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The critical role of a Quality Assurance Partner in technology transformation
Ensuring seamless tech transformation success

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Introduction

Evolving business scale and changing business objectives require organisations to revamp their IT landscapes. Such strategic initiatives require significant investments, detailed planning and substantial involvement from key stakeholders to achieve business objectives.

Technology transformations may include greenfield/brownfield implementations and varied IT projects such as:

- ERP upgrade/implementation
- In-house technologies development
- Infrastructure migration, including cloud deployment
- Adoption to SaaS/PaaS platform

These projects need to be planned and executed appropriately, as failure leads to loss of time, money and effort, impacting the overall organisational growth. Recent surveys have highlighted the following as the key reasons for the failure of technology transformation projects:

- Lack of strategic planning and monitoring
- Insufficient participation from key stakeholders and internal collaboration
- Inadequate testing, including integration with the application ecosystem
- Unstructured approach to data migration and cut-over actions
- Not enough documentation for critical decisions taken

Critical aspects that should be focused on during the project lifecycle to ensure a successful implementation of a technology transformation project are:

Adopting the **best-in-class strategies** to meet project objectives

Effective governance of project management

Using technology to ensure a smooth transition, effective tracking and monitoring

Defining adequate standards for respective project milestones such as data completeness and accuracy, testing sufficiency and appropriate tracking and monitoring

Maintaining **adequate documentation** and standards

Exploiting the **full potential of standard functionalities** within the prospective technology and reducing avoidable customisations
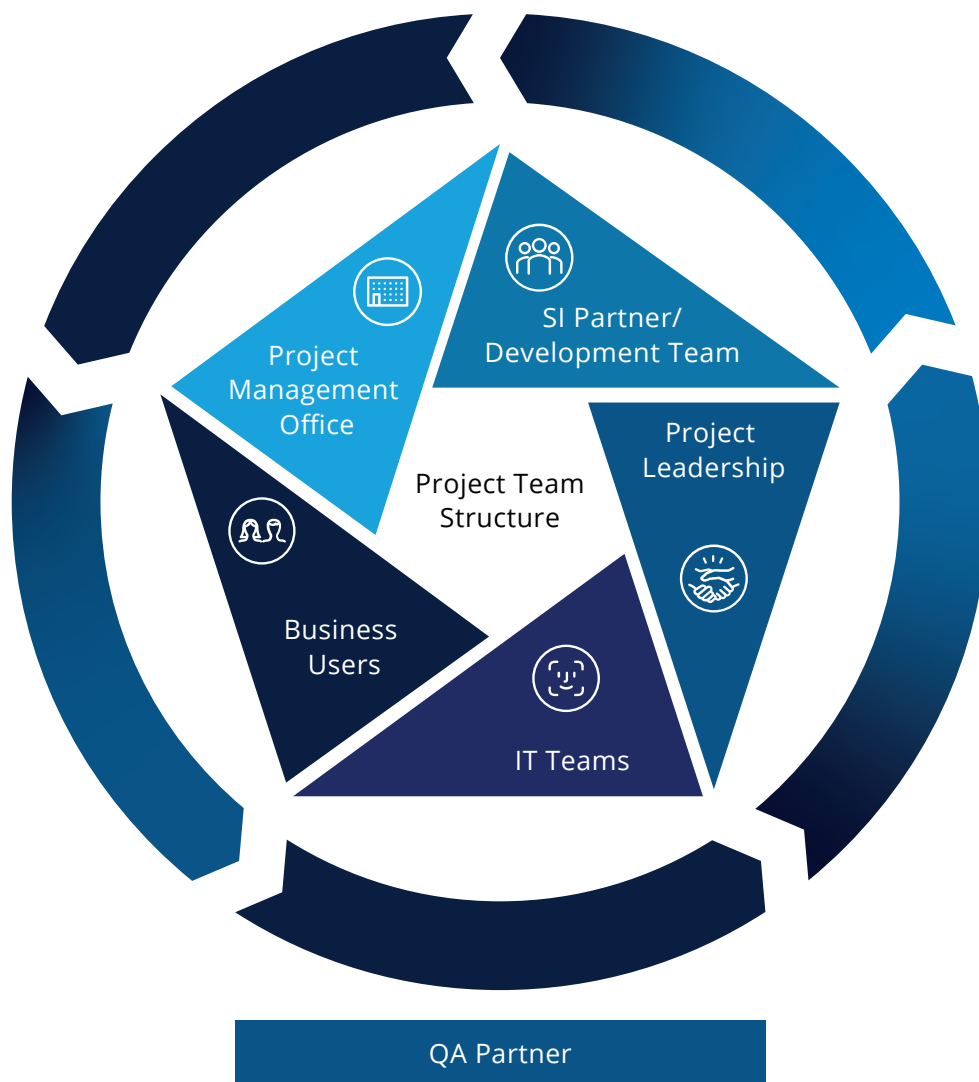
Identifying process gaps/drops affecting smooth execution after implementation

Tracking and benchmarking every action to validate the appropriate resolution before going live

Ensuring the readiness of internal control compliance after going live

Need for an independent Quality Assurance (QA) Partner

The System integration (SI) Partner, PMO and project teams have specific responsibilities and objectives within each project. However, the breadth of their duties may lead to important tasks being overlooked. Therefore, bringing in an independent partner with a clear focus is essential to provide a governance layer that ensures oversight of the overall project structure.

Project Management Office

SI Partner/ Development Team

Project Leadership

Project Team Structure

Business Users

IT Teams

QA Partner

The "No QA, No Go" approach can be implemented to prevent oversights during the project. Some key responsibilities of a QA partner in a project include the following:

Project implementation strategies and approach

- Identify issues and challenges that may impact the project's success and lead to additional costs
- Align with leading best standards and practices
- Align the governance program with PMP frameworks

Data migration activities

- Validate the adequacy of data elements
- Ensure that completeness and accuracy are validated, pre- and post-load reconciliation, and the defect management process is followed for data migration.

Unit testing, user acceptance testing and system integration testing

- Validate the adequacy of identified test scenarios and suggest recommendations to include the critical system checks
- Ensure the coverage of input validation checks, authorisation matrices, and automated calculations-related checks within test scenarios
- Validate completeness and authenticity of the testing performed
- Evaluate system functionalities and customisations to derive maximum value from the technology

Defect management

- Validate the approach to record, track and monitor the defects identified at various stages of the project
- Assess the mechanism to categorise the identified defects based on risk rating and priority criteria
- Identify and correct any disruptions or defects before moving to the next stage

Validation of system interfaces

- Validate testing results of data flow between ERP and connected systems for completeness, accuracy and integrity
- Provide independent monitoring to ensure slippages are identified, reported and course-corrected appropriately
- Maintain adequate governance and documentation standards throughout the project to meet the expectations of statutory auditors

Cut over and go live

- Review the cutover plan and activities to successfully complete implementation activities, including tracking data migration, live monitoring in the cutover window, system downtime, and a plan for BAU.
- Evaluate compliance readiness through project execution rather than as a post facto requirement

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