



COVEROS IMPROVES SOFTWARE TESTING & TEST MANAGEMENT PRACTICES

FOR GLOBAL FINANCIAL SERVICES ORGANIZATION

CASE STUDY

Coveros Improves Software Testing and Test Management Practices for Global Financial Services Organization



Test Process, Test Automation Techniques, Performance Testing, Integration of Quality and Testing into Agile, and DevOps Engineering

A \$45 billion multinational financial services organization with 300,000 people engaged Coveros to help improve its overall software testing and test management practices. The organization was seeking support to grow the capabilities and skills of its test managers to work more effectively in their emerging Agile and DevOps processes and drive cultural change within teams.

CHALLENGES

- Only have Waterfall-based testing knowledge
- Unclear Learning Journeys
- A focus on training instead of learning
- Management focus instead of leadership focus
- No expertise in leading change or change management
- Lack of understanding about Agile, DevOps, and Microservices



ENTERPRISE TRANSFORMATION



As the financial services organization shifted its focus to an Agile and DevOps approach to building and testing software, test managers struggled to understand how to transition their staff and teams away from a traditional Waterfall process and better integrate testing into Agile teams. Corporate learning initiatives struggled without defined learning definitions of Agile and DevOps Testing best practices. There was also no clear understanding of the staff's core skills and competencies, making the creation of a Learning Journey for them impossible. Previous attempts to upskill test managers who had also

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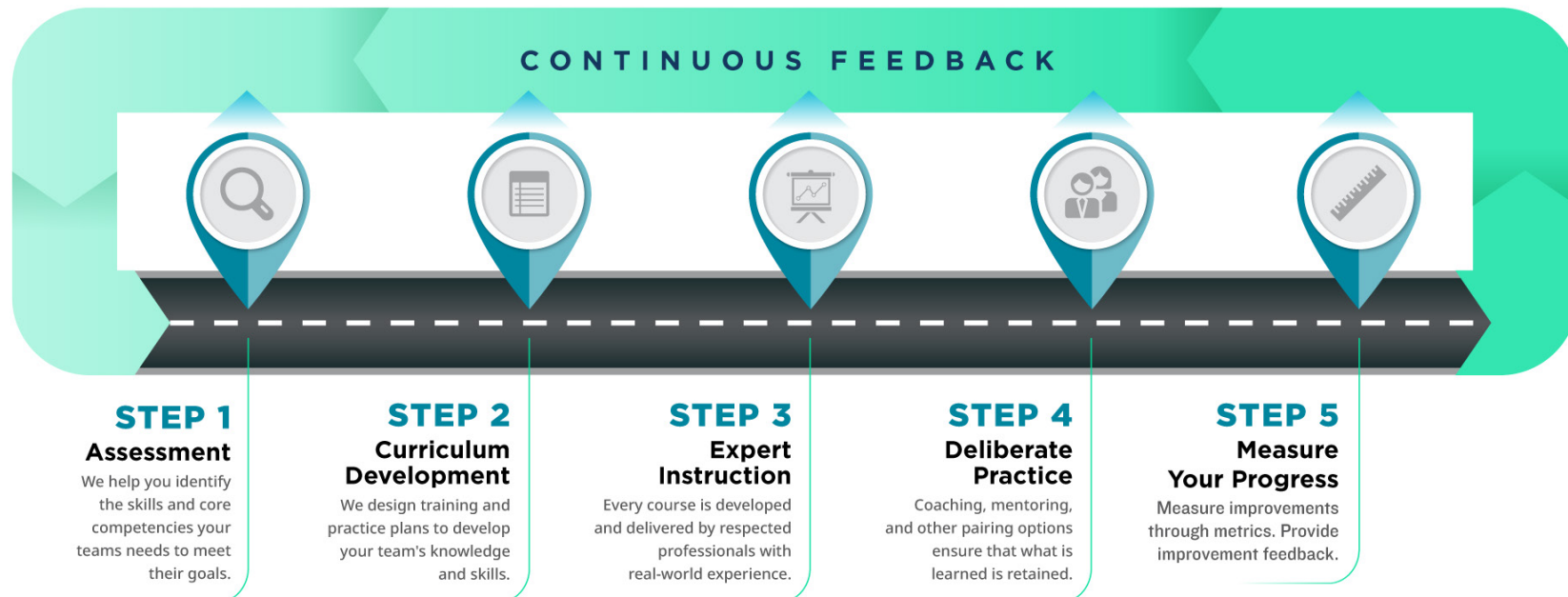
focused only on training had only gotten the organization so far. Without hands-on coaching and mentoring of staff on real-world projects, new techniques were often quickly discarded and teams returned to their old processes. Test managers had also not been given the leadership skills necessary to lead change, drive process improvement, and help their teams embrace Agile and DevOps concepts. All of these challenges resulted in testing still being a silo within the organization.

The financial services company recently formed a Testing Center of Excellence (TCoE) that is responsible for setting test process standards

and providing coaching and training on software testing across the organization. They were seeking a partner to provide learning solutions that upskilled their test managers, leads, and engineers who drive forward testing projects to equip the Test Management role with both basic, intermediate, and advanced Agile and DevOps testing knowledge.

SOLUTION

Coveros was brought on for a multi-year engagement to help the financial services company move the Test Management role to a more strategic leadership approach and ensure that the Test Manager role



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is positioned to drive holistic quality improvements at the product and process levels. Following our Immersive Learning process shown below, Coveros created a Test Management and Leadership Learning Journey, provided staff with a series of training courses to improve their knowledge, and provided hands-on coaching for test managers and their key staff on their real-world projects. Beyond this formal training and coaching, Coveros provided continuous learning opportunities through office hours, informal training sessions, and one-on-one support of test managers as needed.

The first step in the process was to work with the TCoE to assess the skills and knowledge gap within the organization and create an improvement plan that included a Learning Journey for test managers and leads. Coveros reviewed the TCoE standardized testing processes/practices and definition of Test Manager roles. Based upon this analysis, Coveros worked with the financial services company to finalize a Learning Journey that provided their Test Managers with a training curriculum and hands-on coaching (aka deliberate practice) necessary to improve their agile testing, test automation, test leadership, and microservices skills. We defined objectives and key results to establish learning goals so we could track progress during the program. Once the training and immersive coaching schedules were in place, Coveros began training and coaching Test Managers according to these plans. Throughout the entire process, we monitored the success of the training and coaching efforts and adjusted our approach accordingly.

After completion of our learning plan, Coveros worked with the financial services provider to define a training/coaching cadence and begin onboarding Test Managers into the appropriate training classes and coaching rhythm:

- 1. Test Management and Leadership Training.** Six hands-on training classes were given to Test Managers, leads, and others in the areas of Agile Testing, Test Automation, Test Leadership, and Microservices. Hands-on exercises and case studies allowed participants to use the techniques being taught as part of each class. In addition, test managers were given the option of attending relevant public classes if they were unable to make a scheduled private class. As part of this engagement, Test Managers were also given a limited number of free passes to our STAREAST, STARWEST, Agile+DevOps West, Agile+DevOps East conferences to continue their learning.
- 2. Test Management Coaching.** A multi-year training and coaching engagement was provided wherein the above training was performed and then extensive coaching of test managers and teams was done as these leaders and their teams executed real-world testing projects. Coaches worked to emphasize Agile and DevOps values and principles while reinforcing Agile Testing, Test Automation, Measurement and Metrics, and Test Leadership techniques. As teams began tackling projects that were implementing soft-

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ware using a microservices approach, coaches emphasized the knowledge gained in our microservices course to effectively test a service-oriented architecture.

The learning plan covered the importance of Agile Engineering and Quality Assurance practices to improve:

- Software testing techniques and automation skills to focus on deeply understanding techniques for planning, executing, and automating appropriate tests in an agile world
- Test management and strategic leadership concepts that build upon the testing fundamentals
- Shifting testing left and shifting the Test Managers role to a holistic view of quality across the SDLC

The second part of the engagement focused on coaching the Test Managers to apply the knowledge they've learned in training on their projects. Group sessions and coaching office hours were provided. Coaches worked with individual Test Managers to identify appropriate project meetings or ceremonies when it made sense for a coach to observe and then worked with the Test Managers to improve their skills. As it made sense, coaches provided hands-on support as part of this coaching effort. As the Test Managers began to understand and apply new concepts successfully, coaches shifted from hands-on help to review and oversight of activities, allowing Test Managers to become self-sufficient over time. Coaches prioritized their efforts as well, so those in need of additional help could get that help. Coaches also

tracked the progress of Test Managers so the TCoE and management could better understand who is picking up the concepts and applying them and who needs additional support.

BUSINESS VALUE

As a result of this engagement, the financial services company improved the effectiveness and efficiency of the TCoE with well-defined skills training and coaching that was planned and executed. Coveros reinforced the techniques introduced in training with hands-on use of concepts done on real-world projects and in the presence of a subject matter expert to exponentially retain skills and knowledge, which yielded continuous improvement throughout a multi-year Immersive Learning engagement.