

BETA Agreement Process

04/29/2025 6:25 pm EDT

A Beta Agreement is a contract between a company testing a new product/feature and its beta testers. When a product is in beta testing, a beta agreement lays out the terms, privacy policy, and nondisclosure agreement between the company and the testers.

This article reviews the Beta Agreement process for our customers. To receive the Beta Agreement approval, you must submit it to your manager and product manager for the respective offering.

Beta Software – Process for Existing Clients Purchasing Add-On Module or Beta use for New Software Releases

1. Customer Enrollment

- Existing customer expresses interest in participating in the beta program for X product.
- Product Management sends BETA agreement only for customer to acknowledge terms and conditions.

2. Onboarding & Configuration

- A project manager or product manager reaches out post-execution to guide the client through configuration and setup as needed.
- Our PMO assists with setup at no cost to the client.

3. Beta Delivery & Monitoring

- Beta elements of the product are delivered to the customer.
- Ongoing support and feedback collection occur throughout the beta period.

4. Beta Completion & Transition to Sales

- Once the beta period concludes if there is a saleable opportunity, sales is notified that the product is now available for commercial sale.
- Sales engages with the client to discuss full adoption and licensing.

5. Finalization & Contracting

- OAF/SOW is prepared and signed.
- The agreement follows the standard contracting and approval workflow.

Beta Software – Process for New Logo Customers

1. Customer Enrollment & Agreement Execution

- Customer signs the OAF/SOW and Beta Agreement, covering all future beta releases, including defect fixes, new features, add-ons, and integrations.

2. Onboarding & Setup

- Project Manager/Product Manager facilitates configuration and setup with support from Professional

Services.

3. Beta Deployment & Monitoring

- Customer receives beta features/functions.
- Ongoing support and structured feedback collection occur throughout the beta period managed by Product Management.

4. Beta Completion & Transition

- Customer is notified when the beta ends and the release is production-ready.
- Sales engages as needed for full adoption where needed

5. Ongoing Beta Participation

- Customer remains eligible for future beta releases without additional agreements unless changes are required.
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