Reaching 90% Beta Participation

A Best Practices eBook for Getting the Most Out of Your Beta Program

by Centercode



www.centercode.com

v1.1

The Participation Problem

Based on countless discussions with technology companies of all shapes and sizes, we've discovered that **the average level of beta test participation is somewhere in the range of 30-40%**. In other words, only one out of three selected beta testers will contribute at the bare minimum level that's expected of them. This means that in any given beta test, it's likely that more than half of the participants are simply walking away with the product, possibly never even using it at all.

In order to tackle this problem, **most companies choose to over-recruit for their betas by 50-80%**, hoping to compensate for the idle majority of participants.

Unfortunately, this results in an enormous amount of wasted time and resources. You waste time on recruiting testers that you don't even expect to participate. You waste time if you have to delay a product launch until you get enough feedback to feel confident going to market. You waste money (in hardware tests) by adding the extreme expense of manufacturing and shipping unnecessary, pre-production products. Finally, each additional beta recruit increases the potential for leaks of valuable confidential information, which can waste the collective efforts of your entire team.

With this eBook we'll be sharing 12 of our own best practices that we use on a daily basis to solve the participation problem.

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What We've Achieved

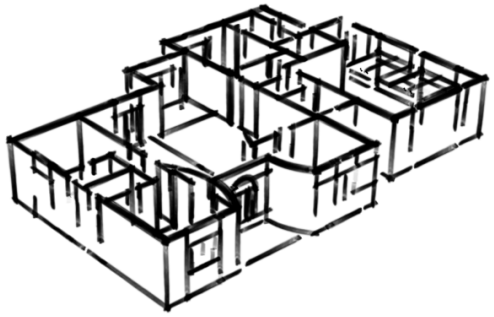
We've run hundreds of beta tests, covering nearly every corner of technology — from mobile software to enterprise hardware. Along the way, **we've managed to achieve greater than 90% participation compliance on nearly every beta test we've conducted**, quite frequently reaching 100%.

We base participation compliance on testers meeting or exceeding specific objectives that we establish before the start of the beta test. Generally this includes completing surveys, submitting bugs and feature requests, providing daily journals, completing specific tasks, and contributing to beta forum discussions. This provides us with a reliable benchmark to track our results and constantly experiment in search of further improvement.

Why Only 90%?

While we're always striving to reach a full 100% participation (and fairly often we do), the fact is that beta involves real customers volunteering their time and sometimes other priorities have to take precedence. To combat this, however, our best practice is to recruit 10% more than our target number as "alternates" who are next in line, ready to go at any time. That way, even if we lose a few testers during the beta, we can still meet our original participation goals.

1. We Always Start With a Plan



Every project needs a plan. In the case of a beta test plan, we include a clear overview of the objectives of the test, followed by the unique requirements of the beta testers, both in terms of who they are (either the target market of the product or a subset of it), as well as the participation requirements we'll be setting for them.

This plan acts as a guide for all phases of the test, setting the stage for all aspects of recruiting and selection, as well as ongoing participation and feedback monitoring and management.

Tip: Check out our software and hardware beta test planning kits.

Pro Tip: Map your beta test out in weeks and outline the level and types of participation expected each week. This might include completing new surveys and tasks, as well as downtime between builds. Use this map to keep your testers informed of ongoing participation requirements (and especially any changes that may occur as the schedule shifts).

2. We Have a Community for Beta

We maintain a persistent community (Betabound) filled with **more than 90,000 highly profiled beta test candidates** from all around the world. This resource allows us to effectively:

1. Recruit great beta candidates who match the exact target market of each unique product we test
2. Focus on the historic performance of previous testers to ensure a more responsive test team from the outset
3. Impart a clear understanding that top notch participation will ensure future testing opportunities
4. Ramp a new project up very quickly, compressing weeks of recruiting efforts into days



Pro Tip: One of the major benefits of maintaining a beta community is reducing the effects of diminishing returns on participation performance. Your beta testers have a limited amount of time and energy that they're willing to donate, which you should maximize any way you can. This can be done by eliminating repeated requests for the same information, such as asking for PC specs on each bug report. Collecting this information ahead of the project can both improve your recruitment capabilities and focus your beta testers on providing original feedback.

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3. We Start With Great Candidates

We've noticed a significant waterfall effect (both positive and negative) in beta test participation, starting early within recruitment. **If you target the right set of customers with the right message from the very beginning, you can go a long way toward ensuring great participation down the road**. Conversely, if you target too broadly, you're setting yourself up for disaster.

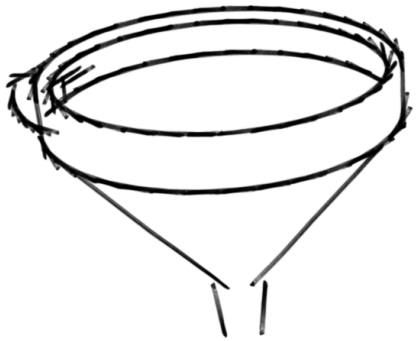
We focus our recruiting on users who meet the identified target market of the product being tested. For us this means filtering our many thousands of possible candidates down to those who match specific demographics, technical platforms, experience, and any other metric useful in identifying the true likely customer of that product.

We then send a clear message of exactly what we're looking for, strongly emphasizing what will be required of them should they be chosen to participate. One important aspect of this is the time commitment expectation. Ensuring that users know exactly how long they'll be expected to contribute allows them to plan their lives accordingly (which applies equally to both consumer and business products), resulting in less frustration on all sides.

Pro Tip: As part of the recruitment process, we include a survey with a small number of questions specific to the project, known as the "beta application." Some of these questions may be aimed at collecting essential information that will be used in future reports, while others are intended to provide additional filtering capabilities that will further identify the best testers from the pool.

4. We Select the Best Testers

Pro Tip: If you have a chance to survey your candidates with a beta application (which is almost always a great idea), be sure to include a couple of open-ended questions along the lines of "Why do you want to beta test this product?" The effort applicants put into these answers will be an early indicator of their willingness to contribute throughout the test.



As covered previously, smaller beta tests offer substantial savings in terms of cost, time management, and resource allocation. The key to a smaller beta test is working hard to ensure optimal beta testers are selected from the pool of candidates.

We begin with a series of automated software filters that are designed to narrow the candidate pool to only those that meet the base requirements of the project, factoring in information provided in their application. Generally, **this will cut out 50-90% of the initial applicants**. From there we manually review as many applications and profiles as possible, identifying great testers based on the effort they put in, experience relative to the product and goals, and how closely they match the demographic we're seeking.

While this can be a time-consuming process, it's an investment in future time savings that can pay off ten-fold. Having the best possible testers from the start of a beta test is the single most important aspect of successfully achieving high participation rates. We can't stress enough just how essential this is.

5. We Communicate Expectations

We provide clear guidelines to our beta testers, so they know what's expected of them throughout all phases of the test. If something changes during the project (such as timelines or objectives), we make sure our testers are fully aware of the change, enabling them to adjust their testing direction and schedules accordingly.

It's equally important to be certain that testers know exactly how to participate in the test. This means ensuring they know what systems they're expected to use to submit bugs, complete surveys, etc., with appropriate links easily accessible. Similarly, access to support should be made clear to all beta testers at all times.

Pro Tip: Keep your requirements realistic. It's impossible to expect a bug a day from every tester (unless of course you've released a really buggy beta product!), but expecting a daily journal (more on that in a bit) is realistic for most beta tests. Similarly, while surveys are a common part of most betas, less is better when it comes to questions. Chances are, 10 questions will produce 10 well-thought-out answers, while 30 questions will produce 30 quick and careless answers. We recommend keeping surveys to 15 questions at most, and running no more than 1–2 surveys per week for most beta tests.



6. We Ensure “Beta Readiness”

In order to start an effective beta, you’ll need to make sure that the beta product, your testers, and your team are all “beta-ready.”

Beta Product: It’s very important that a beta product is in a state that’s suitable for use by real (albeit volunteer) customers. This generally means that it’s both stable and feature-rich enough to be introduced into a realistic customer environment. If the product is extremely buggy at the start of your beta, you’ll likely see a huge amount of feedback for a few days, followed by a lull from your silent-but-frustrated testers. To address this issue, we run each product through a series of basic steps in our lab in order to ensure it’s ready to be used by its target market.



Beta Testers: We always make certain that our testers are not just willing, but able to test. We call this specifically “Tester Readiness” and accomplish it by closely supporting testers to be sure they can participate on all levels. This includes delivering beta product on schedule (and communicating if for some reason we can’t), ensuring they have all of the necessary tools (software, hardware, time, knowledge) to test, making all materials and resources available and easily accessible, and — most importantly — responding immediately to any blocking issues that are preventing them from continuing to test.

This may seem like a simple concept, but not making an initiative of it can have drastic effects. There’s nothing worse than a tester who’s willing to participate, but simply can’t because something out of their control is stopping them. This is compounded when for some reason they can’t communicate the problem clearly, and it carries into the final product.

Beta Team: Lastly, ensuring your own internal beta team (which may just be you) is ready to support the beta is just as important as the testers and product. If you launch a beta project without a support structure (either your own staff or someone like Centercode) in place, then participation will fall off almost immediately as testers reach out, but are dismayed by the lack of response.

Tip: Check out our Getting Ready for Beta Testing Whitepaper.

7. We Offer a Great Interface

As stated previously, your customers generally have a limit to both the time and energy that they're willing to contribute to participating in your beta tests. We find that it's best to think of these as a precious resource that shouldn't be wasted by complicated or confusing feedback tools and processes. Thus, we go out of our way to eliminate any friction in the process of actually providing feedback. That should be the easy part for testers.

The Centercode beta test management platform is designed from the ground up, specifically to handle all of the various beta challenges you might face. This includes targeted recruiting, legal agreements, various forms of feedback (surveys, bugs, feature requests, daily journals, tasks, and forums), participation monitoring, and reporting.

Pro Tip: Avoid using too many systems within a single beta program. Companies who haven't yet adopted a beta management platform may opt to combine off-the-shelf user forums, defect-tracking systems, surveys, and other single feature-focused tools. While individually these tools may provide a fantastic feature set for each activity, the combined set will likely cause confusion with your testers, in addition to providing no real way to aggregate or consolidate their various forms of feedback.



8. We Provide Ongoing Direction



We've found that providing general direction throughout the test is a great way to keep participation consistent and on track with the ongoing objectives of the project. To accomplish this, we like to specify tasks (named activities) that our participants are expected to complete throughout the test. These break down into two basic types:

Broad Tasks: These are activities that guide beta testers through the most basic functions of the product, for example installing it. They're generally not intended to produce bugs (these things should work if it's beta-ready), but rather encourage the user to start using and exploring the product, resulting in other valuable bugs and feedback.

Focused Tasks: These are activities that focus on regression testing specific aspects of the product, often attempting to make sure that bugs that have been reported fixed are no longer reproducible by beta testers. Often we'll assign these to a subset of the tester team that they apply to rather than the entire group.

Pro Tip: It's important to be careful when assigning activities to beta testers. Providing too many will cause testers to consume all of their bandwidth on only those tasks, which generally won't stress the product as sufficiently as a beta should.

9. We Collect Daily Journals

We find that keeping testers coming back to the online beta project site ensures that they're consistently engaged throughout the entire beta test. Unfortunately, most testers won't have a flow of constant bugs, nor is everyone social enough to bring new conversation to the forums daily. To ensure constant connection and participation, regardless of new bugs and social attitude, we like to use "daily journals". This is a simple requirement to login each day and provide a few brief lines of original text about their most recent experience with the product.

We find that daily journals provide a number of great benefits: (1) Encourage users to log in each day, increasing their ongoing awareness of and involvement in the beta project; (2) Directly increase use of the beta product (resulting in more participation), as users feel the need to have something to write about each day; (3) Offer a way for the less-social users to participate, who may not be comfortable contributing to user forums; (4) Provide an outlet for users to write about product experiences that may be problematic, but not something they would have reported as a bug; (5) Provide us with an easy benchmark to gauge the activity of each tester.



Pro Tip: We like to combine our daily journals with a simple rating scale along the lines of "Please Rate Your Experience with the Beta Product Today," with possible answers of 1-5. This allows us to focus more on the polarized experiences, finding unexposed issues in the severely negative experiences, as well as additional marketing content (often including testimonials) in the highly positive experiences.

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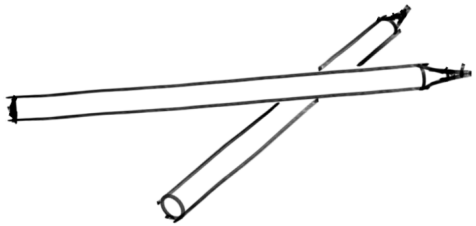
10. We Moderate All Feedback

Pro Tip: It doesn't take a lot to let a tester know you care, but it's important to strike a balance between too much work for you (e.g., writing a paragraph in response to every daily journal), and too little show of appreciation (e.g. an automated template "Thank you!" email). One or two lines in response to any piece of feedback will eventually add up, showing that you're really paying attention.

Beta participants become discouraged and stop providing feedback whenever they feel that their efforts are falling into a "black hole."

To ensure that this doesn't happen, we're constantly moderating and responding to all forms of incoming user feedback, including user forums, bug reports, suggestions, and daily journals.

We find it essential that our participants understand that they're being heard and that all their efforts are very much appreciated.

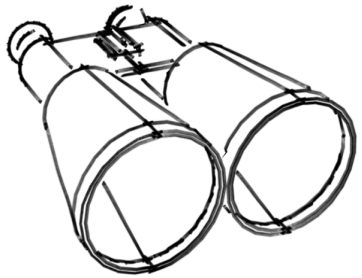


11. We Closely Monitor Participation

From time to time, some testers might temporarily fall off the track. They may have become preoccupied with other priorities, got stuck with a blocking issue, or may have simply lost interest in the product.

We're always careful to be aware of the status of every tester, constantly monitoring participation efforts and reaching out to them directly when they're faltering — first by email, then by telephone. We find that a short, positive dialog is all it takes to get most testers back on track and contributing effectively.

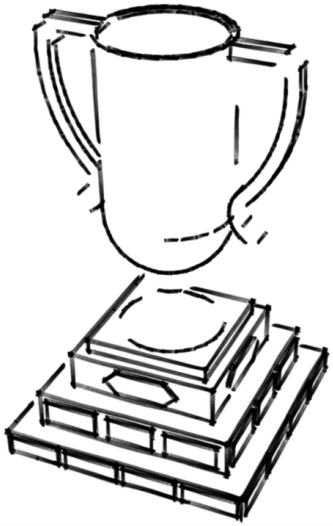
Pro Tip: In addition to monitoring for declining performance, keeping track of your testers will provide you with plenty of opportunities to applaud their efforts. Doing so is a great way to turn a good tester into an incredible tester.



12. We Reward Appropriately

Beta test "incentives" are an integral part to most tests. We award testers who meet our participation requirements with a suitable reward, most commonly the product itself (preferably the release version), or something as closely related as possible. Often things as simple as a custom t-shirt will go a long way toward showing that tester that they're appreciated and making them really feel like a part of the product team.

While this obviously won't affect participation directly (since the beta is over), it helps build strong relationships with your testers that will result in a much more successful long-term beta program over the course of many projects. In other words, it will help the participation of your NEXT test. Also, it's good karma.



Pro Tip: Unless the incentive is incredible (e.g. all-expenses-paid trip to Hawaii), it's generally best to not advertise it to your testers prior to the end of the test. We go out of our way to recruit testers who are more interested in the product than the reward, and if you do announce the incentive and it doesn't meet their expectations, you run the risk of crippling your participation right out of the gate.

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Delta Testing Solutions

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



The Centercode Platform equips you with the automation and best practices 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