Specifying Test Tool Requirements

A Case Study in Picking the Right Tool for the Job

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Introduction

- "Marry in haste; repent at leisure" – William Congreve
- True for people, and for test tools, too
- Many test tools are acquired, but within five years most of those are abandoned
- Often, the root cause of this failure occurred prior to acquisition: failing to understand the needs
- Let's look at a straightforward process which reduces the risk of such failures, illustrated via a case study…

The Engagement

- I was asked to do an assessment for a client
- In addition to the usual evaluation of their test process, they wanted:
  - A maturity score using a prescriptive testing maturity model
  - A set of requirements for a test management tool
- They were using spreadsheets and Sharepoint to manage testing, which created a great deal of frustration and inefficiency
- My assessment revealed a two year or less breakeven period, even for the most expensive tool option

Tool Evaluation Process

1. Identify users and stakeholders for the tool
2. Interview them to elicit their requirements
3. Capture requirements in a document
4. Evaluate priority of the requirements
5. Identify potential vendors who might meet requirements
6. Have vendors self-evaluate against requirements
7. Select the top candidates for the tool short-list
8. Pilot the short-list tools and select the winner

Identify Users and Stakeholders

- The client identified 45 people in various roles
  - QA Managers and QA Test Coordinators
  - Senior Programmers and Lead Software Developers
  - Intermediate, Senior, and Lead Clinical and Non-clinical Analysts
  - Senior and Lead System Analysts
  - Support Center Coordinators
  - Senior Business Analysts
  - Project Managers, Operational Managers, PMO Specialists, and Project Control Engineers
  - Applications Maintenance and Operational Support
- These people would use the tool, be affected by the use of the tool, or receive information from the tool

Elicit their Requirements

- Interviews lasted about an hour
- Each involved two to three people in related roles
- We discussed tool needs, usage, and short-comings of current process
- Over the week, as the requirements converged, we could discuss the emerging requirements
- I also showed people a whiteboard diagram of the way the tool would work for clarity

Capture Requirements

- During the interviews, I took extensive notes (50+ pages)
- After the interviews, I translated these into the client's spreadsheet template
- This process clarified and de-duplicated many of the requirements
- Ultimately, we had:
  - 62 functional and 47 non-functional requirements
  - The 109 requirements broke into 18 categories

Evaluate Priority of Requirements

- Reviewing my notes and translating them into requirements deepened my understanding of people's needs and priorities
- So, I used the client's system to rate each of the requirements
  - Essential
  - Important
  - Desirable
- The lack of clear criteria did lead to some priority inflation!
- At this point, we did two rounds of reviews to finalize the requirements and their priorities

Identify Potential Vendors

- In parallel with the requirements review and approval process, I identified potential vendors
- The client had already identified three potential tools
- In addition to these:
  - I added my own favorites from past engagements
  - I researched credible independent web resources
- There were 21 tools identified as possibly meeting the client's needs
- I anonymously contacted each vendor to start the evaluation process

Vendor Self-evaluation

- I asked each vendor to evaluate their tool against the requirements
- Things got interesting
  - Dropped 8: either never responded or stopped responding during the process
  - Dropped 3: other factors made the vendor or their tool a bad fit for my client
  - Self-dropped 2: one look at the requirements and they were outta there!
  - Dropped 1: refused to self-evaluate; too bad for him
  - Fallback 3: very close, but only to consider if client relaxed requirements
  - Short-list 4: met almost all the essential requirements
- It was really surprising to me how lackadaisical or non-responsive so many vendors were

Short-list

- I contacted the sales contacts for the short-list vendors to let them know the next steps would be direct client contact
- I contacted the other vendors who had engaged with the process to thank them and give them honest feedback
- Interestingly, some who had stopped responding came back weeks later, asking what was next
- My rule: if you have to chase a vendor around to give them money, they'll be even less reliable after you do
- Before you ask, no, I can't name any names, due to NDA

Pilot and Select

- I delivered my assessment report to my client, weighing in at 136 pages
  - 8 pages specifically about the process and short-list described here
  - 16 pages describing the next steps to pilot, select, and deploy the tool
- At this point, the client has begun the budgetary process to secure funding for the tool

Conclusions

- "Fools rush in where angels fear to tread" – Alexander Pope
- Many a test tool project has been doomed at conception from shortcuts in this process
- By spending a few hours (about 20-30) over a few weeks (about 8-12), you can avoid such a fate
- Why spend big bucks and/or make a strategic decision rashly?

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