACT THE SIZE OF YOUR TESTER TEAM:

- Testing in a wider range of user ecosystems
- Testing with users from additional target market segments
- Testing with other connected (an increased number implies there's a standard number to begin with)products that need to interact with yours



*Recruitment is one of the most challenging aspects of executing effective Customer Validation tests. Download the **Beta Tester Recruitment Kit** for an in-depth look at proven techniques for finding and attracting qualified testers.*

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Product Distribution: Hardware

While you don't need to nail down the details of every distribution step in your test plan, getting certain pieces lined up on the front end gives you much-needed time down the road. Here's what you need to include in your hardware Beta Test plan.

*For best practices on the logistics of your hardware test - everything from effectively managing inventory and shipping test units, to handling returns - download the **Beta Shipping Manual**.*

YOUR BILL OF MATERIALS

This is a list of all your test components, like the hardware unit, product manual, product packaging, and charging cables, as well as your Beta Test welcome letter and tester instructions.

SHIPPING LOGISTICS

Make sure to outline details about the method of product distribution, retrieval, budget, scheduling, the size of your units and packaging, and any other details you'll need to account for.

YOUR PROCESSES

Putting procedures in place for anomalies - like defective or lost units, or having to retrieve units from non-compliant testers - helps your team act quickly when your test units are on the line.



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Product Distribution: Software

CHOOSING THE RIGHT MEANS FOR DISTRIBUTING YOUR SOFTWARE PRODUCT

Customer Validation teams typically deliver their software using individualized keys that help ensure their Beta builds aren't shared with the public. Providing each tester with a unique key also allows them to track software downloads and product usage. If you and your stakeholders aren't concerned about leaks or other risks (which is often the case for public Beta Tests), you could opt to distribute your software files directly.

IF YOU PLAN TO DELIVER SOFTWARE USING KEYS, THERE ARE A FEW THINGS YOU'LL NEED TO LAY OUT BEFOREHAND:

- **KEY GENERATION**

  Who will create the software keys and how will they be distributed? If you don't have direct access to the delivery tools or software, you may need to delegate this task to your teammates in Engineering.

- **KEY MANAGEMENT**

  Map out the groups of users and the keys they'll each receive. Since your keys are trackable, you may want to distribute similar keys for separate groups of users (Mac vs Windows, for example) or for separate phases of your test.

- **KEY DISTRIBUTION**

  Outline the process and/or systems you'll use to distribute individual keys to your testers.

- **KEY REPLACEMENT**

  Create a process and instructions for replacing lost or misused keys.

- **BUILD DISTRIBUTION**

  Determine how your testers will receive their build. (e.g., email, FTP, a dedicated Beta portal, or an existing content delivery network)

Product Distribution: Mobile Apps

CHOOSING THE RIGHT TOOL TO DISTRIBUTE YOUR MOBILE APPLICATIONS

If you need to distribute a mobile application to your testers, it's essential to map out the tools you'll be using and to identify any limitations that could impact tester onboarding. While some organizations have predefined tools for distributing their apps, their use could be limited to internal distribution. Review your current tools and policies carefully to be sure you can use them to deliver your app to testers.

COMMON MOBILE APP DISTRIBUTION TOOLS

- TestFairy
- Test Flight
- HockeyApp

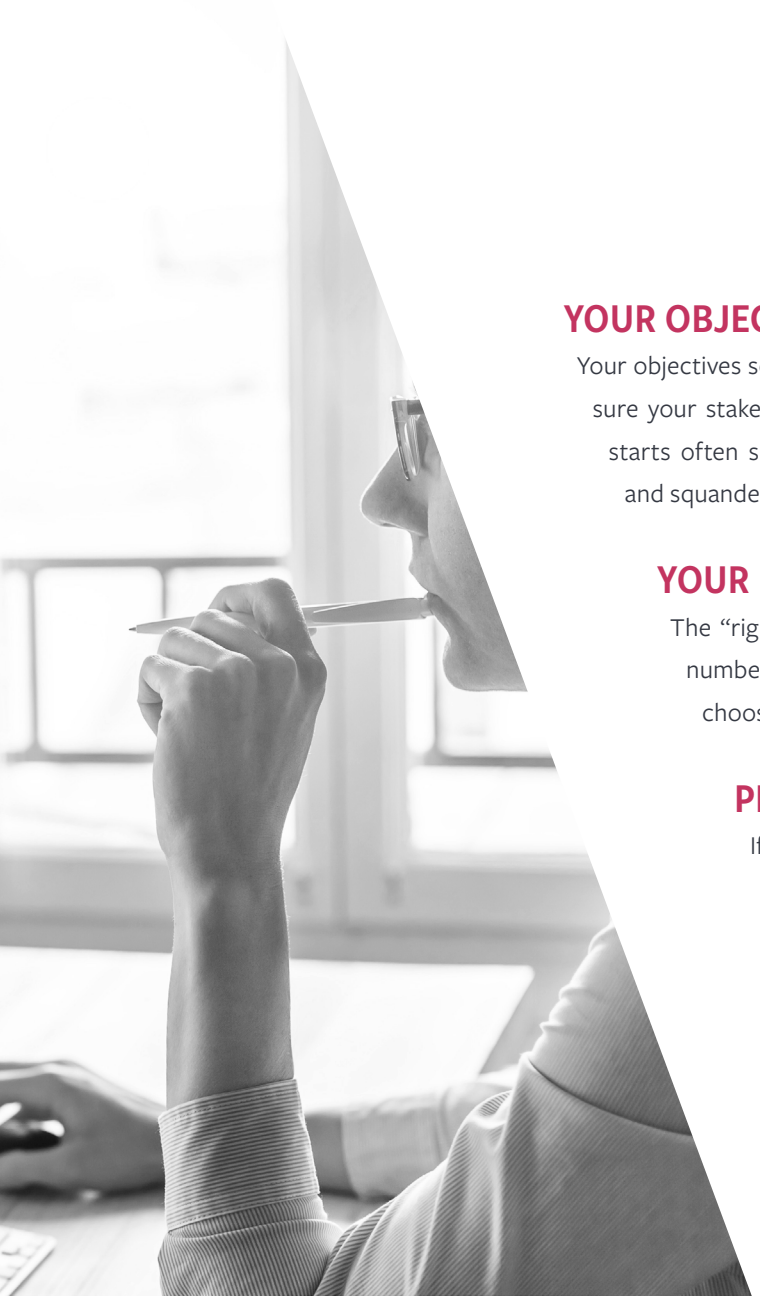
Engineering, Quality, or Product Managers usually have enough background knowledge on the internal distribution of your Beta mobile app to help you with distribution to testers.



Solidifying Your Project Schedule

It's important to consider the unique stakeholders, goals, product features, recruitment needs, and logistics involved with your project when it comes to mapping out your test schedule. This is one of the most important components of your test plan. Because Beta Testing occurs during the later phases of development, there is usually very little wiggle room for schedule modifications. Building in enough time to complete each phase of your Beta Test is essential to maximizing the value of your efforts.





YOUR OBJECTIVES

Your objectives set the tone for your entire test and greatly influence its scope. Map out your objectives carefully and make sure your stakeholders agree on the focus of your test before you begin. Changing or adding objectives once the test starts often spells out troublesome complications in the form of overburdened testers, delays, low-quality feedback, and squandered resources.

YOUR PARTICIPANTS

The "right amount of testers" and the time you need to recruit that number can change from test to test. The number of features you're investigating, the type of product you're testing, your target audience, and the topics you choose to focus on all influence how long your recruitment takes.

PRODUCT DISTRIBUTION

If you're working with physical units, you'll need to consider the time it takes to prepare your products for shipping. You'll also need to account for actual shipping time, including potential delays. If you're working with software or mobile applications, you may need to rely on other departments to execute delivery, so make sure you keep their schedule in mind as well.

YOUR PROJECT WORKSPACE

This maps out the plan for where and how testers will submit product feedback. If you are using a tool with built-in workspace and survey templates like the Centercode Platform, you may not need much time for project setup. If you are building your project space from scratch, you'll need to plan additional time for this into the overall test schedule. You'll need time to configure forms to collect feedback and setup any tools that will be used.



Did you know? Over 80% of feedback is submitted in the first two weeks of Beta Testing.

YOUR TEST

TEST LENGTH

50% of Beta Tests take between three to five weeks to complete. When accounting for test length, make sure to consider not only the test phase itself, but the necessary preparations to open and close the test smoothly.

NUMBER OF TOPICS

We recommend **three to four topics**, with no more than five in a test period. This will allow your testers to focus their energy on recording quality observations with your product before their interest naturally begins to wane. An effective recruitment strategy will mitigate some of the challenges of falling tester participation, but keep in mind that even the most enthusiastic testers will drop off if they're overworked.

INCENTIVES

It's always best practice to reward your testers for their hard work. Build time into the test schedule for incentive distribution. Leaving this off to the last minute can cause delays that alienate testers from working with you in the future. For more strategies on tester incentivization, see the Beta Test Incentives Kit.

Reaping the Rewards of Thorough Planning

Thorough test plans have many moving pieces, and while you may find it difficult to manage at first, don't lose heart. The test plan should be the hardest part of managing a test. When you've done the legwork of making a comprehensive plan, there are fewer potential blocking issues, scope changes, and misdirected resources to grapple with later on.

With your airtight test plan in place, it's time to set about with proactive work, like highlighting patterns in your feedback, expediting useful data to other departments, and refining your processes for future tests. As you execute on your plan, you might notice some things you'll want to do differently the next time around. Even with these iterations, you'll find that each test plan you write will become easier and easier.



To learn more best practices for bringing value to your organization through Customer Validation, check out our resource library.

You can also reach out to us with questions or feedback by emailing us at questions@centercode.com.

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Expand Your Planning Capabilities with Centercode

CUSTOMER VALIDATION PLATFORM FOR BETA TESTING

The Centercode Platform is purpose-built to simplify your work with features that expand your Beta Testing capabilities - during planning and beyond. Set the stage for high-impact results with built-in templates and project profiles. Simplify execution of your tests with feedback impact scoring, automated reporting tools, and much more.

AUDIENCE

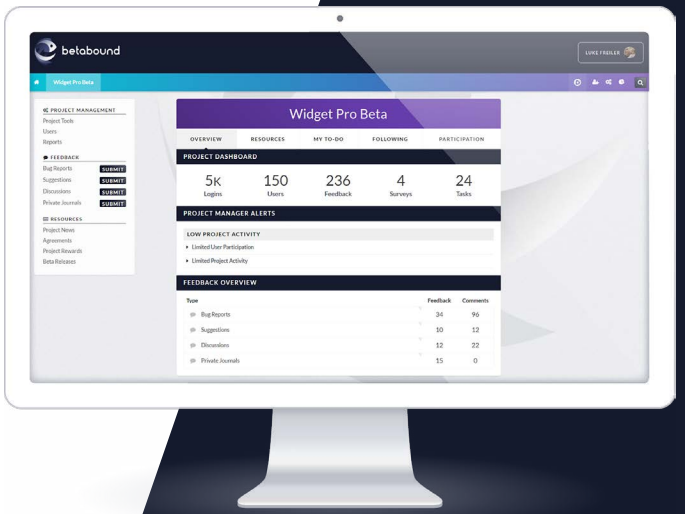
From expert planning and accelerated recruitment, to guaranteed participation rates and delivery of customer-driven product recommendations, professional Managed Testing Services are just the thing when you're short on time or resources.

EXPERT TEST MANAGEMENT

Plan for a successful recruitment with our diverse network of profiled test candidates who are always seeking new products to test. With over 200,000 members, you'll find enthusiastic testers from even the most niche target markets to participate in testing your unique product.

CUSTOMER VALIDATION FRAMEWORK

With the best practices in this kit, your test plan is built for success - now align your processes with a proven approach to achieving high-impact Customer Validation outcomes. The framework is at the heart of every Centercode offering, including our blog and in-depth resources.



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