TEST MANAGEMENT: CREATING AND BUILDING RELATIONSHIPS
Rex Black, President, RBCS, Inc.

When I do assessments for clients, I talk to a lot of people, both inside and outside the testing group. In the opening moments of each interview, I try to engage in a friendly exchange, where I break the ice between the interviewee and myself. Not only is it more pleasant to have a friendly conversation than a tense one, but people are more open and honest with someone with whom they have some kind of positive relationship, compared to a complete stranger—or someone they see as hostile, cold, or inscrutable. Most of the time, I succeed, and I get to spend an interesting hour or so with someone who gives me the benefit of their insights and opinions.

The same is true, on a much larger and longer scale, for test managers. Testing is a matter of providing useful services to stakeholders. If those stakeholders have a good relationship with you and the other test managers in your test group, information will flow more smoothly in both directions. The job of the test group will become easier because it has better access to information it needs. The test group will also become more valuable because the information the group produces will flow more smoothly to the recipients of that information. It's just human nature: We listen to and value the communications we receive from people we are comfortable with, and we are happy to reciprocate that flow of information.

It's not that you must be a personal friend to every stakeholder with whom you work, but a good professional relationship with those stakeholders is a major factor in the success of a test manager. How well you and the other managers in the test group initiate, cultivate, and sustain these relationships will strongly influence the flow of information, as well as the support, you obtain from your colleagues.

A relationship is necessarily a two-way affair. You and the test group can't be the only beneficiaries from a relationship, at least not a good one. Once, a person with whom I worked on a project described the CEO of one vendor as follows: "Every time I meet with that guy, I want to take a shower afterward," meaning that he felt soiled just by being in the same room. Later in the project, when my colleague legitimately but accidentally came into possession of a memo that was certainly not in the vendor's interests to disclose to its client, my colleague felt no compunction about copying the document before returning it in a way that did not disclose that he had seen it. The relationship had become two-way, but not in a good way.

As a contrast, I had an excellent relationship with this same vendor's test manager. Across a significant cultural difference—the same difference my colleague and the CEO had not bridged—he

and I forged a relationship of honesty and trust. I felt I could tell him the truth about what was happening on my side of the project, and he felt the same. We shared information to advance our mutual goals of a successful project and high-quality deliverable while at the same time respecting the limits on communication imposed by our different positions in terms of who our employers were. Even when the relationship between the two companies became testy, he and I were always able to communicate as friends with a good relationship of mutual respect.

I note that this anecdote does not represent an isolated incident but rather a truth that has become plain to me throughout my career in testing. The successful test manager, perhaps more than any other managers in the software business, must cultivate strong relationships with stakeholders, continuously reinforce those relationships with mutual benefits, and maintain the relationships through good times and bad. In the next few subsections, let's look more closely at how.

RANDOM RELATIONSHIPS

While going to work and going to college are very different experiences, a workplace is not terribly different than schools or universities in one interesting way: You will be placed in a communal setting with people, some of whom you probably didn't know before, in an almost random fashion. In either situation, you get to choose how you approach the relationships your build and maintain, whether in college or at work.

Here's where there's an important difference: In college, you don't have to build a relationship with anyone and you can still succeed. You could choose to go to your classes, spend all your free time studying, skip the parties and the games and the social events, talk only to your professors and teaching assistants about the material you are studying, and be a phenomenal success (at least academically). While this could be a sad but feasible path toward straight A's in college, such an asocial approach to any form of management, but especially test management, will simply not work. You don't have to drink beers and go to football games with your co-workers to get ahead, but you need to make these random relationships mutually beneficial. You won't succeed at that task if you approach it like some heartless cyborg or, worse yet, like a selfish manipulator.

Why are these relationships so essential? Consider the following example. You are working as a test manager on a project to develop a new piece of software. That software will be built by a development team, so you need to communicate regularly and honestly with the development manager about the project. You'll want to ask about the status of the development and where the team stands in terms of the lifecycle. You'll want to discuss what level of quality the team can deliver to you, what level of quality the organization needs to deliver to customers, and how testing can help meet that goal. The development manager will want to know what kind of metrics and reports your team can provide. You'll each want to know about deliverables you'll exchange, along with details like how and when those deliverables will arrive, what should be done if there are problems with the deliverables, and so forth. You and the manager have a lot to talk about, and those communications will be much more pleasant and effective if your relationships are good.

As the anecdote about the vendor's slimy CEO illustrated, this need for relationships is not just a within-the-organization thing. You need a good relationship with your vendors too. Of course, this is complicated by the fact that contracts proscribe limits on communication and also the fact that some testing service providers and other vendors are very good at putting glib and charming people in client-facing positions. It may take a while to learn how to juggle this balance, but it is possible to be professional, to fulfill your obligations to your employer and client, and at the same time have positive and enjoyable relationships with vendor representatives. And, if you are on the vendor side of the relationship, be a professional: Treat the client personnel you interact with exactly the same way you'd like to be treated, and don't try to exploit the relationship.

Relationships—good or bad—are built through interaction. A major element of interaction in professional settings is communication. Some of the communications that will occur are formal communications, such as test results reporting. However, you should not rely on these formal communications alone to build strong relationships because people might see these as the test group simply doing their job. The best relationship-builders are events that show you as a person willing to go beyond your obligations, to make a special effort to connect with your colleagues.

What are good way to connect with colleagues as people? I have worked with clients and colleagues around the world and can attest to the fact that the right answer to this question differs culturally, organizationally, and individually. Here are some ideas.

Share a meal: This one sounds simple, but in fact, it is a very human way to make a connection. Many animals, even herbivorous animals, will tend to fight over food. Humans are, if not unique, certainly special in their ability to make meals a social activity where friendships are formed rather than a contest. You can choose to make the conversation social or about business, as the situation requires, but I have found that, in most cultures, setting aside business to talk socially with your colleagues will make a deeper connection. After all, you can talk about business in a meeting. However, if your colleague decides—at the beginning of the meal or at some later point—to talk about business, it's a good idea to follow that lead. In some cultures, a shared meal, followed by business talk, is a major vehicle for problem solving.

Share a drink: This is a somewhat weaker, but easier, variant of the previous technique. As before, my experience is that a social conversation is a stronger relationship-builder than talking about business, so follow your colleague's lead on topics but don't jump directly to business unless you've agreed to do so. What you drink depends on the culture and the company, of course. In the United States, coffee, tea, or other nonalcoholic drinks will often be the only option during normal working hours, but it is not uncommon to have beer or wine with colleagues in Europe and Asia in the middle of a workday, usually with lunch. Drinking alcoholic beverages after work is an established tradition in some cultures, and in some cultures it's almost essential to relationship building, while other cultures and individuals frown on drinking alcohol for religious or personal reasons. Remember that your objective in this situation is to build a relationship: If your personal habits include knocking back a couple whiskeys at the end of the work day, when out for a social hour with

a colleague who doesn't drink, be careful about engaging in behavior that will actually damage your colleague's opinion of you.

Inviting stakeholders to testing meetings: One of the risks associated with independent test teams is the possibility of isolation and even alienation. Most test groups should see themselves as providing valuable testing services to their stakeholders, which goes a long way to managing this risk. However, it can also help to make sure that stakeholders feel welcome to contribute and participate in the way testing is done. For example, if you are introducing a new technique such as risk-based testing, why not invite stakeholders to a brief discussion on how the technique works? Obviously, you need to consider whether the invitee will find the topic interesting; issuing invitations to every testing meeting to every testing stakeholder will send a message of disrespect for their time, not relationship building.

Celebrate the successes: Project and program teams often have events such as post project parties, retrospectives, dinners, and other similar events on major milestones. You and the test group should attend. These can be good opportunities to set aside any negative baggage that accumulated during a tough project, provided you and your group are positive contributors in these events.

There are many other ways to approach relationship building, but these four—breaking bread together, relaxing together, being open with each other, and celebrating together—are keystones of human society that go back to the dawn of human history. Relationship building is a matter of social networking, and that goes beyond Facebook friending and Twitter following. Indeed, trying to establish such "social networks" without first doing the groundwork of building a real human relationship, via these types of techniques, will often come across as insincere and exploitative.

Relationship building is an ongoing activity, not a one-time activity. Those of you who are extroverts may cheer to hear that, while introverts may groan. It is indeed the special challenge of the introverted manager to learn how to enjoy this obligation, but it will pay benefits to you, not only at work but also in your personal life. You should maintain and grow your relationships with stakeholders as the organization changes, as people change positions, and as roles and missions change. Having strong relationships is essential to being a successful test manager. Without such relationships, your team will be less respected than it deserves to be (based on its contributions) and less productive than it could be (based on its intrinsic capabilities).

It's an interesting irony of our business that relationships are so important, isn't it? After all, computers can communicate with each other on an entirely factual basis, and—other than in *Star Wars* movies—there is no need for politeness in the "protocol 'droid." In software, one program that refused to interact with another program based on a bad relationship—say because the other program hogged the CPU or memory—would be considered buggy. However, as long as software engineering remains a human endeavor, "courtesy…the lubricant of human relations," and indeed relationships themselves, remain essential to its working.

WHO YOU (SHOULD) KNOW

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Okay, so you need to have good relationships to succeed as a test manager. But with whom? If you are in any organization larger than a small start-up, you can't know everyone personally. From a purely Machiavellian perspective, even if you could, you probably don't need to know everyone. Who should you know, and how well? The answer to this question will depend on the organization, but here are some thoughts.

Development and other peer managers: These people are the managers that you interact with on a regular, perhaps daily, basis. Development managers, of course, deliver the software you need for testing (possibly indirectly, through a release manager), and your group will be passing an evaluation of that software to the development managers, their developers, and other project stakeholders. Other peer managers on the project may also work closely with you and your group. These managers are probably also the people who are most influential in terms of the organization's perception of you and your group's effectiveness, which is a reality that you need to manage. It would make sense to get to know these people well and build strong relationships with them.

Technical documentation: It's easy to forget about these people, but in organizations where technical documentation teams exist, they are key stakeholders for testing, with test-related interests similar to development managers.

Program and project managers: These people are often peer managers included in the first element in this list. However, if they are not, you should treat them as if they were. I did an assessment where every program manager and project manager I interviewed had words of praise for one particular test manager in the test organization. After delivering the assessment report, I went to lunch at a Japanese restaurant on the way back to my hotel. Lo and behold, I meet her there—having lunch with a key project manager!

Sales and marketing: If you work in an organization that builds and sells software or software-based services, the people are very much interested in—and affected by—the quality of the software. They will have strong opinions about what you should test and how well your group is doing your job. (If your organization builds software for internal use, business analysts have a similar interest in testing.) As with peer managers and project managers, a strong relationship with key people and managers within these groups is essential.

Technical support: These people and the sales and marketing folks have a very similar interest in testing. They want to be sure that software is well tested, and they want to know the quality of the software before it goes to customers or end users. I have often found a strong relationship with technical support managers to be essential and very useful. I once managed to get the test scope expanded, and additional resources to do the testing, based on strongly lobbying by a technical support manager.

Upper management: These are the people who approve your budgets, who write your performance evaluations, and who ultimately measure the success of your team. You definitely need a good relationship with upper management, but you must approach the task sensitively. An

overly forward attempt to win over your superiors through meals or drinks will almost certainly come across badly with your peers, undoing any relationship building you've done there, and will probably not work with the manager either. However, by celebrating successes with upper management, and assiduously ensuring positive and friendly professional interactions with all upper managers with whom you interact, you can establish a reputation as a valuable member of the team.

Vendors: In some cases, you may be testing software or systems provided by vendors. If so, strong relationships with vendor managers—especially test managers, development managers, and program or project managers—are essential. As illustrated in the opening anecdote of this section, a strong relationship with vendor counterparts can provide you with invaluable insights.

Key individual contributors: These are senior individual contributors, such as developers, system designers, business analysts, support staff, and even sales or marketing staff, who work regularly with you or your testers. Many IT organizations are egalitarian meritocracies, and the organizational structure and job titles do not completely reflect how power is distributed. People who have earned respect through doughty hard work and intellectual prowess will have a lot of influence on opinions, including opinions about you and your test team. These are also people to have good relationships with. Inviting them to participate in testing meetings will probably be a better approach than the "meals or drinks" approach because it fits better with their perceived thought leadership in the organization.

Key stakeholder representatives and other stakeholders: There are potentially many other stakeholders for a testing group. You should consider other people (whether managers or key individual contributors) who contribute to or influence testing or your group's test results and quality assessments. You should identify stakeholders so that you know who the test representatives or points of contact are for you. You should cultivate a relationship with these people as well, based on their importance to the actual and perceived effectiveness of the testing group.

Contrary to what you might expect, this job of relationship building becomes more challenging as you move up the organizational structure. This is due to the fact that the individual test manager, working on a single project, will know and can build relationships with all of their co-workers on that project. However, as you move up into director or vice president positions, it will become difficult to know all the members of all the various project teams, and it would indeed probably come across as phony if you tried to do so. So from the broad menu given earlier, you must select the right people to build relationships with. Certainly that should include the peer managers and key individual contributors from that list. In addition, if there are people who have information that your test group needs or who control access to resources your test group needs, you need relationships with them as well.

In addition, you should not confine your thinking about whom you should know to those within your organization. Think about external relationships too. While the approach will often be different, and certainly influenced by various niceties of the business relationship, you should be

just as careful to cultivate people outside your organization who are all the same important. If you ever catch yourself thinking, "Who cares what that person thinks about me; he's just a vendor employee," stop yourself immediately. Not only is dehumanizing people a moral issue, it also creates barriers to communication with people you need information from. Furthermore, it can undermine your other relationship-building efforts when people see how you behave toward others when you think nothing is at stake. As American humorist Dave Barry put it, "A person who is nice to you but rude to the waiter is not a nice person."

You will probably find it easier to build relationships with some people than with others. Your social antennae may well push you toward going for the easy wins in terms of relationship building and ignoring the others. Don't let this impulse convince you to skip the harder cases, for two reasons.

First, there is a management cliché that says, "'I like you' often means 'I'm like you'." In other words, people often tend to prefer friendships with people who are similar to them in outlooks, personality type, and so forth. (Unfortunately, that can extend to gender and race, which has broad implications for test managers, including in hiring.) Since you manage a test group, which is a recipient and a source of information, you should be sure to avoid any sort of confirmation bias that could occur by building relationships only with those predisposed to agree.

Second, it's no great feat to make a friend of someone who is already inclined to be your friend. Making a friend of a skeptic or an enemy, now that's an accomplishment. Converting a skeptic or enemy not only makes your life easier by changing a negative to a positive in your political balance sheet, it also makes the organization *as a whole* more effective and efficient. In my years of doing assessments for clients, I have seen few things more generally corrosive to organizational success than negative personal relationships between key participants. I have become so convinced of this truism—mutual respect enables organizational success, and vice versa—that this dynamic is one of the first things I examine when I do assessments, and keep in mind that I have a degree in engineering, not psychology.

In case it's not obvious by this point, your objective in this relationship-building and -maintaining exercise is not about assembling a coterie of drinking buddies or personal friends. It's not about manipulating people. You want to make sure you and your test group are visible contributors to the organization. As a senior test manager, you must represent the test group in a way that wins respect and shows you as a strong, able, and emotionally intelligent leader.

I want to close this subsection by making an important point. Good relationships are important. Good relationships will make it easier for you and your team to do your job, and to do it better. Good relationships will also, frankly, buy you some political cover if there's a big witch hunt for a scapegoat (pardon the mixed metaphor) after some particular disastrous quality issue during testing or in production. However, good relationships are no substitute for competence. If your intention is to cloak your inabilities with sycophancy and false friendships, that is unlikely to work in the long term. As Abraham Lincoln put it, "You can fool some of the people all of the time, and all of the people some of the time, but you can't fool all of the people all of the time."

A Real Social Network

As a manager of a test group, you cannot—and should not—be the only networker. Key people in your group should also form relationships across the organization, and you should be aware of those relationships. That way, members of the test team can act as your emissary. Effectively, you are delegating some of your relationship building to your team. This not only frees you up for other duties, it also teaches key people within your team the importance of this key management task, thus aiding them on their career path. In large organizations, or organizations doing distributed work, this "one degree of separation" approach to relationship building can be not just a good idea but also necessary.

You will find, as you advance in your management career and see your scope increase, that building relationships, along with other politics and stakeholder management tasks, takes up more and more of your time and becomes more and more central to how you enable the success of your team. In the consulting work my associates and I do, we find that test groups with good relationships with their colleagues have the best results, both qualitatively and quantitatively. The best test managers have soft skills every bit as strong as their technical, testing, and business skills.

As I wind down this article, I want to stress something I think is important. Remember the quote at the beginning from my colleague about "wanting to take a shower" after meeting with someone he disliked? You might feel the same way right now, after my frank discussion about how to benefit from your relationships. Are you thinking, "Gee, Rex, is this all about how to make friends with people so I can take advantage of their friendship?" No, it's not a one-way street, nor is it manipulative.

If you are a manager, you must understand that your job is to get work done through other people. You'll be a lot more effective at working with other people when you have a good relationship with them, as I've said before, and your effectiveness is to their benefit as well as yours. In addition, you may well find that a friendship that starts as purely professional grows into something much more personally meaningful to both of you over time. Almost every personal friend I have made since graduating from UCLA I made through working relationships. Far from being a cold and inhuman thing, I am in fact suggesting that you be fully human in your work as a test manager, and not only for the sake of better organizational effectiveness.