



WEALTH MANAGEMENT SOFTWARE  
COMPANY

MANAGED TESTING SERVICE





Managed Testing



Consulting



Test Automation



Performance Testing



Edge Academy



Digital Test Hub

## Summary

In October of 2014 the client contracted Edge Testing Solutions to help them fulfil their testing practices for their XPLAN system. With the huge success of the initial test team, the client decided to increase their contracted resources and allocate them to the Momentum Project within the company.

## Company Background

The wealth management software company is an Australian company with over 1000 employees over multiple offices around the world, including Canada, Hong Kong and the United Kingdom. Started in 2003, they deal primarily in products for the financial market and wealth management with clients ranging from in small independent businesses to multinational corporations.

## Project Overview

The client was looking to increase its test team to cover their uptake in work. Since the client's customer base was increasing this required a rapid expansion of their testing team. Difficulties arose when trying to find the right calibre of resources for their business and their needs.

The client required system testers to work on the momentum software. The momentum system is software that is used to allow companies to process mortgage and mortgage protection applications electronically. This allows the companies using the momentum software to efficiently complete their applications and create a simpler process for their clients.

During the initial stage of the process, the client requested two Test Analysts to work within the Momentum project team. The knowledge transfer for the Edge Test analysts were handled by the client senior test analysts using documentation and regression scripts for the system. Extensive knowledge was obtained through exposure to the environment, allowing Edge's test analysts to perform in-depth analysis of the system, allowing them to complete testing up to Edge's high standard.

Due to security reasons the client initially needed the analyst to work onsite until Edge had specific security measures in place, which Edge was more than willing to comply with.

Once Edge's test analysts had been with the client for six months, the company decided that due to the excellent service provided, they wished for

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Edge test analysts to handle knowledge transfers for new and existing employees joining the Momentum project.

## Solutions

To accommodate the client's requirements, Edge sent test analysts from the Digital Test Hub (DTH) to fill the needs of the proposal. Two test analyst were assigned to the Momentum Project. During the first few weeks of the project the Test Analyst acquainted themselves with the system and team to ensure that both parties were happy that they were the correct resources for the company.

With having all parties happy and familiar with one another and the system, the next stage was to move testing offsite back to the DTH. Edge completed the necessary upgrades to security for both hardware and software, which allowed for test analyst to work offsite. By allowing this to happen the client benefitted massively by having dramatically reduced cost.

The client then required an analyst to temporarily return onsite to help to train a new member of staff, which Edge was more than happy to comply with. Allowing the new member of staff to have mentor and therefore have a more pleasant and efficient learning experience, which in turn allowed the new test resources to work on projects faster.

They also required a test analyst be placed on site for a short time during a transition of management to ensure that communication and testing continued on smoothly. Which again was gladly provided by Edge.

With the client hiring more permanent staff and creating new projects, the momentum project now has one Edge test analyst on staff. Working with a new test lead, Edge's tester now works alongside the other test analysts on the team and provide support for anyone that has issues with the system.

By subscribing to this model the client has been able to obtain more efficiency within their business as their business grows and develops.

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## Benefits

The key benefits obtained by the client from using the Digital Test Hub service includes:

- The cost-effective alternative to the traditional contractors, which is due to the offsite setup of the Digital Test Hub.
- Test analysts were able to train the client's new staff on the momentum software
- Ramp up and Ramp down model allows the client to choose the amount of resources they require during busier or slower periods of their business.
- Providing them with ISTQB qualified testers, with the skill and aptitude to learn the system quickly during a time where they required more resources.

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