A Remote Tester's Perspective: Challenges and Solutions

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Speaker Background

• Keith McIntosh, CEO and Founder
  • Professional Quality Assurance Ltd. (PQA)
    • Content Quality Assurance
    • Software Quality Assurance
  • Fredericton, New Brunswick
  • Has been in operation since 1997

• 20+ yrs Testing Leadership
  • SQA Consultant
  • Test Automation
  • Quality Assurance Processes
Remote Experience

- Our Locations
  - Head office and delivery center in Fredericton, NB
  - Delivery centers in Halifax, NS, Moncton, NB and Vancouver, BC
- Over 100 employees across 50+ active projects
- Historical Data from 300+ projects since 1997
- Clients World Wide
  - Europe, Australia
  - North America (East & West Coast)
- Industries
  - Healthcare, Financial Services, Gaming, e-Learning, Internet/Web

Questions?

1. How many are currently working on a team that has remote testers located
   - In North America?
   - Internationally?

2. How many are (or have been) the “remote tester”? 
Presentation Goals

• Introduce you to the challenges faced by remote testers
• Provide tips and tools that will help you as you interact within a remote team environment
• Provide insight for the following roles (onsite & remote)
  • Project Managers
  • Team Leads
  • Team Members

Advantages of Remote Testing

• Cost Savings
• Client Services
  • Objectivity / Independence
  • Access to Expertise (Specialized Skills)
  • Focus & Knowledge
  • Scalability
• Employee
  • Skills Development
  • Lifestyle
  • Low Attrition Rates
Remote Testing Myths

• Just Not Worth It!
  • Poor quality delivered
  • Communication challenges are too large
• Time Difference
  • Time is money
• Cultural/Language Barriers
• Decreased company loyalty
• Remote team management

Top 5 Remote Challenges

Collaboration  Physical Connectivity
  Communication
  Time Differences  Project Structure
Communication

Challenges: Communication

- Not involved in the many micro interactions that onsite testers experience
  - No direct contact with client, developers, users
  - Harder to get buy-in of ideas
- Lack of clear communication channels
Challenges: Communication

- “Out of sight, out of mind”
  - Changes are not communicated
  - Slow response time (no urgency)
- Trust / Confidence
  - Visibility into daily work
  - Work is sometimes not measurable or quantifiable
- Language Barriers
  - Writing / Speaking challenges

Solutions: Communication

- Routine Meetings
  - Weekly project meeting
  - Defect report meeting
- Daily Scrums
  - Morning – 10-15 minutes
  - Critical stages – twice daily meetings
- Open/Transparent Communication
  - Invite remote teams
  - Not just management & test leads
- Direct communication with onsite team members
  - Developers, designers, technical analysts
Tips & Tools: Communication

Tips

• Etiquette
  – Mindful of the tone
  – Be professional
  – Stay on point
  – Diplomatic and honest
• Pick-up the phone
• Confirmation & Follow-ups
• Turnaround time

Tools

• Email
  • Responses can be slow
  • Pictures, Screenshots
• Phone
  – Global Conference Numbers
• Instant Messaging
  – Skype, MSN
• Video Chat
  – Skype
  – Reveals body language cues

Collaboration
Challenges: Collaboration

- Lack of knowledge sharing/transfer
  - Between onsite and remote locations
  - Among internal team members
  - Sharing of experience
  - No point-of-contact (domain expert contacts)
- Data management strategies are lacking
  - No repository to retrieve or store information
- Task allocations are unclear
- Cultural challenges to sharing information

Remember: Poor knowledge transfer increases risk

Solutions: Collaboration

- Take responsibility!
  - The onus is on the whole team to facilitate a healthy and constant flow of information
  - Setup point-of-contacts
  - Ensure task allocations
- Focus should be placed on attention and understanding
  - The business flow and methodology of onsite clients
- Maximizing information sharing by
  - Whiteboarding, Video Conferencing, Instant Messaging, Screen Sharing
  - Information Management Systems
    - SharePoint, Wiki, Team/Company Intranet, Forums, Shared Folders

Knowledge transfer (product training) is critical to the success of a distributed team
<table>
<thead>
<tr>
<th>Challenges: Time Difference</th>
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<tbody>
<tr>
<td>• Communication</td>
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<tr>
<td>• Clarifications, Instructions, Direction</td>
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<td>• Technical issues</td>
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<td>• Testing delays</td>
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<td>• Non-overlapping time</td>
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<td>• Delivery of tasks</td>
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Solutions: Time Difference

- Regular team meetings (routine helps to stay synchronized)
- Establish points of contact
  - Test leads, Managers, Escalation hierarchy, Emergency contacts, Afterhours contact
- Flexible hours
- Establish when overlap in work hours will be necessary
  - Start of project, End of release cycle, Critical milestones

Make best use of overlap hours and non-overlap hours

Physical Connectivity
Challenges: Physical Connectivity

• Limited Client Network Access
  • Security Lock Down
    • Administration
    • Access to client functions
  • Automation, Load & Performance Testing
  • White Box Testing (Unit Testing)
  • Bug Investigation (testing scope)
    • Database Access, Software Architecture, Business Logic

• Performance of Client Servers
  • Uptime: Testing Environments, Emails, Testing Tools (QC, QTP, etc)
  • VPN Latency
  • ISPs

Solutions: Physical Connectivity

• On call emergency contact
• Risk Management
  • Emergency communication channels
  • Local backup/copy of tests
  • Task allocation during downtimes
• Provide wider network access to remote staff
• Local test environments
Challenges: Project Structure

- Remote Considerations
  - Regional culture
  - Company/Business culture
  - Team culture
  - Language skills
- Us versus Them
- Lack of testing leadership
- Organizational structure not visible
- Lack of contribution / Control of test planning
- Perception of the Remote Tester – Tester or Consultant?
  - Maximize tool usage (ex. QC)
  - Client methodology
Solutions: Project Structure

- Team Identity
  - Build Relationships
  - One Team Approach
  - Onsite Visits
- Define & Communicate
  - Roles and Responsibilities
  - Escalation Hierarchy
- Involve remote test team in the test planning
  - Facilitate ownership of quality and product delivery
- The Holy Grail: Outsource the Test Lead

Other Challenges
Other Challenges

- Attitudes
  - Towards testing
  - Towards remote teams
- Sense of belonging
- Loss of passion and challenge
- Take pride in being a tester
- Job security

Other Challenges

- Cultural, Personality Conflicts
- Remote Training
- Employee Growth
  - Client develop attachments to employees
- Employee Movement
  - Attrition
  - Reassigned to another project
Did Well – Do Better

Project Strengths

- Project test plans
- Product walkthroughs
- Task assignments
- Rotating testers
- Project status updates
  - Status updates, Defect reports, Weekly execution reports, Project schedule
- Environment build - communication
- Early involvement of testers
- Test management tools & procedures
Project Weaknesses

- Documentation (CR’s, BRD’s)
  - Poorly written, ambiguous
  - Out dated
  - Requirements not well defined
  - Fixes / design contradicting requirements
- Constant change
- Test case management
- Defect ticket management
- Turnover/continuity

Checklist - Starting a Project

- Team Introductions
  - Roles, Responsibilities, Escalation Hierarchy
- Schedules, Milestones, Task Assignments
- Communication Plan
  - Weekly/Daily Meetings
- Test Plan/Strategy
- Access to tools, environments, credentials
- Provide consistency and standardization across projects and teams
What Does All This Mean...

Tips

• Tip #1 - Build Trust / Relationship
• Tip #2 - Build a Communications Plan
  • Gather Feedback
• Tip #3 - Share Responsibilities
  • Develop Ownership, Team Identity
• Tip #4 - Strong Team Leadership
  • Manage Risk, Ensure Service Quality
• Tip #5 - Develop Processes
  • Task Related, Decision Making
• Tip #6 - Put an Escalation Structure in place
Conclusion

- **Communicate! Communicate! Communicate!**
  - “Phone calls, frequent e-mails and live video conferences really helped us understand the scope and details of the project”

- **Strong Project Leadership/Management**
  - “I owe the success of my project to strong leadership that facilitated healthy communication and managed the risks along with other project management processes that were essential in operating a distributed team”

Next Steps...
Thank You

• Thank you for attending this session. Please fill out an evaluation form.

Thank You!

Any Questions?

For more information, contact me at:
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