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Software Beta Test
Planning Kit



What's in This Kit



Ebook

Tips for Effective Beta Test Planning



Beta Test Plan Companion Guide



Deck

Beta Test Planning Strategy Discussion



Beta Test Plan Template

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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

ABOUT THIS E-BOOK

This e-book provides advice for hyper-focused beta test planning, based on lessons learned from years of beta, UAT, and user 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:

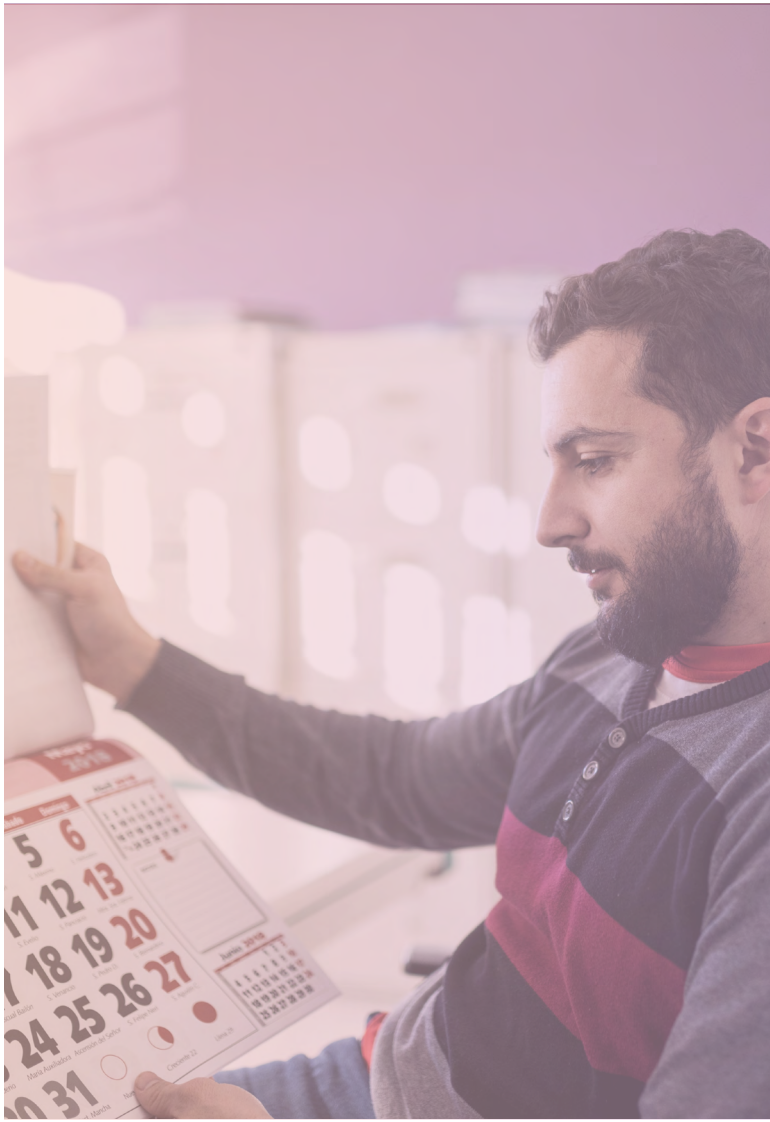
- Save time and money, and gain peace of mind while planning your next test
- Align your stakeholders behind a single document so everyone is on the same page - literally
- Clearly define and organize tasks to prevent key action items from falling through the cracks
- Prove your program's value by creating 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 delta testing use case that evaluates your customers' level of satisfaction with your product and their acceptance of its features before launch.

If you're running an employee product test or a continuous user test, this information will be relevant for you, but you'll want to make adjustments based on the the specific goals of your delta testing use case.



How Planning Affects Your Test



Effective planning is the foundation of high-value beta testing 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. Beta and user testing 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, test managers are required to actively target products for testing within their organizations. This happens more often at companies where testing 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 beta and user testing 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.

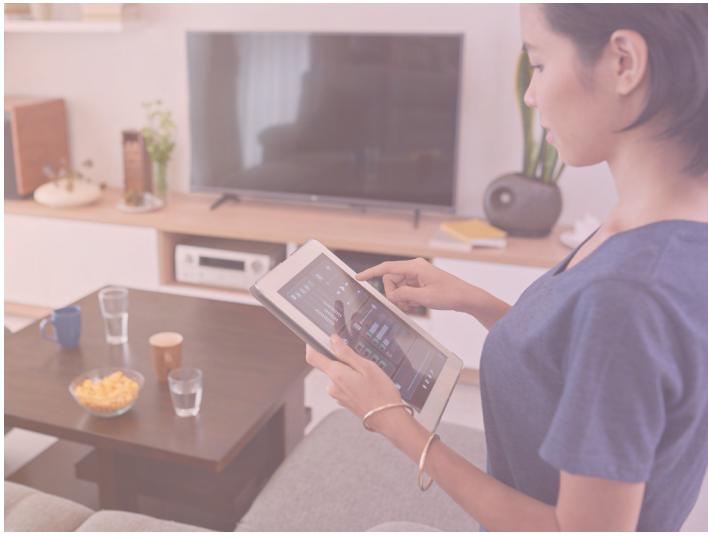


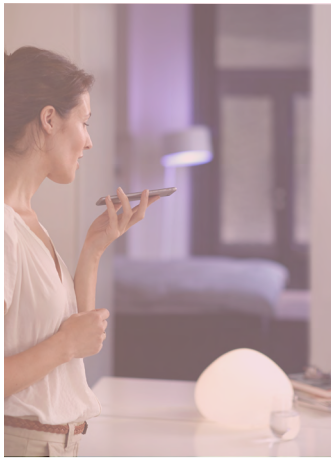
Topics and Activities

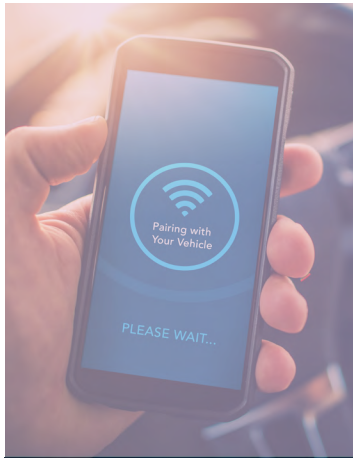
It's typical for each week of beta testing to focus on evaluating three or four specific areas or features of your product, or to answer a few definitive questions. To make sure that testers address these key aspects during your test, you'll need to break your product down into testable areas, or **topics**.

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.







How Many Testers Do You Need?

Half of all beta testing 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 beta and user tests. Download the Beta Tester Recruitment Kit for an in-depth look at proven techniques for finding and attracting qualified testers.

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 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 such as 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.





Product Distribution: Software

CHOOSING THE RIGHT MEANS FOR DISTRIBUTING YOUR SOFTWARE PRODUCT

Beta and user testing 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

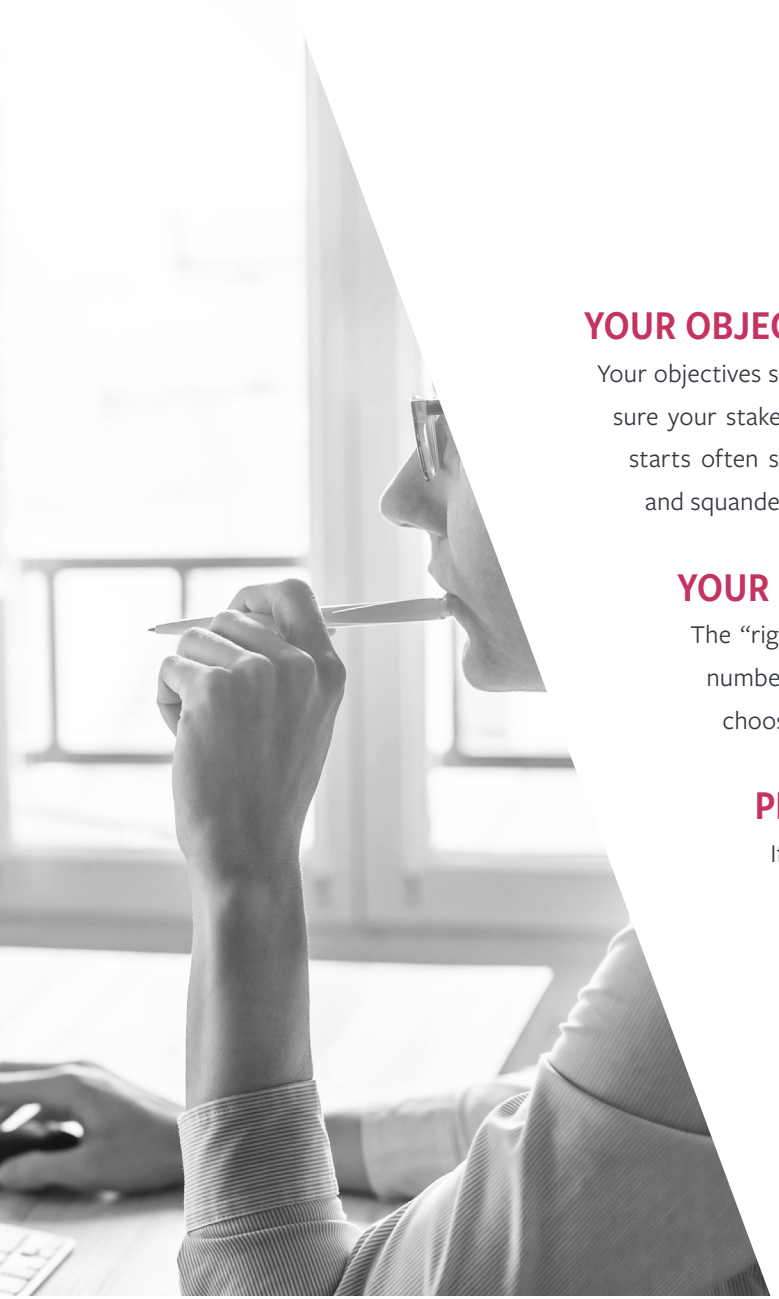
Engineering, quality, or product managers usually have enough background knowledge on the internal distribution of your beta mobile app to help you with distribution to testers.



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 delta testing, 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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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

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 teams 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 38 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 15 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 11 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

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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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Thank You

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[PRODUCT NAME]

Beta Test Plan

Prepared by [Test Manager Name]
[name]@[domain].com
(XXX) XXX-XXXX

TEMPLATE PROVIDED BY CENTERCODE

BETA TEST - EXECUTIVE SUMMARY

Product Overview

Product Name	
Product Description	
Test Codename	

Participants

Total Testers	XXX Total (XXX Core, XXX Surplus)

Schedule

Est. Start Date	
Est. End Date	

Week	Period	Topics / Action Items
1	Prep	Finalize test plan, create recruitment plan, workplace setup
2	Prep	Test sections, resource setup
3	Test	
4	Test	
5	Test	
6	Closure	Reporting, analysis, and presentation

Ongoing Feedback

Feedback Type	Objective
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 Journal	Gather user insight and sentiment, study user experience

Test Notes

Notes
(e.g., Stakeholders prefer materials delivered in PDF format.)
(e.g., Mobile app will be distributed using TestFairy..)

Test Budget

Cost	Notes	Estimated Price (USD)
Beta hardware	Beta versions of the product and its components	$X.XX
Estimated Distribution Shipping		$X.XX
Estimated Retrieval Shipping		$X.XX
Tester Incentives		$X.XX

Test Changelog

Date	Change Description	Author	Version

Note: Once this plan is finalized, any deviations from the plan will be logged here. The plan will not be further modified.

Test Overview

Test Stages and Phases

Stage / Phase	Start Date	Duration	New Testers	Maintained Testers	Total Testers
Prep Period		X Weeks	-	-	-
Beta 1 Test Period		X Weeks	XX	n/a	XX
Beta 2 Test Period		X Weeks	XX	XX	XX
Closure Period		X Weeks	-	-	-

Stakeholders

Test Team

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

Name	Project Role	Contact	Responsibilities
	Test Manager		
	Test Lead		

Product Team

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

Name	Project Role	Email Address	Phone Number	Responsibilities
	Product Owner			
	Technical Lead			

Recruitment Objectives

Tester Team Size

Types of Testers	# of Testers
Core	XXX
Surplus	XXX
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

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

Test Logistics

Test Bill of Materials (BOM)

The following test components will be distributed to testers.

Types of Testers	# of Testers

Packaging Details

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

Package Name	# of Packages	Length	Width	Height	Weight
	XX	X″	Y″	Z″	X lbs.

Shipping Logistics

The following outlines the details necessary to ship and retrieve test units.

Phase	Carrier	Account Number	Transit Time

Direct Research

Directed Research utilizes a product tour approach to gather insights from testers on prioritized areas of the product. The product tour approach lays topics out as a map of the product. Weekly activities are created to guide testers toward an experience and a weekly survey is administered to gather attitudes, thoughts, and opinions of the experience. Through analysis actionable and insightful recommendations are provided in the reports and weekly meeting.

Topic	Description	Activities
Week 3		
Week 4		
Week 5		

Participation Measurement

While many of the engagement efforts of this beta test are circumstantial (e.g., discovering bugs, originating feature suggestions), the following is our standard measurement metric for evaluating successful tester participation.

#	Action
1	
2	

Tester Incentives

The following outlines the details necessary to ship and retrieve test units.

Tier	Participation Level	Incentive
1	Extraordinary, exceeds all expectations	
2	Meets all expectations	
3	Fails to meet set expectations	

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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