

Case Study

Functional Testing Services – of Microsoft Dynamics CRM Application for a major Superannuation Client

Your company information

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Solution group	Testing Services Group
Solution offering	Functional Test Outsourcing
Project name or title	Future Operating Model

Case Study for Functional testing services of Microsoft Dynamics CRM application

Client Profile

Client was established more than 20 years ago to provide professional financial planning advice to current and former public sector employees and their families. It is one of Australia's leading financial planning companies (Superannuation) with over 57,000 clients and more than \$14 billion in funds under management.

Client was implementing project "FOM" (Future Operating Model) to transform the Business and enable the delivery of a new way of engaging and transacting business with clients.

The Scope of the project encompasses three core business processes:

- Sales, Marketing and Customer Experience
- Financial Advice
- Funds Administration

It implemented Microsoft Dynamics CRM for the Sales, Marketing and Customer Experience component, including integration to the other components and SharePoint Document

Business Situation

CRM system will be used by front desk and back office staff of client. System will primarily be used for sales, marketing and client services purpose.

In Sales module, client on-boarding and product selling is supported. In marketing module, campaign creation and distribution takes place through different channels like Email, SMS etc. In Services module, all client complaints and queries are handled by client staff.

Technical Situation

Below were some of the key business areas within the application which needed to be tested:

- Testing scope covers functionality and business logic defined in the Requirement Document and use cases related to MS Dynamics CRM and SharePoint.
- Integration with other systems
- System will be tested on web and outlook client on Win7 SP2
 - ✓ Web will be tested on IE10
 - ✓ CRM Outlook Client (CRM2013 will be installed on Outlook 2010)

Solution

Due to tight project timelines, Adactin proposed and implemented Risk based testing for all 5 sprints followed by one complete cycle of Regression testing to cover End to End scenarios and making sure that bug fixes haven't impacted the working functionalities.

Sprint 1:

- To execute the identified test cases
- Highlight any risk identified during sprint 1

Bug fix sprint 1:

- Defects raised in sprint 1 will be resolved in the dev/test environment in parallel to testing and must be completed for code release.

Sprint 2:

- To execute the identified test cases
- Regression testing from sprint 1
- Highlight any risk identified during sprint 2

Bug fix sprint 2:

- Defects raised in sprint 1 and/or 2 will be resolved in the dev/test environment in parallel to testing and must be completed for code release.

Sprint 3:

- To execute the identified test cases
- Regression testing from sprint 2
- Highlight any risk identified during sprint 3

Bug fix sprint 3:

- Defects raised in sprint previous sprints and 3 will be resolved in the dev/test environment in parallel to testing and must be completed for code release.

Sprint 4:

- To execute the identified test cases
- Regression testing from sprint 3
- Highlight any risk identified during sprint 4

Bug fix sprint 4:

- Defects raised in previous sprints and sprint 4 will be resolved in the dev/test environment in parallel to testing and must be completed for code release.

Sprint 5:

- To execute the identified test cases

- Regression testing from sprint 4
- Defects raised in previous sprints and sprint 4 will be resolved in the dev/test environment in parallel to testing and must be completed for code release.
- If there are any remaining defects after this cycle, decision must be made with client Whether to proceed to UAT with these known issues – dependent on the defects, their Severity and impact to UAT
- Send the ST Test Closure report to client for approval and signoff.

Regression Test:

The objective of the regression testing is to provide assurance that software changes or enhancements have no unintended effects. It will provide a high degree of software quality by ensuring that fixes do not cause further errors in the system.

Benefits

Find below benefits of technical solution proposed to the client:

- Team logged more than 400 issues as part of testing phases leading to improving the quality of the application.
- All key business rules were thoroughly tested within the limited timeframe to make sure that they work correctly.
- Suggestions to improve the flow of business process were made with the business team, to create a better functional application.
- Training to client test team, made sure that all users are familiar and comfortable with the application.
- Effective bug tracking process ensured that open bugs could be easily tracked and fixed.

Products and Tools we used

Tool	Usage
Microsoft Excel	Requirements mapping, Test case creation and execution
Team Foundation Server	Defect Management and Reporting

Assistance provided by client resources

- Assistance provided by client SME's in understanding business requirements.
- Client SME's conducted knowledge sharing sessions on different modules of CRM.
- Client's Development team helped in getting access to test environment.
- Client's Development team assisted in bug fixing.
- Client's Project Management team assisted in test coordination with business users and development team.

For More Information

- For more information about Adactin products and services, call us at +61- 420983561 or +61 (02) 86773409
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