



# Successful Beta Testing

By Centercode



# About Us

- Developers of Centercode Connect – Beta Test Management Software ([www.centercode.com/connect/](http://www.centercode.com/connect/))
- Service Offering includes fully Managed Beta Tests ([www.centercode.com/managed/](http://www.centercode.com/managed/))
- Customers include Adobe, Autodesk, EMC, Symantec, TiVo, Cisco, GE, Time Warner, Logitech, Yahoo, Google, etc.
- Questions = [info@centercode.com](mailto:info@centercode.com)

# Agenda

- Beta Defined
- Types of Beta Tests
- Beta Testing Tools
- Writing a Beta Plan
- Recruiting Testers
- Managing Testers
- Managing Data
- Closing Beta
- Beta Reporting
- Promoting Beta
- Common Mistakes
- Elements for Success
- Beta Myths
- Beta FAQs

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# BETA DEFINED

# Beta Test Definition

A Test of a Product  
Performed by Real Users in  
Real Environments



# The Process

- Distribution of a Product to its Target Market
- Gathering Feedback From that Market
- Evaluating Feedback into Manageable/Actionable Data
- Distributing/Integrating Data into the Organizations it Affects



# The Details

- Typically, the Final Test Prior to Shipping a Product
- A Test that Brings Together Customers with a Company to Help Ensure a Successful Product
- Establishes a Final Assessment of Every Part of a Product Parts Prior to Release
- **Extends QA – Never Replaces It**

# Why You Need to Beta Test (1)

- Reduces risk via customer validation + increased quality
- Beta stresses products very differently than lab testing
- Customer input into A product is critical to its success and is part of all quality systems (ISO 9001, Six Sigma, etc)
- Beta complements all other aspects of product development

# Why You Need to Beta Test (2)

- Beta allows a company to test post-launch infrastructure
- Beta can provide data that is relevant to past, present and future products
- Beta offers a unique window of opportunity to meet and further understand your target market first-hand

# Benefits of Beta Testing (1)

- Very cost effective - especially when compared to similar data gathering methods
- Involves your target market in your product at a critical stage in development
- Provides real feedback from real customers
- Helps generate valuable data for all teams involved in product development

## Benefits of Beta Testing (2)

- Establishes a baseline for Quality organizations to measure customer satisfaction
- Exercises the entire product development process
- Creates goodwill with customers by involving them in the development process
- Tests your product in actual real-world environments

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# TYPES OF BETA TESTS

# Types of Beta Tests (1)

- **Traditional Betas** - Pre-release product is distributed to the target market; data is gathered about all aspects of the product and then used for product improvement
- **Marketing or Technical Beta** - Pre-released or released product is distributed to a user group with intentions of gathering data to benefit a specific organization, often engineering or marketing
- **Public Beta Tests** - Pre-release product is openly distributed online, data is gathered from anyone who responds and then used for product improvement

## Types of Beta Tests (2)

- **Focused Beta** - Pre-released or released product is distributed to the target market, data is gathered on a specific aspect of the product and is rolled into the product
- **Post-Release** - Product is distributed to a targeted group of users, data is gathered about all (or specific) aspects of the product and then improvements are rolled into a future release
- **Internal Beta** - A test program in which employees of a company are given the chance to use a product prior to release. Not technically a beta test, but can be close with a large population.

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# BETA TESTING TOOLS

# Productivity Applications

- **Examples**

- E-Mail, Spreadsheets, Word Processors

- **Pros**

- Extremely Inexpensive (you probably already have them)
- No Learning Curve

- **Cons**

- Can't Scale (> 10 Participants = Trouble)
- No Means for Communication Among Beta Testers
- Not Sufficient for a Team Environment (little to no visibility)

# Engineering Tools

- **Examples**

- BugZilla, Clearquest, FogBugz, TestTrack Pro

- **Pros**

- Easy Internal Adoption / Low Learning Curve (you have them)
- Generally Offer Team Visibility (access to bug reports, etc)

- **Cons**

- Commonly too Technical for Testers to Interact with
- Offers Little Means for Communication Among Testers
- Offer No Means to Provide Testers with Project Information

# Homebrew Tools

- **Examples**

- Any in-house developed application at your organization

- **Pros**

- Often Flexible (you own the code)
- Globally Accessible for Beta Testers (most are web-based)

- **Cons**

- Expensive, Expensive, Expensive
- Most Likely Don't Have the Development Resources Available
- Very Difficult to Maintain

# True Beta Management Tools

- **Examples**

- Centercode Connect, Betasphere FMS, CustFeedback.com

- **Pros**

- Built for Beta Testing! - Globally Accessible, High Visibility
- Low Learning Curve for Customers/Testers
- Surveys, Reporting, CMS, Feedback Management, User Forums

- **Cons**

- Potentially Expensive
- New Application to Learn

# Other Useful Tools (for All)

- **Project Planning Tools** (ex. MS Project) – A beta is a project like any other including milestones, activities, and resources. Treat it so.
- **Spreadsheet** (ex. Excel, Google Docs) – A modern spreadsheet contains everything needed to extract endless amounts of useful data from any beta test.
- **The Web** (Portals, Social Networks, Forums) – Mined correctly, the internet offers an endless collection of great participants.

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# WRITING A BETA PLAN

# The Beta Plan

## The Beta Plan:

- Ensures the project parameters, goals, milestones, activities, and participant demographics are well defined
- Outlines all internal resources (project members and teams) involved, as well as their responsibilities
- Is the basis of the report which will summarize the results and effectiveness of the beta project (**more later**)

# Writing a Beta Plan (1)

- **Product Definition** – Construct an outline of the product itself, including information regarding it's current state (alpha, beta, beta2, etc), high-level modules, etc.
- **Target Market Definition** – Detail the types of individuals this product will be sold to. This could include consumers, business IT departments, soccer moms, previous customers, and everything in between. Most products span multiple markets. Break down the types of users you plan to recruit into pools. Include the tester requirements (time, hardware, etc) in this definition.

## Writing a Beta Plan (2)

- **Test Parameters** – Outline the basic parameters unique to the project including number of beta testers and projected timeline.
- **Test Goals (SUPER KEY)**– List the unique goals of the project. Items such as general quality improvement, interface acceptance, product functionality in real-world environments, test support infrastructure, collect customer suggestions and testimonials. Include the areas (modules) of the product that will be tested.

## Writing a Beta Plan (3)

- **Incentives** – Plan out the incentives that'll be rewarded for participation, as well as the participation levels which they will be based on. (more later)
- **Project Team Responsibilities** – Define the responsibilities of everyone involved in the project. Define how feedback will be managed as it changes hands and progresses.
- **Initial Activities** – Plan out the initial activities which will be performed throughout this beta (activities will likely change in response to the project progression)

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## RECRUITING THE RIGHT BETA TESTERS

# Why Do People Beta Test?

- Early Adopters
- Exclusivity
- Community / Networking
- Furthering Careers
- Participate in the Development Process
- Free Product

# Friends and Employees

- **Employees:** Generally a bad choice for testers as they either have too much insight into the product itself or are jaded by their relationship with the company.
- **Friends:** Usually make bad testers due to the fact that they believe their friendship negates their requirements to participate to the same level as other testers.

# Advertising for Testers (1)

- The internet opens the door to an endless supply of beta testers. It's important to manage this source effectively to collect the right ones.
- Find portals/networks which interest your target market (every market has them). Ask an admin to help advertise for you.
- Clearly indicate the technical requirements for each tester. Wading through unqualified candidates is a waste of everyone's time.

## Advertising for Testers (2)

- Incentives deserve mention in a tester call, but be vague. You want to bring testers based on excitement rather than reward.
- It is not necessary to advertise specific features of the product (especially anything confidential). Focus on the product category being tested – that's enough.
- Be very clear and honest about the time requirements to participate in the project.

# Tips for Effective Site Selection

- Always keep your target market in mind. The wrong market is the easiest way to produce useless results.
- Look for responsive and communicative behaviors.
- Look for detail oriented applications.
- Recognize those who are excited by your product.
- Avoid those who refer to or question incentives immediately.

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# MANAGING TESTERS

# Proper Tester Management (1)

- Clearly Express Expectations Early on and Throughout
- Consistently Encourage Confidentiality (NDA, etc)
- Balance Gratitude with Expectations
- Keep Sites Involved with On-going Activities
- Keep Sites Current Regarding Project Progress

# Proper Tester Management (2)

- Offer a Simple Consistent Method for Testers to Provide Feedback in the Forms you Want
- Allow Testers to Communicate Amongst Themselves (increases participation, secure outlet for excitement)
- Respond Quickly to all Issues and Requests
- Contact Inactive Testers Directly (by phone if possible)

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# BETA ACTIVITIES

# Common Beta Activities

- Bug Reports
- Specific Testing Tasks
- Forum Conversations (Open and Hosted)
- Surveys and Polls (Technical and Subjective)
- If Possible, Regression Between Builds
- Collect Feature Suggestions and Testimonials

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# MANAGING FEEDBACK

# Effective Data Management

- Use Your Tools Effectively
- Drive For Details
- Develop a Strategy to Handle Duplicates
- Quickly Respond to the Needs of the Test
- Ensure the Right People Get the Right Data

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# CLOSING A BETA TEST

# Keys to Closing a Beta Test

- Give Your Testers Time to Submit Final Issues
- Cut-off Tester Access to Submit Issues
- Close all Open Issues
- Offer Testers a Simple Means to Return Product

# Incentives!

- Ensure Incentives Match Participation Requirements
- Include Multiple Levels of Incentives
- Award All Who Meet Those Levels
- Distribute Incentives Quickly
- If Possible, Thank Testers Individually

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# BETA CLOSURE REPORT

# Developing a Closure Report

- Develop an Executive Summary of the Project
- Document Issues Found (by Severity and Repetition)
- Document Requested Features
- Document Survey Results
- Document Top Testers & Incentives Rewarded
- Ensure All Departments Obtain Report

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## PROMOTING BETA TESTING INTERNALLY

# The Beta Message

- Reduces Risk – Increasing Quality
- Cuts Support and Return Costs
- Helps Almost Every Organization in a Company
- Promotes Goodwill With Your Customer
- Can Reduce Time to Market

# Making the Most of Beta Tests

- Involve everyone in your company in the beta test process
- Share the data with those who need it (focused > fire hose)
- Promote the value of beta testing to each organization and clearly show how it can help
- Ensure beta testing is considered throughout the entire development process

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# COMMON BETA TESTING MISTAKES

# Common Beta Mistakes (1)

- Lack of a Serious Program or Program Support
- Using the Beta Program For Sales
- Beta Test Period is Too Short or Too Long
- Release of Unviable Product to Beta Test

# Common Beta Mistakes (2)

- Too Few or Too Many Beta Testers
- Poorly Motivated Testers
- Ineffective Communication or Bad Beta Testing Tools
- Poorly Managed Beta Testers and Test Data
- Badly Managed Incentives

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# BETA TESTING SUCCESS

# Elements for Beta Success (1)

- **Good Communication** – Bidirectional communication with testers regarding timelines, requirements, and progress.
- **Responsiveness** – Make testers feel involved on a constant basis. Treat them as an integral part of your team.
- **Effective Tools** – Use the right tools to increase the efficiency of everyone involved (you, your team, participants).

## Elements for Beta Success (2)

- **Organization** – Beta tests produce an enormous amount of varied data.
- **Effective Site Selection** – The wrong testers can produce useless results.
- **Proper Incentives** – You don't work for free and neither do your testers.

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# BETA TESTING MYTHS

## Common Beta Myths (1)

**Myth:** “It is too late in the process to be effective.”

**Truth:** There are benefits associated with beta testing at any point within the product development cycle including post launch.

## Common Beta Myths (2)

**Myth:** “Lab testing can find every issue with a product.”

**Truth:** Beta testing finds environment and customer specific information that are impossible to find in a lab environment.

## Common Beta Myths (3)

**Myth:** “Other kinds of tests gather the same data that a beta test will gather”

**Truth:** Beta testing is a unique scenario where real users are reporting real problems based on first hand experience.

## Common Beta Myths (4)

**Myth:** “Beta testing generates little or no useful data”

**Truth:** A successful beta test can generate useful information for nearly every group involved with the product.

## Common Beta Myths (5)

**Myth:** “Beta testing is difficult and time consuming”

**Truth:** Like all important processes, beta takes time/experience to obtain the most value. Tools and process can help – a lot.

## Common Beta Myths (6)

**Myth:** “Only software needs to be beta tested”

**Truth:** All products have customers and problems –all products benefit from beta/customer testing.

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# BETA TESTING FAQ

# Frequently Asked Questions (1)

**Q:** How Many Testers Should I Use?

**A:** It varies - your tester pool should depend on the audience and complexity of the product. Generally consumer products should be tested with anywhere from 50-200 people, while business products are tested with anywhere from 10-50. Many variables can change these numbers. Keep in mind your own available resources should drive tester pool as well.

# Frequently Asked Questions (2)

**Q:** How Long Should I Test?

**A:** Beta Tests generally run anywhere from 4-8 weeks, often split between multiple phases. With effective processes, betas can run as little as 2 weeks. Complex products may require 6+ months (generally while gathering feedback on an evolving product, such as in Agile development).

# Frequently Asked Questions (3)

**Q:** How Much Time Should Testers Dedicate?

**A:** This depends highly on the complexity of the project and goals of the project. Simpler products may only require 1-2 hours a week, while complex products can require 10-20 hours a week. Keep in mind that a properly targeted tester should be fitting this product into their daily life, therefore beta testing isn't necessarily "work".



# Thanks for reading

We're here to help, feel free to send questions.

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