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# Leading with Quality

Getting a seat at the table...

Keith Klain



- Over 25 years in software quality, test automation, process improvement, and transformation initiatives for corporate, retail banking and capital markets clients.
  - KPMG UK
    - Financial services, QE/AI,
    - Fiserv, Barclays IB/WM, Citigroup, UBS IB
- Built and managed teams for global financial services and consulting firms in the US, UK, and Asia Pacific.
- Chartered Management Consultant, Executive Vice President of the Association for Software Testing

### **Awards and Honors**

- Testing Excellence Award - EuroSTAR June 2025
- Bronx Borough Presidents Award - March 2016
- Diversity in Tech Award - Code/Interactive Feb 2016
- Person of the Year - Per Scholas June 2014
- Software Testing Luminary Award - Software Test Professionals October 2013

**LinkedIn**

**YouTube**



# Objective and Agenda

- Objective – Share my model for getting testing represented in senior decision making (Coaching new testers and test managers)
- Getting a seat at the table
  - What works...
  - What doesn't work...
  - A model to plan for success...
- Case Studies

*Disclaimer: IMO based on IME!*

**Q: What is getting a seat  
at the table...?**

**Q: Why doesn't testing get  
a seat at the table...?**

# Know your role...

- Your role is RISK MANAGEMENT!
  - Testing is a function of risk management
  - Finding important risks as quickly and efficiently as possible
- Key differentiator to professional success in testing - RISK is the lens to look at EVERYTHING you do!
- **How Complex Systems Fail** - Richard Cook
  - Catastrophe requires multiple failures - single point failures are not enough.
  - Complex systems contain changing mixtures of failures latent within them.
  - Complex systems run in degraded mode.
- Manage your own expectations!

**How to get a seat at the table...**



# What works...

- Principles - framework to guide your decisions
  - Honesty - first with ourselves, then others
  - Integrity - critical distance is vital and a lost art - part of your job
  - Accountability - ownership of the quality of your testing - act like a professional tester
- Principles are more important today than ever with agile's sister cult "continuous everything" - YOU'LL HAVE TO COMPROMISE!
- MY practices to limit the amount of risk testing is exposing to the business
  - We use the tools and people available to do the best job possible - right now
  - Align our strategy to business objectives
  - Agree the test approach with our sponsors
- **Rethinking Expertise** - Harry Collins

# What doesn't work...

- IME the value proposition of testing is context dependent – you must use influence and skill to define a value proposition
- How to undermine testing's value proposition (common mistakes in testing)
  - Don't speak the language of your project...
  - Making the testing personal...
  - Word police...
  - Don't have a pragmatic approach...
  - Don't actively listen...
- Your ideal form of influence is first to help people see their world more clearly, and then to let them decide what to do next.
- **Secrets of Consulting** – Jerry Weinberg

# Mission, data, preparation...

- My model for interacting with management - lots of listening, lots of observing, lots of agency, lots of trust, lots of air cover for my team
  - 1.No amount of process improvement is going to solve your underlying problem: org dysfunction
  - 2.The greatest determining factor in the success of your process is how people are comped
  - 3.Assumption they don't know much about good testing and most of what they know is bad

## **Mission**

- Risked based decision making supported by data
- Test Management is focused on keeping the team aligned to the mission
- 80% hands on testing

## **Data**

- Gather data to support what we want to know about how we are functioning as a team - how long things take and why
- "We're starting to fail" heuristics - slipping test types; parallelism, defect closures

## **Preparation**

- Meeting preparation is 100% determining factor in successful testers
- Conversations - CIO critical bug test
- Awkward questions - Huh? Really? So?

# Case studies . . .

Disclaimer: Any resemblance to real people or projects is strictly coincidental and the names have been changed to protect the innocent..

# Case Study A

- **Company**
  - National payments strategy and architecture organization
- **Client**
  - CIO
- **Requirement**
  - Need strategy and approach to testing, testing resources, automation, and performance testing
- **Context**
  - New payments scheme introduced through joint venture with FS sector and government regulatory body
  - Multi-bank participant scheme that must be included for industry adoption
  - Perm test director and PTM
  - Heavy use of consultants and wants metrics driven approach with lots of automation
  - No test tools in house, no discernable test strategy, no perm test team
- **Your brief...**
  - Propose a test strategy and resourcing model to deliver the new schema in 12 months

# Case Study B

- **Company**
  - UK based financial global services company
- **Client**
  - CIO, CTO
- **Requirement**
  - Need test approach for test service migration (SIT/UAT), test automation and NFT
- **Context**
  - Highly technical CTO and CIO with deep understanding of testing and test automation
  - Challenges with perm team and defensive local management
  - Short window for implementing onboarding plan to accommodate existing release schedule
  - Heavy regulatory and internal "process quality" requirements
- **Your brief...**
  - Propose a resourcing approach and test strategy to take on the existing work loads to migrate to new service in 6 months

# Case Study C

- **Company**
  - Enterprise-wide ERP transformation
- **Client**
  - CFO, COOs
- **Requirement**
  - Needs turn around strategy for test approach, quality gates, and test governance
- **Context**
  - ERP implementation including legacy data migration, process re-engineering, enterprise financial and regulatory reporting
  - Program running for over 12 months, multiple missed deadlines and release dates, highly charged political environment
  - Test approach mandated was waterfall/agile hybrid, mandatory "phase gates", and staffed with junior internal resources
- **Your brief...**
  - Develop a test process improvement strategy, communication model, metrics, and test plan to meet new deadline

### Case Study A

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**Case studies results...**

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Success!\*

\*So far...

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+12 months late!  
Success?  
4x over budget!

# Summary

## **Know your role!**

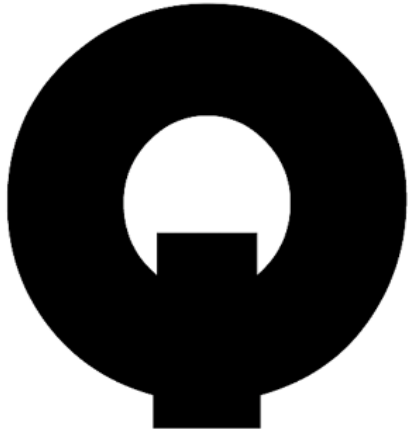
- Risk management
- Timely information

## **Don't undermine your value!**

- Don't speak the language of your project...
- Don't make it personal...
- Don't word police...

## **Preparation is key to success!**

- Mission
- Data
- Preparation



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**Thank you!**

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