MAKING IT WORK:

A Guide to Successful Software Testing

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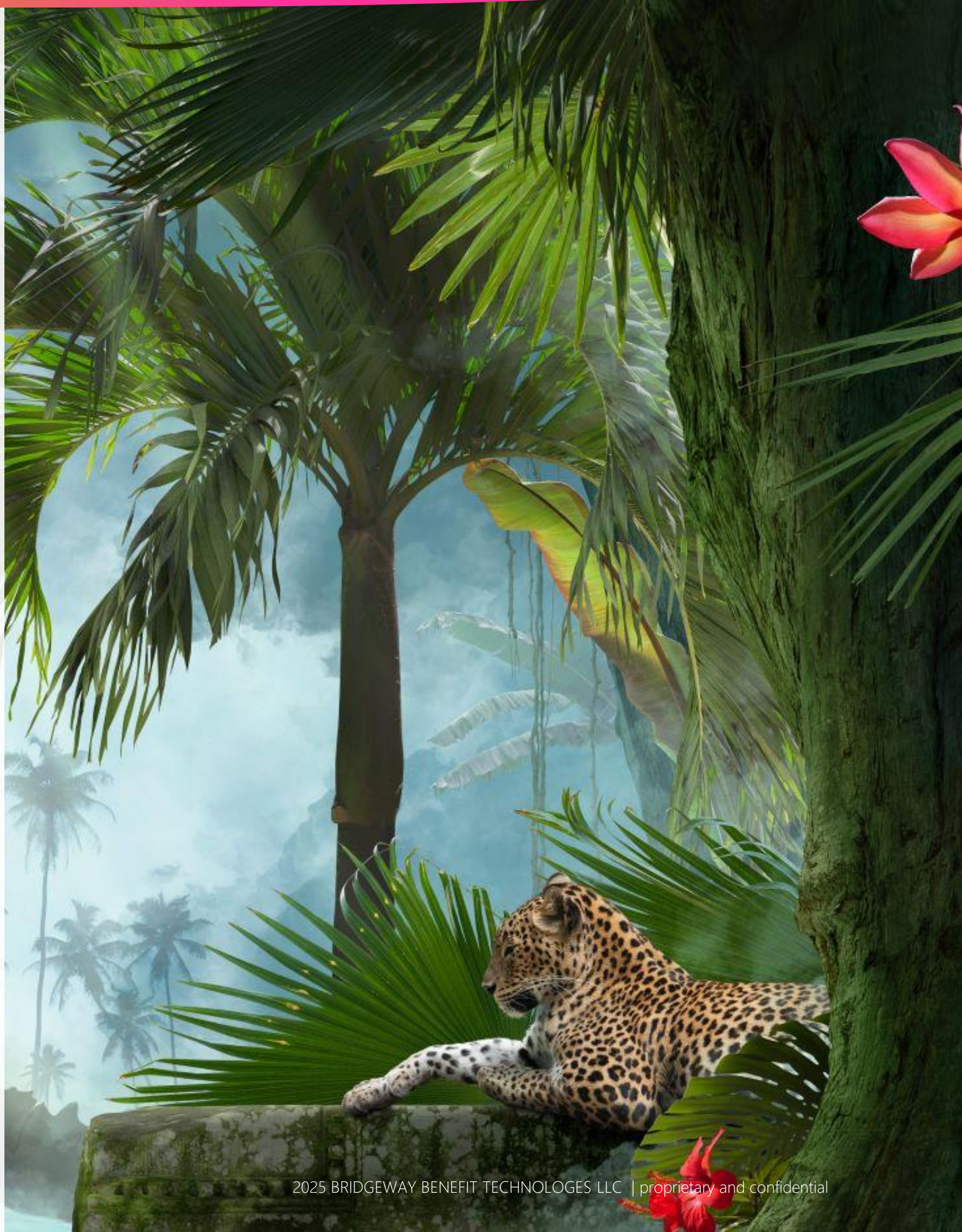
BRIDGEWAY
2025 USERS GROUP CONFERENCE

& Modern Unified ON THE MOVE



About Me

- Bridgeway BASYS Platform Trainer
- Background:
  - MBA, MS Management and Organizational Behavior
  - Certified Prosci Change Management Practitioner and Instructor
  - Microsoft Certified Trainer
- Passionate about empowering others to succeed
- World Traveler

Illinois

Australia

South Korea

안녕

Denver

Illinois

Homeowner

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KEYS TO SUCCESS

1. ALIGN EXPECTATIONS & GOALS
2. IDENTIFY KEY STAKEHOLDERS
3. PLAN & STRATEGIZE
4. TEST
5. DOCUMENT OUTCOMES
6. COMMUNICATE EFFECTIVELY

The Software Testing Process

What is it?: A planned process with defined outcomes

Purpose: Verifies that the software **meets business requirements** before deployment

Why it matters:

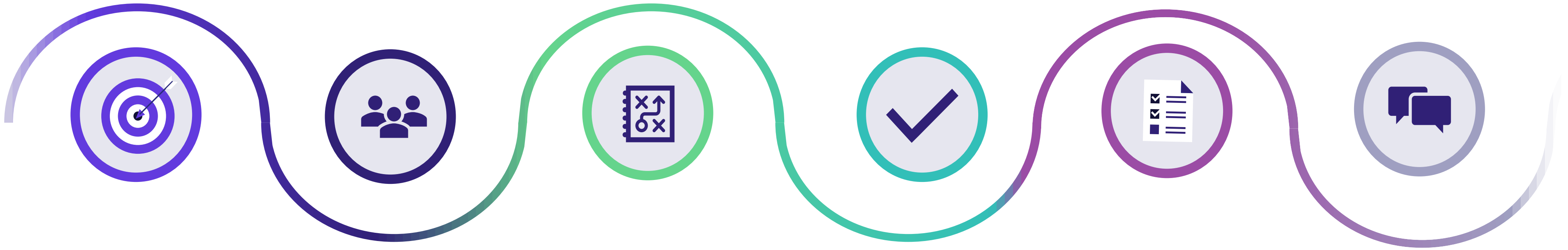
To The Business:

- Halted Business Processes
- Unhappy Employees, Members, Clients
- Regulatory Issues

To You:

- Stress
- Stress
- Stress

Keys to Success



Align Expectations & Goals
Define expectations and desired outcomes

Identify Key Stakeholders
Determine who is involved and affected

Plan & Strategize
Record critical processes and allocate tester time

Test
Conduct realistic tests using reliable data

Document Outcomes
Provide effective & actionable feedback

Communicate Effectively
Inform changes, identify contacts, share insights

Applying Concepts

Take the car to the shop – What could go wrong?

- You want the software to work
- You want your car to work

Expectations & Goals

Expectations & Goals

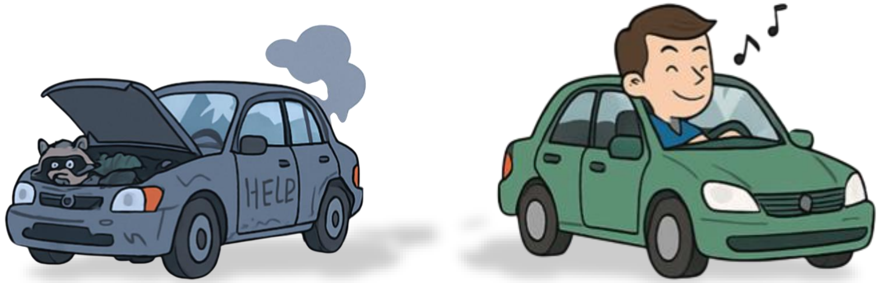
- Set clear expectations for testers regarding their role in the **process**
- Clarify the purpose of testing and what a successful test should achieve

Applying Concepts

You have expectations of your mechanic, and they have expectations of you

- You want the car to work
  - Mechanic sets expectations for service durations
  - Sets expectations for employees about repair needed
  - Mechanic relays expected repair

- You want the software to work
  - Set expectations for testing duration among team members
  - Set expectations to team members about their role in the process
  - Relay expected outcomes



Identify Key Stakeholders

Identify Key Stakeholders

Which users will be impacted?

Who should be performing the tests?

Who is overseeing the process as a whole?

The Testing Team

End Users

Individuals who use the software to perform routine activities

Internal Points of Contact

Project Managers, Department Heads

SMEs

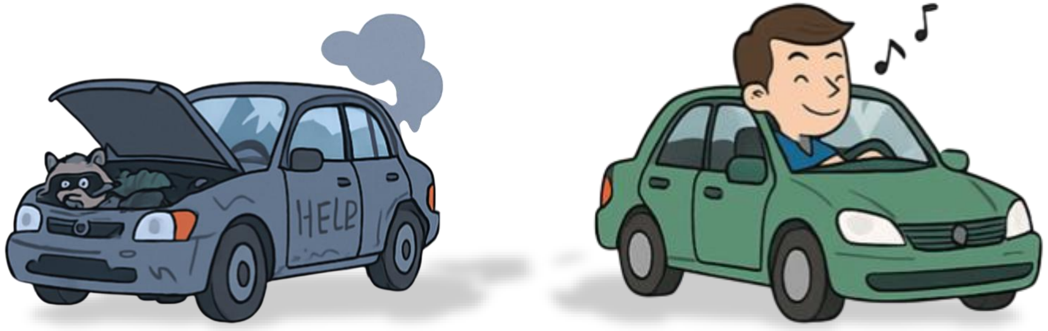
Experts on the software being tested and the related business processes

Applying Concepts

Don’t have the engine person fixing your brakes

- You want the car to work
  - Make sure the shop has the right people on hand
  - The shop employees know their roles and responsibilities

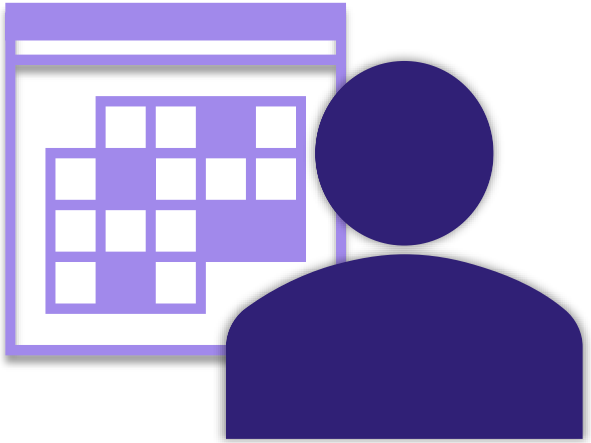
- You want the software to work
  - Assign the right people to do the testing
  - You’ve established roles and responsibilities among your testing team



Plan & Strategize

Plan & Strategize

- Document critical processes and workflows
- Ensure testers have scheduled time for tasks



Plan and Strategize

- Run Book – a consistent list of steps expected from every software process. A run book helps you to:
  - Understand your critical processes
  - Identify where the changes will impact those processes and/or user experiences
  - Context-based testing

Plan & Strategize

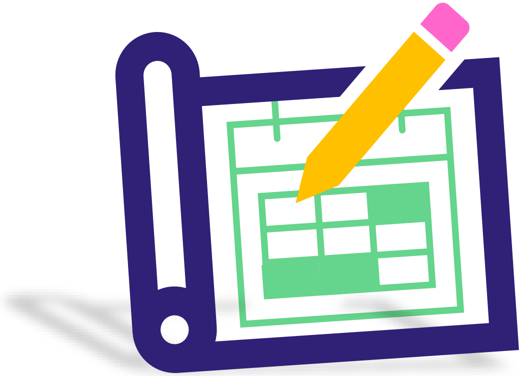
- Engage the tester early into the project
- Set a shorter, more focused testing period
- Plan for users to adjust their routines
- Modify success criteria to be more achievable

Applying Concepts

You want your mechanic to have a plan and strategy

- You want the car to work
  - Mechanic should manage their schedule
  - Document regular procedures/diagnostics
  - Allot time for shop related tasks

- You want the software to work
  - Manage testing schedule
  - Create your run-book
  - Allot time for testing & adjust metrics of success



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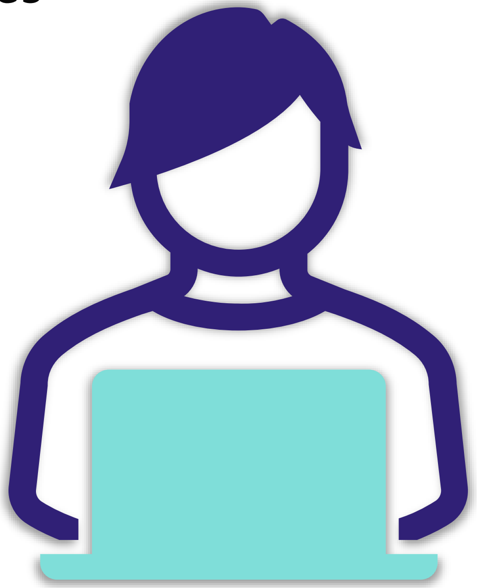
Test

Test

- Use a realistic scenario & realistic data
    - Edge cases should be considered, but not the focus
- Incorporate your critical processes
    - Ensure testers have the knowledge of the critical processes necessary to run them
- Report additional issues & address separately
    - Avoid shifting focus if a new issue comes up



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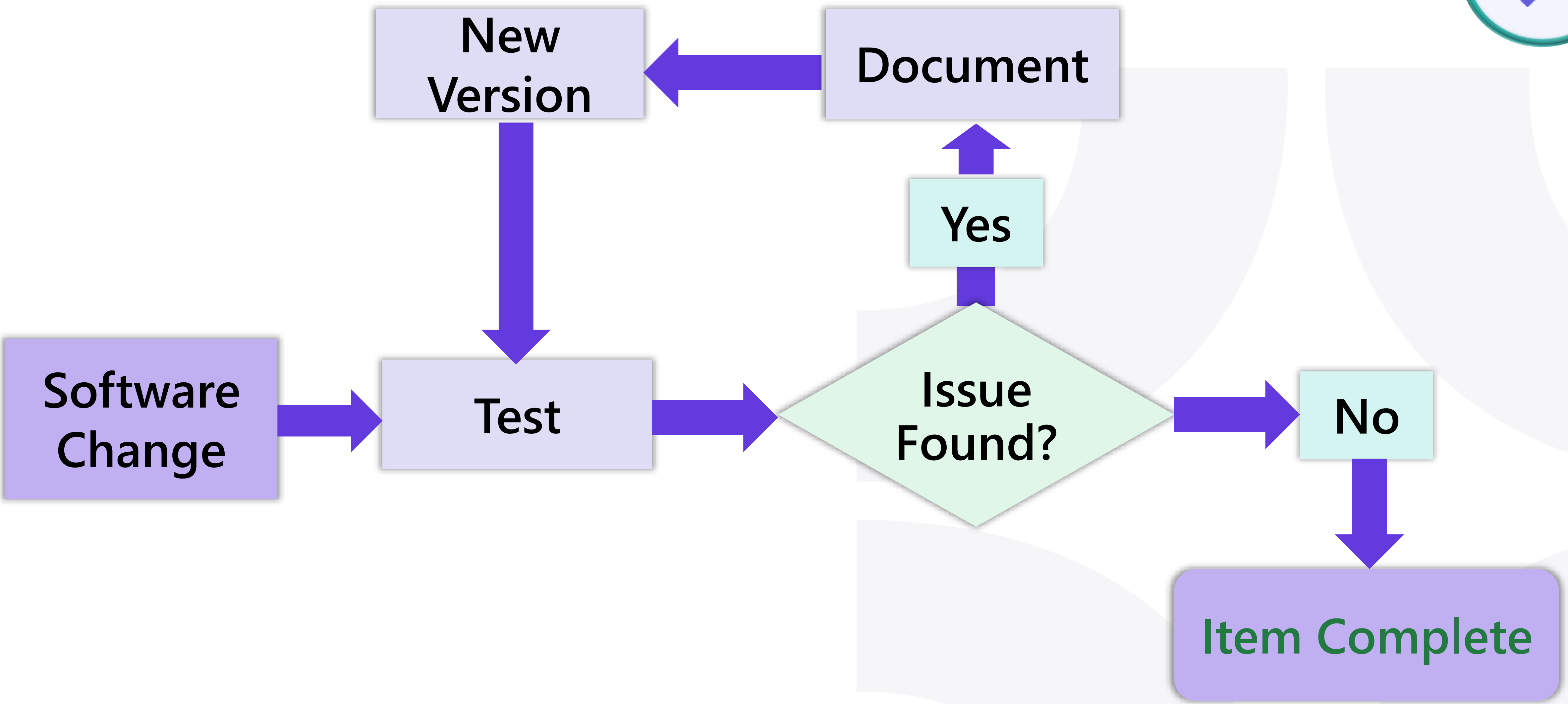
Software Testing Flow



Applying Concepts

Have you ever had a mechanic say your car is fine when you know it's not?

- You want the car to work
  - Test the car under real conditions
  - Consider unusual driving scenarios but focus on common issues
  - Ensure essential systems of the car are tested thoroughly

- You want the software to work
  - Test the software in a realistic scenario
  - Consider edge cases but prioritize testing core functionalities that users will frequently use
  - Include critical processes

Document Outcomes

Document Outcomes

- Actionable and valuable feedback
  - Provide a clear and detailed explanation of the issue
  - Describe what is happening vs. what is expected
  - List the step-by-step actions to reproduce the issue
  - Provide screenshots or videos if possible
  - Were there any workarounds attempted & the result

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Document Outcomes

Ineffective Feedback

Lacks detail → I couldn’t verify the results

Vague steps → Went to the menu, but the option didn’t match

Impact on users → Users won’t be able to use the system correctly

Specific suggestions → The results need to be corrected

Document Outcomes

Good Feedback

Provides a detailed description → The results in box 22 did not align with page 5 report

Clear steps to reproduce → Navigated successfully to the correct page, entered test process 3x. Results consistently misaligned

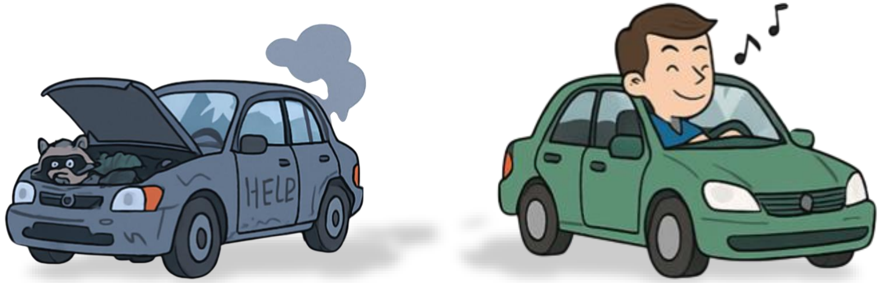
Impact on users → This field directly impacts the field entry process

Specific suggestions → Review config for box 22. Ensure the formula references box 21 data

Applying Concepts

- You want the car to work
  - Clearly documents the issue reported and how it was reproduced
  - Describes how it was repaired
  - Provides a detailed billing statement

- You want the software to work
  - Documents the test/goal
  - Provides screen shots/recording demonstrating how it was tested
  - Clearly defines what the expected outcome was and the actual outcome



Communicate Effectively

Communicate Effectively

- Keep all key stakeholders informed of any changes to the plan
- Know who you should communicate to about which issues
- If there are insights gained during testing or deployment, communicate them for future improvements in the process

Communicating Effectively

Informed Decisions

- Reduces risk of project delays
- Encourages timely feedback and support

Targeted Communication

- Issues are addressed by the right experts
- Leads to faster resolutions

Sharing Insights

- Fosters a productive environment
- Helps refine processes for better quality

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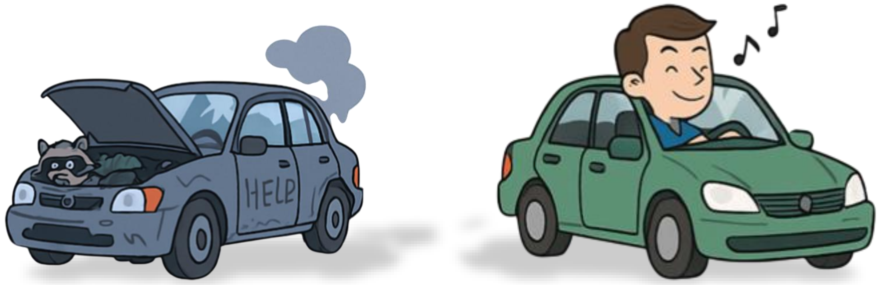
Applying Concepts

Have you ever called to check in on your car and found that it's been ready for a week already?

- You want the car to work
  - Inform customer of any additional work/parts
  - Calls the right person
  - Share insights such as ways to improve car functionality



- You want the software to work
  - Inform stakeholders of delays in the testing plan or new issues discovered during testing
  - Reports issues to the right manager
  - Share insights gained during testing, such as effective testing strategies to improve future testing processes

Conclusion

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