

## Banking Industry – Transition of Requirements and Testing to Business Unit

A leader in the banking industry sought a well-defined method to transition Business Requirements development and User Acceptance Testing to the business unit within the bank that handles a complex suite of operations applications.

IQS was brought in to assess and develop an approach to help the team understand best practices that enable them to take over requirement document development and structured UAT of the newest technology being implemented at the bank.

### The Problems

The enterprise test organization doesn't have SME expertise required for the new technology.

Requirement documents are developed elsewhere in the bank where business needs may not be fully understood and documented.

The "offshore" test team presents issues such as the language barriers, 30% employee turnover in India, and their need for continual analysis ... not really testing.

Distributed environment issues such as time differences and the impression that people on the other end of teleconferences are not engaged during discussions and don't participate to the degree that is required.

The result of these issues is that requirements documents are changed numerous times after testing begins, and a large number of defects go undetected and unresolved.

### Goals

- Review and assess the current state of requirement artifacts and processes
- Review and assess the current state of test artifacts and processes

- Provide Gap Analysis of current state and best practices and make recommendations for future state process improvements



### Solution/Approach

Perform assessment by meeting individually with all business analysts and managers with the goal of determining the team's knowledge and readiness to take over requirement document development and business testing of the applications.

Determine the depth of training needed to ensure that the business analysts are ready to develop good requirements and test to those requirements.

Customize the training needed to enable the business unit to build a good foundation that relates to their specific needs within the guidelines of best practices.

The evaluation focuses on the prioritized business goals/objectives while improving specific processes that will support those objectives.

Research processes, tools and templates currently provided by the Enterprise Testing Group at the bank in an effort to maintain consistency.

## Solution/Approach (cont.)

### Key Deliverables

- Provide standardized templates (either gathered from Enterprise groups, or new IQS templates).
- Develop “Requirements Standards” guidelines
- Develop “Testing Standards” guidelines
- Develop Requirements Development training
- Develop Structured Testing training
- Conduct training sessions followed by 1 x 1 follow-up mentoring sessions
- Recommendations for a phased approach to implementing a requirements management tool
- Recommendations for phased approach to implementing a test management tool

### Results

Training presentations were developed that included detailed notes to provide guidelines and information needed to write good requirement documents and to plan and perform good User Acceptance Tests.

A separate two-hour training session was held for Requirements and Testing segments.

Printed course material was distributed and the PowerPoint presentations were turned over to the department manager for future customization when needed.

Follow-up mentoring sessions and review found that the business analysts gained confidence that they are ready to assume the responsibility for developing good requirements and performing all user acceptance testing.

## About Intelligent Quality Solutions [IQS]

Intelligent Quality Solutions, Inc. (IQS) is a professional services and solutions provider that focuses exclusively on QA/Testing. Our goal is to bring cost effective (smart) technical and staffing solutions that will enable our clients to achieve their quality goals.

Unlike many other professional service companies that will promise to implement QA best practices and industry standards, we at IQS take pride in working with our clients to define best practices that will achieve their organizational goals. We've found that each client is unique and has varying QA objectives for their business. IQS consultants listen to the client to understand their QA/Testing concerns, goals and objectives and then define smart solutions, with measurable results that meet the client's business needs.

Let IQS help your company with proven QA solutions that will provide improved quality while reducing your time to market and overall costs.

### Contact us

If you have any questions or would like to arrange an assessment and proposal, please contact us.

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