

THE QA CONSULTANCY

NASHVILLE QA MEETUP, OCTOBER 17TH, 2017

WORKFLOWS & QA

AGENDA

- ▶ Introduction
- ▶ Workflows
 - ▶ Why workflows?
 - ▶ Designing YOUR workflow
 - ▶ Best Practices
- ▶ Issue Management
 - ▶ Implementing in your Issue Management tool
 - ▶ Best Practices
 - ▶ Advanced Concepts
- ▶ Q&A

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INTRODUCTION

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INTRODUCTION

- ▶ Owner / Executive Consultant @ The QA Consultancy
- ▶ Past leadership at HomeAdvisor, MEDHOST, Scripps Networks
 - ▶ 12 Years in QA, 22 in IT
- ▶ Quality is a passion!



WORKFLOWS

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WORKFLOWS

- ▶ Who
- ▶ What
- ▶ When
- ▶ Where
- ▶ Why
- ▶ How

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Richard Scarry's

Busytown Mysteries

WHO NEEDS TO BE INVOLVED?

- ▶ Product
- ▶ UI/UX
- ▶ Development
- ▶ QA
- ▶ DevOps
- ▶ Leadership (from all of the above areas)
- ▶ Optional: IT, Business

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WHAT SHOULD YOU INCLUDE?

- ▶ What is your goal/desired outcome?
 - ▶ This needs to be defined BEFORE starting the rest
- ▶ Core processes from development lifecycle
- ▶ Focus on what's important to:
 - ▶ Organization
 - ▶ Department
 - ▶ Team
 - ▶ YOU!
- ▶ Anything needing repetition and consistency

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WHEN DO YOU START?

- ▶ When there is coordination needed
- ▶ When there are multiple teams or release cycles
- ▶ When you are in a distributed team
- ▶ When you are trying to use CI/CD
- ▶ Reality Check!!!!!!

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WHEN DO YOU START? - THE REALITY CHECK VERSION

- ▶ ~~When there is coordination needed~~
 - ▶ BEFORE coordination is needed
- ▶ ~~When there are multiple teams or release cycles~~
 - ▶ BEFORE you start scaling to multiple teams or release cycles
- ▶ ~~When you are in a distributed team~~
 - ▶ BEFORE you are distributed
- ▶ ~~When you are trying to use CI/CD~~
 - ▶ BEFORE you try to do CI/CD

WHERE DO YOU IMPLEMENT?

- ▶ In development tools
- ▶ In development teams
- ▶ In overall release process

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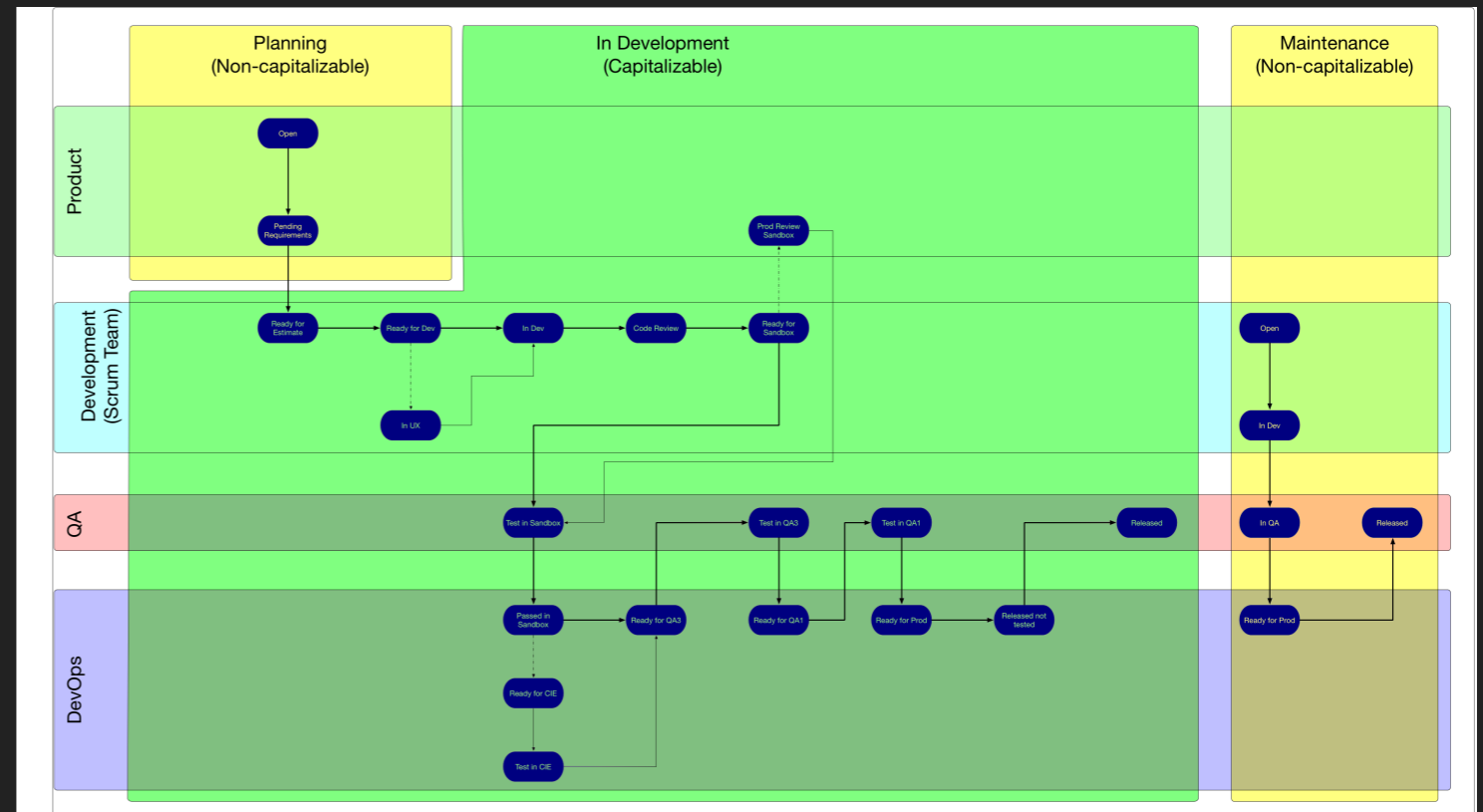
WHY USE WORKFLOWS?

- ▶ Benefits
 - ▶ Consistency
 - ▶ Scalability
 - ▶ Simplicity
- ▶ This seems like a lot of work...
 - ▶ HomeAdvisor example

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HOW DO YOU IMPLEMENT YOUR WORKFLOW?

- ▶ Document the process as it stands now
- ▶ Determine changes needed
 - ▶ You will find some gaps or inefficiencies as you work through building it out
- ▶ Build out a basic workflow diagram
 - ▶ Helps visualize the overall process
 - ▶ Assists in creating training material
- ▶ DON'T OVERCOMPLICATE THINGS!



ISSUE MANAGEMENT

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IMPLEMENTING IN YOUR ISSUE MANAGEMENT TOOL

- ▶ What is your goal
- ▶ What do you need
- ▶ How long to implement
- ▶ Best practices

WHAT IS YOUR GOAL

- ▶ Should be in line with the goal you identified in your Workflows/What step
- ▶ Aim to remove inefficiencies
- ▶ Don't change for the sake of change

"IF IT AIN'T BROKE, DON'T FIX IT. THAT'S THE TROUBLE...FIXING THINGS THAT AREN'T BROKEN AND NOT FIXING THINGS THAT ARE BROKEN."

Thomas Bertram Lance – Nations Business, May '77



WHAT IS YOUR GOAL

- ▶ Should be in line with the goal you identified in your Workflows/
What step
- ▶ Aim to remove inefficiencies
- ▶ Don't change for the sake of change
- ▶ Define all areas that need created/changed/deleted
 - ▶ Issue types/statuses/resolutions
 - ▶ Screens
 - ▶ Fields

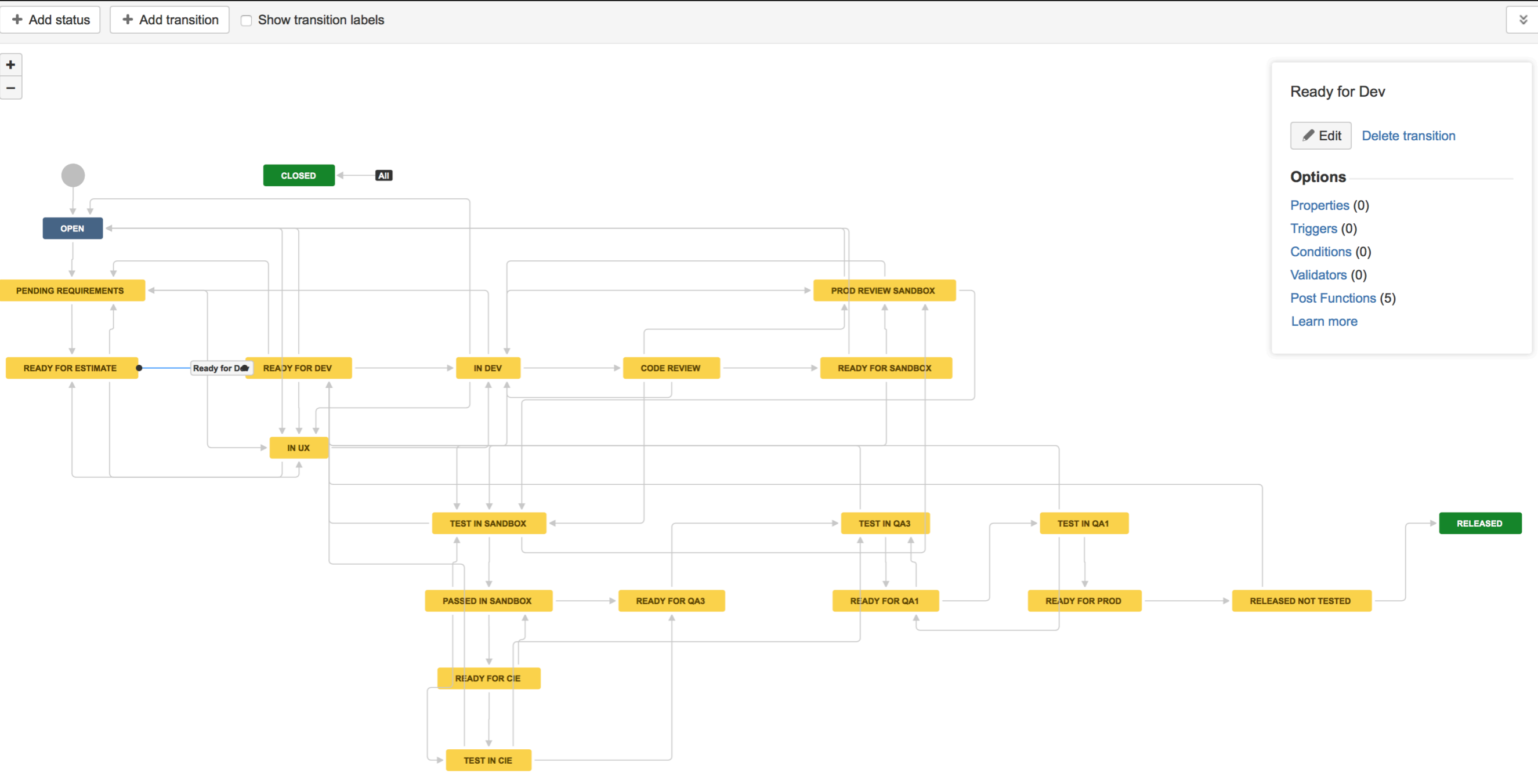
WHAT DO YOU NEED?

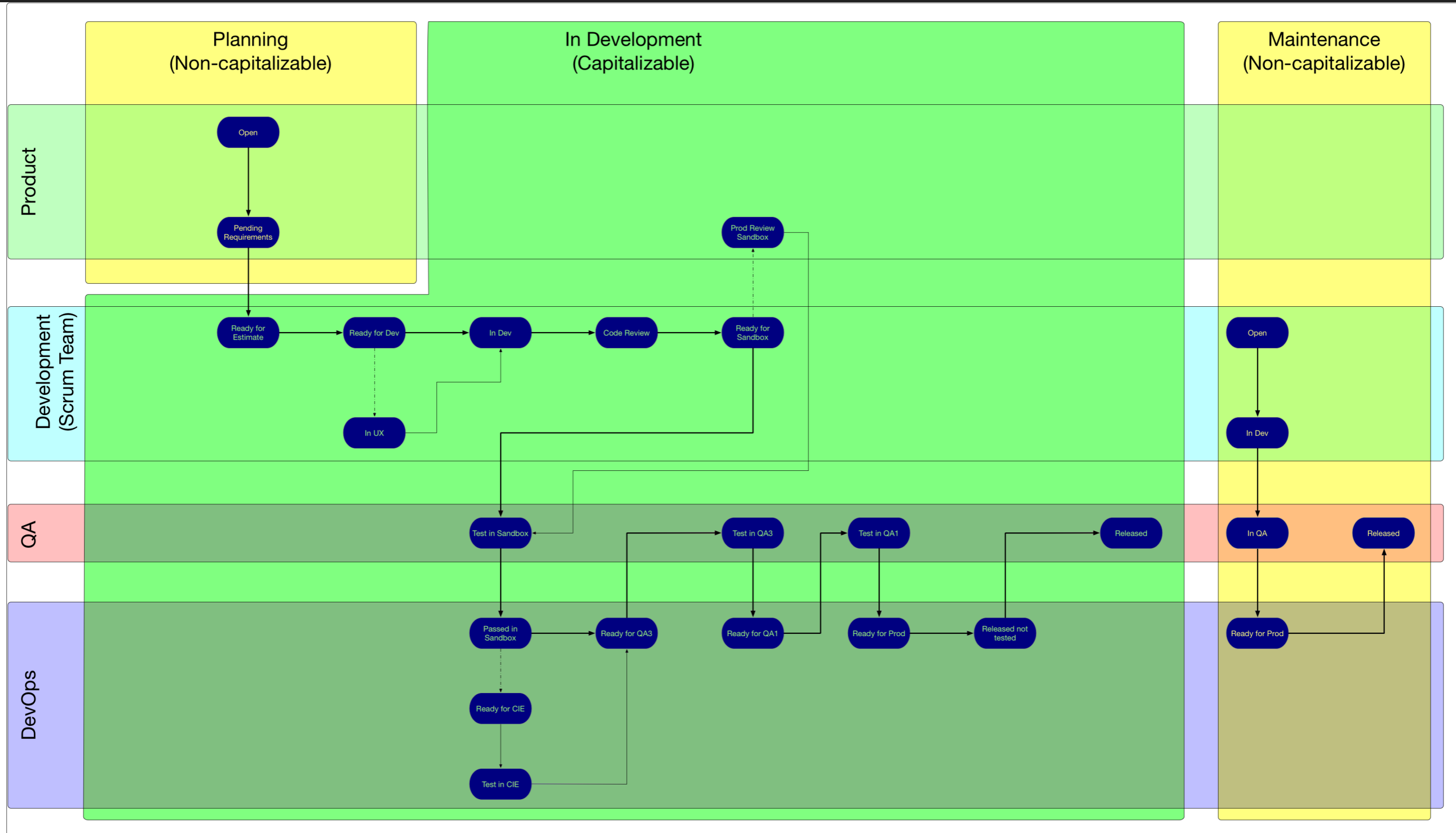
- ▶ A documented workflow
 - ▶ Without this, you are signing up for a lot of avoidable pain
- ▶ Buy-in from leadership and any impacted teams (directly or indirectly)
- ▶ Relevant plugins purchased/installed
- ▶ Someone to do the actual implementation if you are not able to

HOW LONG TO IMPLEMENT

- ▶ Factors to consider
 - ▶ Complexity
 - ▶ Availability of person/team implementing
 - ▶ Quality/comprehensiveness of proposed plan
 - ▶ How much pre-release testing will you need
 - ▶ Availability of testers
- ▶ **Build in a contingency buffer**

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BEST PRACTICES

- ▶ Minimize the steps or clicks needed
- ▶ Don't rush
 - ▶ Resist the urge to release quicker, but in an incomplete state
- ▶ Solicit feedback from stakeholders
- ▶ Test it, test it again, and then test it some more

ADVANCED CONCEPTS

- ▶ Transition validation
- ▶ Post function on transition
- ▶ Web hooks
- ▶ Groovy scripting
- ▶ UI tweaks via JavaScript

Q&A

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