Discover How St James's Place Used Eggplant Test to Accelerate Their Automation Strategy

KEYSIGHT

Overview

St. James's Place (SJP) is one of the UK's largest, advice-led wealth management companies. SJP advise over 917,000 clients on investments and all aspects of financial services. SJP's products and services include face-to-face wealth management advice on ISAs, Unit Trusts, Bonds and International Bonds as well as pension planning, mortgages, income protection, later-life care and financial wellbeing.

> Our approach is to give clients the confidence to create the future they want. We do this through face-to-face financial advice, delivered exclusively by qualified, expert advisers who make up our Partnership. Our technology is focused on supporting clients and the Partnership on this journey. Every experience with our technology estate matters, whether it's the first time a client accesses our website or using the digital services we provide to support clients and Partners through a lifetime's investment with us – establishing trust and confidence in our systems is fundamental to our success.
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> **Mike Gwyer, Head of Division**
> **Technology Operations Development and Projects at St. James's Place.**

With a Partnership of 4,693 qualified expert advisors supporting 917,000+ clients and trusted with over £148bn of client funds, SJP's success doesn't go unnoticed. But behind all their successes, there is a solid QA Test Automation strategy made possible through a partnership with Intellect and Eggplant.

Intellect Design is a global leader in Financial Technology for Banking, Insurance, and other Financial Services. Andrew Young, Delivery Director at Intellect shared his experience working with St. James's Place, achievements using Eggplant Test Automation and some of the challenges he has faced in the Financial Services industry whilst partnering up with SJP.

Challenges in the Financial Services Industry

We've asked Andrew, from Intellect Design, about some of the challenges he has encountered in his career within the Financial Services industry and during his time working with SJP:

Shortage of qualified QA engineers

As time went by, it was clear to SJP senior stakeholders that expanding their testing team without an automation strategy would hinder their growth plans. They required a standardized testing strategy with the right testing platform and partnership to drive their initiatives.

"One of the requirements for SJP's strategy was a solution that was very easy to use, didn't require upskilling and able to run the same script across multiple devices. At the end, the only Test Automation platform that checked all the boxes was Eggplant Test."

Covid and Mobile Testing

When Covid struck, many companies had to pivot their employees to home working, including SJP and Intellect. Even though offices were predominantly closed, they've continued to test from home. One of their biggest challenges was to test with physical devices when some of their team members caught Covid and couldn't carry out testing because the devices were not available on the cloud.

"That was a big learning curve for us, currently we have several devices in a secure location connected to Eggplant Cloud. By doing so, we can test devices remotely across different teams around the world anytime."

Complex Systems and UI Testing

There are often legacy systems that are extremely important for Financial Institutions, and these systems can have subsystems that also need to be tested. Eggplant Test allows the testing of multiple systems from a user perspective whilst testing a system that's connected to the backend simultaneously.

"Because Eggplant tests on a UI level and not through code level, we are able to find errors that when tested manually wouldn't appear. For example, a button that was visible on the code layer but hidden to the user on a UI perspective. It's crucial to provide a frictionless experience to customers, especially when they are trying to access important information, such as the balance of their retirement funds."

The Eggplant Experience

Regression Testing done at lightning speed

Before Eggplant, SJP had systems that could take up to two weeks with two or three people to do regression testing. Automation is more efficient because instead of a human trying to navigate the screen, a machine runs the test precisely how it's designed to do so and without the need of supervision. When Andrew's team automated the regression testing of these same systems using Eggplant Test, it reduced the testing time from weeks to hours. It not only provided St. James's Place with substantial savings in time and money, but also resulted in gaining consistency across their entire testing operations.

"In 2021, we ran a combined total of 2,261 days of regression automation across the whole of SJP using Eggplant, which saved them over £500k. At the beginning of the year, I set up a stretch target of 3,000 days. We finished 2022 on 3,730 days saving over £900k by using Eggplant Test Automation."
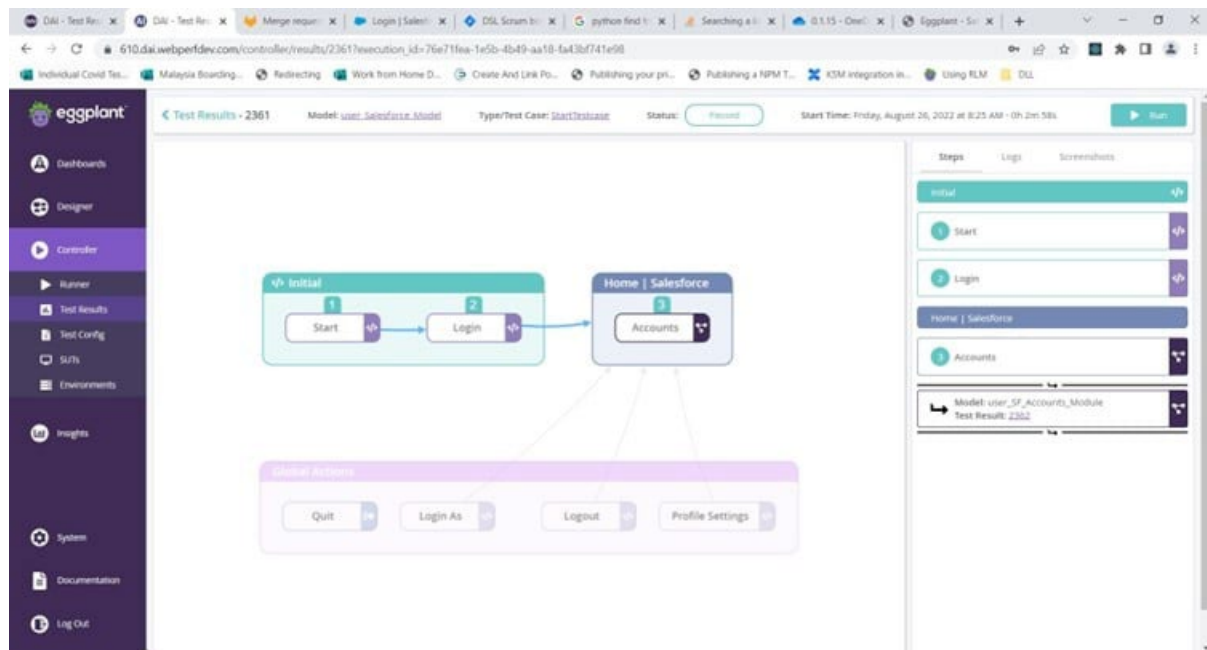
"Eggplant's team showed me how powerful their platform is. I haven't found a single system that Eggplant can't test it yet, including Salesforce."

Test Automation of Salesforce

Salesforce is a Customer Relationship Management (CRM) solution that allows an organisation to have a single but shared view of every customer. It's one of the most used CRMs in the world and one of the hardest applications to carry out Automation testing due to its complexity. After SJP implemented Salesforce, Andrew questioned whether it would be possible to automate Salesforce testing using Eggplant.

Importance of consistency

Data is everything when it comes to Financial Services. Without an automation tool capable of testing large samples of data in a consistent and accessible manner, businesses expose themselves to unexpected errors and bad user experience. Which then leads to the increased risk of customer dissatisfaction or loss.

"The data is of absolute importance for Financial Services or any organization dealing with real time information. When you have 3 people running the same test 400 times in a week, it's hard to keep it consistent. There's always the chance of human error when doing it manually, which makes test automation a great alternative for more consistent and reliable test results."

Key Outcomes

With the help of Eggplant's powerful software and Intellect Design's expertise, St. James's Place was able to automate manually tested regression packs, resulting in sizeable savings of time and money. After implementing a solidified testing automation strategy, ensuring the day-to-day operations proceeded according to plan and with the help of Eggplant Test, they were able to achieve incredible outcomes.

- Testing time reduced from 2 weeks with 3 people to machine testing within hours
- 1.4 million estimated savings with regression testing in the past 2 years
- 3730 days saved with regression testing by using automation in 2022
- 96.55% annual retention of client funds under management
- Digital Transformation Apps now integral to ways of working replacing legacy applications
- 15 months of 0% defect leakage to production for their key servicing and policy applications
- Functional Testers Upskilling to move into BDD with +90% success rate

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