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Zephyr Scale

Case Study

Zephyr Scale and Wüstenrot & Württembergische:

Simplifying the complexity of financial services requirements

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The W&W Group is a financial services group that originally emerged from the merger of the two long-established companies Wüstenrot and Württembergische. Financial planning represent the essence of the Group's business activities. Three divisions, nine brands and 17 companies are now part of this financial planning group. Together, they help their customers to fulfil their desire for personal development with the greatest possible security – each with their own contribution and all together.

The approximately six million customers of the W&W Group value the service quality, competence and customer proximity of the financial planning specialist, for whom some 13,000 people work. An extensive network of business partners, sales agents as well as brokerage and direct activities enables the W&W Group to reach more than 40 million people in Germany. The W&W Group will continue to focus on growth in future and has already established itself as Baden-Württemberg's largest independent financial service provider with the strongest customer base.

The team

W&W IT has several disciplines including development and test management. Leading the test management discipline are Claus Stanullo and Joshua Hähnel, who, along with some engineers, look after different strategies – even beyond testing.

"We try to optimize everything that involves testing, whether it's testing processes, testing technologies, automation technologies, and so on. We try to make it as useful as we can for the whole company," says Claus.

One of the most important tasks for them is to bring the company to new levels by helping it adapt to new technologies.

The challenge

"W&W is basically a combination of two companies," says Claus. "From a professional standpoint, they do different things, but we wanted everyone to be on the same platforms."

So they started looking for a tool tied to Jira integration. Claus's team made a list of possible Jira test management tools that could help. They even looked beyond Jira, but came to the conclusion that the tools that integrated with it had a very strong advantage.

The second priority for them was to have a tool that supports a keyword-driven testing approach. "At that time, about 3 years ago, I think Zephyr Scale was the only tool that really supported that, so it was an easy choice," says Claus.

Suitability for such a regulated industry

End-to-end traceability with Jira was paramount for W&W. "It was one of our stronger requirements," says Claus. "We need to have a chain from requirements over test cases, to test executions, to defects."

Tight traceability in a test management tool – one that lets you to follow your testing outcomes with more dynamic and broad-ranging reports – is exactly what Claus's team was looking for.

"Traceability reports are something we have to provide from a regulatory perspective," he said. "This is possible with other tools, but it's very complex. Whereas in Zephyr Scale it's as simple as getting the report in one click."

Now, with this tool, they have issues to prove that all requirements have been covered by test cases. That is, that all of those test cases have been executed. Per regulation, when any defects are found, it needs to be easy enough to track those defects and show them. Zephyr Scale allows them to do just that.

The ease of getting everyone on board

The other significant factor was being able to use it throughout the day, every day. Having a tool tightly integrated with Jira was a big advantage. "Not only for us, but for any financial service provider in Germany," Claus said.

"Usability is very important for us. We have lots of projects, and, from a regulatory standpoint, almost all of them have to prove how they tested their requirements."

Being able to use only one tool – like Zephyr Scale, linking test cases to requirements, defects, and executions – makes it easier for the tester. "Basically a tester without any technical knowledge, who tests the business processes, can use it," says Claus. "That was a big benefit for us. Now we have something that's easy for the user to meet our regulatory demands."

According to Claus, they had a lot of trouble with requirements not being up to date, or a test case not linking to the right requirements. "We managed projects using Excel, then we moved to (an older) test management tool. That had a bit of a Jira integration and could create defect tickets, but it was very rudimentary, and you couldn't link Jira requirements."

> *"With Zephyr Scale, we essentially have everything in one tool. At least for the user, it looks like it's all in one tool. And that makes everything way easier."*

Bridging the business with tech

Another part of why Zephyr Scale is so successful for W&W is because it's easier for everyone to stay in sync. "Everyone likes the tool," says Josh. "Everyone likes the usability directly integrated into Jira, and all the projects come running to us and say, 'We want to know how this tool works, we want to use it' ."

With a standard solution, Joshua adds that it basically runs itself. "The learning curve is not that steep, so it works well from a usability standpoint, and everyone likes using it."

They went on to say that the usability factor even added a psychological advantage with using

the system. For users who already work with requirements, it's a very small step to go on to the test section. They have their requirements, and they have their test cases, so making the next move comes naturally.

Claus added that getting the entire company to buy in was previously always a challenge, but the usability of Zephyr Scale helped tremendously.

> "A business analyst can easily become a test analyst because they don't have to concern themselves with moving to a different tool. This is indeed a very strong thing."

Bringing automation in

"From a test automation standpoint, we have our own home-made framework based mostly on open source drivers and some commercial tools, including Selenium, Appium and drivers for SAP and JAVA automation," says Joshua.

"The way we integrate this into Zephyr Scale is by using the free REST API. We have a test run with test cases in it that are automated, and they are in this modular structure."

"So what we do is we tell our framework to take one or more of the test cycles or test cases, and make a call to Zephyr Scale's REST API," says Josh. "It gets the data of all the modules, parameters, values, and how many steps it takes, then sends that to our framework. Then the execution magic happens. It'll play the results back through the API into the test cycle, and this works really well for us."

This is especially useful from a usability experience, as the testers who aren't

automation engineers don't have to care about what happens in the background. "What they want is to start an execution in the same space. They want to see what happened, and they want all the log files, screenshots, and step results with comments. And we can provide that using the API, which is really nice," said Josh.

"I think that was one of the most important things," he continued. "Automated test cases shouldn't look different than standard manual test cases. So I have all the test cases look identical, but when the automation engineer is done implementing all those scripts or keywords, then we're done. I can run the whole test case automatically."

Flexible REST API

Another strong point for this automation setup is platform independence. "We have different platforms, but we even have test cases jumping around the platform," said Josh. "And this is also supported."

The benefits are simple, but efficient. Joshua gives the example: "We can, say, start on an IBM Host and create a customer. And finally we go to the SAP system and create a contract for this customer. We could even go to a web application and do a bonus application for this contract. We can do this all automatically – and it's just one test case."

"At one glance, Zephyr Scale looks like a very simple, easy tool, easy to use – but you have this API that allows us to integrate our automation tool, which was very important for us," added Claus.

The right tool for the financial industry

"When I'm at conferences, I don't see anyone happy with the other tool they're using."

"People usually start with other tools that can do some of the things, but they just don't have the same level of integration with Jira as Zephyr Scale."

This keyword-driven approach makes Zephyr Scale an easy choice for financial service providers.

But Claus noted the importance of having to balance this. "How important is it to have everything in a tool? Much of it depends on the user base. We have a lot of non-technical people using the tool. For them, it needs to be usable, it needs to be easy, it needs to be intuitive. And they don't want an extra tool outside of Jira that needs to be configured correctly."

But he notes that they need both of those sides. "If you have a small company, only have five guys, chances are they're all developers. They won't care about having an extra tool. But for us (W&W), that's a factor because we don't want our users to worry about adjusting from one tool to another."

"They go to Jira, they click on create test case, and they create a test case. And they're happy with that."

The Result

Zephyr Scale is now the standard test management tool in the W&W arsenal.

"When we started, we had a few pilot projects, and it slowly started to gain some traction. Now we are at about 100 projects that range in the order of magnitude of hundreds of test cases. For example, our biggest project has more than 10000 test cases, and we have a handful with more than 3000 test cases. And at least half of all the projects use keyword driven testing as their main approach to specifying test cases."

"That number is definitely going to grow," concludes Joshua.

To see Zephyr Scale in action, and how its tight integration with Jira can help organizations manage their testing more effectively, take a free trial today, or visit the product page for more information.

About SmartBear

At SmartBear, we focus on your one priority that never changes: quality. We know delivering quality software over and over is complicated. So our tools are built to streamline your process while seamlessly working with the products you use – and will use. Whether it's TestComplete, Swagger, Cucumber, ReadyAPI, Zephyr, or one of our other tools, we span from test automation, API lifecycle, collaboration, performance testing, test management, and more. Whichever you need, they're easy to try, easy to buy, and easy to integrate. We're used by 15 million developers, testers, and operations engineers at 24,000+ organizations – including world-renowned innovators like Adobe, JetBlue, FedEx, and Microsoft. Wherever you're going, we'll help you get there. Learn more at smartbear.com, or follow us on LinkedIn, Twitter, or Facebook.

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