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## Vision 2015 Information sheet – Process Test Approach

### Purpose

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The purpose of this information sheet is to provide Vision 2015 projects and Integrated Programme deliveries (known as BSD's) with a guide to determine the best fit process test approach.

### Audience

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The intended audience for this information sheet are Business owners, BSD Managers, Project Managers and the Business Analysis Team.

### Background

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The process changes INZ will experience through Business Service Delivery drops are of varying complexity and risk. Testing business processes prior to finalising for deployment into the business helps us to:

- improve the efficiency of the process
- remove non-value adding steps
- identify and fix errors and further mitigate risk
- ensure there are no unexpected business impacts (people, process or technology)
- further validate our benefit assumptions
- obtain sign off for deployment.

There are a number of ways to test processes through both the design and pilot phases of a project. These can include but are not limited to the following examples which can be completed individually or combined to suit the level of complexity and risk involved.

1. **Process walkthroughs** – end users are taken through the new process maps and any supporting documentation to assist with items listed above (typically done without system or tools)
2. **Pilot** – a 'live' test of the final solution on a limited scale prior to full deployment. The extra effort involved in running a pilot is worthwhile when there is change of a significant size, cost and risk involved in implementation
3. **User Acceptance Testing (UAT)** – end user testing (by staff or customers) of the system and processes to ensure it meets their requirements and can be accepted for deployment
4. **System Integration Testing (SIT)** – tests interactions between systems after they have been individually tested
5. **Full simulation or model office** – the build of a working office that brings together teams of stakeholders and process/system subject matter experts to test and refine complex business designs.



## Understanding complexity

In order to guide teams through selecting the best fit process test approach, the following tables have been provided. They are a guide only meaning logic should prevail and other elements such as cost and time may impact final decisions.

The table below should be used first by project teams to quantify complexity, and therefore risk, of the process change they are delivering.

The highlighted boxes and total at the base of the table provide an example of how a process change might be quantified.

	Process	People	Technology	Projects
<b>5</b>	New level 4 processes along with significant change to existing processes	Significant change to multiple roles and responsibilities	Introduction of a new system(s)	Five or more projects delivering change
<b>4</b>	Significant change to multiple level 4 processes	Moderate change to multiple roles and responsibilities	Significant change or new functionality added to existing system(s)	Four projects delivering change
<b>3</b>	New level 4 process or processes introduced	Moderate change to one role and responsibilities	Minor to moderate changes to existing systems	Three projects delivering change
<b>2</b>	Moderate change to an existing level 4 process	Minor changes to multiple roles and responsibilities	Minor change to existing tools or templates	Two projects delivering change
<b>1</b>	Minor change to an existing level 4 process	Minor changes to one role only	No technology change	One project only delivering change
<b>Sub-total</b>	<i>Process = 3</i>	<i>People = 2</i>	<i>Technology = 2</i>	<i>Projects = 1</i>
<b>Total</b>	<i>Complexity/Risk score = 8</i>			

## Determining best fit process test approach

Once the complexity/risk score has been quantified, the second table can be used to help determine the best fit process test approach to follow. Examples of current tests completed or planned are also provided to give a comparison.

Note: UAT and SIT testing which are typically used for system testing have been included. If technology change is being implemented however, the process test approach recommended should be considered in conjunction with the technology teams approach to system testing.



<b>Total rating</b>	<b>Overview</b>	<b>Suggested test approach</b>	<b>Example provided for comparison</b>
<b>0 – 8</b>	Low complexity and risk associated with the changes.	Process walkthrough(s) with subject matter experts.  Include staff to represent the role(s) impacted.	<b>Customer interaction model</b> – estimated complexity/risk score of 8 mainly due to the number of projects delivering change at the same time.  <i>While impacts were across multiple roles, changes were at procedural level with no technology change (online account used to customer communications was tested under the technology stream)</i>
<b>9 – 15</b>	Moderate complexity and risk	A pilot and/or combination of process walkthroughs, UAT and SIT for sufficient testing of the technology and process change.	<b>Triage and Verification System (interim)</b> – estimated complexity/risk score of 14 due to the moderate impact across all elements of people, process, and technology and multiple projects involved across the Manage Risk cluster. <i>The pilot run prior to global implementation was critical to confirming expected results and reducing risk.</i>
<b>16 +</b>	High complexity and risk	Full simulation or model office.	<b>Assess and Decide Workflow</b> – estimated complexity/risk score of 18. <i>This project will be testing new and changed level four process that cut across most roles and systems. A number of other projects are also delivering change both at the proposed time of testing (e.g. Quality and reporting frameworks) and at the proposed time of implementation/deployment (e.g. Final triage and VAT solutions).</i>