A major IT transformation project, delivered on time, to plan and in budget

Ten10
Engineering

Summary

The client is a large international bank that needed to integrate the services of a US-based clearing house into its financial operations, a project that included the involvement of two other consultancies. As a consequence of Ten10's testing strategy which accelerated delivery, this major IT transformation project was delivered on time, to plan and within budget.

The client

The client is a French multinational banking and financial services company with a global outlook, and divisions supporting a range of services including; global transaction banking, local and international retail banking, financial services, corporate and investment banking, private banking, asset management and securities services.
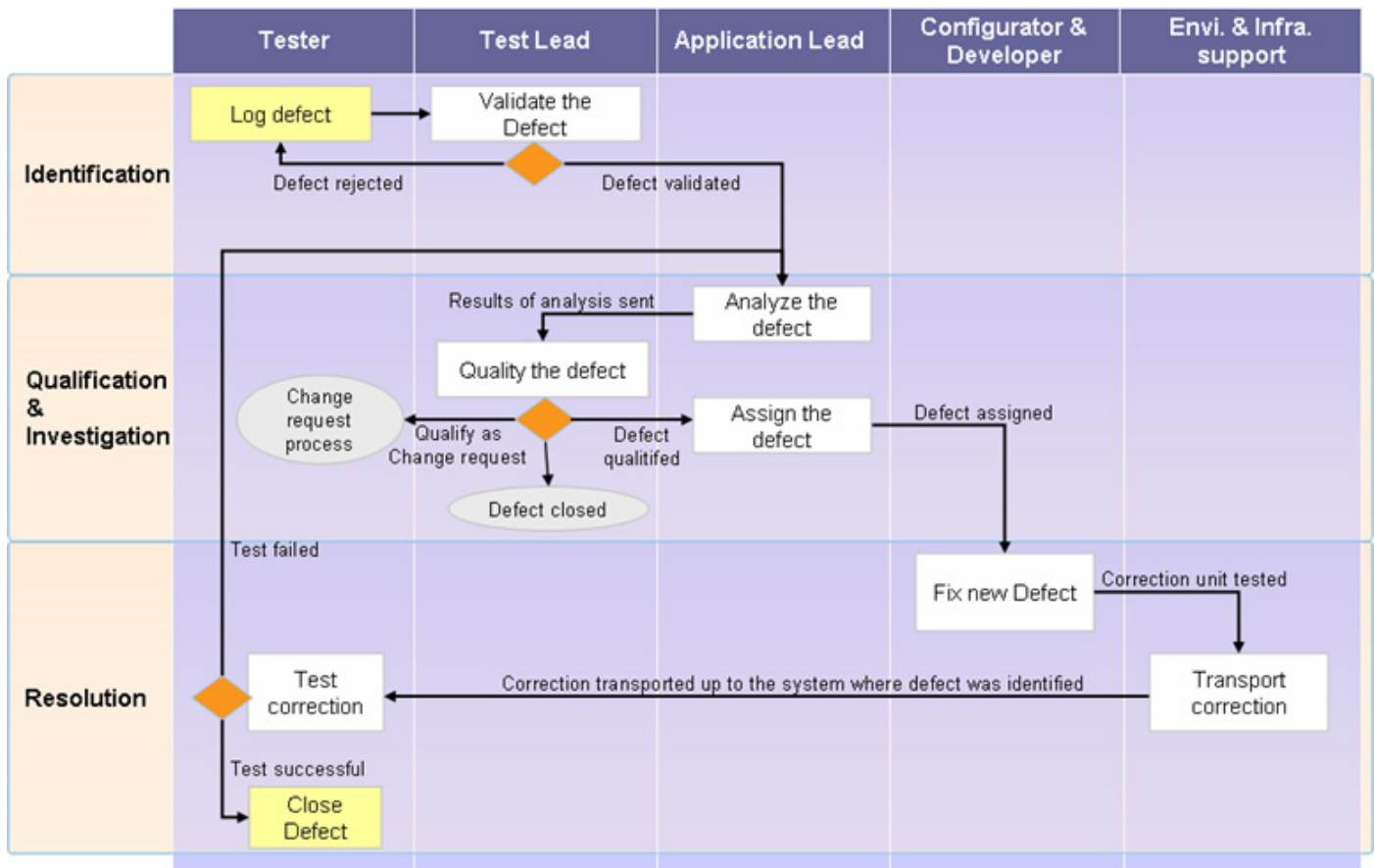
The project

The company was integrating the services of a US-based clearing house, a major transformation project that required infrastructure to support end-to-end delivery of fund settlement through FIX messaging via NVision and Gloss – a real-time, multi-currency, transaction processing engine that processes messages that have been re-formatted by NVision. The project involved two consultancies, each of whom were delivering different aspects of the solution.

Ten10 was asked to review the delivery and to provide a testing strategy that would accelerate delivery, as well as to provide a test manager and test scheduler to ensure the delivery and the day-to-day management of the execution kept within the planned timelines.

Goals

A test strategy needed to be developed and deployed, that would bring the go-live of the project forward by six months. This was to be achieved by moving the development process from the legacy waterfall methodology to an Agile methodology, integrating testing into an iterative development process to enable the faster delivery of results.

Waterfall   Agile

To achieve this Ten10 split the project into five drops of functional delivery (instead of one big build at the end), allowing the solution to be delivered in a sequential nature.

	Tester	Test Lead	Application Lead	Configurator & Developer	Envi. & Infra. support
Identification	Log defect →	Validate the Defect — Defect rejected / Defect validated			
Qualification & Investigation	Change request process — Qualify as Change request — Defect closed	Results of analysis sent — Quality the defect — Defect qualitifed	Analyze the defect — Assign the defect — Defect assigned		
Resolution	Test failed — Test correction — Test successful — Close Defect	Correction transported up to the system where defect was identified		Fix new Defect — Correction unit tested	Transport correction

Challenges

There were a number of challenges that needed to be considered with this project. Firstly, there was the need to work with two external consultancy firms, both of which were based in Paris and were responsible for the execution of the product. The geographical challenges were overcome by initially establishing a morning test call (to allocate tasks) and an evening test call (to review progress). Towards the end of the project Ten10 set up a war room and made it mandatory for a Project Manager from each site to be in London so escalation could be resolved in a timely and efficient manner.

Secondly, the administrative overheads associated with compliance in the financial services sector, required daily monitoring and reporting. Whilst this was not a test task, due to the strong reporting framework that the Test Manager had implemented he was asked to step in and own reporting of the compliance backlog to ensure these were addressed prior to go-live.

Finally there was also the need to deliver a test strategy that would rescue a project which was already running four months late. Once the strategy was delivered, we had to win the trust of the other consultancies and develop a 'one team, one dream mentality'. Through the effective communication mentioned previously, taking full ownership of the test deliverables, and ensuring a no-blame culture was in place the teams worked autonomously but collaboratively which allowed the milestone to be met.

Success story

Ten10 applied a rigorous test management approach; ensuring that each tester understood the functionality they were testing, as well as setting daily execution targets to ensure the project ran to time. Daily test reporting was set up to effectively monitor the progress against plan, and to provide the client sponsor with

complete visibility and transparency of the project and any issues. This led testing to be the main driver behind daily stand ups.

In addition, we implemented an end-to-end defect management approach to ensure that defects were correctly raised, and that in-turn, fixes were provided by developers in a structured manner. We recommended that input messages from the clearing agent were stubbed during the early part of testing, which removed the dependency of waiting for the clearing agent's development to be completed. Finally, we ensured that the project sponsor reviewed and signed off the test scope in order to provide a full audit trail.

Through comprehensive management of the external QA parties, detailed progress review and escalation as needed, the project was delivered in the timelines detailed in Ten10's test strategy, as specified to the client. This was described as being the only major IT transformation project at the bank which was delivered on time, to plan and within budget.