

# What's your Strategy?

Strategic Portfolio Test Management

# Discussion Roadmap

- Do you have a Strategy? What is it?
- How are you going to handle particular situations?
- How do you leverage staff with different skills across projects?
- How do you do procurement and resource management?
- How do you determine Quality and its management?
- How do you manage Risk?
- How about team structure? Does it play a role?
- Do you have a strategy for 'Cradle to Grave'?

# Discussion Roadmap

- So here's the scenario.....
- Management is now calling you the Portfolio Test Manager! You've got the power!
- How am I going to do this? Strategy is all about big and little rocks.
- Meet the Portfolio! This is what you've got to manage.

# Your Portfolio!

	Project 1	Project 2	Project 3	Project 4
App under test	Web-based app	Safety Critical	Mobile app	COTS project
Orientation	Client facing	Internal use by employees	Sold to a client	Internal use
Methodology	Waterfall	Waterfall	Agile	Agile
Team type	Small team	Virtual team outsourced	Medium team	Vendor
Project Methodology	Prince 2	PMBOK	PMBOK	hybrid PMBOK agile

# Project 1

- Communications strategy and stakeholder engagement and management.
- Who are the stakeholders?
- The RACI Model: Responsible, Accountable, Consulted and Informed.









# Project 1 – RACI Analysis

Communication Matrix	Test Plan	Test Summary Report
Sponsor	C	I
Project Managers	R,A,C	I
Testers	A,C	R,A,I
Developers	C,I	I
Business/UAT Testers	C,I	I

# Communications Strategy

All Projects 🏠								
	Testers	Progress/ECT	Next Actions (high priority)	Next Actions (low priority)	Documents	Project Purpose (why)	Brainstorming (how)	Objectives (what)
★ Project 1	👤 Bob and John	<p>Accomplishments</p> <ul style="list-style-type: none"> <li>UAT Drop 1 completed</li> <li>Completed Actions 2</li> <li>Completed Actions 3</li> </ul> <p>📅 Aug 20</p>	<p>1 Monitor UAT Drop 1</p> <ul style="list-style-type: none"> <li>Action 1a</li> <li>Action 1b</li> </ul> <p>2 📅 UAT Drop 2 31/07/13</p> <p>3 Obtain BRD</p>	<p>Test UAT Drop 3</p> <p>Test UAT Drop 4</p> <p>Test UAT Drop 5</p>	<p>Subtopic 15</p> <p>Subtopic 16</p>	<p>Build a mobile application for MyRams</p>	<p>Idea 1</p> <p>Idea 2 ╕</p>	<p>double click to edit</p>
★ Project 2	😊 Gail	<p>Accomplishments</p> <ul style="list-style-type: none"> <li>Completed all test cases to current sprints</li> <li>Templated UAT Release Notes</li> <li>Selenium scripts up to date</li> </ul> <p>📅 Going to UAT soon</p>	<p>1 UAT Build</p> <ul style="list-style-type: none"> <li>Smoke test</li> <li>Run existing test scripts</li> </ul> <p>2 Regression test</p> <p>3 Action 3</p>	<p>Action 4</p> <p>Action 5</p> <p>Action 6</p>	<p>drag files &amp; drop here</p>	<p>Build an Internet Banking version of 5.2</p>	<p>Idea 1</p> <p>Idea 2 ╕</p>	<p>double click to edit</p>
★ Project 3	👤 Paul and John	<p>Accomplishments</p> <ul style="list-style-type: none"> <li>Build at present in UAT</li> <li>Load and Performance tool ready</li> <li>All test cases up to date</li> <li>Handover from Justin to Alex/Stuart</li> </ul> <p>🔥 I don't know</p>	<p>1 Monitor UAT</p> <ul style="list-style-type: none"> <li>Action 1a</li> <li>Action 1b</li> </ul> <p>2 Prepare for Load and Performance test</p> <p>3 Plan for Browser Compatibility testing</p>	<p>Action 4</p> <p>Action 5</p> <p>Action 6</p>	<p>drag files &amp; drop here</p>	<p>double click to edit</p>	<p>Idea 1</p> <p>Idea 2 ╕</p>	<p>double click to edit</p>
★ Project 4	👤 Gail and Peter	<p>Accomplishments</p> <ul style="list-style-type: none"> <li>build at present in Pre-prod</li> <li>Completed Actions 2</li> <li>Completed Actions 3</li> </ul>						
★ Project 5	👤 Stuart	<p>Accomplishments</p> <ul style="list-style-type: none"> <li>build at present in Pre-prod</li> <li>Completed Actions 2</li> <li>Completed Actions 3</li> </ul> <p>📅 Go Live - 01/08/13</p>						
★ Project 6	👤 Dave	<p>Accomplishments</p> <ul style="list-style-type: none"> <li>Project Charter in OneNote</li> <li>Completed Actions 3</li> </ul>						

# Communications Strategy

Phase	Status
UAT Drop 1	 95%
UAT Drop 2	 4%
UAT Drop 3	 3%
UAT Drop 4	 5%
UAT Drop 5	 0%
UAT Drop 6	 0%
Environmental Tests	 5%
Other Test Activities	 0%



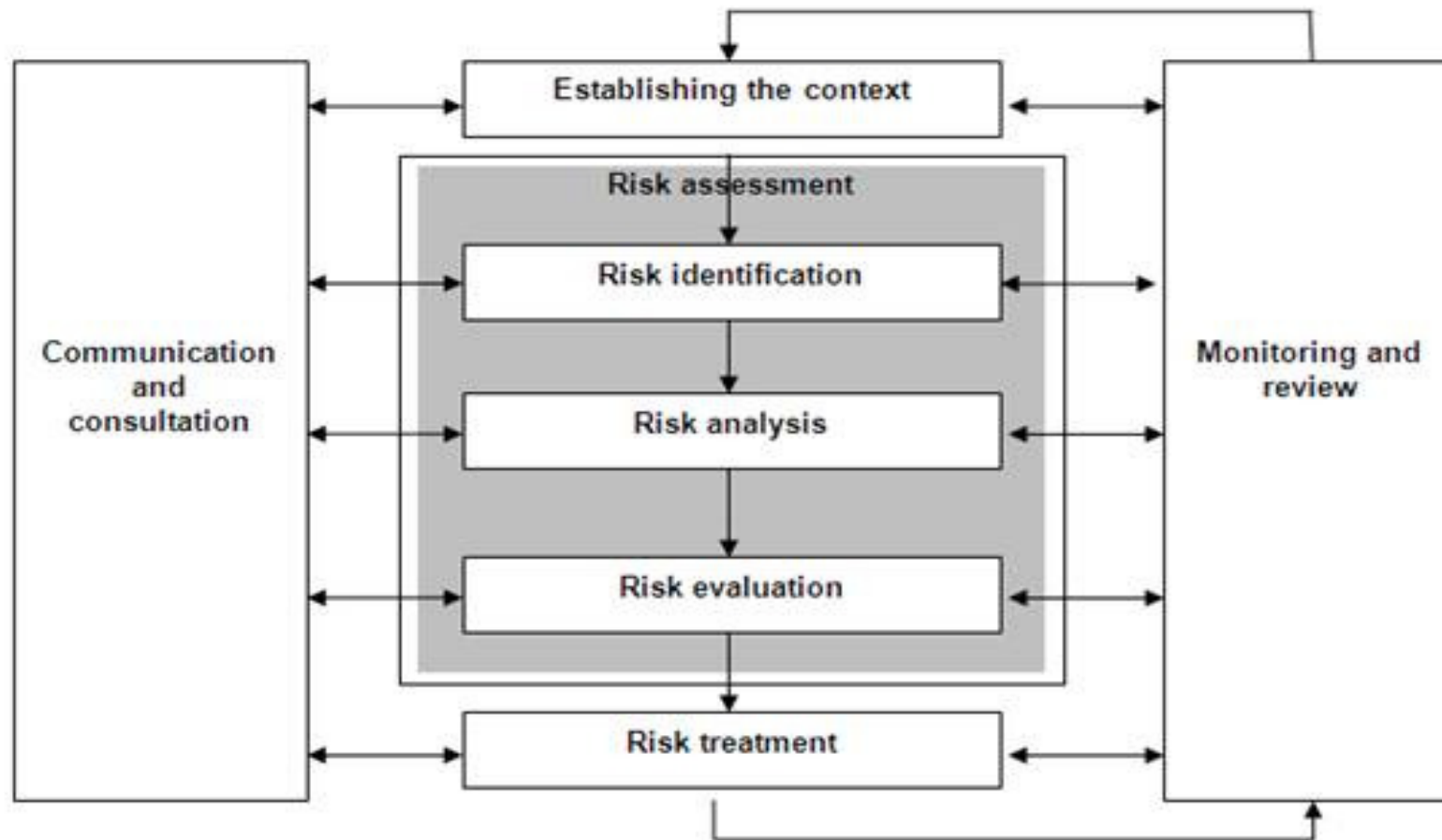
# Project 2

	Project 1	Project 2	Project 3	Project 4
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# Risk Management Strategy Process

- Risk identification – identifying the sources of the risk
- Risk assessment – of the risk event
- Risk analysis – what's the impact?
- Developing management response strategies – assigned to someone to own
- Monitoring and evaluating – is this working?

# Risk Management Strategy Process



# Project Risk Assessment

Risk Matrix	Project One	Project Two	Project Three	Project Four
Cost	High	High	Medium	Low
Schedule	Low	High	Medium	Low
Quality	Medium	High	Medium	High
Scope	Low	Medium	Low	Medium

# Risk Management Plan

## Risk response strategies

- Acceptance – complete acceptance
- Mitigation – can't be avoided – work with in it
- Rejection – avoid altogether
- Transfer – give it to someone else
- Share – between participants

# Risk Management Plan

*"Denial is a common tactic that substitutes deliberate ignorance for thoughtful planning."*

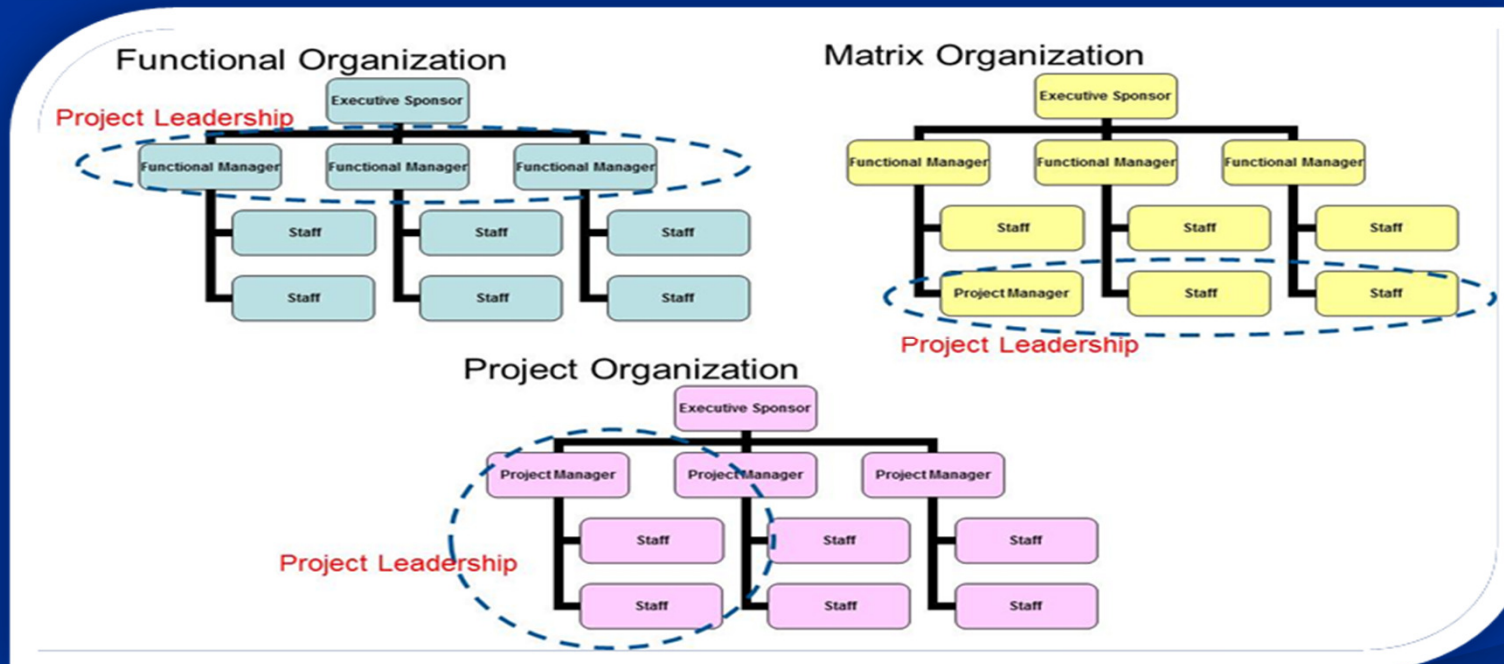
*Charles Tremper*

# Project 3

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# Project 3 - Test Team types

Teams come in many shapes and sizes.





# Project 4

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# Quality Management Plan

- Develop checklists of the usual deliverables
- Standardise your framework to ISO9126/ISO25000 and IEEE829/ISO29119 (not yet)
- ISO9000/9001 – Quality Management
- Standardise your tools where possible
- Standardise document templates
- Review, walkthroughs and inspections

# Quality Management Plan

- How do you cope with different methodologies?
- In project terms what are the differences?

# And lastly - Schedule Management

- Celebrate the milestones
- Timewasters and time-takers
- Don't go to a meeting you don't need to be in
- Beware of people trying to shift responsibility to you – they have to work within the framework

# Politics, Strategy and Leadership

- Politics in the workplace is inevitable
- How does politics effect strategy?
- Leadership and Management are different

# A Final Word

- Relax and enjoy the view – you're at the top of your game!!
- It's OK to have some distance between every project and what you do

# Resources

- ISTQB Test management stuff
- Seek out resources – there are numerous blogs etc. out there to help – don't reinvent the wheel
- Use the ISTQB material as a roadmap

# References

- <http://pm-foundations.com/2011/03/04/pm-foundations-the-core-team/>
- ISTQB Glossary
- <http://quickbase.intuit.com/blog/2011/08/26/the-5-types-of-power-in-leadership/>



# Conclusion

- And what we've just done is create a Strategic Plan!