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SUMMARY

From September 2013 to March 2015, RefineM worked with American National Insurance to improve their cycle testing process so they could confirm policy outputs were working as intended. The main phases of the project were understanding American National's current cycle testing process, optimizing the process, and testing the optimizations through a series of pilot projects. RefineM delivered this optimized process, along with planning documentation, metrics to track results, and recommendations to further improve the process moving forward.

CHALLENGES

The unpredictability of the process posed several challenges. First, technical errors could derail testing efforts by rendering the output unusable and necessitating new test data. Another issue was a lack of plan and metrics; cycles were often run on an ad hoc basis, and there weren't markers to indicate whether a cycle test had run correctly. The lack of metrics also contributed to schedule uncertainty: it was difficult to estimate how many cycles would be needed for a given project and how long those cycles would take. This variability in project length also contributed to issues with staff availability; without a set timeline for cycle testing, it was difficult to secure the necessary resources for critical portions of the testing, which led to further project delays.

SOLUTION

RefineM's consultants developed an "as-is" process, from interviews with subject matter experts, and presented those findings to a core group of functional managers and VPs overseeing process improvement efforts. RefineM then developed the "to-be" process to reduce waste and clear bottlenecks, and validated that process with the core group and stakeholders. RefineM then created cycle testing plans for each project, including projections of the number of cycles needed based on the number of test cases and projected test cases per cycle. A major breakthrough was realizing that test cases could be "stacked," meaning testers could use the same data to check multiple cases at once. This process resulted in major efficiency gains for American National.

OUTCOME

American National Insurance was very pleased with the results RefineM delivered during this project. The RefineM consultant established an agreed-upon process that the core group and stakeholders bought into. RefineM presented American National with a plan and method by which to estimate project length and number of cycles, as well as metrics to measure the impact across projects. RefineM also provided a way to optimize test cases by developing a stacking method, which saved American National weeks of testing per project. The optimizations provided by RefineM were described as "a great asset to the organization."