

Ten Lessons in Test Outsourcing

Good Testing Wherever the Work is Done



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Ten Lessons in Test Outsourcing

1. Understand motivations
2. Recognize process differences
3. Select the right contract type
4. Manage organizational politics
5. Recognize importance of experience
6. Understand resource management issues
7. Understand tool usage implications
8. Foresee security issues
9. Manage geographical and language issues
10. Avoid planning and estimation blunders



Understand Motivations

- ❖ Assess project, resources, and reason for outsourcing
 - ❖ Need for trusted testing partner
 - ❖ Need for extra hands
 - ❖ Need both of the above
 - ❖ Need specific skill set
- ❖ Is assignment short-term or long-term?
 - ❖ Invest in resources
 - ❖ Buy or rent any special equipment
 - ❖ Implementing security or other standards
- ❖ An effective and efficient engagement means alignment of needs with proposal



Recognize Process Differences

- ❖ Ignoring process differences during planning and initiation means big problems later
- ❖ Staff augmentation simple; outsource testing services not
- ❖ Test service providers follow own processes
- ❖ Consider:
 - ❖ Test strategy differences
 - ❖ Waterfall, Agile, other lifecycle
 - ❖ Special requirements (e.g., maturity model)
 - ❖ Unique requirements for the domain



Select the Right Contract Type

- ❖ Time and materials?
 - ❑ More flexible in the face of uncertainty
 - ❑ Cheaper if the client manages change carefully
- ❖ Fixed bid?
 - ❑ Good when scope is clear
 - ❑ Minimizes budgetary risk
- ❖ Another option: T&M not to exceed
- ❖ Get the deal right: Neither party is well-served in the long run by trying to wrong-foot the other in the contract



Manage Organizational Politics

- ❖ Can be a big or small issue, depending on the client
- ❖ Underestimating the importance leads to disaster
- ❖ Testing service provider politics should not affect client
- ❖ Common client politics
 - ❖ Client employees perceive it as a threat
 - ❖ Dependency on other service providers
 - ❖ The reporting person on client side has hidden agenda
- ❖ Test service provider can't solve these issues



Recognize the Importance of Experience

- ❖ Test service providers usually accept any business
- ❖ Simple tasks don't create problems...in the short term
- ❖ Longer periods can create resource anxiety
 - ❑ Project uses outdated or unusual technology
 - ❑ Project work is monotonous
 - ❑ Technical solution doesn't require skills
- ❖ Resources request new projects, accounts



Understand Resource Management Issues

- ❖ Test service providers like growing projects in terms of billable resources
- ❖ This can create issues
 - ❑ Drastic increase in the required resources
 - ❑ Request for experienced (unavailable) resource
 - On another project
 - On leave or vacation
 - Gone
- ❖ Both client, test service provider should discuss such resource requests at start



Understand Tool Usage Implications

- ❖ Tool usage often encouraged, but inappropriate planning and usage can cause problems
 - ❖ Choosing the wrong tool initially
 - ❖ Picking a tool based on past experience
 - ❖ Client insists on a tool they own
 - ❖ Client selects a free tool (that won't work)
- ❖ Switching the tool can create additional issues
 - ❖ Migrating the work completed
 - ❖ Increasing effort to use new tool
 - ❖ Reducing familiarity, experience with new tool
- ❖ These can impact deliverables and deadlines



Foresee Security Issues

- ❖ Many clients concerned about security of data and intellectual property
- ❖ Pay attention to these requirements
- ❖ Common mistakes
 - ❖ Not foreseeing issues in obtaining test data
 - ❖ Misjudging the complexity of access to client's network
 - ❖ Unawareness of client HR procedures
 - ❖ Not planning for special requirements



Manage Geographical and Language Issues

- ❖ Problems in interaction with key resources can create significant problems
- ❖ Practical considerations
 - ❑ Suitable time for conference calls
 - ❑ Differences in holiday calendars
 - ❑ Language (if not managed properly)
- ❖ Mismanagement of issues can lead to frustration and miscommunication



Avoid Planning and Estimation Blunders

- ❖ Most of outsourced testing project failures begin at the planning stage
 - ❖ Client unable to get the job done on time, with quality
 - ❖ Test service provider loses money
 - ❖ Both
- ❖ Common planning and estimation mistakes
 - ❖ Unidentified implicit requirements leads gaps in plan
 - ❖ Bad assumptions on stakeholder involvement and commitments
 - ❖ Underestimating the effort required
 - ❖ No buffer for complications



Conclusions

- ❖ Outsourcing testing can benefit both vendor and client
- ❖ Both parties should
 - ❑ Be aware of the risks
 - ❑ Ensure mutual understanding
 - ❑ Agree on process, constraints and expected results
 - ❑ Be honest about motivations, abilities, expectations
 - ❑ Exercise due diligence
- ❖ Insist on mutually beneficial relationship

Rex thanks his co-authors on the source materials, Ashish Usman and Andy Soundranayagam

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