**IRS EST - Win Themes | Hot Buttons | Discriminators**

(*Source: Kickoff Meeting – Phase 2: IRS EST BPA-Unrestricted - Notes from 7/17/2024*)

**WIN THEMES:**

1. Deep Domain Experience with IRS EST:

* Demonstrated operational understanding of over 100 IRS systems, including legacy and modernized environments (e.g., MEF, ACA, IFS, RRP) and EST processes across mainframe and Java-based systems.

1. Automation-First Testing Strategy:

* Proven use of Jenkins, Selenium, Rational, and HP tools to enable 60–70% automation coverage, with a roadmap to increase further. Strong automation reduces cost, improves quality, and accelerates delivery.

1. Integrated Testing Across Platforms:

* Capability to support integration and regression testing across IRS mainframe, Java, and mid-tier applications, including support for EITE, SIT, UAT, and end-to-end validation across multiple systems.

1. Surge Readiness and Resource Bench with MBI:

* History of surge staffing (50–60 testers during tax season), with an established bench of MBI-cleared personnel and a trusted database of proven candidates. VALIDATE.

1. Agile and SAFe-Aligned Processes:

* Alignment with IRS adoption of Agile/SAFe practices and behavior-driven development. Experience supporting project teams across staggered sprints, integrated planning, and iterative testing cycles.

1. Proactive Risk Mitigation via Early Testing Involvement:

* Proposal to shift testing “left” in the SDLC to reduce defect injection rates and accelerate validation, including earlier involvement in requirements analysis and story grooming.

1. Expertise in Mainframe Testing at Martinsburg and Virtual Environments:

* In-depth familiarity with regression frameworks and modular integration of COBOL/mainframe systems, including environment provisioning and rollback procedures.

1. Support for IRS Strategic Priorities:

* Alignment with IRS goals such as zero-defect delivery, automation scaling, cost containment, and modernized test data strategies.

1. Experienced Proposal and Program Management Team:

* A proven team with hands-on delivery expertise and institutional knowledge of prior IRS contracts, capable of executing under compressed timelines and evolving requirements.

1. Ethical, Scalable Test Data Management:

* Understanding of IRS test data pain points and solutions including redacted datasets, synthetic data, and secure handling of sensitive information.

**HOT BUTTONS (Customer Priorities and Pain Points):**

1. Inadequate Resources and Staffing Gaps:

* IRS struggles with limited availability of MBI-cleared testers and inconsistent resource planning. Proposal must offer a sustainable pipeline of cleared talent.

1. Lack of Continuity Across Projects:

* Testers are rotated too frequently. Highlight your approach to maintaining institutional knowledge and team continuity.

1. Manual Testing Bottlenecks:

* Legacy projects still rely on manual testing. Emphasize automation capabilities and plans to transition manual processes to automated frameworks.

1. Late Testing Entry into Development Cycle:

* Test teams are engaged too late, increasing risk. Your approach should showcase early engagement and requirements-driven validation planning.

1. Poor Coordination Across Multiple Vendors:

* IRS has experienced siloed approaches with multiple vendors. Stress your collaboration model, governance, and ability to work cross-functionally.

1. Aging Technology Stack and Legacy Integration:

* Need to maintain and test COBOL/mainframe systems. Your ability to handle hybrid environments with both modern and legacy tech is key.

1. Security and Clearance Delays:

* Clearance processing can take 9+ months. Include your plan for onboarding MBI-cleared staff or managing interim support.

1. Performance Testing Across Large Datasets:

* Systems like e-File and ACA require massive throughput. Describe your experience handling high-volume performance/load testing.

1. Environment Provisioning and Scalability Constraints:

* Environments are statically provisioned and require pre-planning. Offer solutions using virtual environments, infrastructure-as-code (if applicable), and optimized environment sharing.

1. Quality and Timeliness Under Legislative Pressure:

* Tax law changes in Nov/Dec must be live by January. Position your ability to perform under high-pressure, short-deadline scenarios.

**DISCRIMINATORS:**

1. Incumbent Insight via TriTech:

* Our team includes TriTech, a current EST contractor with on-the-ground staff, offering incumbent insight, legacy knowledge, and immediate operational continuity.

1. Cleared, IRS-Experienced Personnel:

* We offer a team of MBI-cleared personnel with direct IRS experience. Letters of Commitment (LOCs) from named staff ensure immediate availability and stakeholder familiarity, reducing onboarding friction.

1. Superior Technical Capability:

* Our team spans mainframe, Java, mid-tier, and cloud-based platforms, offering seamless testing across legacy and modernized systems using best-in-class tools (Jenkins, Selenium, Rational, HP ALM).

1. Unmatched Domain Expertise:

* Our staff includes veterans of key IRS programs (e.g., ACA, MEF, IFS, RRP) and Census programs, providing a deep bench of IRS-literate testers and leads with experience in tax, financial, and administrative systems.

1. Proven Past Performance:

* Past performance includes Agile-based testing at scale (>$50M task orders), successful delivery on IRS, USPTO, and Census programs, and quantifiable accomplishments like defect reduction and test cycle compression.

1. Seamless Transition & Surge Management:

* Demonstrated experience onboarding 50–60 surge testers annually for IRS and Census. We ensure continuity through pre-cleared candidates and documented knowledge transfer protocols.

1. Automation and AI-Led Innovation:

* We integrate AI/ML tools for test script generation and validation and proactively analyze annual tax law changes to drive focused test coverage and reduce regression risks. (Rod input pending)

1. Optimized Cost & Resource Model:

* Our phased staffing model ramps down high-cost SMEs and ramps up junior staff with automation support. We leverage hybrid staffing and FFP-based delivery to maximize cost-efficiency.

1. Census Bureau Modernization Background:

* Our team brings lessons from large-scale modernization at the U.S. Census Bureau, using tools like SAS Viya, JIRA, GitLab, and virtual test environments—transferable to IRS enterprise needs. (Confirm with Rod)

1. Early Tester Engagement via Process Innovation:

* We propose a projected UWR-based tester onboarding model, enabling test design and data prep during early SDLC phases with minimal cost impact—aligning with IRS shift-left goals. (Confirm details with Rod)

1. Upskilling with AI-Augmented Training:

* We will train testers in modern scripting and validation techniques and deploy AI co-pilots to write and review test scripts, enhancing workforce agility and reducing reliance on manual effort.

1. Proven End-to-End Integration Testing at Scale:

* Our team led full-lifecycle end-to-end integration testing at the U.S. Census Bureau across mission-critical systems, including PEARSIS, SPEED, and ISSA, validating data pipelines, interfaces, and dependencies across regions and data centers.

1. Committed Integration Testing Experts:

* We offer Letters of Commitment (LOCs) from named Integration Testing specialists with prior IRS and Census experience, ensuring continuity and advanced familiarity with complex data-driven workflows. (Pending contact and confirmation)