

# Context

my new gig had lots of challenges

tooling, lack of domain knowledge, lack of resources, unrealistic project plan, poor internal development practices, communication between teams, developer driven specifications, massive product, unreliable architecture, no dedicated testers, no budget for training existing staff, shifting organisational objectives, etc etc...

- I had a mandate to "make testing happen"
- Testing needed to commence ASAP

## Initial Steps

Everything depends on penetrating the uncertainty of veiled situations to evaluate the facts, to clarify the unknown, to make decisions rapidly, and then to carry them out with strength and constancy. - Helmuth von Moltke

- I took immediate steps to plan and deliver testing
- Resourcing was a major issue - so I decided to *facilitate* testing, by getting the business users involved from the outset
- Things proved more challenging than I anticipated though...

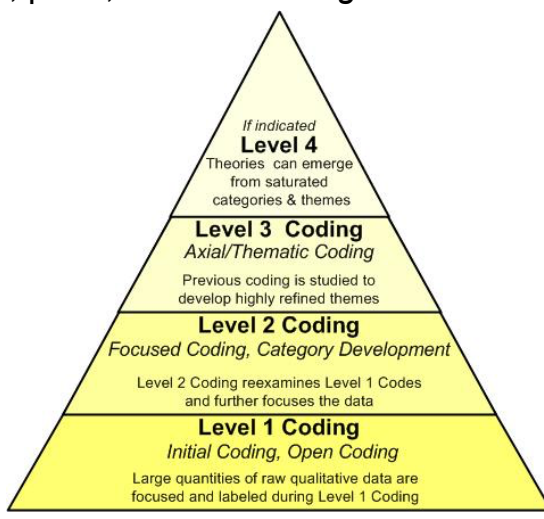
## First Encounters

No plan ever survives its first contact with the enemy. - Helmuth von Moltke

- CRM was not well understood by me
- It was not really understood at all by the business - nor were their requirements for it
- Dilema - we need to test CRM works, but we don't know what it does or how it should do it
- Answer = exploration
- We tried a couple of initial approaches using Google Docs, TFS & MS Test Manager, Trello - they didn't work out

## Qualitative Research Coding

Coding is a heuristic (from the Greek, meaning "to discover") – an exploratory problem-solving technique without specific formulas to follow. - Richards & Morse, 2007, p137, via *The Coding Manual For Qualitative Researchers*



The Coding Pyramid (from Chris Hann's Techniques & Tips for Qualitative Researchers)

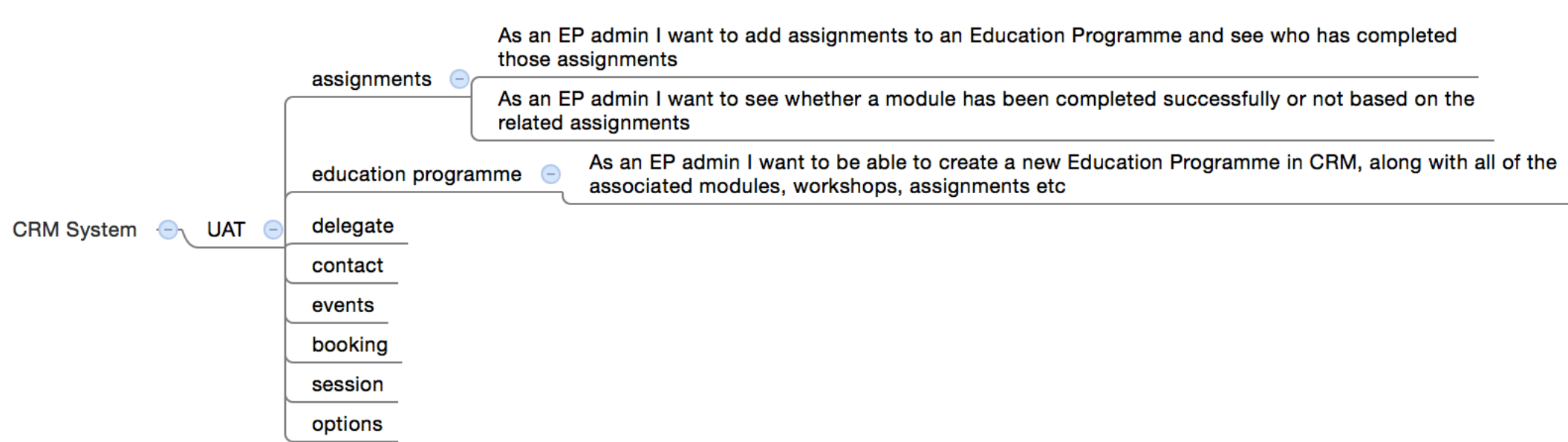
## Level 1 - Initial Coding

As an EP admin I want to add assignments to an Education Programme and see who has completed those assignments  
[assignments|education programme|delegate|contact]

As an EP admin I want to be able to create a new Education Programme in CRM, along with all of the associated modules, workshops, assignments etc  
[educational programme|events|booking|delegate|sessions|options|assignments]

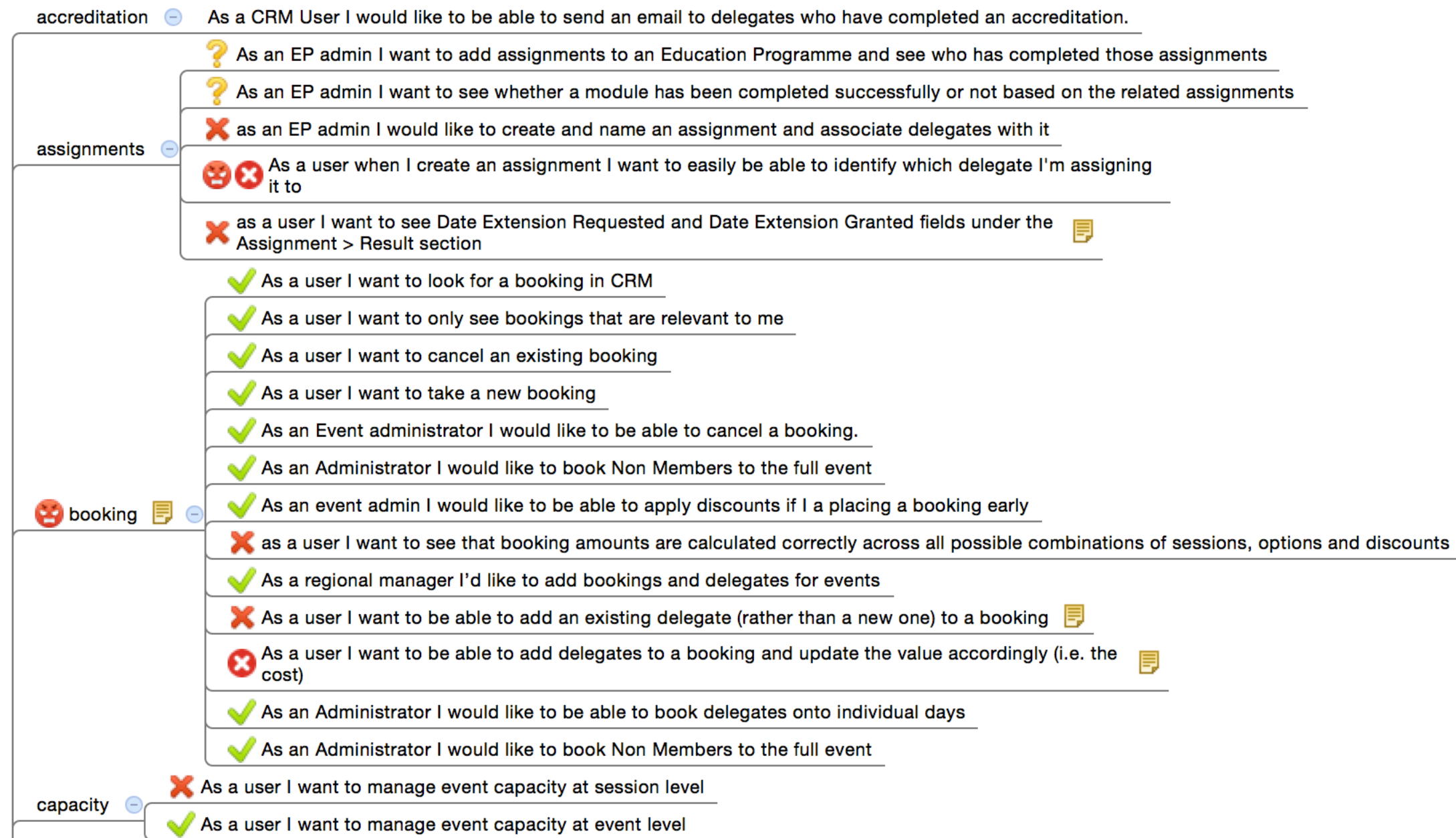
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## Level 2 - Focused Coding



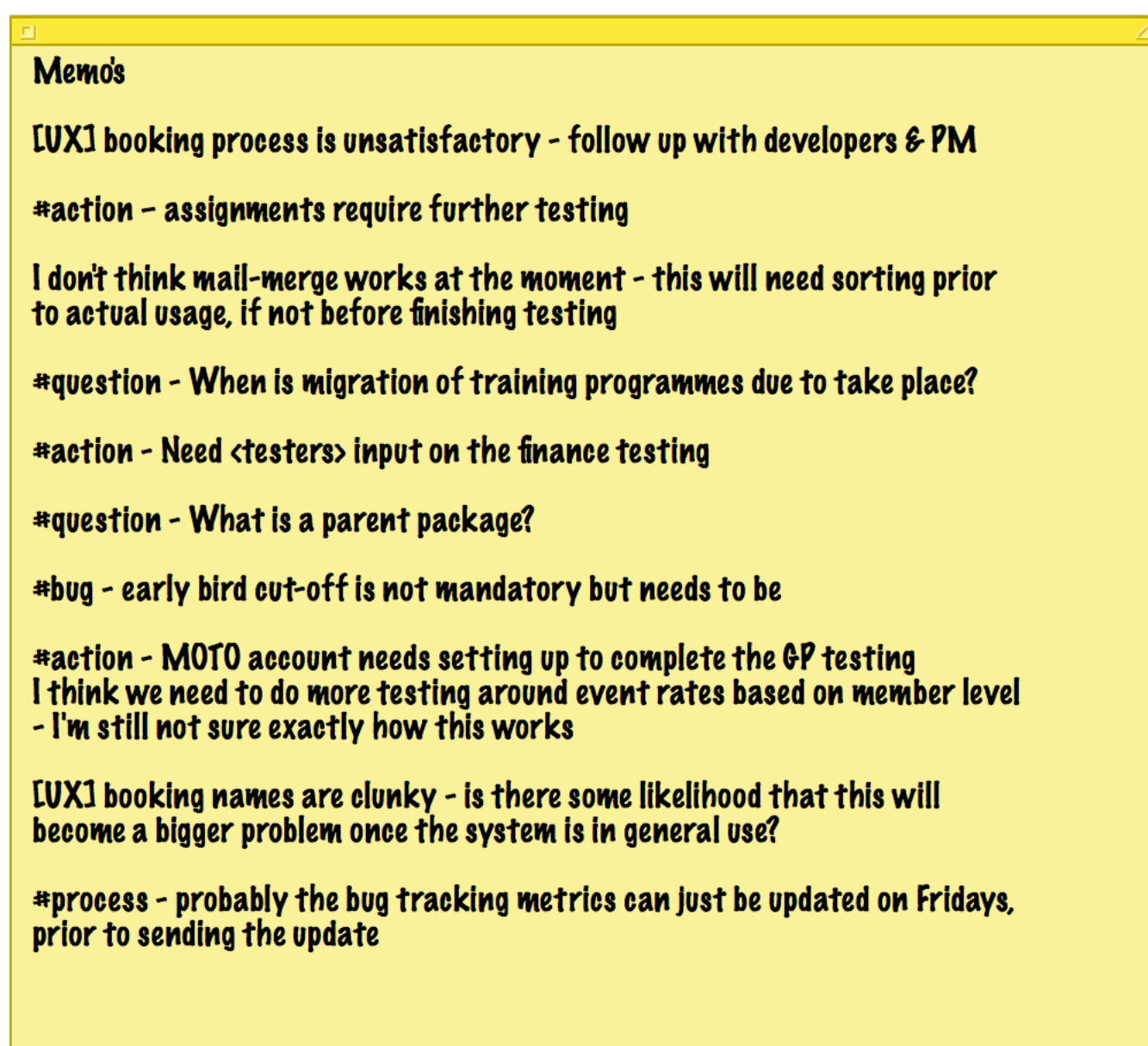
Codes and testing missions, mind mapped

## Level 3 - Thematic Coding



mind map after further testing and coding

## Level 4 - Emerging Themes



## Questions?

Since testing is a fluid phenomenon, its conduct requires flexibility of thought. Success depends in large part on the ability to adapt - to proactively shape changing events to our advantage as well as to react quickly to constantly changing conditions. - Helmuth von Moltke (changes mine)

With thanks to John Stevenson @steveo1967

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