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Professional Profile

Fiona Charles teaches organizations to match their software testing to their business risks and opportunities. With more than 30 years experience in software development and integration projects, she has managed testing and consulted on testing on many large and small projects for clients across the business spectrum, including some of Canada's largest retail, banking, financial services, health care, and telecommunications companies.

Fiona has been a consultant for 15 years. Prior to founding Quality Intelligence Inc. in 2007, she worked as a test manager and consultant on client projects for IBM Global Services and LGS Group.

Fiona has extensive experience designing, implementing and managing practical and effective testing and test management processes. In her role as founding manager of the LGS Toronto Testing Practice, she defined client testing services, designed and developed the LGS Test Manager's Toolkit, and coached and mentored testers and test managers.

Fiona began her career with software product development companies, progressing through roles as a technical writer, tester, and Quality Assurance manager, and acquiring a solid foundation in excellent software development, testing and release management practices. Her training and experience in performing project audits have proven invaluable in the test capability assessments now central to her consulting practice.

Fiona's track record includes several turnarounds of ineffective or stalled testing efforts. She specializes in program-level test management on multi-project programs and complex large-scale (enterprise) systems integration testing, but she is passionate about inspired, collaborative test management on software projects of all sizes.

Throughout her career Fiona has advocated, designed, implemented, and taught pragmatic and humane practices to deliver software that will delight its stakeholders—in even the most difficult project circumstances. Her articles on testing and test management appear frequently in *Better Software Magazine* and on *StickyMinds.com*. She edited *The Gift of Time* (Dorset House, 2008), and is co-founder and host of the Toronto Workshop on Software Testing, a peer conference for senior test practitioners.

Services

- ❖ Capability Assessment for Testing and Test Management
- ❖ Process Design and Implementation for Testing and Test Management
- ❖ Management of Large-Scale (Enterprise) Systems Integration Tests
- ❖ Program-level Executive Test Management on Multi-project programs
- ❖ Test Strategies and Plans
- ❖ Rescuing stalled testing projects
- ❖ Workshop facilitation
- ❖ Coaching and mentoring

Skills and Expertise

- ❖ Rapid assessment of testing risks, roadblocks and process issues
- ❖ Strong problem solving skills
- ❖ Strong leadership skills
- ❖ Test strategies that find bugs
- ❖ Communication and presentations
- ❖ Workshop facilitation
- ❖ Test Project/Program Management
- ❖ Coaching and mentoring
- ❖ Structured and exploratory testing
- ❖ Scenario testing
- ❖ Defect and problem management

Business Domain Experience

- ❖ Retail and Distribution
- ❖ Banking and Financial Services
- ❖ Private and Public Sector Insurance
- ❖ Telecom
- ❖ Health Care
- ❖ Manufacturing
- ❖ Energy
- ❖ Library Cataloguing
- ❖ Professional Sports Labour Union
- ❖ Software Product Development

Professional Experience

February 2007
to Present

Owner and Principal Consultant, Quality Intelligence Inc.
Toronto, Ontario

Offering test and test management consulting and test project management services.

April 2010 to
present

Programme Test Manager, FiReControl (UK)
EADS Defence Systems, Newport, Wales

Test Manager responsible for all testing done by the integrator on this critical national infrastructure project, with a team of 80+ testers (projected size). FiReControl is implementing a fully networked and co-ordinated system for the Fire and Rescue Services throughout England, consisting of 54 integrated components (primarily applications) covering everything from receipt of an emergency call via the 999 intelligent network; mobilisation of the appropriate personnel, equipment and appliances; provision to firefighters via mobile data terminal of data required to get to the scene and deal with the emergency; recording of incident data; closeout of the incident and secure storage of all records. Under the overall management of UK Communities and Local Government, EADS is the system provider and integrator.

March 2010

Consultant
IBM Global Business Solutions, Toronto, Ontario

Performed an assessment of IBM's test approach and processes on a challenging client project using a large team of global testers, some sited offshore and some working at the client's project site in Greater Toronto. I recommended a reduced-documentation approach incorporating exploratory testing, to improve test coverage and capability and radically increase the team's chances of achieving the client's very aggressive end date.

February 2010

Testing Coach and Consultant
VisionMAX Solutions, Inc., Mississauga, Ont.

This rapidly growing company wanted expert advice on their testing capability, but were moving too quickly to pause for an assessment or a standard consulting engagement. Instead, I proposed on-the-ground practical coaching with the testers. I sat with each tester through a work day, asking questions and suggesting pragmatic alternatives for improvements. The final deliverable was a consulting report consolidating those recommendations and others that required management action, which I presented in an interactive session with the test team and the Chief Operating Officer.

October to
November 2009

Editor
Software Test & Performance Magazine

Guest editor for the January 2010 special issue, with the theme "Influential Women in Software Testing". Working to a tight deadline, I managed the project: solicited articles from nine authors on three continents, including five testing bloggers whose work has never before appeared in print; subsequently worked with each author to prepare the articles for handover to the final publication editor; wrote and finalized the editorial.

2009 to present

Writing Projects
Currently writing two books: "Business Risks for Testers" and "Managing Systems Integration Testing".

Professional Experience

October to
November 2008

Consultant

Odyssey Financial Technologies, Toronto, Ontario

**Financial
Services**

This international software company develops products for the financial services industry and customizes them for each client's unique requirements, primarily using configuration but also customizing code. The Toronto delivery group needed help with a major bank client, which was demanding unreasonable evidence of testing and deliverables that were not in the contract and not budgeted. My initial mandate was to act in the client-facing senior testing/QA role short term, and to advise the delivery vice president on project risks. It was immediately apparent that testing was only one facet of the problem, and my principal deliverable included testing but focused primarily on findings and recommendations about project management and delivery management issues and risks. As well as recommending a going-forward strategy and practical tactics, I worked with the delivery project managers to define test deliverables and reporting that would satisfy the major banks and still fit within the software company's nimble delivery process, and I coached the project managers on assessing the business risks of a software implementation.

December 2007
to April 2008

Test Manager - Cardiac Wait-times

Cancer Care Ontario, Toronto

Health Care

I joined this project just after the start of test execution, and continued through User Acceptance Test and Production Acceptance Test, to Go-Live. The project had a troubled history, with confused requirements, many change requests, and the failure of the first developed version to achieve end-user acceptance from the client organization's very challenging client. As test manager I was responsible for ensuring a rigorous test process and practice commensurate with the risks of a partly clinical application. An equally important element of my role was to help the project management team identify, manage, and resolve user acceptance issues with potential to threaten Go-Live for a second time.

October 2007

Consultant - Test capability assessment

Forzani Group, Calgary, Alberta

Retail

I evaluated the capabilities and practices of the 11-person QA team against the real ongoing business risks of the client's software projects. I recommended a paradigm shift in their test approach, moving to risk-based testing, and made several other practical recommendations for improving the test practices and growing the capabilities of the QA team. I subsequently worked with the QA team and Manager to implement risk-based testing practices, and coached and mentored the QA Manager on the new approach.

The engagement included evaluating the test strategy for a major infrastructure upgrade project. I worked with the QA Manager and project Lead Tester to change their strategy from a total regression test to targeted testing following technical verification oriented to the upgrade technical risks—which I taught them how to identify. With the revised approach, the client achieved substantial savings of both money and time, including a reduction in business risk over the originally proposed strategy.

Professional Experience

January to July
2007

End-to-End Test Prime – IPTV
Bell Canada-Bell XpressVu, Toronto, Ontario

Telecom

(This was a resumption of the program suspended by the client in August 2005.)
Responsible for oversight of all IT testing on the program: standards, coverage, effectiveness, completion.

Managed the planning and preparation of a large-scale systems integration test to mitigate the client's IT risk with the launch of this strategic new product offering. The IT solution consists of many legacy systems from multiple lines of business, which have been integrated or partially integrated with new systems, a vendor IPTV product, and each other. The end-to-end test covered the principal business flows, including order capture through activation of the video stream on the customer's TV set-top box, equipment inventory tracking, billable TV and data stream events, and billing/financials.

Designed the strategy and processes, staffed, trained and led the team in preparing the test, then transitioned to a client resource to manage test execution.

January 2003 to
January 2007

Test Manager and Consultant, IBM Global Services
Markham, Ontario

Managed testing and consulted on testing and test management on IBM client projects, and contributed testing expertise to client business proposals.

September 2006
to January 2007

Test Manager – Point of Sale Implementation
Shoppers Drug Mart (Shoppers Home Health Care), Toronto, Ontario

Retail

Managed test planning and preparation for an end-to-end acceptance test to verify the financial accuracy of a heavily customized POS system, with minimal documentation and no access to the development team. Designed and developed the test strategy to be scalable for both the Home Health Care standalone implementation and the proposed subsequent Shoppers Drug Mart implementation which would be integrated with multiple store and corporate systems. Staffed and managed the team developing scenario-based tests assembled from building-block transactions. Transitioned to a more junior test manager for test execution.

May 2006 to
September 2006

Test Consultant – THINK project
Trillium Hospital, Mississauga, Ontario

Health Care

Consultant on a transformation of the client's processes and systems, moving from provider-centred to patient-centred care. The multi-year initiative is primarily to implement new systems in place of manual processes, and to replace a monolithic legacy clinical system with a suite of integrated best-of-breed systems from a variety of vendors. I conducted a Test Assessment, which identified a need for increased testing rigour to address the risks of new software to patient safety and corporate liability. I worked with the program management team to convince clinical management of the need to implement the assessment recommendations, including additional skilled testing resources, and then helped hire new people. I designed a new test process and toolkit, tailored to match the client's "buy don't build" practice, and with a core strategy of Risk-Based Testing and due diligence documentation. Finally, I coached the test co-ordinators and project managers and assisted with rollout of the new process throughout the program.

Professional Experience

September 2005
to February
2006

**Financial
Services**

Test Manager – TECP Project (Truncation and Electronic Cheque Presentment)
Intria Items, Mississauga, Ontario

Responsible for User Acceptance Test, Operability Test and Performance Test on a complex suite of combined applications and hardware for the electronic cheque imaging project. Managed the client's test teams. Directed the selection and implementation of a new bug tracking system. Represented the customer on the Canadian Payment Association's Inter-FI Test Working Group, which is responsible for planning and co-ordinating the eventual integration test across all financial institutions.

December 2004
to August 2005

Telecom

Program Test Manager, IT PMO – IPTV Program
Bell Canada-Bell XpressVu, Toronto, Ontario

Program-level Test Manager in the Program Management Office of a large development and integration project to implement IPTV over wirelines. Responsible for defining the overall IT test strategy, defining and developing the end-to-end SIT strategy and plans, staffing and managing the end-to-end SIT core team, and managing the execution of the complex end-to-end systems integration test, which covered functionality from customer orders through to billing and back-end financials, television use and service assurance. Worked with other streams of the overall program (primarily the network and video technology groups) to define a layered testing model and negotiate responsibility boundaries. Developed and implemented IPTV program-wide defect management process. Responsible for overseeing IT sub-project testing to ensure appropriate coverage and risk management. Reviewed IT sub-project strategies and plans, and conducted periodic assessments of the state of IT sub-project testing. (Program suspended by customer in August 2005.)

June to
December 2004

**Banking
Financial
Services**

Program Test Manager, PMO – Integrated Lending Program
CIBC, Toronto, Ontario

Program-level Test Manager in the PMO for the "front-end" sub-program of a large project integrating the bank's mortgage and lending applications to enable a consolidated suite of lending services to consumers. The FE program encompassed the legacy loan applications, as well as two mid-tier service layers and the proposed GUI for the integrated applications. Worked with all levels of management on the program to define the overall program test strategy and processes (encompassing all sub-programs). Developed the FE integrated test strategy for an overall team of 33 testers and worked with each of the FE project test managers to define their component testing and staff their sub-teams. (Program terminated by the customer.)

October 2003 to
May 2004

Retail

Program Test Manager, PMO – COFI Program
Hudson's Bay Company, Toronto, Ontario

Program Test Manager on a 70-person project to customize and implement the Oracle e-business suite as a retail application for the client's big ticket line of business. The application functionality covered the full retail lifecycle: supply chain planning, procurement, merchandising, sales, logistics, order fulfillment and warranty servicing, and was fully integrated with the client's existing corporate and store systems, including vendor EDI, warehouse management, point of sale, sales audit, loyalty rewards, corporate financials, and management reporting. I developed and implemented a strategy for End-to-end Test to ensure data control, co-ordination among all participants and full auditability. Developed overall strategies for and oversaw other major test activities: performance test, data conversion test.

Professional Experience

February to
October 2003

Test Manager – Service Platform Teller Application
RBC, Toronto, Ontario

Banking

Managed System Test and Systems Integration Test on a RAC iterative development project to develop a new teller application for the bank. Joined the project part way through test development with mandate to turn the testing around (replacing another test manager). Redirected the test strategy to ensure data control and improved auditability for SIT. Designed and implemented processes tailored to the project and environment. Staffed and directed the 12-person mixed test team of client resources, independent contractors, and IBM resources. Designed and implemented test metrics for management planning, control and communication. Assisted and supported the client UAT manager through test strategy and scenario design and development, and test execution.

January 1999 to
December 2002

Manager of Testing Services, Systems Integration
LGS, Toronto, Ontario

Practice Manager, responsible for definition and delivery of LGS Toronto Branch Testing Services, and management and mentoring of branch testing resources. Founding manager of the practice. Developed and implemented the LGS Test Manager's Toolkit, with templates and examples for all test processes and deliverables.

Managed testing and Quality Assurance, and consulted on testing, test management and Quality Assurance on LGS client projects, and contributed testing expertise to client business proposals.

October 2002 to
January 2003

Consulting Executive Test Manager, PMO – Retail Integration Program
Major insurance company, Waterloo, Ont. (Client requested IBM not divulge name)

Insurance

Test Manager on IBM consulting engagement to establish and manage the Project Management Office for the Retail operations integration of two major Canadian insurance companies. Formally assessed the current state of Retail Integration testing, and recommended increased governance to ensure consistent application of good testing practices across 132 IT projects. Developed an overall Retail Integration Test Strategy for implementing the assessment recommendations. Established a Test Council and chaired weekly meetings to ensure appropriate levels of testing to prove that the total solution would work. Developed an initiative to promote and institutionalize a formal process for Risk-Based Testing in all integration projects. Implemented a weekly Test Status reporting process for projects, and a Testing Scorecard for reporting status and issues to the Retail Integration Steering Committee. Participated in weekly PMO reviews of the prime projects, and in weekly Steering Committee meetings.

As a result of these initiatives, there was a significant increase in the testing rigor and discipline, and increased management visibility of, and confidence in, the testing process. At the conclusion of the engagement, transitioned the knowledge and role to the client team replacement.

Professional Experience

December 2001
to March 2002

Manager, System and Integration Test - Corporate Web Banking
Bank of Bermuda, Bermuda

Banking

Managed "Alpha" test (equivalent to system test and modified systems integration test) of a new corporate web banking custom application. This IBM project included integration to the Bank's management system for corporate accounts. It was managed from Toronto, with the Development team based in California, and the client in Bermuda.

Joined the project shortly before the beginning of test execution, with mandate to implement rigorous test (replaced previous test manager). Redirected the testing strategy to improve the coverage and better manage the risk. Developed realistic plan and convinced the project manager and client's CIO to implement an achievable test schedule. Staffed and directed the test team. Tailored and implemented management planning, control and communication processes. Made key contribution to successful handover of a quality application for Bank acceptance testing.

February to
June 2001

Manager, Integration Test – Promotional Funds Management Project
Shoppers Drug Mart, Toronto, Ontario

Retail

Managed systems integration test for project designed to provide client's Marketing Finance and Merchandising managers with detailed reporting of promotional funds, revenue and expenses, through a new data warehouse and web-based reporting system. The project included modifications to operational corporate systems to extract promotional funds data at a finer level of granularity for feeding to the new data warehouse; and a new application for entry of adjustments.

Developed strategy and plan for Integration Test, including balancing of differently stated production financial data. Managed Integration Test execution and verification and acceptance process with Marketing Finance, making key contribution to successful on-time implementation.

January to
February 2001

Consultant - QA Assessment
Merrill Lynch/Spectra, Toronto, Ontario

Financial Services

With another consultant, performed a quality assurance assessment of the testing and release processes for a portfolio management application, and recommended process improvements and risk mitigation strategies to address issues which had been identified with the quality, cost and timeliness of application releases.

Conducted interviews and reviewed documents at Merrill Lynch and at Spectra (software reseller), who had jointly commissioned the assessment, as well as at the software company responsible for developing the product. Developed recommendations for all three companies, including "quick hits" for the upcoming release, and mid- to long-term process improvements covering the entire release cycle: from content determination and scheduling, through development and system testing, to UAT. Prepared report and co-presented to executive management of the three companies.

Professional Experience

June to
November 2000

Manager, Integration Test – hbc.com
Hudson's Bay Company, Toronto, Ontario

Retail

Managed large and complex systems integration test of new e-commerce site, involving more than 60 interfaces among new, existing and modified applications, and across NT, UNIX, and VM platforms.

Developed the test strategy, processes and plan, and led core Integration Test team in developing and automating test transactions and scenarios. Secured buy-in from multiple organizations within the client's IT and business for plan requiring extensive participation in the integration test from development and support teams. Managed test execution and verification, staffed by large team comprising the Integration Test Team and representatives of all participating applications. Testing was widely credited with the success of the site's initial launch and early business.

November 1999
to May 2000

Manager, Testing Team – POiNTS Project
National Hockey League Players' Association, Toronto, Ontario

**Professional
Sports Labour
Union**

Managed the test team of a complex application development project for labour union case management. This iterative development project was the pilot for the LGS reuse framework strategy and a new object oriented application development tool.

Replaced a more junior test manager, as a member of a project management "rescue" team, with mandate to turn the test effort around. Developed the test strategy and plan. Managed the final stage of test preparation, introducing management controls and refocusing the 6-member test team to a risk-based approach. Paired testers with programmers to share requirements knowledge and finish development. Managed system test execution. Played key role in project turnaround and successful conclusion.

February to
October 1999

Manager, Integration, Testing and Implementation – Optimum Program
Shoppers Drug Mart, Toronto, Ontario

Retail

Managed systems integration test and corporate systems implementation for the pilot rollout of this strategic Loyalty Program. Developed integration test strategy and plan, operating within tight timelines, and involving a small ITI team and multiple development teams. Staffed ITI team, and led development of test transactions and environment plans for development, testing, and corporate systems implementation. Managed integration test of complex solution bringing together existing and new software applications running on several platforms, both in the stores and at corporate headquarters, and including real-time satellite links between systems as well as batch interfaces. Participated in weekly program steering committee meeting with business and IT management.

November 1998
to January 1999

Testing Process Expert - Reuse Framework
LGS Group, Toronto, Ontario

Developed testing process flow and deliverables for object-oriented SDLC in new LGS reuse framework. Key player in development of entire SDLC process definition.

Professional Experience

January to
November 1998

Quality Assurance Manager - Y2K Corporate Program
Ontario Hydro, Toronto, Ontario

Energy Utility

Operating within the Corporate Program Management Office for Y2K, defined the corporate-wide quality management program for the Y2K program at this critical provincial utility, and oversaw its implementation. Supported and assessed business unit Quality Assurance managers in their quality processes. Developed framework and process for quality audits of business unit Y2K projects, including evaluation criteria and assessment procedures. Led project audits of Y2K projects at the power plants and throughout the corporation.

February to
October 1997

Project Manager – Dallas WMS
Shoppers Drug Mart, Toronto, Ontario

Distribution

Managed project to test and implement a major upgrade to a large (3.5 million LOC) mission-critical warehouse management application. Developed the test and implementation strategies, processes and plans, and implemented a key user review and signoff process.

Managed a project team of 14 including consultants, independent contractors, users and client IT staff. Managed the relationship with the application vendor to ensure timely resolution of issues, and liaised with the client's IT, logistics, and distribution centre management.

November 1996
to January 1997

Test Manager - LMS Billing
Livingston Logistics Management, Toronto, Ontario

Distribution

Designed the time-boxed system test strategy, and led the systems testing team for a custom client server billing application with interfaces to several packages. Provided direction to users in development of UAT test cases, test data creation and setup. Managed mixed team of user personnel and development team members during the test execution phase.

May to
September 1996

Project Manager – Y2K Planning and Analysis, Group Life and Health
Canada Life, Toronto, Ontario

Insurance

Managed the Year 2000 planning and analysis project for the Group Life and Health division of this major Canadian insurance company. Developed and delivered a business and technical impact report and high level plan for the conversion project.

February to April
1996

Process Engineer - Year 2000 methodology
LGS Group, Toronto, Ontario

Designed and developed the testing component of the LGS Year 2000 methodology.

Professional Experience

July 1994 to
April 1996

Director – in Business Solutions Implementation practice

LGS Group, Toronto, Ontario

Participated in the management of the practice, reporting to Senior Director. Provided coaching and career management for a group of eight technical consultants.

January 1996

Consultant – Reset Product Management

Workers' Compensation Board of Ontario, Toronto, Ontario

**Public Sector
Insurance**

Consulted on design and implementation of product management and help desk processes for the Reset program.

July 1994 to
December 1995

Assistant Project Manager & Quality Assurance Manager – Reset Development

Workers' Compensation Board of Ontario, Toronto, Ontario

**Public Sector
Insurance**

Acted on project manager's behalf in high-risk areas requiring large day-to-day time commitments, e.g., legacy interface testing, maintenance, system testing. Managed acceptance process for project manager. Acted as consultant to managers and team members on quality processes. Monitored processes, identified risks, and recommended improvements.

1993 to 1994

Director, Quality Assurance and R&D Services

PROMIS Systems Corporation, Toronto Ontario

Responsible for quality assurance, user documentation and customer training, with a total staff of 15.

1991 to 1994

Manager, Quality Assurance

PROMIS Systems Corporation, Toronto Ontario

Manufacturing

Responsible for assuring the quality of industry-leading manufacturing software products, with a staff of 4 QA analysts. Mandated as acceptor for all R&D Department activities: software development and maintenance, user documentation, customer training, technical support, and product release. Initiated, defined and led project to re-engineer development processes for existing product, and obtained developer buy-in. Negotiated with development managers to define quality processes and acceptance criteria for new products using new technologies (OO, GUI), and for porting of existing product to UNIX. Implemented formal project planning. Initiated and laid groundwork for corporate project to achieve ISO 9000 registration. Established QA analysts as essential members of project teams. Established credibility of QA throughout the corporation and with customers, and made substantial contribution to product quality improvements.

Professional Experience

1986 to 1990

Manager, Documentation Services

PROMIS Systems Corporation, Toronto Ontario

Manufacturing

Responsible for all aspects of user documentation planning, development, maintenance, printing and distribution, with a staff of 5 writers. Created Documentation department. Hired, trained and focused effective, professional group of writers. Developed standards, review procedures, and configuration management practices for manuals and online help. Gained acceptance for documentation as integral part of product, and for technical writers as essential members of development teams.

1984 to 1986

Quality Control Specialist

PROMIS Systems Corporation, Toronto Ontario

Manufacturing

Responsible for testing on standard PROMIS product. Developed pre-release test procedures, and co-ordinated testing projects involving entire product development staff. Enhanced, maintained and executed regression tests, analysed results, and reported problems.

1982 to 1984

Technical Writer, Data Base Services

I.P. Sharp Associates, Toronto, Ontario

Wrote user manuals and reference guides for this unique Canadian company, which specialized in APL language development, custom software, time-sharing and data subscription services. Developed standards for online documentation.

1978 to 1982

Technical Writer

UTLAS International, Toronto, Ontario

Library Cataloguing

Pioneered technical writing within software development group for this industry-leading library automation company. Designed and wrote user documentation for programming and database staff. Developed documentation standards and review practices. Developed and taught in-house courses on complex database utility programs.

Conferences, Workshops, Publications

CAI Software Best Practices
Webinar Series

- ❖ "Make Risk-based Testing A Reality" - October 2009

BCS SIGIST, London, U.K.

- ❖ "Soft Skills Don't Have to be Hard" – keynote address - September 2009
- ❖ "Designing Test Scenarios Based on Data" (interactive workshop) - September 2009

CAST, Colorado Springs

- ❖ "Testing Your Testing" - full-day interactive tutorial (with Michael Bolton) - July 2009
- ❖ "Designing Test Scenarios Based on Data" – July 2009

StarEast, Orlando, Florida

- ❖ "What Price Truth? When a tester is asked to lie." (presented by Lee Copeland) – May 2009

Conferences, Workshops, Publications

EuroStar	<ul style="list-style-type: none"> ❖ "Make Risk-based Testing A Reality" – webinar, July 2009 ❖ "Determining Business Risks for Testing" – half-day interactive tutorial, Stockholm, December 2009 ❖ "Designing Test Scenarios Based on Data", Stockholm, Sweden, December 2009 ❖ "The Future of Software Testing Is Ours To Make" – half-day interactive tutorial, The Hague, November 2008
StarWest, Anaheim, California	<ul style="list-style-type: none"> ❖ "A Modeling Framework for Scenario-based Testing" – September 2008 ❖ "What Price Truth? When a tester is asked to lie." – September 2008
Toronto Workshop on Software Testing (TWST)	<p>Co-founder and host of this annual invitational peer conference for senior test practitioners.</p> <ul style="list-style-type: none"> ❖ "Coaching and Mentoring Testers" - 2009 ❖ "Deception and Self-deception on Software Projects" - 2008 ❖ "Risk-Based Testing" – 2007 ❖ "Test Modeling" – 2006 ❖ "Testing in an Agile World" – 2005
AYE (Amplifying Your Effectiveness) Conference, Phoenix, Arizona	<p>2006:</p> <ul style="list-style-type: none"> ❖ "The Software Development Board Game" ❖ "Pay Attention!" ❖ "Transforming Rules into Guides" (with Johanna Rothman) <p>2005, 2009 - Assisted Gerald M. Weinberg at 3 sessions:</p> <ul style="list-style-type: none"> ❖ "Using Your Yes-No Medallion" ❖ "Organizational Mapping" ❖ "Transforming Rules Into Guides"
QAI International Quality Conference, Toronto	<ul style="list-style-type: none"> ❖ "Connecting The Dots" – full-day interactive tutorial on managing a systems integration test – 2007 ❖ "What Price The Truth" – the dilemma and choices faced by testers and test managers who are asked to lie about project status and quality – 2007 ❖ "Managing Your Logistical Nightmare" - large-scale systems integration tests – 2006 ❖ "Soft Skills Don't Have To Be Hard" – 2006 ❖ "A Flexible Process Model for Systems Integration Test" – 2005 ❖ "Strategies for Managing a Large Systems Integration Test" – 2000
TesTrek, Toronto (QAI), October 2009	<ul style="list-style-type: none"> ❖ Manager's Workshop – speaking/facilitating as Guest Industry Expert ❖ "Test Scenarios Designed from a Conceptual Data Framework" – interactive workshop
KWSQA "Targeting Quality" Conference, Kitchener-Waterloo	<ul style="list-style-type: none"> ❖ "Deception and Self-Deception in Testing" (interactive tutorial) – April 2009 ❖ "Determining Business Risks for Testing" (interactive tutorial) – April 2009 ❖ "Make Risk-based Testing A Reality" – April 2008
Canadian Information Processing Society (CIPS) IT Management SIG	<ul style="list-style-type: none"> ❖ "Planning the Endgame" (interactive workshop) – Dec. 2007
Kitchener-Waterloo Software Quality Association (KWSQA)	<ul style="list-style-type: none"> ❖ "Software Quality and the Role of The Tester" – Nov. 2007
Southwestern Ontario Quality Group (SWOQG)	<ul style="list-style-type: none"> ❖ "Planning the Endgame" (interactive workshop) – Sept. 2007
Toronto Association of Systems and Software Quality (TASSQ)	<ul style="list-style-type: none"> ❖ "Strategies for a Successful Systems Integration Test" – Apr. 2006 ❖ Designed, organized and facilitated 3 "Ask TASSQ" open panels at TASSQ dinner meetings: Sept. 2004, Feb. 2005, and Sept. 2005

Conferences, Workshops, Publications

Blue Horizon Conference (IBM), Niagara Falls, Vancouver, Montreal	<ul style="list-style-type: none"> ❖ "Professional Skills for Testers – Soft Skills" – 2006 ❖ "A Flexible Process Model for Systems Integration Test" – 2005
Software Test & Performance Magazine	<ul style="list-style-type: none"> ❖ Guest editor for January 2010 issue: "Influential Women in Software Testing" ❖ "Data-Driven Software Modeling Scenarios" – using system data to design a framework for modeling test scenarios – November/December 2009
Better Software Magazine and StickyMinds.com	<ul style="list-style-type: none"> ❖ "Weekend Engagement" – interesting weekend activities for developing your craft as a tester ❖ "Growing Your Career in Tough Times" – low or no-dollar opportunities for growing a tester's skills – September 2009 ❖ "Rescuing a Captive Project" – dangers of allowing an individual to use his knowledge to make a project his hostage, and a proposed remedy – August 2009 ❖ "Deception and Self-deception in Software Testing" – the untruths and misconceptions testers need to be ready to address – June 2009. ❖ "Not Wanted on the Voyage" – common attitudes and practices that testers need to throw overboard – February 2009. ❖ "What's in a Name?" – the dangers of inflated names (like Quality Engineer), and the importance of precise language for recognition of the tester's rightful place in software development – October 2008 ❖ "The Test Manager's Vade Mecum" – essentials for a test manager to take to each project – July 2008 ❖ "Surveying The Terrain" – developing a 'survey report' to show application quality and testing progress – May 2008 ❖ "Pack Up Your Troubles" – thriving on troubled projects – February 2008 ❖ "Planning the Endgame" – planning the mix of test, fix, retest that occurs before a release – September 2007 ❖ "Sophie's Choice" - handling the situation where a test manager is pressured to lie about project status metrics – September 2007 ❖ "How Do You Think?" - interviewing tester candidates – March 2007 ❖ "Overtime Under Control" - making the best choices about tester overtime – October 2006 ❖ "Don't Let the Bedbugs Bite"- crisis management as applied to software projects – September 2006 ❖ "Bulking Up" - tester teamwork and communication skills – January 2006
Books	<ul style="list-style-type: none"> ❖ Charles, Fiona, editor, The Gift of Time: Essays in Honor of Gerald M. Weinberg on his Seventy-fifth Birthday; Dorset House Publishing, N.Y., 2008. ❖ Works in progress – "Business Risk for Testers", "Managing a Systems Integration Test"

Professional Memberships

- ❖ Association for Software Testing
- ❖ Toronto Association for Systems and Software Quality (TASSQ) - Board Member, 2004 to 2008
- ❖ Shape Forum (Software as a Human Activity Practiced Effectively—Gerald M. Weinberg's online community for consultants and computer professionals) – 2001-2008 (Shape end) - Volunteer moderator, 2007
- ❖ IBM Canada Test Community of Practice, Core Team – 2003-2006

Education and Professional Development

University of Toronto	❖ Bachelor of Arts, 1981
Quality Assurance Institute	❖ Certified Software Test Engineer (CSTE), 1998
Workroom Productions, London	❖ Getting a Grip on Exploratory Testing, 2009
Weinberg & Weinberg, Albuquerque	❖ Designing Experiential Sessions and Workshops, 2009 ❖ Consulting Skills Workshop, 2006 ❖ Problem Solving Leadership, 2001
AYE (Amplifying Your Effectiveness) Conference, Phoenix	❖ 2009, 2008, 2007, 2005, 2004, 2003, 2002 (presented in 2006)
CAST (Conference of the Association for Software Testing), Toronto	❖ 2008, volunteer facilitator
Agile Alliance	❖ Agile Conference, Toronto, 2008
IBM	❖ Blue Horizon Conference: 2004, 2003 ❖ Rational Test Tools, 2004 ❖ Rational Unified Process Concepts Workshop, 2004 ❖ IBM Global Services Methods, 2000
Satisfice, Inc.	❖ Rapid Software Testing, 2006
Los Altos Workshop on Software Testing	❖ LAWST 14: "Test Modeling", 2002
Quality Assurance Institute (QAI)	❖ Effective Methods of System Testing, Quality Assurance Institute, 1998 ❖ International Conference on Software Testing, Orlando, 1999, 1997
NADUM	❖ Facilitating Skills, 1996
GE Advanced Concepts Center	❖ Object Oriented Methodology, 1993
Quality College of Scotland	❖ Software Quality System Assessment (TickIt, ISO 9001): Lead Assessor Training Course, 1993
Technology Training Corp.	❖ Applied Software Measurement, 1992 ❖ ISO 9001/9000-3: Applying ISO Guidelines for Software Quality, 1992
Rick Ball & Associates	❖ Software Inspections, Walkthroughs and Reviews, 1991