Research Plan - Manual-to-Automation Workflow & Progress Reporting

Document Owner	@Ha Nguyen
Stakeholders	@Vy Huynh (Deactivated) @Tran Le @Huy Tieu @Mai Le @Anh (Vivian) Nguyen @Cristiano Caetano

Executive Summary

This research plan outlines our approach to validate the manual-to-automation workflow and Automation Progress Report concept for TestOps Gen3. The research aims to ensure our product direction aligns with real user needs and workflows, particularly focusing on teams transitioning from manual to automated testing.

Research Objectives

Primary Objectives

1. **Validate Manual-to-Automation Workflow** - Confirm our proposed status workflow aligns with real team processes
2. **Test Automation Progress Report Concept** - Validate key metrics, visualizations, and use cases
3. **Identify Integration Requirements** - Understand how TestOps should integrate with existing tools (Zephyr, Jira, etc.)

Secondary Objectives

- Discover pain points in current automation tracking processes
- Understand decision-making criteria for automation prioritization
- Identify additional reporting needs beyond our current concept
- Assess ROI measurement practices for automation efforts

Research Methods

Primary Method: Proof-of-Concept User Interviews

Method Rationale: PoC interviews allow us to validate specific workflow concepts and report designs with users who have real automation management experience. This method provides both validation of our assumptions and discovery of unmet needs.

Interview Structure:

- **Duration:** 45-60 minutes per session
- **Format:** Semi-structured interviews with concept validation
- **Materials:** Workflow diagram, report wireframes/mockups
- **Delivery:** Remote via video call with screen sharing

Supporting Methods

Method 2: Workflow Mapping Sessions

- **Purpose:** Visualize current-state workflows with key customers
- **Duration:** 30 minutes per customer
- **Deliverable:** As-is workflow diagrams for comparison

Participant Recruitment

Primary Participants (PoC Interviews)

Target Profile

- **Role:** QA Managers, Test Leads, Senior QA Engineers
- **Experience:** 2+ years in test automation
- **Tools:** Active Katalon Studio users with manual testing processes
- **Team Size:** 5+ person QA teams with mixed manual/automation work

Recruitment Criteria

- **Tier 1 (Must Have):**
  - Currently using Katalon Studio for automation
  - Have both manual and automated testing processes
  - Use external test management tools (Zephyr, qTest, JIRA, etc.)
  - Team responsible for 100+ test cases
- **Tier 2 (Nice to Have):**
  - Currently tracking automation progress manually

- Have automation ROI measurement practices
- Multi-project or enterprise-scale testing operations

Recruitment Strategy

- **Existing Customer Outreach** - Leverage PoC program, CSM relationships and support channels

Research Questions

Workflow Assumptions:

- How they currently track automation status (if at all)
- Decision-making process for what gets automated
- Assignment and handoff process between manual and automation teams
- Pain points in their current process

Report Assumptions:

- Coverage percentage calculation method
- Status categories relevance
- Key metrics importance
- Trend analysis value
- Scope and filtering needs

Integration Points:

- Test Management Tool integration importance
- Katalon Studio workflow fit
- Data synchronization needs

Interview Flow Strategy

1. **Deep Workflow Discovery (20 min)** - Understanding their current Katalon Studio + Zephyr process
2. **Workflow Validation (10 min)** - Testing our proposed manual-to-automation flow
3. **Report Validation (10 min)** - Validating the Automation Progress Report concept
4. **Insights & Closing (5 min)** - Capturing additional needs

Interview Protocol

Pre-Interview Preparation

- Review participant's current Katalon Studio usage, team profile and previous discussions in

  📄 Outreach
- Identify their test management tool stack
- Prepare customized examples using their likely test volumes
- Set up recording and note-taking tools

Interview Flow

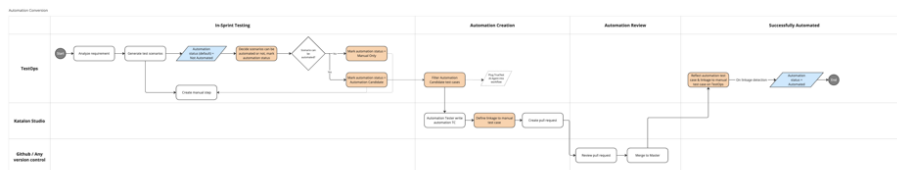#### Phase 1: Current State Discovery (20 minutes)

Focus: Deep understanding of existing manual-to-automation processes
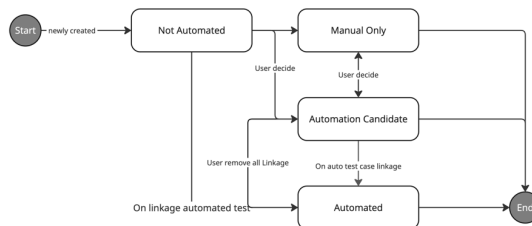
Key Topics:

- Team structure and role responsibilities
- Manual test case creation and management practices
- Automation decision-making process
- Current tool integration challenges
- Existing automation progress tracking methods

Phase 2: Workflow Concept Validation (10 minutes)

Focus: Test our proposed automation workflow

📝 Manual & Automation Status Workflow
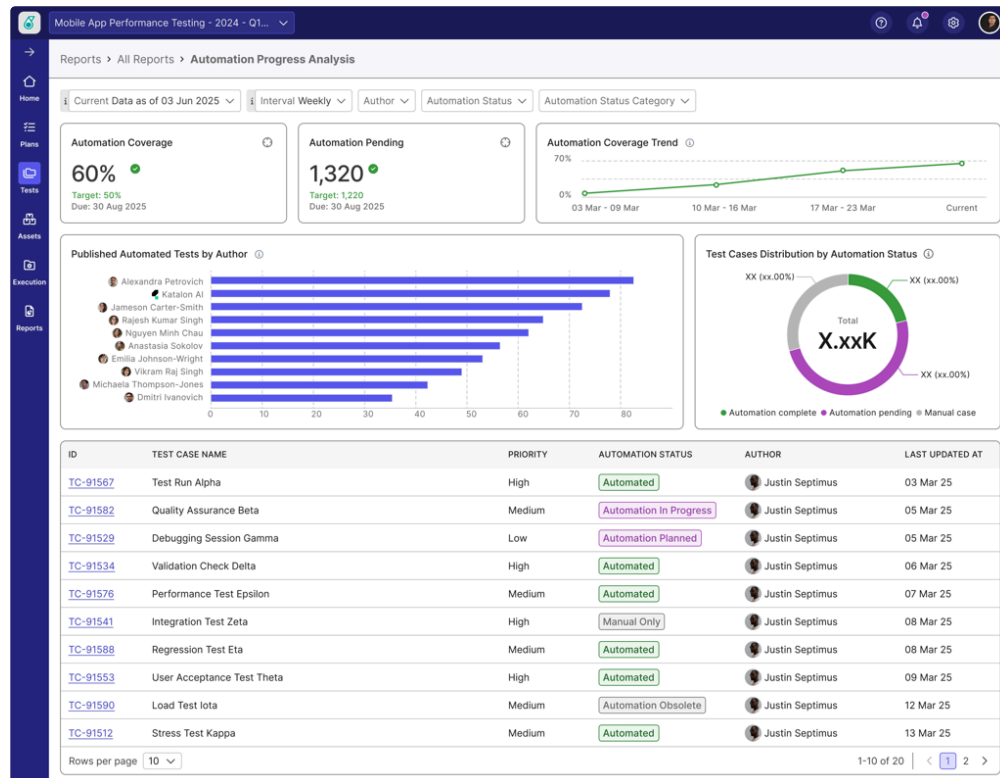

📝 Manual & Automation Status Workflow

Validation Points:

- Role assignments (Manual Tester → Test Lead → Automation Engineer)
- Status progression (Manual Only → Planned → In Progress → Automated → Obsolete)
- Decision points and handoff processes
- Status field implementation feasibility

Phase 3: Report Concept Validation (10 minutes)

Focus: Validate Automation Progress Report design and metrics

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Validation Areas:

- Key metrics relevance (Coverage %, Total Cases, Backlog)
- Visualization effectiveness (pie chart, trend line, data table)
- Scope and filtering requirements
- Use case scenarios and decision-making support

Phase 4: Integration & Future State (5 minutes)

Focus: Understand integration requirements and additional needs

Key Areas:

- Tool integration priorities
- Additional reporting requirements

- Implementation timeline preferences

Post-Interview Activities

- Transcription and analysis within 24 hours

- Insight categorization and pattern identification

- Concept refinement based on feedback

- Follow-up questions via email if needed