



# TEST MANAGEMENT SOLUTION Buyer's Guide

WHITEPAPER

# How to Select the Best Test Management Vendor?

The implementation of a Test Management system to automate business processes is a strategic investment for any development and QA project team. Buying the right system and choosing the best vendor is critical to your software quality success.

This Test Management Systems Buyer's Guide is designed to help business decision makers quickly identify their enterprise's testing needs, effectively communicate these needs to vendors, and successfully compare various product alternatives. To identify Test Management system needs, buyers must examine four crucial areas: vendor reliability, cost considerations, product requirements, and IT requirements. This guide is structured around these areas.

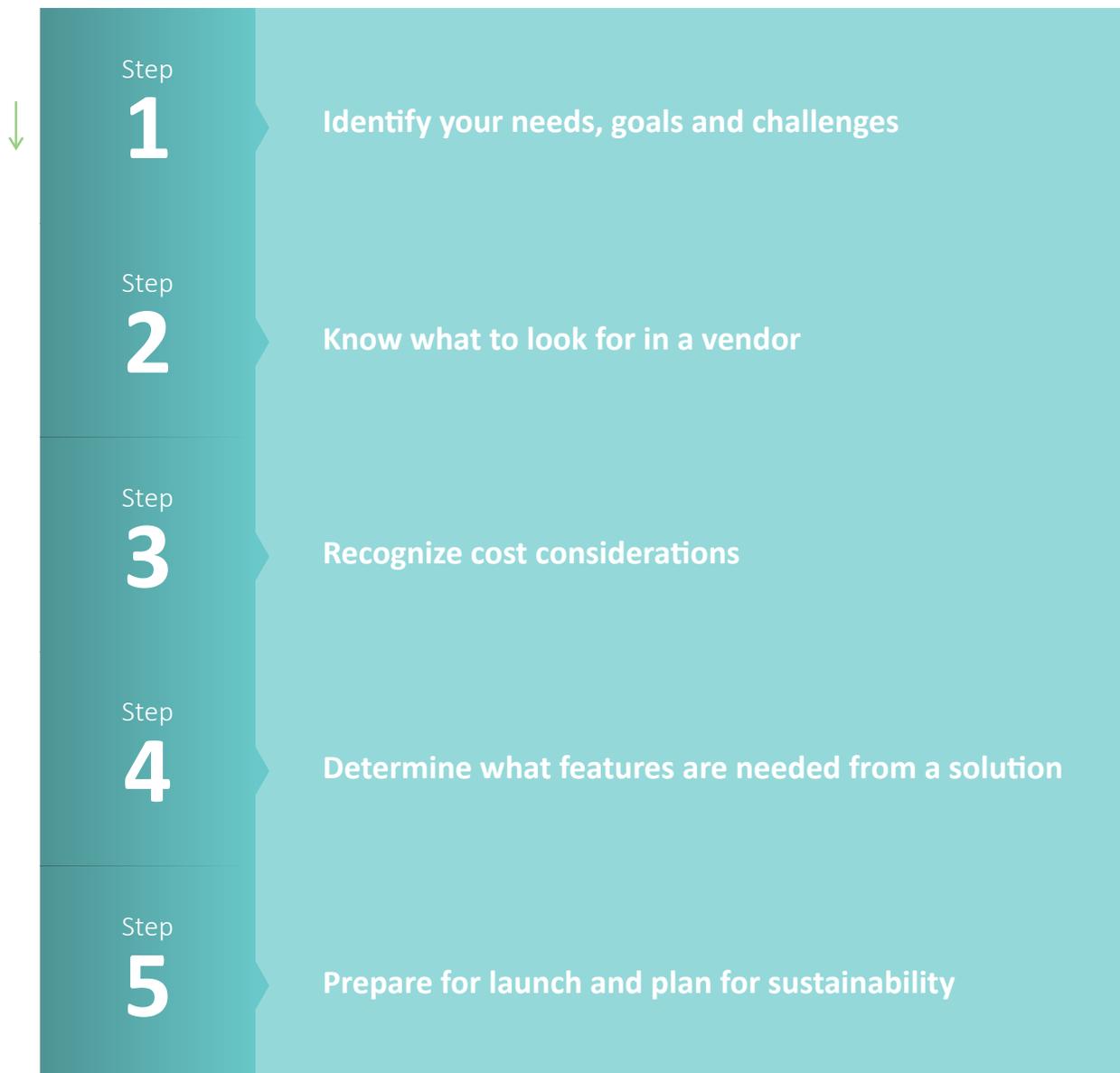
## Table of contents:

- 3** Test Management Overview
- 4** Buyer Situation
- 6** Vendor Reliability
- 7** Cost Considerations
- 8** Product Requirements
- 10** IT Requirements

# Why do you need **Test Management**?

A good test management platform streamlines the quality assurance process and provides quick access to data analysis, improves collaboration and enables communication across multiple, globally distributed teams. In addition to standardizing automated and manual test processes, this technology also allows teams to define, organize and reuse complex test scenarios and testcases, track milestones and view quality dashboards and metrics, making them available to all stakeholders.

Choosing the right test management platform depends entirely on the circumstances and needs of the buyer. Thankfully, deciding on the ideal solution is a simple, five-step process:



Step  
**1**

# Identify your needs, goals and challenges

While all buyers' circumstances are unique, there are some commonalities that characterize them, resulting in three fundamental potential buyer situations. By identifying your current scenario - including needs, budget restraints and challenges - you can land on the most worthwhile test management system.



## Situation # 1 - Just getting started with Test Management

- Small or mid-sized businesses with relatively simple business processes
- Requirements can be easily met by off-the-shelf Test Management systems with minimal to no customization
- Require basic integration with external systems like defect tracking and automation
- Have limited or no internal IT support
- More likely to explore on-demand Test Management applications

## Situation # 2 - Homegrown or underperforming Test Management

- Typically mid-sized business or project teams with some complex business processes
- Demands have outpaced current tools
- Growing need for integration with external systems
- Require depth of functionality in each system
- Have some data migration demands
- Need to enhance productivity and visibility

## Situation # 3 - Have a big legacy ALM suite

- Growing mid-sized businesses to large enterprises with highly complex processes
- Have globally distributed teams
- Utilize a mix of methodologies
- Have advanced data and systems integration needs
- Have sophisticated in-house IT expertise



Step  
**2**

## Know what to look for in a vendor

Now that you've identified your needs, goals and challenges, you're ready to start vetting potential vendors. Not all test management providers are created equal, with companies offering varying levels of performance, cost-effectiveness and support. While many test management systems appear to be similar, the following are business issues that have to be taken into consideration while evaluating vendors:



**1** Longevity

How long has the vendor been in business? Does it have a track record of success?

**2** Customer base

Is the vendor industry-specific? Are current and past customers happy with their experience? Can this be verified through case studies, testimonials and detailed references?

**3** Training service

Will the vendor bring your team up to speed on its platform and show everyone the ropes?

**4** Support

Will the vendor supply updates on a regular basis? What other assistance will it provide if needed?

**5** Credibility

Does the vendor have a strong reputation built upon a reliable brand?

**6** Partnerships

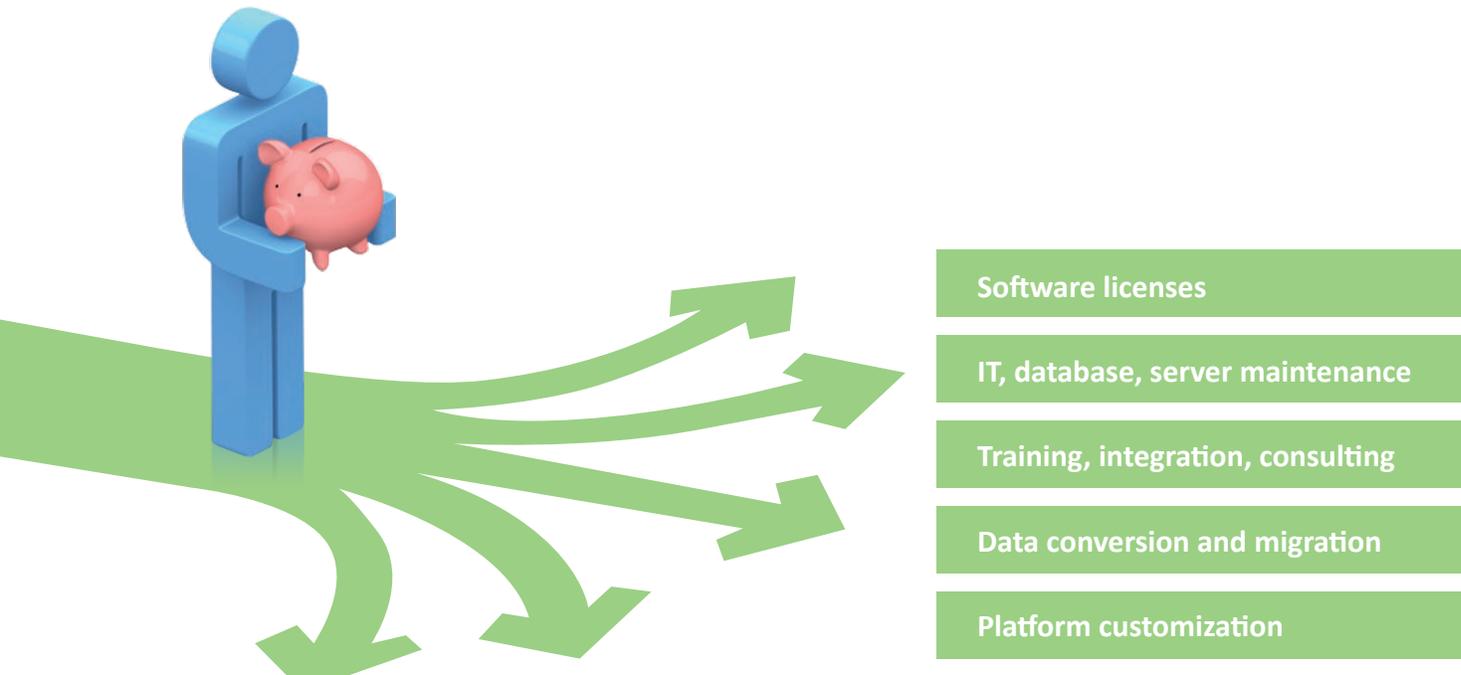
Has the vendor formed any lasting and beneficial partnerships with industry leaders?

Step

3

## Recognize cost considerations

Business leaders should be aware of the various costs that might come packaged with a test management tool. A good vendor will always keep these expenses in mind, offering a great value for what you get.



Software licenses

IT, database, server maintenance

Training, integration, consulting

Data conversion and migration

Platform customization

It's important to keep these various cost factors in mind when considering a test management purchase. If they aren't properly accounted for, companies may find that their total cost of ownership is higher than they anticipated.

Businesses should also accurately set their expectations on their return on investment. It's natural to look for immediate benefits with any new tech addition. However, test management solutions require some time to get properly aligned with systems and processes and begin demonstrating their value.

It's also wise to have a plan in place to measure precisely what you're looking for out of your test management system. Will you measure its performance in the amount of time it saves QA teams? An increase in test coverage? The quality of finished software releases?

Step  
**4**

## Determine what features are needed from a solution

You've established your test management goals, challenges and costs. Now it's time to look at what specific features you need - and expect to receive - from a test management platform to make its installation a success:

**1** **Testcase management**

Define and translate test cases as well as assign them to specific team members.

**2** **Test automation**

Share automated test runs with everyone and review past results by date and machine. A quality product should feature an automated test scheduler to prepare runs on selected computers.

**3** **Reporting & metrics**

Give managers and other superiors insight into the QA team's daily activity with detailed reports and metrics. This information allows decision-makers to more effectively structure units and allocate resources.

**4** **Requirements traceability**

Determine if your team has the right test coverage to meet each requirement.

**5** **Release management**

Take an in-depth look at release statuses and their underlying dependencies. Define sprints, iterations and builds to better understand where your projects stand.

**6** **Defect management & issue tracking**

Keep tabs on your defect activity, including how long it takes team members to find and address software flaws.

**7** **Rich interactive testing desktop & dashboards**

Browser-based, interactive desktops and dashboards allow testers to configure applications and freely switch between project builds.

#### **8 Organize test repositories**

QA professionals can tap into global testcase repositories to access every single testcase ever written. A quality test management tool will allow teams to both import and export testcases as well as manage local repositories.

#### **9 Integrate with leading defect tracking systems**

Test management systems shouldn't have to act alone. Ideally, they will be able to integrate with the best defect tracking systems available, such as JIRA.

#### **10 Manage manual testcases**

Create manual testcase templates to quickly write new testcase then map them to various requirements.

#### **11 Plan and execute test cycles**

Launch test execution runs from a single platform and manage every aspect of their use. Define test run properties based on various criteria and collect results for insightful testing metrics.

Some test management systems will offer more advanced features that go above and beyond standard services and further enhance QA efforts. Organizations that really want to take their software testing processes to the next level should be on the lookout for the following options:

- + **Real-time metrics and dashboards**
- + **Rich user interface**
- + **Quality business intelligence**
- + **Unlimited API access**
- + **Real-time collaboration**

Step  
**5**

## Prepare for launch and plan for sustainability



The last step in the test management purchasing process is to ready legacy systems to integrate the new platform and ensure that no issues arise that could delay operations. Consider these factors as you near a final decision.

**1** **Implementation process**

How easy is it for the IT team to install and configure the environment? Will the vendor provide any assistance during the rollout?

**2** **Migration**

Has the vendor handled test management migrations before? How have they charged for these services in the past?

**3** **Deployment**

Can the test management system be deployed solely on-premises, or does the vendor offer hosted services as well?

**4** **Backup/Disaster recovery**

How does the Test Management solution provide for backup and disaster recovery solutions?

**5** **Performance**

Does the test management function consistently for all team members - even remote users? How does it handle in real-world scenarios with collaborative elements?

**6** **Scalability**

Can the vendor's product be scaled up to meet your organization's needs and handle both current and future testing workloads?

7

### Seamless integration

How easily does the test management solution allow for integrations with various tools your teams are using: defect tracking, automation, requirements management, etc.?

8

### Control of data

Will you be able to easily extract all the data - tests created, test execution information, requirements, etc. - from the test management software? What formats are supported?

## Finalizing your decision

At this point, your team should have a good understanding of the various goals, challenges, cost considerations and performance requirements you need to take into account before purchasing a test management solution. By going through this step-by-step process, your organization will have zeroed in on the relevant criteria for making an informed decision. It's important to keep in mind that regardless of the bells and whistles a product offers, the success of a test management solution will ultimately be determined by how well it fits your company's specific needs. If you adhere to that simple principle, you can't go wrong choosing a test management platform.

# About Zephyr

Zephyr is a leading provider of quality management solutions, powering intelligent DevTestOps for more than 11,000 global customers across 100 countries. Project teams and enterprises of all sizes use Zephyr's products to enable continuous testing throughout their entire software delivery pipeline to release higher quality software, faster. Zephyr is headquartered in San Jose, CA with offices in King of Prussia, PA, Europe and India. For more information, please visit [www.getzephyr.com](http://www.getzephyr.com).



**Contact Zephyr Today!**

[sales@getzephyr.com](mailto:sales@getzephyr.com)

[www.getzephyr.com](http://www.getzephyr.com)

+1-510-400-8656