



# Qualitest Enables Successful Risk-Free Salesforce Migration for Major Energy Supplier



## Challenge

Migrate all users of legacy CRM system to Salesforce Lightning.

Assure functionality of components as standalones and of entire integrated CRM process.



## Solution

Delivered comprehensive testing services and quality analysis providing quantifiable data.

Used shift-left approach, iterative methodology and customization for third-party integration.



## Results

Enabled evidence-informed migration with all timelines met & under one percent defect leakage.

Successful move to Salesforce created blueprint for entire parent group.



## Client Overview

The Client is one of the UK's largest suppliers of liquefied petroleum gas (LPG). They service around four million homes and businesses, delivering LPG to power gas appliances from central heating and hot water to cookers, fireplaces and barbecues. The company mainly supplies LPG to homes in rural areas where there is no main natural gas supply.

## From a Legacy CRM's Dim Light to Salesforce Lightning

To enhance their sales and customer service, the Client wanted to move their legacy CRM users to Salesforce Lightning. This was a massive migration program, and it was pivotal to ensure a smooth transition to ensure a continuously flawless customer experience.

As the Client was one of the first companies in their parent group to make the move to Salesforce, a successful migration could serve as a blueprint for other subsidiaries.

The Client chose Qualitest, as Salesforce testing experts, for comprehensive testing services and quality analysis to inform their acceptance of the Salesforce transition, with total responsibility for the management and delivery of testing.

## Testing Piece by Piece to Assure the Big Picture

Our first objective was to provide quantifiable data on how each of the systems involved in the new Salesforce CRM would work on their own, and then, most importantly, how all the integrated business

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activities supported by the CRM would function holistically.

Because the Salesforce implementation would be delivered by a third party, we aligned our approach and activities to provide the most business risk mitigation with the optimal coverage for the time and resources available. That gave the Client an approach to testing that was both accelerated and tailor-made.

Our plan included:

- Static testing of requirements through the User Stories.
- Third-party System Testing audit.
- In-house development Unit Testing audit of test results, quality and coverage.
- System Testing of the in-house development of integrated applications.
- System Integration Testing of the Salesforce solution into the Client's system architecture.
- End-to-end process testing to ensure the user experience.



- Early identification of defects, saving costs and time and enabling earlier User Acceptance Testing (UAT).
- Business-ready reporting: technical and quality reports and the critical information key stakeholders needed to understand the level of business risk at Go-Live.

## Shift-Left: Early Birds Catch More Bugs

In every engagement, Qualitest is committed to a shift-left approach to drive detection as early as possible, reducing test cycles and saving time and costs. In this Client's case, development and System Testing were being performed externally, so we worked with the development team to adapt an Iterative Testing process. This let us oversee and verify the quality of the System Testing before accepting the code.

By getting visibility and input into the testing early, we were able to run multiple effective small test cycles against each iterative development, improving the quality of the code delivered to System Integration Testing. Qualitest's consistent shift-left approach helped decrease the number of SIT cycles as well as reduce defects, contributing to the delivery of a zero-defect product into Go-Live.

## Reducing Risk While Increasing Quality

To ensure the amount of testing we performed was appropriate and targeted, we took a Risk-Based Testing approach, targeting those requirements and developments with the highest business priority, the most significant business impact, and the highest areas of technical risk.

By aligning our testing efforts with the development approach, we supported the project's goal of delivering a Minimal Viable Product (MVP) as early as possible. Test completion reports after each testing phase documented the quality added through defect detection and resolution, detailed remaining risk in terms of open defects or untested areas, and rated that risk in terms of potential impact to the business.

This enabled development teams to focus on delivering high quality in the areas where it mattered, so deploying the MVP did not disrupt the business. A smaller support team concentrated on fixing lower priority issues, and an implementation team was able to quickly deploy more and more functionality.

## A New Testing Phase Prevents a PR Disaster

A negative User Acceptance Testing experience by business users can have profound impact on user uptake and support of the solution. To mitigate that risk, Qualitest proposed a pre-User Acceptance phase called Solution Acceptance Testing, which would cover the same ground as UAT but would be executed by testers, not actual business users. The new step resulted in smooth UAT execution with only minimal defects discovered—none of which were critical.

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# MIGRATION



## Key Benefits

In effect, our test approach became an enabler of the Client's success. The approach we built accelerated the whole process by early defect identification, better quality coming through, smooth User Acceptance Testing and effective data to make informed decision-making.

- Zero critical defects leaked into production.
- Adoption and performance of the core product was faster and higher than plan expectations.
- Our on-time, on-budget delivery avoided overrun costs that typically run into tens of thousands of dollars, protecting the Client's ROI.
- The reporting approach gave confidence and visibility at every stage, with evidence-based decision-making and informed planning.
- The Client's parent group viewed the processes and methods we used to install Salesforce and replace the legacy CRM system as a long-term blueprint for their other business units.

The migration to Salesforce CRM was Phase 1 of a multi-phased agreement with the Client, which is ongoing with regular upgrades, development and deliveries.

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