

How to Run A Successful Beta Program

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About This Seminar

- Designed to teach you best practices for beta programs
- Included in 280 Group Beta Program Toolkit
- Additional templates & files in the Toolkit:
 - Critical Decisions Checklist
 - Deliverables Checklist
 - Sample NDA
 - Beta Program Plan Template
 - Sample Beta Agreement
 - Final Report Template
 - Sample Exit Survey
 - Text for communicating with participants
 - Database for tracking participant status
 - Bug/feature database
 - Master schedule for showing what needs to happen when

Agenda

- Our Background & Qualifications
- Why Beta Programs are critical to success
- How to run a successful Beta program

Slides available at www.280group.com/beta.pdf

About the 280 Group...



The Product Marketing & Product Management Experts™

Consulting • Contractors • Training • Templates

Experience With Beta Programs

- Apple
- Symantec
- Claris
- Whistle
- Propel
- Adobe
- Quiver
- Multiple Startups
- End user in dozens of programs

Why Beta Programs Are Critical

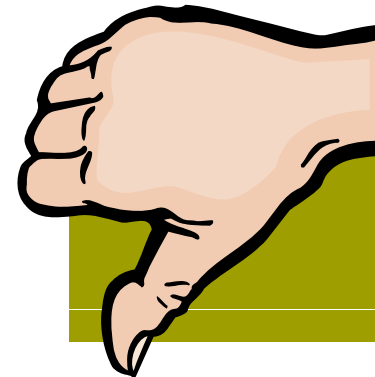
- Outside validation to build confidence
- Product readiness for ship
- Early learning & feedback
- Testimonials, quotes & success stories
- Build ongoing relationships with a friendly set of customers

First, A Bad Example

- Recently contacted
- Interesting new product
- For a friend of mine
- Was I interested?
 - Agree to terms
 - Download client
 - Test starts X/X/XX
- Win Amazon \$\$\$!

The Results

- Logged on
 - No idea how to use the product
 - No docs or help system
- New builds appeared without details
- Never confident about product
- I began to ignore the emails
- Not sure what ever happened



Now A Good Example

- Whistle InterJet
- 10 customers using the product for 6 weeks
- Supplemented QA efforts nicely
- In-depth feedback from each customer
- 3 early success stories
- Many new feature ideas early on
- 10/10 told us “Ready To Ship”



How to Run a Beta Program

- Setting goals
- Write plan & sign off
- Who manages the program
- Length of program
- Recruiting participants
- Selection of candidates
- Factors in response rates
- Participation levels
- Agreements
- Incentives
- Kicking off the programs
- Ongoing communication
- Responding to participants
- Communicating internally
- Exit surveys
- Final report
- After the beta
- Best practices

Beta Program Timeline

Task	Amount of Time
Set goals, write plan, sign off	1 week
Recruit & receive applications	3 weeks
Select, notify, send agreement	1 week
Run program	3-6 weeks
Exit survey, tally results, write final report	1 week
TOTAL	8-12 weeks

*More detailed timeline included in Beta Program Toolkit

Setting Goals

- Do this early (MRD)
- Also do this later (separate beta plan)
- Make goals concrete
- Get team & management buy-in & sign off



Potential Beta Program Goals



- Validate ship readiness
 - External data point for decision
- Supplement QA efforts
 - Short on QA resources
 - Holes in testing plan
- Customer references
 - Success stories
 - Quotes
 - Testimonials
 - Press referrals
- Early feedback for dot or next major release
- Help find top FAQs/support issues
- Include early press, analysts & influencers


Examples of Concrete Goals



- Determining Ship readiness
 - 20 site actively using the product for >4 weeks
 - N transactions/uses etc. per company
 - 90% of beta companies agree product is ready
 - At least 3 companies with Linux servers using product
 - Server runs successfully without crashing/reboot for N weeks
 - 9/10 of customers install successfully without assistance
- Supplementing QA Efforts
 - Have at least N customers older operating systems
 - Have at least N customers using different browsers
 - Run server software in at least N unique network environments
- Press/Launch
 - 3 companies willing to be success stories
 - 5 customer quotes for website/collateral

Write Beta Program Plan

- Goals
- Recruiting
- Criteria for starting
- Costs
- Timeline
- Responsibilities
- Criteria for success
- Signoff



End User Beta Program For Client

Goal:

- Our 25 users assess a wide variety of configurations to use Beta Software intensively in real-world environments for a least 3 weeks to get feedback on the performance, quality, usability, and functionality and ensure the product is ready for shipment.

Process for recruiting end users and running program:

- Candidates have no cost
 - o Cost: \$500 total - ensure that 100 will apply and that 1 out of 4 will actually participate - total of 25 successful users
 - o Candidates from previous beta testing and other efforts
 - o Other sources of users who have been using the services for a least 6 months (avoid newbies and people who may have just signed up)
- Assurances: The Big Deal!
 - o We've been working on a cutting edge version that will give you beta performance and several other advantages
 - o We are looking for a limited number of participants (with a room to grow)
 - o OTA resources (\$2500 total cost)
 - \$20 Amazon gift certificate for all who participate (100 users * \$20 each)
 - 3 months of free service
 - Coupon for an Apple iPad (40GB model - \$399 value * 3 = \$1197)
 - o To apply go to web page and fill out form
 - o Have them re-participate up front about what they can do to qualify
 - Formally accept the user/sign agreement
 - Keep all information under NDA
 - Fill out initial survey for reasons
 - Install the software and use intensively for 3 weeks
 - Submit bug reports if they find problems
 - Fill out exit survey to help us determine whether ready to ship
 - o Also welcome ask for assurance willing to be success stories and provide quotes (i.e. "This new version of is absolutely fantastic - I'm thrilled with the performance and usability provided.")
- Send an automated application form packet participant PM about a representative cross-section of users/Operating Systems/Devices/Third-Party compatibility, etc
 - o They respond to us enough we send a second communication with more specifics about what we are looking for to fill the beta
- When software is available welcome the participants to advanced page to be when developed and installed.
- We communicate with them weekly about status, usage expectations, and address all needs/desires (each week we announce whether additional needed and in the drawing to give them even more assurance to use the software and report bugs)

Who Manages It?

- Could be
 - Product Manager
 - QA Manager
 - Admin
 - Contractor
 - Engineering Resource
 - Project Manager
- Key criteria
 - Reliable
 - Responds to customer appropriately
 - Can meet stated goals
 - Has enough time dedicated to it
- May be dependent on who participants are
- Plan on it taking 10-20 hrs/week for duration



When Do You Start?

- No crashing bugs
- Bug count has stabilized
- Using product internally successfully for N days/weeks
- Successfully deployed and running at one customer site

How Long?

- Oftentimes by default ends up being 2 weeks
 - Very optimistic
 - No room for slack
 - Doesn't take into account user's priorities
- Longer programs will lose momentum
 - 8-10 weeks – usage will drop off
- Optimal time 3-6 weeks
- Highly dependent on
 - Type of product
 - Incentives
- Ideal length: 4-6 weeks



Recruiting Participants

- Sources
 - Current customers
 - Prospects that didn't purchase
 - VCs/Investors
 - Personal Networks
 - Sales force & leads
 - Advertisements (Craigslist, local newspaper)
- Approaches
 - Email
 - Phone
 - Via website

Recruiting Process

- Initial contact with details*
 - Overview of product
 - Time commitment required
 - Compelling incentives
 - Brief questionnaire about environment
- Marketing 101
 - Benefits
 - Name the program
- Build database of interested prospects including criteria*
- Select combination that meets goals – notify chosen
- Send out beta agreement, NDA to return by deadline*
- At deadline evaluate whether you to further expand

Factors In Responses

- Popular/Interesting product = High
- New/unproven product = Marginal
- Will it affect mission-critical operations = Marginal
- Who your company is
- How personal/compelling your approach is

Incentives

- “Help Us Improve The Product”
- Free/reduced price or upgrade
- Contests (entry for each bug report)



Participation Levels

**Existing product with
personal approach**

25 Recruit



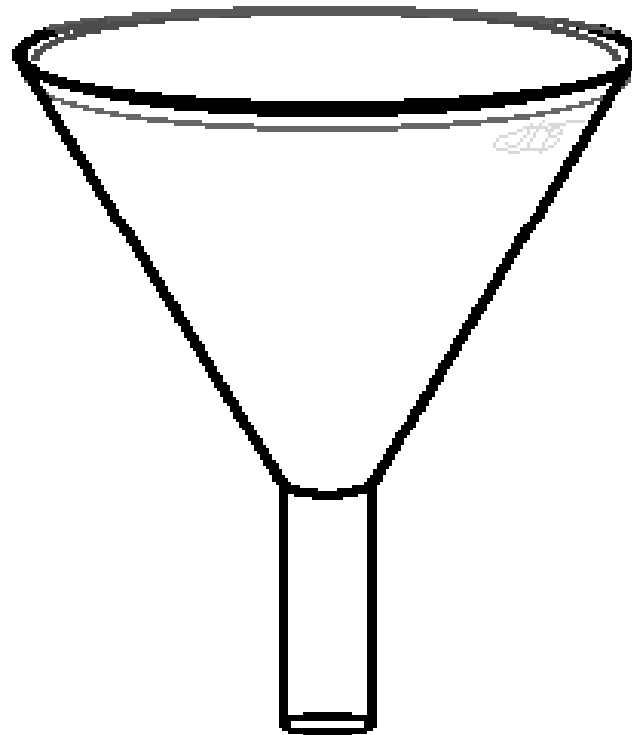
20 Interested



15 Sign Up



10-12 Active



**New product with
impersonal approach**

100 Recruit



40 Interested



20 Sign Up



5-8 Active

Selection Of Candidates

- Representative of target customer base
- Try to get some non-power users (difficult)
- Supplement QA efforts

Agreements

- Helps improve commitment level
- Sets expectations
- Make it simple
- Items to include
 - Length of program
 - Incentives/rewards
 - Responsibility of participants & expected amount of usage to get incentive
 - Support that will be provided



Kicking Off The Program

- Try to avoid a false start if at all possible
- Build quick FAQ
- Get documentation out early
 - Easier for them to install/use
 - Feedback on how effective it is
- Make sure installer works

Ongoing Communication

- Key to keeping the program going
- Smaller programs – phone calls
- Bigger programs – email
- Weekly leading up to and during program
- Make sure you cover
 - Start date
 - End date
 - How to submit bugs/feedback
 - Ongoing status
 - New build/installation info
 - Contest details/add'l incentives



Responding To Participants

- Types
 - Bug reports
 - Tech support
 - Feature requests
- How to capture
 - Ideally online into a database
 - If not, use email
- Set a response metric
 - Within 1 day for tech support
 - Follow up if bugs get fixed
 - Autoresponder for feature requests

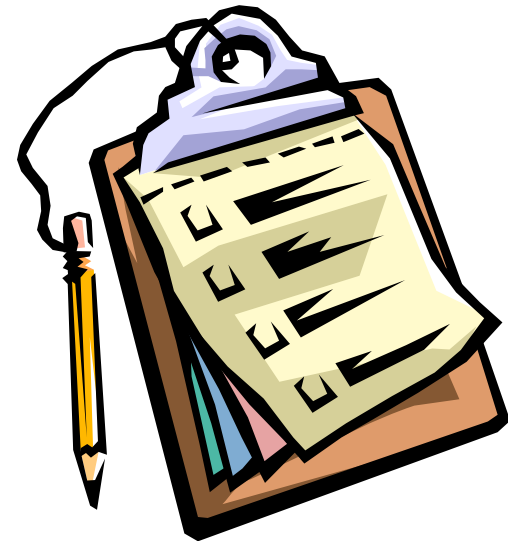
Communicating Internally

- Weekly status reports
- # bug reports (quantify to show trend)
- Top priority bugs
- Meeting stated goals
- Feature requests



Exit surveys

- Make it short
- Make it required to get incentive
- What to ask
 - How much did you use the product
 - Overall impressions
 - Rate the features
 - Is it ready to ship
 - What can be improved
- Methodology
 - Via email
 - Zoomerang, Survey Monkey



Final Report

- Deliver a short summary
- Bug trend info & program information
- Whether met goals
- Summary of customer opinions/feedback
- Deliver prior to FCS decision


Follow Up Afterwards

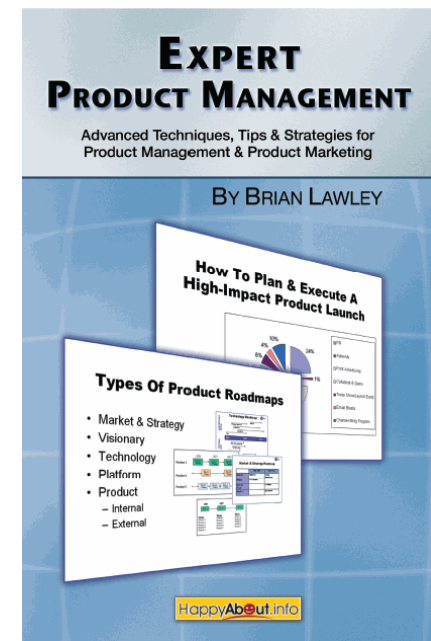
- Don't waste your hard work
- Thank you letters & incentives
- Ask about:
 - Ongoing customers council
 - Future beta programs
 - Personal call list

Best practices for next program

- Short summary after product ships
- What worked well, what didn't
- Give credit where credit is due

280 Group Resources

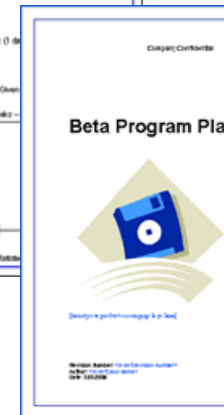
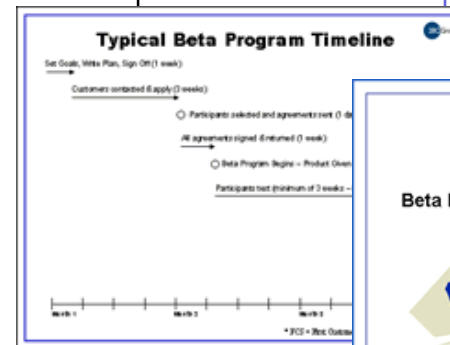
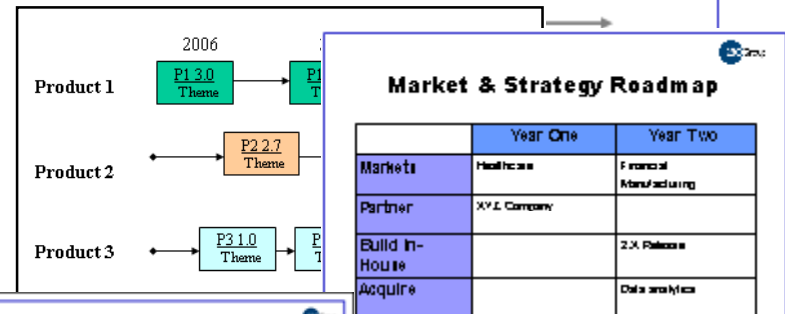
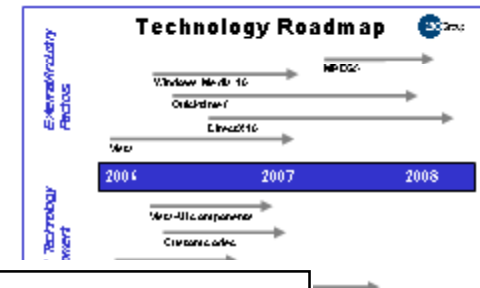
- Free templates and white papers
 - 8 white papers
 - 12 templates
- 280 Group Product Management 2.0 Newsletter
- 280 LinkedIn Group 
- Product Management 2.0 Blog
- PM jobs description & job listing sites
- Books
- PMA listings
- Expert Product Management (paperback, ebook, bundle)



www.280group.com/resources.htm

Other 280 Group Toolkits

- Topics
 - Product Manager’s Toolkit™
 - Product Launch Toolkit™
 - Product Roadmap Toolkit™
 - Beta Program Toolkit™
 - Developer Program Toolkit™
 - Product Review Program Toolkit™
- Contents
 - Templates
 - Samples
 - Narrated presentations
 - White papers
- PM Office™ Bundles



Market Requirements Document (MRD) - Template

280Group logo

Company Name: <Blue company name>
Product Name: <Blue product name>

Size:	Small
Owner:	Blue team lead
Customer:	Blue customers 1
Market:	Blue market 1
Timeline:	Blue timeline 1

Item	Owner	Priority	Completed



280 Group Services Offered

Product Management

- **Market Analysis**
- **Developing Business Cases**
- **Profit & Loss Analysis**
- **Customer Research**
- **Market Research**
- **MRDs & PRDs**
- **Product Roadmaps**
- **Working With Engineering Teams**
- **Reviewing Functional Specs**
- **Finalizing Product Requirements**
- **Prioritizing Feature Sets**
- **Feature, Schedule & Cost Tradeoffs**
- **Competitive Analysis**
- **Running Beta Programs**

Product Marketing

- **Product Launches**
- **Sales Tools**
- **Positioning**
- **Pricing**
- **White Papers**
- **Reviewer's Guides**
- **Product Demos**
- **Competitive Comparisons**
- **Customer Testimonials**
- **Success Stories**
- **Features & Benefits/USPs**
- **Press Tours & Materials**
- **Presentations**
- **Training Materials**

Q&A

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