Beta Test Plan

Companion Guide



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INTRODUCTION

This companion guide will walk you through the process of creating a best practice test plan using the ***Beta Test Plan Template*** provided in this kit. Alongside the ***Tips for Effective Beta Test Planning*** e-book (also in this kit), it provides helpful context, best practices, and planning considerations to help optimize your Beta Tests. Be sure to adjust or remove sections of the test plan based on your individual needs.

Let's get started!

You'll learn practical techniques for:

- Scoping a Beta Test that delivers on stakeholder expectations
- Designing a test plan that clearly test management activities
- Avoiding common pitfalls when it comes to Beta Tests, saving time and money
- Saving time and money

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Is this Resource for You?

This companion guide is written for quality, support, engineering, program, and product managers who've been tasked with conducting a Beta Test.

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EXECUTIVE SUMMARY

This section gives your team and stakeholders a quick overview of your test's most critical details at a glance.

Product Overview

The Product Overview is a transfer of knowledge from your stakeholders and/or product owner about the product you're Beta Testing. Gaining a deep understanding of the product from the stakeholder's perspective will help you outline how they view the product, how they're positioning it in the market, and any important dates to keep in mind when planning your test.

Note: Stakeholders on the Product Management, Engineering, and Marketing Teams will often have the best ability to answer questions that relate directly to the product.

Here are a few questions that you can ask to help you create a clear Product Overview for the Test Plan:

- What is the product's name and how would you describe it?
- What problem(s) does the product solve for its users?
- Is the product a new release or a revision? If it's a revision, which features have been added or updated?
- Which products or companies does the product compete with?
- What separates the product from its competitors?

Critical Information About Your Product

- Product Name
- Product Description
- Project Codename
- Important Project Dates (feature integrations, release, and patch dates)

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EXAMPLE

Product Name	Smart Light
Product Description	A Bluetooth-enabled light that allows users to control the device via a mobile application. It provides full control over their lights and allows users to enter a new world of connected products.
Test Codename	Ghost
Critical Dates	September 19, 2050 - Timer feature integration November 20, 2050 - Product Launch

Participants

The Participants section defines what segments of your target market you will need to recruit. Beta Tests capture feedback about your target market's acceptance of the product. Without clear-cut details about who your testers are, you run the risk of collecting irrelevant or misleading feedback.

Note: The "Core Testers" number in the table reflects the target number of testers that you want to have actively participating in your Beta Test. On top of that, you'll want to recruit a group of "Surplus Testers" to help make up for typical levels of tester fatigue or fall-off.

Test Schedule

Beta Testing typically happens during the later phases of development, when there is very little wiggle room for schedule modifications. You'll want to know how it fits into the overall product schedule and deadlines. Since your test schedule may have to accommodate delays from prior stages in product development, it's critical to build room into your test plan for any unexpected changes in schedule.

Here is a brief list of questions you can ask your stakeholders to inform your test schedule.

- When is the drop dead date?
- When is the product's release date?
- When is the hardware/software going to be available to send to testers?

Note: The Project or Product Management team are likely to have a good understanding of dates, milestones, and events. These are the people that have the greatest influence over your Beta Test schedule.

You'll lay out the details needed for the second table later on in the test plan based on your project objectives, topics, and activities. Circle back to this table after completing the ***Directed Research*** section of the test plan (see page 18 of this guide), making sure that the most important items are prioritized at the top of this table.

EXAMPLE

Week	Period	Topics / Actions
1	**Prep**	**Finalize Test Plan, Create Recruitment Plan, Workspace Setup**
2	**Prep**	**Tester Selection, Resource Setup**
3	Test	Unboxing, Hardware Setup, Mobile Setup
4	Test	
5	Test	
6	**Closure**	**Reporting, Analysis, and Presentation**

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Ongoing Feedback

This section establishes a plan for the types of continuous feedback that testers will submit throughout the course of your test. While your survey format may vary from test to test, the format for collecting ongoing feedback stays relatively consistent. You can learn more strategies for collecting feedback - including determining weights based on stakeholder priorities - in the ***Beta Feedback Playbook****.*

EAMPLE

Feedback Type	Objectives
Bug Reports	Test quality, interoperability, and real-world performance
Suggestions	Measure acceptance; prioritize backlog; generate new ideas
Open Discussions	Emulate real-world discussion; drive focused collaboration
Private Journals	Gather user insight and sentiment; study user experience

TEST NOTES

Use this section to log any additional notes that are relevant to your test.

EXAMPLE

Notes
Stakeholders prefer materials delivered in PDF format
Mobile app will be distributed using TestFairy

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TEST BUDGET

This table illustrates the costs associated with your Beta Test, with the exception of sunk costs, such as existing employees (typically considered overhead).

Each line item should include an Owner who is responsible for the cost, as well as the estimated cost itself. As this plan will likely be used to secure budget to run this Beta Test, accuracy is important.

The following are common items that would be included in your Beta Test plan:

- Beta Unit Manufacturing
- Beta Unit Distribution (Shipping)
- Beta Unit Retrieval (Shipping)
- Beta Tester Incentives
- Beta Tester Incentive Distribution (Shipping)

EXAMPLE

Cost	Note	Estimate
Beta Hardware	Beta versions of the product and its components	$X.XX
Estimate Distribution Shipping	FedEx 2-Day	$X.XX
Estimated Retrieval Shipping	UPS Ground	$X.XX
Tester Incentives	Amazon gift cards	$X.XX

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TEST CHANGELOG

Once the plan is finalized, you can log any changes made to the original plan here.

EXAMPLE

Date	Change Description	Author	Version
11/26/19	Updated tester counts from 75 to 85	Arthur Dent	1.1

TEST OVERVIEW

Once your test has begun, you can use this table to keep track of its progress.

EXAMPLE

Stage / Phase	Start Date	Duration	New Testers	Maintained Testers	Total Testers
Prep Period	8/3/20	2 Weeks	-	-	-
Beta 1 Test Period	8/17/20	4 Weeks	125	-	125
Beta 2 Test Period	9/14/20	3 Weeks	50	75	125
Closure Period	10/5/20	1 Week	-	-	-

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STAKEHOLDERS

The Stakeholders section provides an overview of all individuals with involved in the Beta Test. Since there are many teams who benefit from the insights revealed by your Beta Test, stakeholders can come from various departments within your organization. These people include those responsible for managing the test (such as Product Owners or Technical Leads) and those responsible for implementing the results. Sometimes, the teams implementing results will participate as observers for the Beta Test, meaning they don't have direct influence over the project's direction.

Note: The teams typically involved in Beta Tests are Product Management, Project Management, User Experience, Marketing, Support, Engineering, and Quality Assurance.

Here are some brief questions that you can use to ensure you are inviting the right people to participate:

- Are they involved in making product decisions?
- Can they leverage the results of the Beta Test?
- Are they typically involved in the earlier stages of product development?
- Who will represent the stakeholder team as the primary point of contact and decision maker?
- Who can be the point of contact in case technical difficulties arise with the product?
- Who will manage product issues submitted by the tester team?

Note: Host a strategy session to kick off planning with your stakeholders and gain an understanding of their needs and concerns. You can use the ***Strategy Session Discussion Template*** provided in this kit to guide your conversation.

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EXAMPLES

Test Team

The following team will be assigned to this project and is responsible for the successful execution of this test.

Name	Role	Contact	Responsibilities
Arthur Dent	Test Manager	arthur@domain.com	Primary test contact; project setup; selecting testers; designing and implementing activities; hosting meetings; delivering reports; responsible for a successful test
Ford Prefect	Tester Lead	ford@domain.com	Primary participant contact; unit shipping and retrieval; tier 1 technical support, feedback filtering; participation monitoring and compliance; participant scoring; and incentive distribution

Product Team

Team Members will be invited to the platform and receive reports and status updates.

Name	Project Role	Email Address	Phone Number	Timezone
John Crisp	Product Owner	john@domaine.com	(213) 456 - 7890	PST
Larry David	Technical Lead	larry@domaine.com	(213) 789 - 4560	PST
Ann Nichols	Researcher	ann@domaine.com	(213) 456 - 0987	PST
Nicole Mcintyre	Project Manager	nicole@domaine.com	(213) 4098 - 4567	PST

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RECRUITMENT OBJECTIVES

Determining how many testers you need and what characteristics those testers should have will vary from test to test.

FREE RESOURCES

While this section covers the basics of mapping out your recruitment requirements, the ***Beta Tester Recruitment Kit*** provides you with an in-depth description of how to identify the characteristics of your ideal testers and make informed decisions about the size of your tester team.

Note: The definition of the product's target market likely comes from your organization's Product, Marketing, or UX Team.

Here are some brief questions that you can use to collect information about the audience that you'll target during recruitment:

- Which traits do your target customers have? (e.g., region, job title)
- Who will purchase this product? (e.g., age range, income level)
- Which types of related technology do your customers have? (e.g., iOS/Android smartphone, computer, smart home products)
- Is there anything else you should know about this product's audience?
- Is there a limit to the number of test units that are available for the project?

Critical Information About Your Ideal Testers

- Total Required Number of Testers
- Core Requirements - Requirements that all testers must meet to be eligible for the test
- Demographic Segmentations - Characteristics required to mirror your target market
- Technographic Segmentations - The technology and specific equipment required to test

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TEST LOGISTICS

It's important to line up how you will be distributing your product to your testers, whether it's software, hardware, or a mobile app. It's also essential to anticipate hiccups in the product relay and avoid introducing more delays with a lack of delivery preparation.

Hardware

Not everything needs to be figured out or directly defined during the planning of your Beta Test, but it's more than helpful to have a few pieces lined up. It's best to begin the information inquiry as soon as possible.

FREE RESOURCES



The ***Beta Shipping Manual*** outlines everything you need to know to effectively manage inventory, ship units, and returns for your test.

Build of Materials (BOM)

This section outlines the Beta "build of materials" (i.e., what's in the box) that will be distributed to beta testers. The following are examples of what types of components might be shipped with the beta unit:

- Product Packaging
- Beta Instructions
- Beta Unit
- Product Manual
- Charging Cable

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EXAMPLE

The following test components will be distributed to testers.

Component	Provided By
Beta Version of Smart Lights	Product Owner
Smart Light Hub	Product Owner
3′ Power Cord	Product Owner
6″ Ethernet Cable	Product Owner
Tester Welcome Letter	Test Manager
Return Shipping Label	Test Manager
Shipping Packaging	Test Manager

Shipping Logistics

This table provides details about the method of distribution for the product, including post-test retrieval and defective unit replacement. The Retrieval line should be removed if you're planning to allow testers to keep products.

EXAMPLES

The following provides size estimates for the packages will be shipped to testers.

Package	# of Package	Height	Width	Depth	Weight
Test Unit	50	12″	12″	6″	2 lbs (kg)

The following outlines the details for shipping and retrieving test units.

Phase	Carrier	Account Number	Transit Time
Distribution	FedEx	1234-567-8910	2-day
Retrieval	FedEx	1234-567-8910	Standard

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Software

Because there are many different ways to distribute software builds for testing, the ***Beta Test Plan Template*** does not include a standard outline for this process. However, there are some key aspects that you'll want to keep in mind for your software test if you're using keys to distribute your Beta builds.

These sections outline the main steps involved with distributing software keys. Since the person managing the test may not have the access required to deliver keys directly to testers, it may be necessary to rely on your Engineering team for this task. For a more detailed overview on distributing software to testers via Key Generation, see page 11 of the ***Tips for Effective Beta Test Planning*** e-book.

Beta Key Generation Process

This section provides an outline of the process that will be used to generate the product keys provided to beta testers.

EXAMPLE

> Beta keys will be generated by Engineering and delivered to our partner Sone Software for registration through the web-delivered application portal.

Beta Key Management

This section allows the keys to be split up into groups, allowing different key sets to be distributed to different types of users (for example, separating Mac users and Windows users key sets). Keys may also be assigned to different phases of your test, with different owners holding responsibility for each individual pool.

EAMPLE

Recipient	Owner	Key Count
All Beta Testers	Tricia McMillan	250

Beta Key Distribution Process

This section provides an outline of the process and/or systems which will be used to distribute individual keys to beta testers.

EXAMPLE

> Beta keys will be distributed in the Centercode beta management system. Users will log into the system, and the key will be delivered through a distributed value system. The key is tied to the participant account and the user will be able to access that key throughout the test. Keys have a fixed 60-day limit and will expire at the end of that period once they're registered through SnapBlue's new online web-delivered application system.

Beta Key Replacement Process

This section provides an outline of the process to replace keys in the event that they are lost or misused.

EXAMPLE

> Records of beta keys are recorded in the Centercode beta management system. Should a participant lose a key, they can easily access the system to see its value.

Beta Build Distribution Process

This section provides an outline of the process by which testers will receive their build. This may be via email, FTP, a dedicated beta portal, or an existing CDN (content delivery network), such as Akamai already available within your company.

EXAMPLE

> All builds will be posted in the web-delivered application portal operated by our partner, Sone Software. Inside the Centercode beta management system, links to the Sone Software Network will be provided. The links will open a web installer, which will automatically deliver the application.

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Mobile Application Delivery

If you are planning on distributing mobile applications to your testers, it's very important to know what tools you will be using and any limitations that could impact tester onboarding. Companies often have predefined tools they use to distribute their apps, but sometimes these tools are limited to internal distribution for QA/QE teams. Be sure when you are outlining what tools you will be using that you review your current tools and understand whether they can be leveraged to distribute to your testers.

What questions should you be asking

- What operating systems will the beta app be using?
- What tools do we use to distribute the beta app internally?
- Are we able to leverage our internal tools to distribute to testers?
- Should we use a different tool to send the beta app to testers?

Note: Engineering, Quality, or Product Managers should have a good understanding of how the beta version of a mobile application is used internally and how it could get to beta testers.

EXAMPLE

Operating System	Delivery Method
iOS	TestFlight
Android	Downloadable APK

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DIRECTED RESEARCH

Project Goals

All of the research efforts for your test relate directly to your project goals. These goals reflect the product areas or features you're evaluating and how your testers will evaluate them. Your test's **topics** - the product's features, functions, or related experiences that your testers will focus on - will depend on the objectives you outlined with your stakeholders. Then you can structure your test around these topics, creating brief descriptions that communicate the purpose of each topic to your tester team. To guide testers through each topic, outline a set of corresponding activities that provide teters with a clear way to experience and evaluate the specific parts of your product.

Here are a few questions to ask your stakeholders when looking to understand the product areas and questions that your test should focus on:

- What would you like testers to do? (e.g., Test the onboarding experience)
- Which questions would you like this test to answer? (e.g., Do testers like our social integrations?)
- Is there anything else that is keeping you up at night? (e.g., Will we achieve a positive NPS?)

See page 7 of the ***Tips for Effective Beta Test Planning*** e-book for more details. Keep in mind that it is best to plan 3-4 activities per week of testing.

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EXAMPLE

Topic	Description	Activity
Week 3		
Hardware Setup	Initial setup of the hardware in the house.	· Setup the hardware device
Mobile App Setup	Initial setup of the mobile application that interacts with hardware device.	· Install the mobile app · Create an accounts · Complete mobile setup walkthrough
Scenes	The ability to control the lights in the room	· Create your own scene · Use a preset scene
Week 4		
[Topic]	[Description]	· [Activity 1] · [Activity 2]
[Topic]	[Description]	· [Activity 1] · [Activity 2]
[Topic]	[Description]	· [Activity 1] · [Activity 2]

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PARTICIPATION MEASUREMENT

Measuring tester participation is best practice for properly rewarding high-quality testers. While you won't need to have an exact method in place to finalize your test plan, the earlier you determine how you're going to track participation, the easier it'll be to execute during your test.

EXAMPLE

#	Action
1	Completed every Directed Activity within 1 week of availability
2	Was responsive (within 2 days) as required by Product or Test Teams

TESTER INCENTIVES

There are many different ways to reward your testers for their hard work, Even though you generally don't reveal rewards until Test Closure, it's important to consider an appropriate incentive for your testers' time and effort from the get-go. For scheduling considerations and an in-depth look at incentive planning best practices, download the ***Beta Test Incentives Kit***.

EXAMPLE

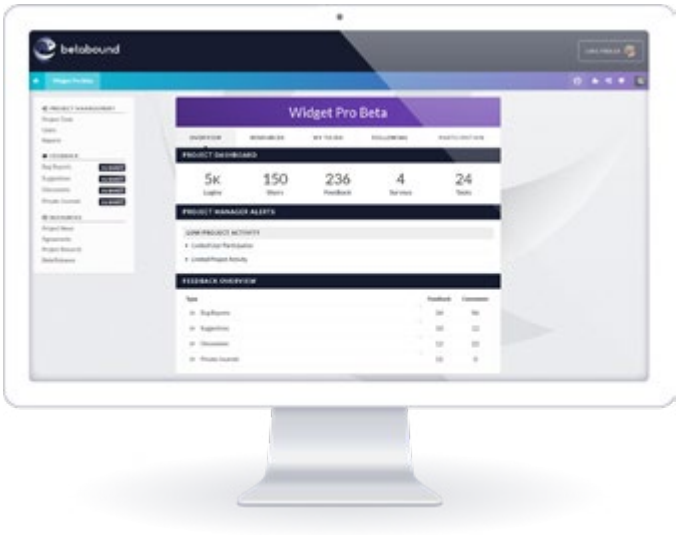
Tester performance will dictate the appropriate incentive level based on these tiers.

Tier	Participation Level	Incentive
1	Extraordinary, exceeds all expectations	Tier 1 incentive
2	Meets all expectations	Tier 2 incentive (e.g., Amazon gift card)
3	Fails to meet set expectations	No incentive

HOW CENTERCODE HELPS

Customer Validation Platform

The ***Centercode Platform*** is purpose-built to simplify your work with features that expand your Beta Testing capabilities - not only during planning, but throughout all of your Beta Testing processes. The platform empowers teams to plan for high-impact results with features like built-in templates and project profiles. It also simplifies execution of those plans with feedback impact scoring, automated reporting tools, and much more. ***Schedule a demo*** to experience the platform firsthand.



Managed Testing Services

From expert planning and best-practice 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. Start by requesting a free ***test plan*** - no strings attached.

Betabound

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. You can ***announce your Beta Test*** on the ***Betabound*** homepage for free, and if you're a Centercode customer, you can target candidates who fit your specific requirements.

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*** aimed at helping industry professionals excel in their field.