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# Financial Services

A privately owned investment management firm primarily providing services to pension and profit sharing plans needed to revitalize their testing efforts. They called on Idexcel to assist them in thoroughly testing their applications allowing fewer defects into production.

## Challenge

Idexcel was tasked with helping the client in achieving their goal by developing a regression test bed in which working functionality can be re-tested at will to determine if the changes in the applications functionality has broken the existing functionality.

## Solution

Based on previous successes, Idexcel utilized a Discovery, Transition, and Delivery Approach:

- \* The **Discovery** phase is the time at the beginning of the engagement that is used to orient project staff with specific operating procedures and climate within the client environment. Although Idexcel has a robust set of processes to pull from, alignment within the client environment is of utmost importance.
- \* The **Transition** phase transitions the responsibilities for testing deliverables from current SME staff to Idexcel offsite staff for the scope of the applications under test. It is Idexcel's experience that when the SME's are involved in this process, the number and frequency of clarification questions is greatly reduced.

- \* The **Delivery** phase puts plans into action. Activities include processes:

Project Oversight	Software Configuration
Team Management	Release Management
Training Management	Knowledge Management
SLA Management	Operations Improvements
Customer Service Management	Requirements Improvements
Production Support	Process Improvements
Project Delivery	Infrastructure Improvements
Production Control	Lessons Learned

And services:

Weekly Status Report	Services Level Quality Assurance
Periodic Sponsors Meetings	Management Quality Assurance
SLA Performance Reports	Technical Deliverables Quality
Workload and Resource	Efficiency and Effectiveness
Production Support	Service Level Improvement
User Support / Problem Resolution	Quality Improvement Programs
Completed Maintenance Requests	Cost Improvement Programs
Application of Lessons Learned	



## Results

Idexcel successfully conducted this program resulting in:

- \* Increased the applications coverage through the collaborative design phase of the test processes
- \* More defects were found and fixed before deployment as a result of a more defined defect management plan
- \* Actionable metrics were presented to the team resulting in an increase in the issues addressed before deployment.