

## iSelect Case Study:

## The Power of Quality People

How iSelect successfully implemented Salesforce using a standardised testing approach that streamlined planning, execution, and reporting.



***“Planit is the best testing partner with the finest resources I have seen. This is why we continue to engage Planit to partner with us on multiple projects for our transformation.”***

*Shannon Henwood  
Head of Technology  
iSelect*

iSelect is a publicly-listed Australian company with its headquarters based in Melbourne, Australia. There are two customer contact centres in Melbourne, as well as offices in South Africa and Fiji, with more than 800 team members working across these five offices and three countries.

In June, 2016 Shannon Henwood was appointed as Head of Technology at iSelect to lead the technical transformation, and reinforce iSelect's industry position as a digitally-enabled broker rather than a comparison website.

“One of my first goals was to transform our CRM with the implementation of Salesforce.

“Just as iSelect places importance on independence, I needed independent experts to test the implementation. In addition to independence, I am very clear about the type of testers we need and they need to meet specific selection criteria.

“These criteria are underpinned by the fact that I want to work with testers in a real partnership. They need to demonstrate that they:

- Understand our business and requirements
- Always look for better ways to do things because they aligned with us in being outcome focused in the best interests of our customers and stakeholders
- Have the capacity and capability to disrupt where needed
- Have the technical ability to work with and verify codes, and complete UA testing

***“We needed a test partner to address this and help us in achieving a standardised collaborative approach and we can be far more effective, transparent and visible. We successfully achieved this through partnering with Planit.”***

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#### KEY OUTCOMES:

- Increased visibility of risk position from a proactive communication and escalation channel.
- Ability to track project delivery through meaningful metrics by streamlining the test planning, execution, and reporting.
- Accelerated delivery of projects from Agile and adjustable staffing.
- More effective, transparent, and visible testing from a standardised collaborative approach to Jira.
- Increased project quality from testing expertise and functional knowledge, and a standardised approach to testing.

#### DELIVERED:

- Salesforce Testing
- DevOps Services
- Testing Tools
- Staff Augmentation

#### TECHNOLOGIES:

- Salesforce
- Atlassian Jira

- Create testing foundation processes and establish the transformational test plan
- Implement a robust testing plan
- Have the strategy to implement auto processes
- Proactively provide their professional opinion
- “Bleed orange” just like the we all do at iSelect
- Are an excellent cultural fit for us

“Having worked with Planit in a previous role, I knew and respected their work. We discussed our requirements with Planit and they provided their people recommendations, complete with technical CVs, and a cost-effective statement of work.

“The interactive interview with our team and the proposed test manager from Planit demonstrated an excellent cultural fit. I conducted the reference checks to complete the process, and having liked what I heard, Planit was selected.”

“Our new JIRA system, populated by the test team, generates reports that identify defects and provides a central point so we can see exactly what’s going on via the dashboard. We had the tools with no process.

“We needed a test partner to address this and help us in achieving a standardised collaborative approach and we can be far more effective, transparent and visible. We successfully achieved this through partnering with Planit.

## Quality and independence

“There are many benefits to our partnership with Planit, all of which provide significant returns on our investment. There are three characteristics of the relationship that impact the extent of these benefits;

- It is a real partnership where communication is excellent and trust is implicit
- We have consistent access to high quality people with real subject matter expertise
- The independence that Planit provides has proven to work in the best interests of iSelect, our customers and stakeholders.

“There are five key benefits resulting from Planit’s work with us:

#### Increased visibility of risk position

“Planit helps us gain better visibility on the quality of the projects being delivered and manage risks through a proactive communication and escalation channel. By streamlining the test planning, execution, and reporting, we are able to track the project delivery through meaningful metrics, such as defect density and defect aging.

#### Accelerated delivery of projects

“In line with best practice, Planit is Agile and accommodating to ensure that we have a smooth path to delivery and is free of interruptions by ramping up and down as the situation demands. The team is flexible, supportive, and has worked out of hours to ensure the project stays on track.

#### **ABOUT PLANIT:**

Get more out of your Salesforce implementation and deliver quality quicker with our expert advice, hands-on skills, and technical solutions. Access our value-add Salesforce Accelerators to make valuable cost savings and get up and running quicker.

Find out how we can help you unlock further value and efficiencies by assuring quality and accelerating delivery.

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#### **Improved customer experience**

“Our new JIRA system, populated by the test team, generates reports that identify defects and provides a central point for us to see exactly what’s going on via the dashboard. We had the tools with no process, but now we have a standardised collaborative approach that enables us to be far more effective, transparent, and visible.

“This is all in-line with what iSelect expects in terms of excellence in delivery for our customers. The team has gained significant functional and domain knowledge, improving their ability to support business users and conduct demo sessions to internal and external stakeholders.

#### **Increased product quality**

“By using Planit’s testing expertise and functional knowledge to deliver a standardised approach to testing, we are delivering project outcomes with increased quality. There is no doubt that improving the experience and quality of our products contributes to our business growth and impacts our bottom line.

#### **Commitment to continuous improvement**

“Planit actively seeks to add value by aligning with us on our business goals and with innovation in testing. Our test manager from Planit is currently working with various stakeholders at iSelect, including Architecture and PMO, to implement processes and controls along with standardised test reporting reliant on metrics.

“The open nature and partnership of the business relationship enables Planit to offer suggestions in the Technical & DevOps space to help achieve iSelect’s strategic vision.

### **An easy recommendation**

“Over the 12 months Planit has been our testing partner, their people have always proven to be a technical and cultural fit. Planit’s recruitment process is stringent and they get the best and most eager staff with a keen work ethic.

“They always support their people, and when I get a newly graduated Planit recruit, they are fantastic. Our internal team doesn’t want to see them leave.

“Planit is the best testing partner with the finest resources I have seen. This is why we continue to engage Planit to partner with us on multiple projects for our transformation.

“If you are looking for a body shop, you’ll never get the full potential of what Planit can offer. But if you are willing to partner with Planit and take their advice, it will be very rewarding for both parties.”

*Shannon Henwood  
Head of Technology  
iSelect  
Victoria, Australia*