



Readiness Checklist Templates for **Beta**



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You're almost there. Sanity-saving templates coming right up!

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How to Use These Templates:

Thanks for downloading our Readiness Checklists for Beta! Included in this guide are three essential checklists: Beta Test Readiness, Product Launch Readiness, and a Go/No-Go Launch Assessment. These templates are designed to help you ensure you've considered the most important aspects of this stage in the product development lifecycle including product development, beta testing, and market launch.

Each checklist aligns with a key milestone in the lead up to launch. Simply choose the checklist that aligns with your current stage, and adapt it to your specific project needs. We encourage you to add, delete, or edit any of the items as required to tailor the content to your unique product and market.

Each checklist is crafted to provide a clear framework for assessing readiness, making informed decisions, and executing your strategy with confidence. We've also incorporated some sample checklists to illustrate how these checklists might be utilized.

Feel free to reach out to us for further assistance or resources in implementing these checklists into your product launch process. Your success is our priority, and we're here to support you every step of the way!



Worry-Free, Automated Beta Testing

Easily build your user tests, collect feedback, collaborate with testers, and improve your product release.

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Beta Readiness Checklist

This checklist aids in evaluating the readiness of the product, testers, and team for a beta test. If any crucial items are missing, it may indicate a need to delay the test, requiring further preparation and alignment. If all aspects are in place, it signals that the beta test can proceed, laying the groundwork for valuable user feedback.

PRODUCT READINESS	DONE?	IN PROGRESS?	ECD
Verify with your product team that all key features are working and the product is 'beta-ready'			
Check that all the materials users might need for testing have been created (e.g., product documentation, testing instructions, etc.)			
(Hardware Only) Assemble all your auxiliary components into a single package for your testers (including documentation, as needed)			
Review the out-of-the-box experience, including setup, installation, and documentation			
Document any known issues that could not be addressed before testing (in case they come up and need to be communicated to your testers)			
Verify the uninstall or (if applicable) product return process			

TESTER READINESS	DONE?	IN PROGRESS?	ECD
Make sure you have enough testers identified in each segment of your market			
Notify selected testers that they're on the beta team			
Verify contact information (and shipping address if you're testing a hardware product)			
Get all non-disclosure and test participation agreements signed and returned			
Communicate the project schedule and tester responsibilities to the tester team			
Give testers an overview of the feedback systems and formats they'll be using (provide clear instructions if submitting feedback isn't dead simple)			
Make sure your testers have readily accessible, easy-to-understand resources for carrying out their responsibilities			

TEAM READINESS	DONE?	IN PROGRESS?	ECD
Identify the features or experiences that will be tested during your project and verify them with your stakeholders			
Write out your task scenarios, including a quick description and the activities necessary to test each feature or experience			
Make sure you have defined processes for test goals, feedback collection, product distribution, and incentives			
Define your project schedule, taking your goals, recruitment needs, and logistics into account			
Communicate important milestones and deadlines to your stakeholders and contributors			
Make sure your stakeholders have handed off all the deliverables (tools, documentation, surveys, packaging, product keys, NDAs, beta units, etc.)			
Create a contingency plan and/or chain of command in the event of vacation, parental leave, etc.			
Set up and test your project space, feedback channels (free templates here), issue tracking, content delivery, and servers ahead of the testing period			



Product Launch Readiness Checklist

This checklist serves as a structured guide for assessing the preparedness of the product, market, and team for the official product launch. If any key elements are missing or misaligned, it may necessitate postponing the launch for further coordination and fine-tuning. If everything aligns with the launch strategy, it signifies that the product is primed for a successful debut in the market, connecting with customers and stakeholders alike.

PRODUCT READINESS	DONE?	IN PROGRESS?	ECD
Verify with your product team that all final enhancements, based on beta feedback, have been implemented and thoroughly tested			
Ensure all marketing and promotional materials are prepared, including press releases, social media posts, and advertisements			
If applicable, assemble all product units and documentation for distribution			
Review the purchasing and unboxing experience, including setup, installation, and user guides			
Document any remaining known issues for internal tracking and potential communication to customers			
Finalize the after-sale support process, including returns, if applicable			

MARKET READINESS	DONE?	IN PROGRESS?	ECD
Identify key market segments for targeted launch promotions.			
Notify key influencers, media partners, and stakeholders about the product launch date.			
Ensure all promotional agreements, partnerships, and legal documents are signed and in place.			
Communicate the launch strategy to the marketing, sales, and distribution teams.			
Provide all involved parties with necessary resources, guidelines, and schedules for executing the launch.			
Prepare a social media engagement plan, ensuring a cohesive online presence.			

TEAM READINESS	DONE?	IN PROGRESS?	ECD
Identify the key performance indicators (KPIs) that will be monitored during and after the launch, and verify them with stakeholders.			
Outline the launch day scenario, including a timeline of activities, responsibilities, and communication channels.			
Ensure defined processes for launch goals, sales tracking, customer feedback collection, and ongoing support.			
Communicate important launch milestones and deadlines to stakeholders and involved teams.			
Ensure stakeholders have provided all necessary tools, documentation, content, product units, etc.			
Create a contingency plan in the event of unexpected challenges or changes.			
Set up and test all online platforms, customer service channels, tracking systems, and other tools needed for the launch period.			



Product Go/No-Go Launch Assessment

This checklist helps in making a full assessment of whether the product is ready for launch. If any of the critical elements are not met, it may signal a “no-go” decision, leading to further review and adjustments. If all elements are satisfied, a “go” decision can be confidently made, signaling readiness for a successful product launch.

Product Functionality and Quality

- Verify that all key features and functionalities are working as intended
- Confirm that all critical bugs identified during UAT have been addressed
- Assess the overall quality and stability of the product
- Review any known issues that remain and determine if they are acceptable for launch

Documentation and Support Readiness

- Ensure that all necessary product documentation, user guides, and FAQs are prepared and accessible
- Confirm that customer support teams are trained and ready to assist users
- Verify that the after-sale support process, including returns, if applicable, is well-defined

Marketing and Sales Alignment

- Confirm that marketing materials, press releases, and promotional plans are finalized and aligned with the product's messaging
- Verify that sales and distribution channels are briefed and ready for the product launch
- Assess if market demand and positioning align with the launch strategy

Compliance and Legal Considerations

- Ensure that all legal agreements, contracts, and compliance requirements are met
- Confirm that any necessary certifications or regulatory approvals have been obtained

Logistical Readiness

- Verify that inventory levels are sufficient for the initial launch period
- Confirm that shipping, handling, and distribution processes are in place and tested (where applicable)
- Assess the readiness of online platforms, customer service channels, and tracking systems

Stakeholder and Team Alignment

- Ensure that all stakeholders are informed and in agreement with the launch plan
- Confirm that the launch team understands their responsibilities and is ready to execute
- Verify that contingency plans are in place for unexpected challenges or changes

Final Decision: Go / No-Go

Based on the assessment above, make the final go/no-go decision for the product launch.



EXAMPLE: Beta Readiness Checklist

This checklist aids in evaluating the readiness of the product, testers, and team for a beta test. If any crucial items are missing, it may indicate a need to delay the test, requiring further preparation and alignment. If all aspects are in place, it signals that the beta test can proceed, laying the groundwork for valuable user feedback.

PRODUCT READINESS	DONE?	IN PROGRESS?	ECD
Verify with your product team that all key features are working and the product is 'beta-ready'	X	-	-
Check that all the materials users might need for testing have been created (e.g., product documentation, testing instructions, etc.)	-	X	9/1/23
{Hardware-Only} Assemble all your auxiliary components into a single package for your testers (including documentation, as needed)	n/a	n/a	n/a
Review the out-of-the-box experience, including setup, installation, and documentation	X	-	-
Document any known issues that could not be addressed before testing (in case they come up and need to be communicated to your testers)	-	X	9/1/23
Verify the uninstall or (if applicable) product return process	X	-	-

TESTER READINESS	DONE?	IN PROGRESS?	ECD
Make sure you have enough testers identified in each segment of your market		X	8/25/23
Notify selected testers that they're on the beta team	-	-	TBD
Verify contact information (and shipping address if you're testing a hardware product)	-	-	TBD
Get all non-disclosure and test participation agreements signed and returned	-	-	TBD
Communicate the project schedule and tester responsibilities to the tester team	-	-	TBD
Give testers an overview of the feedback systems and formats they'll be using (provide clear instructions if submitting feedback isn't dead simple)	-	-	TBD
Make sure your testers have readily accessible, easy-to-understand resources for carrying out their responsibilities	X	-	-

TEAM READINESS	DONE?	IN PROGRESS?	ECD
Identify the features or experiences that will be tested during your project and verify them with your stakeholders	X	-	-
Write out your task scenarios, including a quick description and the activities necessary to test each feature or experience	-	X	8/18/23
Make sure you have defined processes for test goals, feedback collection, product distribution, and incentives	X	-	-
Define your project schedule, taking your goals, recruitment needs, and logistics into account	X	-	-
Communicate important milestones and deadlines to your stakeholders and contributors	X	-	-
Make sure your stakeholders have handed off all the deliverables (tools, documentation, surveys, packaging, product keys, NDAs, beta units, etc.)	-	X	8/25/23
Create a contingency plan and/or chain of command in the event of vacation, parental leave, etc.	X	-	-
Set up and test your project space, feedback channels <small>(free templates here)</small> , issue tracking, content delivery, and servers ahead of the testing period	-	X	8/18/23



EXAMPLE: Product Launch Readiness Checklist

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PRODUCT READINESS	DONE?	IN PROGRESS?	ECD
Verify with your product team that all final enhancements, based on beta/UAT feedback, have been implemented and thoroughly tested	-	X	9/8/23
Ensure all marketing and promotional materials are prepared, including press releases, social media posts, and advertisements	-	X	9/12/23
If applicable, assemble all product units and documentation for distribution	n/a	n/a	n/a
Review the purchasing and unboxing experience, including setup, installation, and user guides	X	-	-
Document any remaining known issues for internal tracking and potential communication to customers	-	X	9/15/23
Finalize the after-sale support process, including returns, if applicable	X	-	-

MARKET READINESS	DONE?	IN PROGRESS?	ECD
Identify key market segments for targeted launch promotions.	-	X	9/15/23
Notify key influencers, media partners, and stakeholders about the product launch date.	X	-	-
Ensure all promotional agreements, partnerships, and legal documents are signed and in place.	X	-	-
Communicate the launch strategy to the marketing, sales, and distribution teams.	-	X	9/8/23
Provide all involved parties with necessary resources, guidelines, and schedules for executing the launch.	-	X	9/8/23
Prepare a social media engagement plan, ensuring a cohesive online presence.	-	-	TBD

TEAM READINESS	DONE?	IN PROGRESS?	ECD
Identify the key performance indicators (KPIs) that will be monitored during and after the launch, and verify them with stakeholders.	X	-	-
Outline the launch day scenario, including a timeline of activities, responsibilities, and communication channels.	-	X	9/15/23
Ensure defined processes for launch goals, sales tracking, customer feedback collection, and ongoing support.	X	-	-
Communicate important launch milestones and deadlines to stakeholders and involved teams.	-	X	9/8/23
Ensure stakeholders have provided all necessary tools, documentation, content, product units, etc.	-	X	9/15/23
Create a contingency plan in the event of unexpected challenges or changes.	-	-	TBD
Set up and test all online platforms, customer service channels, tracking systems, and other tools needed for the launch period.	-	-	TBD



EXAMPLE: Product Go/No-Go Launch Assessment

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Final Decision: Go / No-Go

Based on the assessment above, make the final go/no-go decision for the product launch.

