

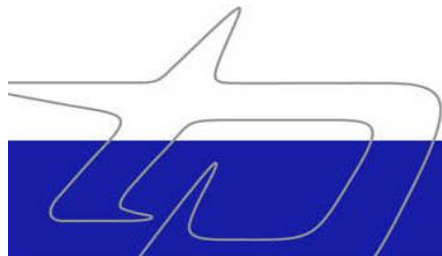
**Making IT happen**

Providing business critical and innovative testing solutions

## Candidate Information Pack

**Version: 1**

**Date: 12 August 2011**



## OUR VISION

Test-Direct will be recognised by the Industry, our Clients and our People as the Premier Independent IT Test and Assurance Consultancy in the UK.

## OUR MISSION

Providing bespoke testing and assurance solutions that enable our clients to deliver with Confidence

## OUR VALUES

We bring professionalism, business knowledge, testing expertise, auditability, flexibility and value for money.

From these statements and the overall company objectives, we will craft objectives for the various functional areas which will cascade through to individual objectives

## Who are we?

Test-Direct is a flexible and dynamic IT testing consultancy; formed with the aim of delivering quality, expertise, trust and value for money for our customers. We enjoy ongoing and established relationships with some of the UK's largest Blue Chip Companies and our client base continues to expand. We pride ourselves on working with our customers not for them: ideally working in partnership to produce win-win outcomes.

Founded in 2002, Test-Direct has been providing bespoke testing solutions delivered by cost effective, planned or "on demand" teams, predominantly for clients within the Financial Services sector. We ensure that our clients are able to confidently launch new products and services with knowledge of their quality and performance.

Test-Direct has a wealth of knowledge and experience of IT testing and financial services products and systems. Our directors, as well as our colleagues, are experienced IT testing practitioners and we are committed to an ongoing programme of investment in our people, ensuring key staff are trained to the highest standard, versed in our proven QUICK methodology and ISEB/ISTQB accredited.

## What do we do?

Test-Direct is able to offer our clients a comprehensive range of quality, Managed Testing Services tailored to their specific requirements either on client site or from our Test Lab. We can also provide high-level test consultancy or individual consultants from Senior Test Managers to Junior Test Analysts if required, all of which are Test-Direct permanent employees or trusted associates.

Here is a sample of some of the work that we do

## UAT Case Study

### 1. Client Background

Our client is a major and prestigious high street retailer with over 100 years trading history and around 900 outlets world-wide.

In the 1980s our client started a financial services company offering finance, insurance and saving products to high street customers.

### 2. Business Challenge

Our client was implementing a new, branded credit card offering. As part of this programme of work they wanted to implement a credit scoring capability provided by one of the UK's top credit reference agencies.

The programme was to include an initial pilot scheme for the credit card, with a limited number of customers. If this was successful then the scheme was to be rolled out nationally. The implementation would be even more challenging as the product selected by our client was new to market and had not been used by a national card provider before.

Our client had an existing card management system which had previously been used to manage store cards. This functionality was to be migrated to the new and more flexible card management solution, so a significant data migration activity was also needed.

In addition, our client had historically experienced difficulties when using business resources to carry out user acceptance testing.

### 3. Solution

After winning a competitive tender process, Test-Direct were requested to shape and manage our client's User Acceptance Testing. We deployed a team of professional test analysts and incorporated subject matter experts (SMEs) from the client's business.

Given the previous problems experienced with SME test resources our professional test team worked closely with client's staff. We provided training in QUICK – our in-

house test method, and helped them to appreciate the key role they would play in assuring that the new system would support their business. We mentored them throughout the testing process so that they could go back to business as champions for the new system.

Our team analysed the client's existing system from both a business and technical perspective, and also analysed the proposed new system. We built an effective and business focussed set of user acceptance tests which were used with the pilot programme. Our team built up a high level of expertise in the client's system and because of this were asked to provide first-line support during the pilot programme. As a result of the work done by the team the client deployed with confidence and the pilot was a complete success.

Test-Direct were retained by the client organisation and asked to test and support the migration of 3 million customer accounts from the existing card management system. This more technical testing required detailed analysis work on behalf of our team, and an understanding of batch processing technologies. This phase of the work was also a complete success and the branded credit card was launched successfully on a national scale.

Our client has retained Test-Direct's services to facilitate future programmes of work as they expand their financial offerings.

### 4. Key Benefits

- ▶ Increased engagement with the business
- ▶ Introduced an auditable testing process
- ▶ Higher productivity and effectiveness in user acceptance testing
- ▶ Business confident in launching a major financial product on a national scale
- ▶ Cutting-edge financial management system successfully deployed
- ▶ 3 million accounts migrated successfully.

## Risk Based UAT Case Study

### 1. Client Background

Our client is a multi-national company and a world leader in developing solutions for managing credit card services. The company has a 50 year history and is valued at over \$24 billion. Their requirement was to deploy their software solution for a leading UK bank.

Our end-client was one of the UK's largest retail banks, with over 250 years of trading. In 2006 the bank had profits of over £1.5 trillion.

### 2. Business Challenge

Our client was in the process of implementing their credit card management system for the retail bank.

The project required the migration of 25 different credit card products and all the subscribed customers, including both MasterCard and Visa systems. This process was further complicated by a need to convert data during the process and to work within short timescales.

The system provides a range of capabilities for client organisations, from fraud detection, through account management and controlling ATM networks. During this exercise it was identified that the client did not have the necessary skills available to carry out acceptance testing of the new system. Our client therefore suggested a independent third party be brought in who they knew could assist the client in its user acceptance testing and recommended Test-Direct for that role.

### 3. Solution

Test-Direct has expert knowledge in the credit card systems to be deployed, and quickly built a team to support our client and the end-client. Using our in-house method (QUICK) our Test Manager worked closely with both vendor and bank stake holders. To meet the two primary goals of achieving speed of delivery and assurance of quality Test-Direct recommended a risk-based approach to testing the system. Through our expert knowledge of the system to be deployed, we were able give strong input regarding the areas where testing should be focussed to meet the needs of the business and for them to go-live with confidence.

Test-Direct deployed a team of our skilled test analysts who were fully briefed on the system and had prior experience of assuring it for client organisations. The overall implementation of the system was split into several delivery phases. During each of these phases our analysts carried out a detailed risk analysis of the elements being delivered and worked closed with both vendor and bank representatives to ensure the specific priorities of our end-client were met. We built a testing plan which prioritised the areas where most business confidence was needed, and this ensured that delivery dates were protected against slippage.

As this was a critical project for both of our partner organisations it was essential that the progress of testing could be accurately tracked and reported. Test-Direct deployed our standard testing metrics and then customised them to meet the specific information requests of the project.

Our team collected detailed information on the type of defects being detected, and used this information to refine the work being carried out. Defects relating to the most business critical areas could quickly be addressed and resolved, whilst future work could be refocused. Our team also developed reporting dashboards so the senior project management could easily see the status of the work.

As the user acceptance testing progressed our team identified the most critical business process and built these into a high-value regression test pack. This pack of tests was re-used within the project and formed a key part of the final system proving before go-live. The regression test pack was handed over to our clients so that it could be used in future projects involving the newly deployed system.

### 4. Key Benefits

- ▶ New system delivered successfully to live operation
- ▶ User acceptance testing carried out with high level of business engagement and clear communications
- ▶ Risk-based testing used to ensure the right things were prioritised
- ▶ Objective and independent testing gave the end-client a higher level of confidence than could be achieved with either vendor testing or in-house testing alone
- ▶ Re-usable regression test pack produced and handed over to the business.

## Model Office Testing Case Study

### 1. Client Background

Our client was a multi-national insurance provider with over £300 billion under management. The company has been in business for over 150 years and provides a range of insurance investment products to their customers, who number around 7 million in the UK alone. This engagement was with the general insurance division of the organisation.

### 2. Business Challenge

Our client needed to increase their customer reference number for seven digits to nine as their organisation continued to grow in size. This was a particularly challenging exercise as the customer reference number was used extensively throughout all the business systems within the organisation, including the reconciliation of their general ledger.

The project had been underway for almost two years and the client could not achieve the level of business confidence they needed through traditional testing approaches. If the new length customer number was not handled correctly by the full system then there was a significant chance the company would be unable to continue its day to day business. To ensure that all the systems would work as expected in live, the business needed to carry out a full and diverse month of processing across all their systems.

There were also challenges in engaging the right business representatives to carry out this needed work, as the end of the project overlapped significantly with the organisation's busiest time of year: this time period would require them to carry out both regular end of month activity as well as end of year processing.

Finally, there was a general problem of engagement between the project team and the business, as this piece of work was seen as an 'IT project' with no real value for the company.

### 3. Solution

Test-Direct took ownership of the testing process. Our test manager quickly identified the different factions within the client organisation and started to work on engaging with key business representatives.

Based on industry best practice mixed with practical experience we produced a test strategy which explained how a model office would be used to give the business

the confidence to go live with their systems updated to handle a longer customer reference. By bringing objectivity and credibility to the proposed work our consultant quickly won over the business representatives and got them to positively engage with the work. Our consultant also revised the timelines which testing was planned to be run over. By changing the proposed timeline slightly it was possible to use data based on live files from the company's busy period. These test files could then be fed back into the model office systems and the outputs were verified, making it possible to efficiently test a wide variety of system behaviour including both the end of month and end of year processing. In the course of this work our team identified that the client's model office was not as representative as required, and these shortcomings were resolved to allow the needed testing to be carried out.

By carrying out an analysis of the system our team identified and documented, at a high level, the business processes carried out during daily, monthly and annual processing. Subject matter experts (SMEs) from the business were then brought into the team to first sanity check these high level processes and then fully document the 'real' processes they carried out whilst executing the model office testing.

In addition to the test management activity, our team also mentored and supported the SMEs. The team trained the SMEs in QUICK – our in-house test method based on a combination industry best practice and many years of practical experience in delivering test services. Our team also included a skilled test analyst who worked with the subject matter experts on a daily basis; they worked with all the business testers and quality assured their work, helping them fully document all the processes and ensure that any 'assumed knowledge' was captured effectively. This level of documentation allowed the team to objectively assure that the necessary levels of test coverage had been achieved.

### 4. Key Benefits

- ▶ Key stakeholders were engaged and brought into the project, facilitating go-live
- ▶ An extremely thorough testing of the system functionality meant that the new system was deployed successfully with no significant issues experienced by our client
- ▶ Our client was left with a detailed test pack to support future work on the system.

In terms of remit, projects can vary dramatically and can include

- Test Consultancy
- Test Management
- Test Strategy and Planning
- End to End Testing
- System Testing
- User Acceptance Testing
- Test Analysis and Execution
- Automated Test Tools
- Non Functional Testing
- Capacity Management
- Data Management
- Environment/Configuration Management
- Incident Management
- Implementation Management
- Test Function Health Checks

## How We Do It?

Test-Direct have the ethos of delivery not sales. We offer all our clients the benefits of our proven QUICK test methodology. QUICK is a risk based, real world approach to delivering quality testing faster, reducing costs and improving testing process through Quality, Understanding, Improvement, Communication and Knowledge.

Alongside existing test processes, or in the absence of any structured process, the application of our QUICK methodology has enabled our clients, to confidently launch their systems and products faster, within budget and with increased certainty of outcome with regards to delivery of business change in the last decade.

## Where We Do It?

Our main office is Albion House, 29 Winckley Square, Preston, PR1 3JJ but we have people working throughout the UK and Europe.

## Who are we looking to recruit?

A wide range of Testers and Test/Project Managers with a strong delivery background, who can work to defined testing methodologies within a structured environment. You will potentially work on a variety of client projects requiring a flexible attitude and positive approach. We have vacancies in the Midlands and throughout the UK and the willingness to live away from home is a fundamental component of the job.

## The assessment process – what to expect?

- Once your application has been screened you will then be invited to a face to face assessment, likely to be held in our offices in Preston so that you can meet the team and see us on our home turf.
- As part of this process, we try and give you every opportunity to learn more about Test-Direct and for us to learn about you – your background, skills, knowledge and aspirations career wise.
- The face to face element usually lasts around 3 hours and covers a short welcome, a written test and an interview plus time to ask any questions you may have. We try to cover this all in one visit to enable an efficient, convenient process for all.
  - It includes a short welcome brief – which will give you more information about working for Test-Direct and about the company generally.
  - A written test which we have developed in-house looks to assess communication skills, workload management and the level of your testing ability. The test is hand written and, to be fair and consistent is also timed.
  - The interview will seek to understand your experience by going through your CV. In addition to this, being a consultant and predominantly client based, we also cover soft skills such as relationship building, workload management, commitment to delivery, communication and influencing skills.
  - For Test Managers (TM), we also include a short presentation as part of the process as we are finding that more and more clients want TMs to be able to undertake presentations regarding strategy, approach, progress etc.
  - We are happy to provide feedback as part of this process.

Once you have successfully completed this process then an offer will be made however, **before** we can put this offer in writing we will need to see

1. **Proof of identity and eligibility to work in the UK** – valid passport/visa/UK birth certificate
2. **Proof of residency** – driving license, utility/household bill issued within last 3 months.
3. **Reference** – of someone we can contact that has ideally known you for more than 3 years in a work capacity.
4. **Copy of Last payslip** – to prove last employment details

Again to facilitate a smooth, quick process and to save putting valuable documents in the post we are happy to accept this information at the face to face event and take copies on the day.

## Once recruited what should you expect?

Induction - One of the aims of the recruitment process is to understand what you know and can do as well as identify any gaps that you may have. Using the information we have gathered, we will plan your induction which, dependant on the level you join us at, could vary from a couple of days to a couple of weeks.

We regularly run an academy programme which covers theoretical and practical learning, as well information on the industry sectors in which we operate and the products associated with them. The knowledge of our clients' products and systems is retained with our permanent staff base and, subject to client approval, incorporated within our Academy literature.

For those who have not completed the ISEB/ISTQB foundation certificate we will aim to put everyone through this at the earliest opportunity.

## First assignment/project – what will it be?

Once your induction is complete then you will go into our resource pool until your first assignment comes through.

Work requests come in to our Capability Manager (CM), who then allocates the work out dependent on the required skills set and location of the project. The CM will aim to match requirements to available consultants, but with client requirements changing and dates slipping this can be a challenging process. Assignments can vary in terms of length from a couple of weeks, to months, to sometimes years. Requests can be for a single consultant to deliver a piece of work or for teams of people.

Once allocated to a project you will be given a “**working on client site form**”. This is a factsheet which tells you about the client and their business, the project that you will be working on, who else is already there or are going in as part of your team, contact details, information about shift patterns/daily hours of work, staff dress requirement, onsite facilities etc. It also confirms who your Relationship Manager will be.

The **Relationship Manager** (RM) role is there to act as the conduit between Test-Direct, the client and the Test-Direct team on site working on the project. Whilst on an assignment the RM will act as your line manager undertaking reviews, setting goals, identifying training needs, sanctioning holiday etc. At the end of each assignment they will produce an end of assignment review which documents any new skills/knowledge that you may have acquired, any training that has been carried out or is needed, plus

recommendation regarding likely next steps etc. This will then form part of your formal review as well as help feed into the Training & Development plan.

Once your assignment is complete you may come back into the resource pool before going on your next assignment or you may go straight onto a new piece of work.

The resource pool is managed by our Capability Manager, who will ensure that your time there is put to good use. Training and development opportunities, involvement in internal projects and research are some of the activities that you could be involved in.

## Career progression and salaries

- We have an established monthly review process when you are on assignment/project, whereby you and your RM sit down on a monthly basis to review your progress against objectives.
- In addition to this, more long term, you are given a salary plan whereby milestones, deliverables and objectives are set which are geared towards you developing your skills set and getting you ready for the next level up. So if you are a Test Analyst (TA) we would make sure you are fully operational at this level, using our job profiles as the benchmark to measure your progress. Once you are proficient we would then look to start developing your skills for a Senior Test Analyst (STA) role. Again this is reviewed regularly and when milestones are achieved etc a salary/role review can take place.
- Test-Direct actively supports personal development. The more skills, knowledge and experience that our colleagues have, the more transferable these are to our clients. Formal reviews will take place bi-annually, whereby ongoing development needs and long term career goals can be discussed.
- For colleagues who do not hold ISEB/ISTQB Foundation Cert – they will be encouraged, supported and sponsored to sit this exam, ideally in the first 6 months of employment.
- We are keen that anyone joining us sees the career opportunities that we can offer through the full testing spectrum.
- We have a salary scale for each role in the organisation. Using the information gathered at the face to face assessment we benchmark starting salaries against this scale.
- Salaries are paid on the last Friday in each month, for that month. Monthly salary is calculated as being one twelfth of the annual salary.
- Pay reviews are not limited to annual reviews.
- We also have a bi-annual bonus scheme based on individual and Company performance.
- To support colleagues' development, not only in relation to their skill set and knowledge, but also in relation to individual career development, the company holds quarterly promotion boards. The Promotions Board comprises of Relationship Managers (RM), Capability Manager (CM) and HR and its sole purpose is to review career progression opportunities.

## Expenses

- Unfortunately we are unable to offer travel expenses for candidates to come for interview.
- Our expenses policy is in line with HMRC guidance and so usually requires receipts to support expenditure and covers out of pocket expenses.
- Once working for us you will be allocated a “base location” this usually being the office or your home.
- We have a comprehensive Mileage Policy which covers reimbursement of mileage expenditure from your base location to client sites. Mileage is currently paid at rates in line with HMRC rules.
- Before mileage can be claimed, a copy of a valid insurance certificate must be provided clearly detailing the vehicle used for travel is insured for business mileage beyond travel to/from work
- Should you be allocated to an assignment/project which necessitates you staying away from home, we will pay for accommodation costs and provide a subsistence allowance. Where possible accommodation is booked and paid for centrally by the company. Again more details are outlined in our Expense Policy.

### **£20 daily on-site attendance allowance.**

This is a non-contractual, ex-gratia payment given in lieu of any requirement requested by the Company while attending a client site on a placement and working away from base location. Test-Direct recognises its colleagues are sometimes inconvenienced by such project placements; this payment is made in recognition of such inconveniences and also includes, but is not limited to:

- Travel time to/from home and the client site
- Any parking costs while working away from your base location
- Any transport costs between any accommodation and client location while working away from your base location

## Hours of Work

- Your contract of employment will define your hours of work per week – 37½ hours for Junior/Trainee TA/Test Analyst/Senior TA and for Team Leader / Testing Specialist /Test Managers, 40 hours per week
- If you are off charge or working in the office then you can flex your start and finish times around our core hour's principles - i.e. the earliest you can start/finish is 8am/4pm and latest you can start/finish is 10am/6pm.
- If you are working on client site then the expected working pattern will be set by the client and be included in the working on site form

## Days of work

- Typically we work Monday to Friday.
- Some clients may request ad hoc weekend working but the terms of this would be agreed in advance and you would receive time off in lieu or overtime payments.

## Staff Dress

- In the office, smart business wear, Monday to Thursday, dress down day/smart casual on Fridays.
- On client site, conform to local rules set by the client information of which will be included in the working on site form

## Holidays

- The holiday year is the period from 1 January to 31 December. The current holiday entitlement for all full time colleagues is 23 days per year. This would be pro rata based on start date. For part-time colleagues this figure is on a pro-rata basis.
- Entitlement increases with service up to a max of 30 days.
- All staff are also entitled to the normal bank/public holidays.

## Pensions

We have a contributory pension scheme that employees are eligible to join after successful completion of the probationary period.

Once the qualifying period of 12 months in the scheme has been completed, the Company will match employee's contributions up to a maximum of 5%

## Life Assurance

Eligible once probationary period is completed and equates to 3 times Basic Annual Salary

## Health care

We have a private health care scheme that employees are eligible to join after successful completion of the probationary period.

## Company sick pay

Employees will be eligible for company sick pay once they have completed 3 months service. The length of sick pay is determined by length of service.

## Probationary Periods

- 13 weeks for Junior/Trainee TA/Test Analyst/Senior TA
- 6 months for Team Leader / Testing Specialist /Test Manager

## Communication

To supplement regular meetings with colleagues, Monthly briefings are produced and circulated to keep you updated on Company news and developments. We also have a quarterly Newsletter "The Testing Standard" and other events to ensure free communication throughout the Company.