

## PRODUCT TESTING

# Product Testing Campaign Template

Plan, run and report a consumer product test: objectives, sample design, questionnaires, analysis and a report structure, with targets you set yourself.



Free to use



No signup needed



Print-optimized

# Product Testing Campaign Template

Plan, run and report a consumer product test: objectives, sample design, questionnaires, analysis and a report structure, with targets you set yourself.

## Product Testing Campaign Template

### Plan, Execute, and Analyze Consumer Product Tests

#### How to Use This Template

1. **Fill out the planning sections** before launching
2. **Use the checklists** to track execution
3. **Collect data** using the provided frameworks
4. **Analyze results** with the included formulas
5. **Document learnings** for future tests

#### Part 1: Campaign Planning

##### Test Overview

| Field              | Input                 |
|--------------------|-----------------------|
| Product Name       |                       |
| Product Category   |                       |
| Test Objective     |                       |
| Test Duration      |                       |
| Target Sample Size |                       |
| Budget             |                       |
| Timeline           | Start: ____ End: ____ |

##### Test Objectives (Select All That Apply)

- ☐ Product-market fit validation
- ☐ Feature preference testing
- ☐ Pricing research
- ☐ Packaging evaluation
- ☐ Competitive comparison

- ☐ Usability assessment
- ☐ Quality perception
- ☐ Purchase intent
- ☐ Concept testing
- ☐ Other: \_\_\_\_\_

### Success Criteria

Set every target before fieldwork starts, from your own past tests or launches. This template deliberately gives no default targets: what counts as a good score depends on your category, price point and scale, and borrowed thresholds are not evidence.

| Metric                  | Target   | Minimum Acceptable |
|-------------------------|----------|--------------------|
| Overall satisfaction    | ___ /5.0 | ___ /5.0           |
| Purchase intent         | ___ %    | ___ %              |
| NPS                     | ___      | ___                |
| Completion rate         | ___ %    | ___ %              |
| Specific feature: _____ |          |                    |
| Specific feature: _____ |          |                    |

## Part 2: Sample Design

### Target Demographics

| Criteria                    | Requirement |
|-----------------------------|-------------|
| Age range                   |             |
| Gender                      |             |
| Income level                |             |
| Geographic location         |             |
| Product category experience |             |
| Purchase behavior           |             |
| Other criteria              |             |

### Sample Size Calculator

| Variable         | Input |
|------------------|-------|
| Confidence level | 95%   |

| Variable                      | Input           |
|-------------------------------|-----------------|
| Margin of error               | 5%              |
| Population size               | (if known)      |
| Expected response variance    | 50%             |
| <b>Calculated sample size</b> | <b>n = ____</b> |

#### Quick Reference:

- 95% confidence, 5% margin → ~385 respondents
- 95% confidence, 10% margin → ~97 respondents
- 90% confidence, 5% margin → ~271 respondents

### Recruitment Plan

| Channel        | Target # | Method               |
|----------------|----------|----------------------|
| Portifer Panel |          | Platform recruitment |
| Email list     |          | Direct invitation    |
| Social media   |          | Ad/organic           |
| In-store       |          | Intercept            |
| Partner panels |          | Referral             |
| <b>Total</b>   |          |                      |

## Part 3: Test Design

### Product Delivery Method

- ☐ Ship physical product to testers
- ☐ In-person pickup
- ☐ Virtual/digital access
- ☐ In-store experience
- ☐ Other: \_\_\_\_\_

### Test Duration Considerations

| Product Type    | Recommended Duration |
|-----------------|----------------------|
| Food/beverage   | 1-3 days             |
| Beauty/skincare | 2-4 weeks            |
| Electronics     | 1-2 weeks            |

| Product Type         | Recommended Duration |
|----------------------|----------------------|
| Apparel              | 1 week               |
| Home goods           | 2 weeks              |
| Software/apps        | 1-2 weeks            |
| Subscription service | 1 month              |

## Test Conditions

| Condition             | Specification |
|-----------------------|---------------|
| Usage frequency       |               |
| Usage context         |               |
| Comparison products   |               |
| Instructions provided |               |
| Support available     |               |

## Part 4: Survey Design

### Pre-Test Survey (Before Product)

#### Section A: Screening & Demographics

1. Age range
2. Gender
3. Location
4. Income bracket
5. Category usage frequency
6. Current products used

**Section B: Expectations** 7. What features are most important to you in [category]? 8. What would make you switch from your current product? 9. How much would you expect to pay for a product like this?

### Usage Diary (During Test)

#### Daily/Weekly Log:

1. Date of use
2. Duration of use
3. Context of use
4. Initial impressions (Day 1)
5. Ongoing observations
6. Issues encountered
7. Comparisons to alternatives

# Post-Test Survey (After Product)

## Section A: Overall Experience

- 1. Overall satisfaction (1-5 scale)
- 2. Quality perception (1-5 scale)
- 3. Value for money (1-5 scale)
- 4. Likelihood to recommend (0-10 NPS)
- 5. Purchase intent (Definitely not → Definitely would)

## Section B: Feature-Specific Ratings

| Feature   | Rating (1-5) | Importance (1-5) |
|-----------|--------------|------------------|
| Feature 1 |              |                  |
| Feature 2 |              |                  |
| Feature 3 |              |                  |
| Feature 4 |              |                  |
| Feature 5 |              |                  |

## Section C: Open-Ended

- 6. What did you like most about the product?
  - 7. What would you change or improve?
  - 8. How does this compare to products you currently use?
  - 9. Any other comments?
- 

# Part 5: Execution Checklist

## Pre-Launch (2 Weeks Before)

- ☐ Survey finalized and tested
- ☐ Sample size target set
- ☐ Recruitment channels identified
- ☐ Products ready for shipping
- ☐ Instructions/materials prepared
- ☐ Timeline communicated
- ☐ Incentives defined
- ☐ Consent forms ready

## Launch Week

- ☐ Screening survey deployed
- ☐ Participants qualified and selected
- ☐ Products shipped/delivered
- ☐ Confirmation emails sent

- ☐ Support contact shared
- ☐ Pre-test survey completed
- ☐ Tracking system in place

### During Test

- ☐ Daily/weekly check-ins scheduled
- ☐ Diary entries monitored
- ☐ Drop-off follow-ups sent
- ☐ Issues documented
- ☐ Partial data reviewed

### Post-Test

- ☐ Post-test survey deployed
- ☐ Reminder emails sent
- ☐ Incentives distributed
- ☐ Data collected and cleaned
- ☐ Analysis completed
- ☐ Report created
- ☐ Stakeholders informed

## Part 6: Analysis Framework

### Quantitative Analysis

#### Satisfaction Metrics:

Overall Satisfaction = Average of Q1 responses  
Quality Score = Average of Q2 responses  
Value Score = Average of Q3 responses  
NPS = % Promoters (9–10) – % Detractors (0–6)  
Purchase Intent = % selecting "Probably" or "Definitely" would buy

#### Feature Importance-Performance Analysis:

| Feature | Performance (avg) | Importance (avg) | Gap | Priority |
|---------|-------------------|------------------|-----|----------|
|         |                   |                  |     |          |

#### Gap = Importance - Performance

- Positive gap (high importance, low performance) = Priority to fix
- Negative gap (low importance, high performance) = Potential over-investment

### Qualitative Analysis

#### Theme Coding Framework:

| Category    | Theme | Frequency | Sentiment |
|-------------|-------|-----------|-----------|
| Positive    |       |           |           |
| Positive    |       |           |           |
| Improvement |       |           |           |
| Improvement |       |           |           |

### Segment Analysis

Compare results across segments:

- By demographic
- By usage level
- By competitor currently used
- By satisfaction level

## Part 7: Reporting Template

### Executive Summary

**Test Overview:**

- Product: [Name]
- Sample size: [N]
- Duration: [Dates]
- Objective: [Primary goal]

**Key Findings:**

1. [Headline finding 1]
2. [Headline finding 2]
3. [Headline finding 3]

**Recommendation:** [Clear recommendation based on data]

### Detailed Findings

**Overall Metrics:**

| Metric          | Result | Target        | Status |
|-----------------|--------|---------------|--------|
| Satisfaction    | /5.0   | (your target) | ✓/✗    |
| Purchase Intent | %      | (your target) | ✓/✗    |
| NPS             |        | (your target) | ✓/✗    |

**Feature Analysis:** [Insert importance-performance matrix]

**Qualitative Highlights:**

- Most liked: [Top 3]
- Most common improvement request: [Top 3]
- Representative quotes: [2-3 quotes]

### Segment Insights:

- [Segment finding 1]
- [Segment finding 2]

## Recommendations

### Based on this test, we recommend:

1. **[Proceed/Iterate/Stop]** with [product/feature]
2. **Prioritize improvements to:** [specific features]
3. **Target positioning:** [positioning insight]
4. **Pricing guidance:** [pricing insight]
5. **Next steps:** [recommended follow-up]

## Part 8: Sample Incentive Guidelines

Incentive levels vary by country, audience and effort, so this template gives no amounts. Price the incentive against the time you ask for, check what your recruitment source recommends, and remember that in a product test the product itself is often part of the reward.

| Test Type             | Time asked of the tester | Your incentive |
|-----------------------|--------------------------|----------------|
| Quick survey          |                          |                |
| In-home use, 1 week   |                          |                |
| In-home use, 2+ weeks |                          |                |
| In-depth interview    |                          |                |
| Focus group           |                          |                |
| Diary study           |                          |                |

## Run Your Next Product Test

**Portifer** runs a product test as one campaign:

- Testers from your own lists, HubSpot or the UserLabs tester community
- Shipping through your own carrier accounts or a fulfilment partner
- Surveys plus photo and video feedback after delivery
- Automatic summaries and sentiment scoring of responses
- Campaign dashboards and exportable reports

**See how it works** → [portifer.com](https://portifer.com)

*Successful products start with consumer insights.*

**Version 1.0 | December 2024**

TAKE THE NEXT STEP

# Run your next product test in Portifer

Testers, shipping, surveys and photo and video feedback in one campaign.

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