200603 M5|L1 Lab Beta Plan Format

**Exercise 1:** Develop a Beta Plan for the Scenario.

**Part I: Beta plan overview**

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| Beta planning category | Beta planning consideration |
| Testing purpose | * Define the test purpose and intended results * Identify the type of beta test |
| Internal readiness | * Define testing roles and responsibilities |
| Tester recruitment | * Identify external buyers and users to be included in the test * Define tester incentives |
| Targets | * Describe how testers will be contacted |
| Testing objectives | * Define the testing objectives * Objectives should be SMART (Specific, Measurable, Attainable, Relevant, and Time-Bound) |
| Test management | * Define test management logistics * Include testing venues |
| Communications planning | * Describe how communications will be conducted |
| Costs | * Define testing costs * List funding source(s) |
| Scheduling | * Define the testing schedule |
| Legal | * Describe any legal considerations |
| Key performance indicators (KPI) | * Define testing measurables or KPIs |

**Part II: Beta plan template**

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| Beta planning category | Beta planning consideration |
| Testing purpose | * Purpose: Validate core functionalities and usability for business users. * Type of Beta Test: Closed Beta with selected external users. |
| Internal readiness | * Roles: Project Manager, QA Engineers, Developers, Customer Support. Each team is responsible for tracking progress, reporting and triaging issues, fixing bugs, and gathering user feedback respectively. |
| Tester recruitment | * Recruit 10 B2B client companies and 30 individual users across target industries. * Incentives: One-year free subscription or a $100 Amazon gift card for qualified participants. |
| Targets | * Testers will be contacted through personalized email invitations and a dedicated beta sign-up landing page. |
| Testing objectives | * Objective 1: 90% of testers should complete the core task within 10 minutes. * Objective 2: Collect at least 50 actionable UI/UX improvement suggestions. * Objectives are SMART: Specific, Measurable, Attainable, Relevant, and Time-bound. |
| Test management | * Testing will be conducted remotely on the cloud platform. * Jira will be used for managing testing progress, issue tracking, and feedback collection. |
| Communications planning | * A dedicated Slack channel will be created for real-time communication. * Weekly email updates will be sent to testers and internal stakeholders. * A post-test debriefing session will be held virtually. |
| Costs | * Estimated testing cost: $5,000. * Includes tester incentives, communication tools, and support hours. * Funding Source: Marketing department’s beta testing budget. |
| Scheduling | * Testing period: June 10 to July 5, 2024 (4 weeks). * Feedback analysis and follow-up: July 6–12, 2024. |
| Legal | * All testers will sign a Non-Disclosure Agreement (NDA) and a Beta Testing Agreement. * Data collection and usage comply with GDPR requirements. |
| Key performance indicators (KPI) | * Bug detection rate: Avg. 2 bugs per tester. * Task completion rate: 85%+ testers complete all assigned scenarios. * User satisfaction score: Average ≥ 4.2 out of 5. |