Managing Your Offshore Testing Team

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MANAGING YOUR OFFSHORE TEAM

Many testing teams are outsourced, using people from other companies and other countries. In many cases, neither the test manager nor the testers ever meet in person. And in these situations, most often, the time differences and cultural differences between people add more obstacles to navigate. While CEOs and other executives extol the virtues of achieving work in another country while we are asleep here in the States, as the test manager or team lead, you have the practical concerns of getting the right work done without the advantage of having staff onsite or staff working the same hours. As a software test consultant, Karen Johnson has worked with several clients who have outsourced and offshored testing. She's worked on waterfall and Agile projects with team members in different countries. Karen will share tips on how to get to know your offshore testers, how to communicate work tasks and how to request (and review) status reporting. Karen shares her thoughts on how to bridge the gaps in offshore testing.

During this talk:

I want to make sure people have a chance to talk, ask questions, share their ideas, move around and have time to meet other people.

We will have mini-brainstorming sessions to share and generate ideas.

We will use a team exercise where you can work with and meet other people.

And I'll give you a couple of "tests" throughout this program. Just kidding! Well – sort of – I do have a few pop quizzes get you thinking!
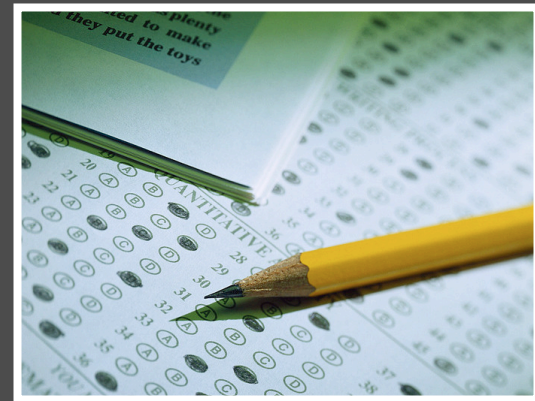
Know your offshore staff

KNOW YOUR OFFSHORE STAFF

- Do you know your current offshore staff members?

- Do you interview replacement staff members?

- Does your onsite staff know the offshore staff?

Experience Report

I've had clients with offshore testers where the onsite staff has never met the offshore staff or even seen a picture of the other people. For one client, I collected photos of each offsite staffer and shared the photos.

Next we (a colleague and I) assembled chairs in the working area and attached a photo to each chair. The area filled up quickly and it became more obvious how big the team really was. We left the working area like this for a few weeks and watched other teams walk through and observe.

A visual of each person helps to make each person come to life. Add video to meetings whenever possible.

Tips ~

Getting to
know your
offshore staff

- Exchange photos of the onsite and offshore staff.

- Hold video meetings (not just audio meetings).

- Host one-on-one sessions with offshore staff just like you currently do with onsite staff.

- Provide input to offshore staff reviews.

- Observe meeting participation and encourage offshore staff to join in.
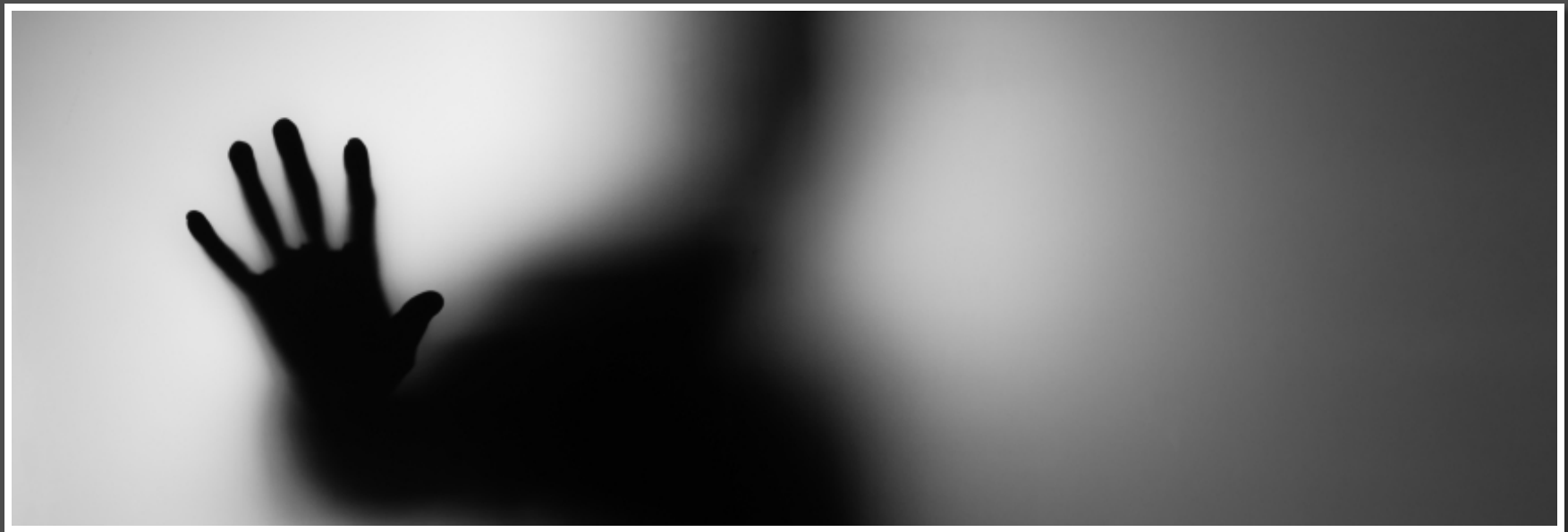
Identify shadow resources

IDENTIFY SHADOW RESOURCES

- Do you know what a shadow resource is?

- Shadow resources are backup resources for the existing offshore staff should something happen to a team member, the shadow resource is ready to step in.

- Shadow resources are often not billed directly (distinctly) to a client so shadow resources are often not known.

- Account managers often promise and "give" shadow resources at "no cost" to you so what's the harm?

Experience Report

At one client location, the use of shadow resources meant that for each person working offshore, there was a person assigned who was working alongside them (also offshore). Shadow resources were never introduced (to the client). For the most part, the client was not supposed to know the shadows existed – unless a staffer was out and then the shadow would step up and fill the spot.

There was no consideration given for whether the shadow resource was trained or able to fill the role.

Tips ~

On managing
shadow resources

- Ask your account manager if there are shadow resources.

- Request that when/or if a shadow resource is being used or needs to refill a position, that you receive notification.

- If standup meetings and other meetings are visual as well as audio – it will be more obvious when another resource joins the team (for a day, a week or more).

Brainstorm

Do you have solutions you've used
For getting to know offshore resources?

Let's make a list.

Working with the account manager

Tips ~

Working with the account manager

- Realize they may not know anything about software testing itself.

- Recognize they are in the business of staffing not testing.

- Be mindful that in every conversation or meeting they are assessing whether there will be staffing changes.

- Realize that some account managers will promise many things.

Get what you ask for

GETTING WHAT YOU ASK FOR

- When you assign work tasks, are the tasks understood?

- How do you gauge whether work tasks are understood?

- Do you receive the needed outcome from assignments?

Experience Report

There is a term called: codify. Codify in the dictionary is: to put (laws or rules) together as a code or system. In outsourcing, codify means to break down a work task into small steps so that the process is understood. In a thought job such as testing, this can be challenging because to define steps that include how to think, how to find what is not expected (defects) is difficult. What may seem obvious to you, may need to be codified to an offshore staff.

With one client, the need to codify the steps to test software were difficult to write in detail for me as the process has become intuitive and to define the process explicitly was a challenge.

Tips ~

On getting the needed outcome from work assignments

- Sometimes it is necessary to "codify" the work.

- Codifying "thinking" work is challenging because you might *only* get exactly what you ask for.

- You might find you need to learn the difference between the following:
  - Knowing what you need
  - Asking for what you need
  - Giving offshore staff freedom to think outside the box while still following directions

More Tips ~

On getting the needed outcome from work assignments

- Use the most basic language to communicate.

- Follow up conversations with emails.

- Do not be vague. Be specific about what you need accomplished.

- Clarify exactly what you want delivered.

- Explain what it will take for a task to be "complete."

Quiz!

Let's find out what countries people *currently* or *previously* had staff located in.

Why?
So people working with the same cultures can make a point of meeting each other.

Quiz!

1. Form a team
2. Watch the video
3. Write the steps for the process shown
4. How many steps do you believe it takes to describe the process?

The video used during presenting is not available outside of the presentation.

The video was a short clip that showed a process.

The purpose of the video was to show how many steps were needed to "codify" a process – even a short simple process.

- Use the most basic language to communicate.

- Follow up conversations with emails.

- Do not be vague. Be specific about what you need accomplished.

- Clarify exactly what you want delivered.

- Explain what it will take for a task to be "complete."

Getting work done

Getting work product reviewed
by the vendor

Experience Report

In one client experience, I discovered that the testing staff was mostly fairly junior in experience and the individual testing teams did not have anyone reviewing their work product. Junior testers were writing plans and executing without much supervision or guidance.

When you have outsourced testing, do you know if anyone is reviewing the testers work product before the work is being turned over to you? Remember, you are the client of your outsourced team.
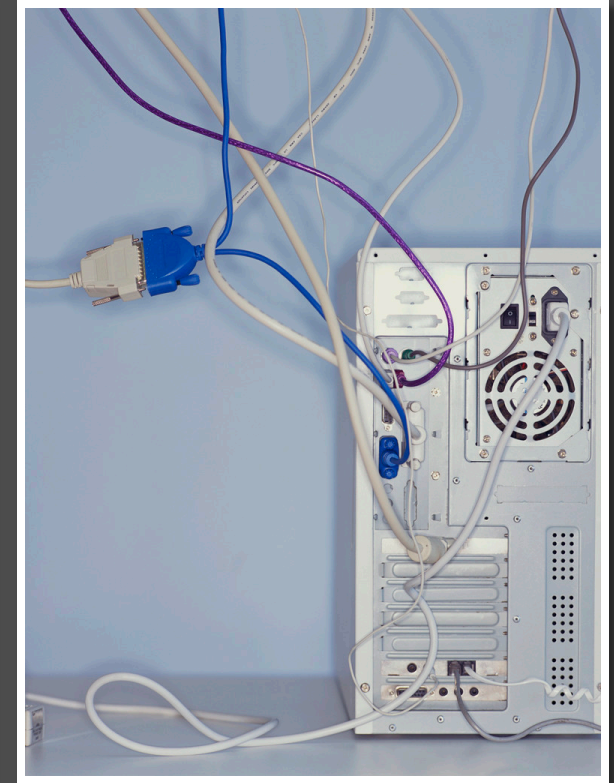
Supervising offshore work

Managing from afar …

test automation

mobile devices

equipment

Tips ~

Getting work
product reviewed

- Be involved.

- Ask questions.

- Realize how you and your onsite staff may create conflicting goals and priorities for offshore staff.

- Create an environment where anyone feels comfortable to ask questions.

Agile teams & offshore staff

AGILE TEAMS
WITH OFFSHORE STAFF

- Does your offshore team actively participate in all team meetings including daily standup and retrospectives?

- Does your offshore staff have additional meetings with their employer (your vendor) that you are aware of?

- Does your onsite staff interact casually and regularly with offshore staff?

Experience Report

In the most successful environment I have seen with Agile teams that included offshore staff, the video screens were used on a regular basis for standup meetings and other meetings. In addition, IM (instant messenger) sessions were used rapidly and frequently throughout the day. And the offshore staff worked on a rotating basis onsite at the client for weeks/and or months at a time.

Tips ~

Agile teams & offshore resources

- Frequency (contact & communication) breeds familiarity.

- Communicate to offshore staff that it is not "acceptable" to not participate in meetings.

- Train onsite staff to allow time for offshore staff to join in conversations.

Working with multiple teams
in multiple time zones

Brainstorm
How do you include offshore staff in meetings?

Let's make a list.

Receiving meaningful status reports

RECEIVING MEANINGFUL STATUS REPORTS

- Do status reports provide information that is practical and useful?

- Do you read the status reports you receive?

- Are status reports filled with meaningless metrics?

DO YOU KNOW WHAT'S BEHIND THE STATUS REPORTS YOU ASK FOR?

- How much work does it take to generate the status reports you ask for?

- Are you aware that what you ask for in status reporting drives how the team spends their time?

- Do you sense that status reports are not a reflection of how the team actually spends their time?

Experience Report

One offshore team proudly produced a monthly newsletter highlighting team accomplishments. The newsletter was filled with numbers such as how many test had been automated or how many defects had been reported.

But the newsletter did not explain the specifics behind what had been automated or whether the defects found were important, high priority or low priority defects. I cringed to think how much time was spent generating such a newsletter.

Recognize "lines of loyalty"
within the vendor

Tips ~

Receiving
meaningful
status reports

- Again, ask questions.

- If you receive status reports that you do not read and pull any meaningful information from then why continue to have staff spend time generating meaningless reports.

Roadblocks working with offshore staff

Roadblock:
Never meeting in person

Roadblock:
Not being on the same time zone

Roadblock:

Language – culture differences

Roadblock:
Ease of communications may be limited

Roadblock:
Trust

Roadblock:

Ongoing training & education

Idioms & Business "Speak"

- Don't assume "basic" business lingo is understood

- Be open to learning expressions from your offshored resources in exchange.
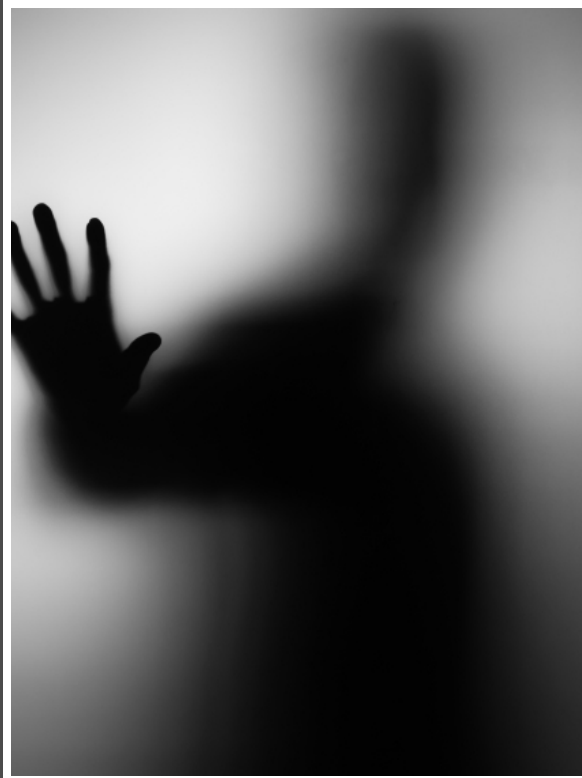
- Learning is not just one way.

An example:

*A **fork in the road** is a metaphor, based on a literal expression, for a deciding moment in life or history when a major choice of options is required.*
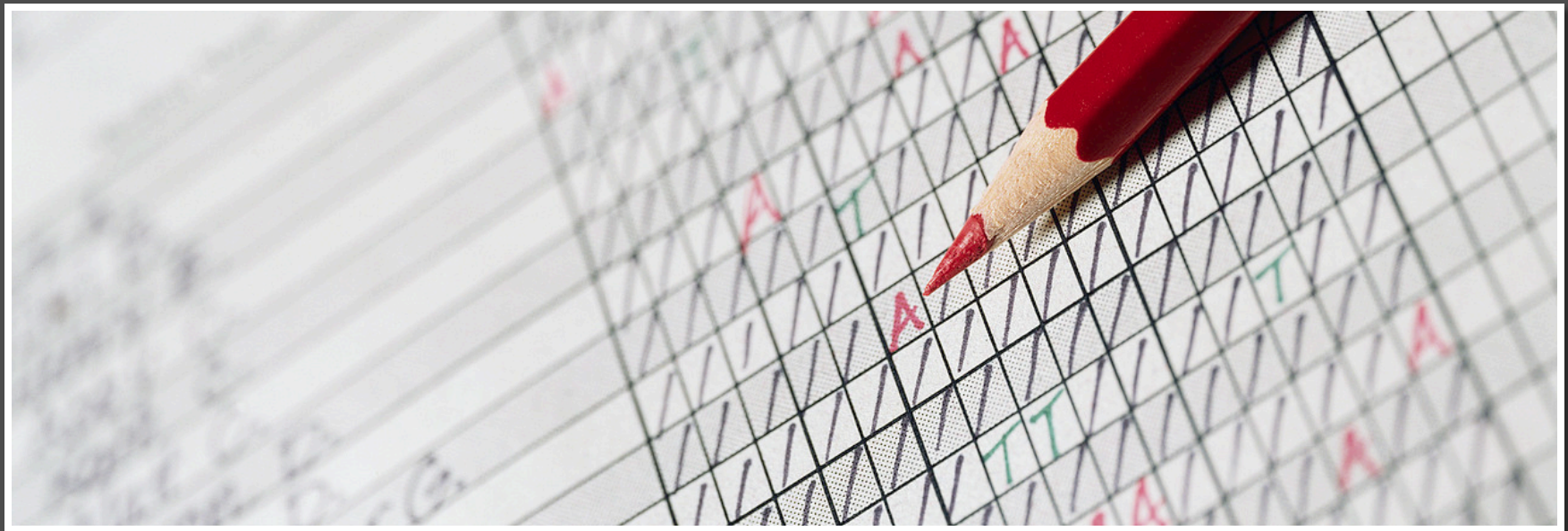
Rating the vendor

Know your resources

Shadow resources

Account manager
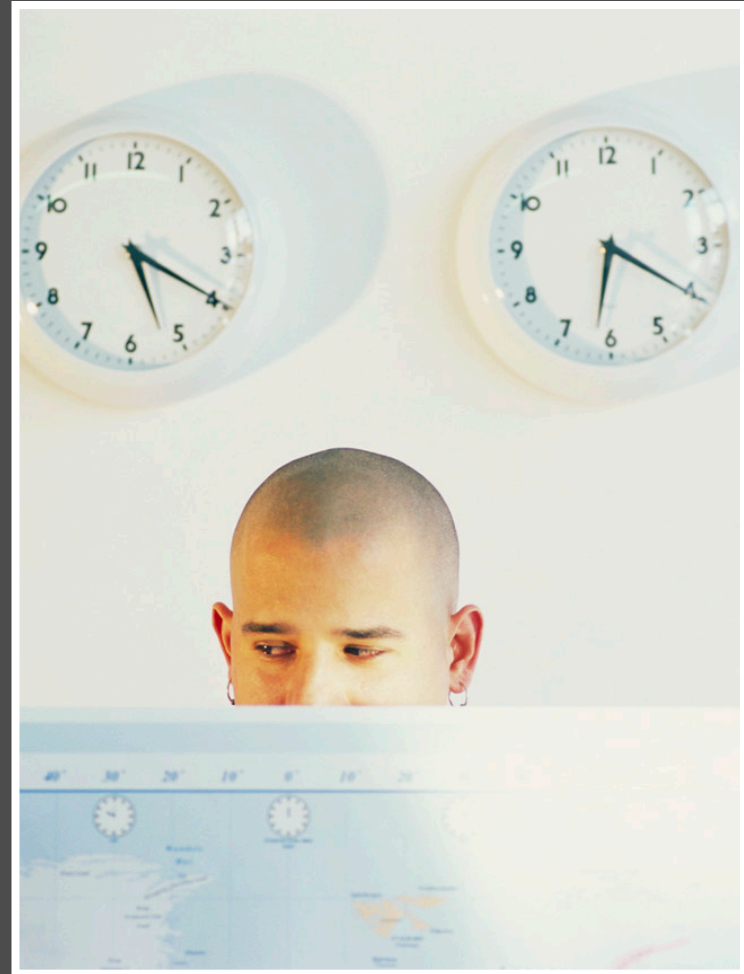
Assigning work

Reviewing work
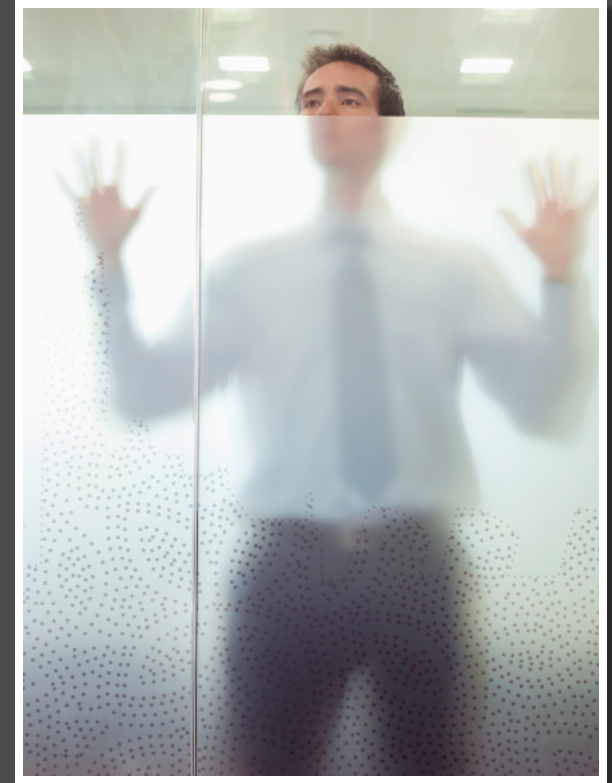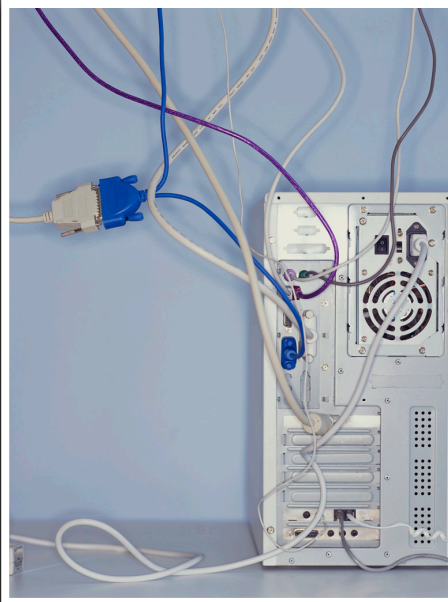
Supervising

Agile teams
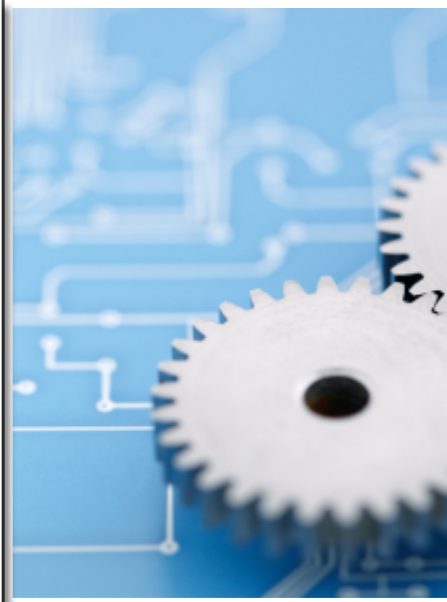
Time zones

Status reporting

Internal reporting

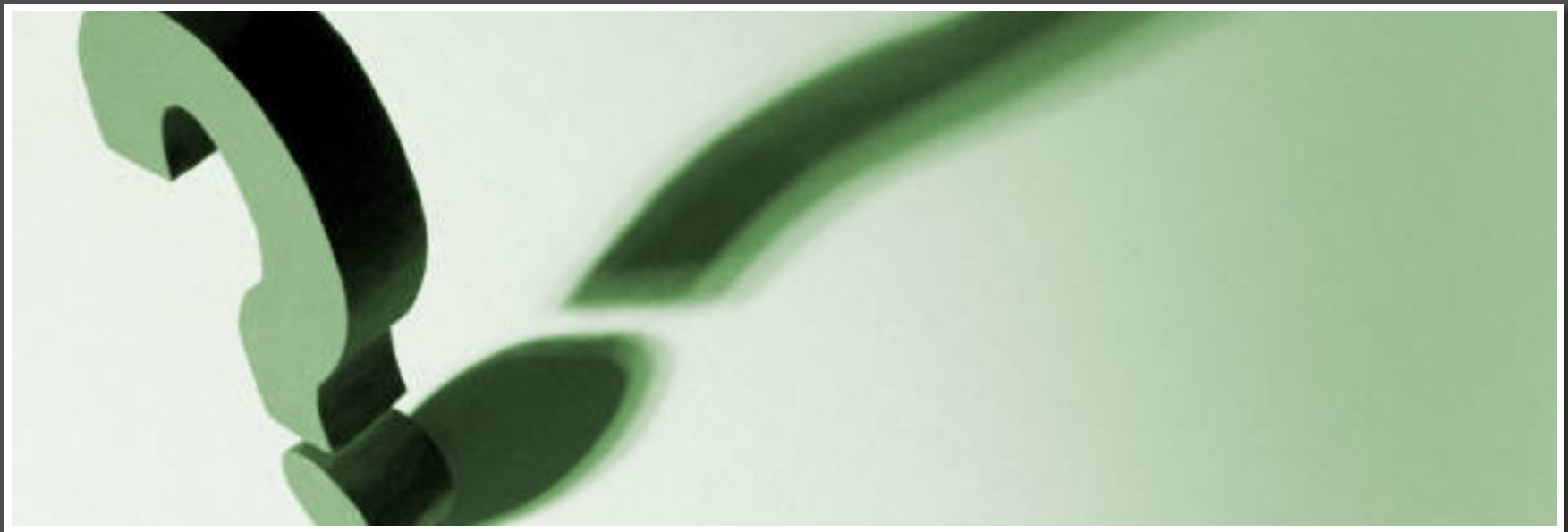Education   Equipment   Automation   BYOD

Thank you for attending.

Questions?

RESOURCES
FOR MORE INFORMATION

How to Build a Strong Team
InformIT
Karen N. Johnson
May 2010

Outsourcing Confidential
Software Test & Performance magazine
Karen N. Johnson
September 2009

Working Through Language, Time and Cultural Differences
FTP Press 2006
Karen N. Johnson

Harvard Business Review
Getting Offshoring Right
Ravi Aron and Jitendra V. Singh
December 2005