



Financial Forum

CHICAGO

Technologies for DevOps, automation and AI



5th April 2022
Mid-America Club

Automation for testing, quality assurance and continuous app delivery

WELCOME

Dear Delegate,

Thank you very much for coming to the QA Financial Forum Chicago.

I hope you enjoy your day and that you find it a good investment of your time.

I would very much appreciate it if you could bear in mind that our speakers today have agreed to participate on the basis that this is a "background-only" event.



Please do not report their comments, including in social media posts.
In this way, our speakers can share their insights and experiences openly.

Equally, do feel free to ask questions at the end of each speaker session. We are equally keen to involve you in the discussion.

I look forward to meeting you during the day.

With thanks,

A handwritten signature in purple ink that reads "Matthew Crabbe". The signature is fluid and cursive.

Matthew Crabbe
CEO, QA Media

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perfecto.io

Perfecto by Perforce powers exceptional digital experiences and strengthens every interaction with a quality-first approach for web and mobile apps through a cloud-based test environment. From creation to execution and analysis, Perfecto has a proven, unified solution for mobile and web testing. Now, BlazeMeter (www.blazemeter.com) joins forces with Perfecto to add AI-driven, unified, shift-left continuous testing to Perforce's growing enterprise quality portfolio. BlazeMeter is a complete and integrated continuous testing platform built on and fully compatible with open source. Used by some of the largest global enterprises, BlazeMeter provides a single solution for application quality for all teams across the CI/CD pipeline. The SaaS-based platform is a Gartner Peer Insights Customers' Choice for Software Test Automation. Together, Perfecto and BlazeMeter will solve the most difficult quality challenges in DevOps for a global customer base.



tricentis.com

With the industry's #1 Continuous Testing platform, Tricentis is recognized for reinventing software testing for DevOps. Through agile test management and advanced test automation optimized to support over 150+ technologies, we provide automated insight into the business risks of your software releases—transforming testing from a roadblock to a catalyst for innovation. Tricentis is the only vendor to achieve “leader” status in all three top analyst reports. This honor is based on our technical leadership and a Global 2000 customer base of 1500+ companies. Customers rely on Tricentis to achieve and sustain test automation rates of over 90%—increasing risk coverage while accelerating testing to keep pace with Agile and DevOps. Tricentis has a global presence in Austria, Australia, Belgium, Denmark, Germany, India, Netherlands, Singapore, Switzerland, Poland, United States and the UK.

SILVER



avoautomation.ai

At Avo, we aspire to free the unlimited power of human potential by intelligently automating manual, repetitive work across the business. We see a world where all employees can happily work alongside software and process automation so they can be free to do the more strategic, and fun parts of their job. This leads to more employee engagement, more productivity, and more profit. With Avo's enterprise-grade quality automation products, customers can seamlessly create, deploy, and manage software test automation and end-to-end business process automation to propel their business forward. As a testament to our customers success thus far, we have earned accolades from G2, Gartner Peer Insights, Software Testing Help and Guru99.

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delphix.com

Delphix is the industry leading data company for DevOps. Data is critical for testing application releases, modernization, cloud adoption, and AI/ML programs. We provide an automated DevOps data platform, masking data for privacy compliance, securing data from ransomware, and delivering efficient, virtualized data for CI/CD and digital transformation.



saucelabs.com

Sauce Labs is the company enterprises trust to deliver digital confidence. More than 3 billion tests have been run on the Sauce Labs Continuous Testing Cloud, the most comprehensive and trusted testing platform in the world. Sauce Labs delivers a 360-degree view of a customer's application experience, helping businesses improve the quality of their user experience by ensuring that web and mobile applications look, function, and perform exactly as they should on every browser, OS, and device, every single time. Sauce Labs enables organizations to increase revenue and grow their digital business by creating new routes to market, protecting their brand from the risks of a poor user experience, and delivering better products to market, faster.

BRONZE



applitools.com

Applitools is on a mission to help test automation, DevOps, and software engineering teams release visually perfect mobile and web apps. We are the only commercial-grade visual-AI solution that validates the user interface in a fully automated manner, with our ground-breaking image processing stack that we developed from scratch in-house. The Applitools platform seamlessly integrates with your existing Appium tests and also runs across multiple browsers/devices on our Ultrafast Test Cloud. For more information, visit applitools.com



cyara.com

Say hello to Cyara, provider of the world's leading Automated CX Assurance Platform. Helping you deliver better CX with less effort, cost, and risk is what we do, and here's how we do it. Our contact center solutions automate testing and monitoring from one end of your customer journey to the other, and across all voice and digital channels, assuring that you're delivering flawless CX. The best part? We make this easy by integrating with your existing technologies, accelerating development, and providing a single, proven platform where your teams can build and monitor customer journeys that deliver customer smiles, at scale. Visit: <https://cyara.com/>

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parasoft.com

From development to QA, Parasoft's AI enabled technologies reduce the time, effort, and cost of delivering secure, reliable, and compliant software, by integrating static and runtime analysis; unit, functional, and API testing; and service virtualization.

QUALITEST

qualitestgroup.com

Qualitest is the world's largest independent, pure-play quality assurance company. We enable every client and every brand to navigate an ever-changing world by delivering smarter quality assurance and testing solutions to meet their precise technology needs -- mitigated of risk, exceptional to use and ready to perform. Quality assurance is at the core of our business and everything that we do. Our team of focused specialists provides a broad service offering that goes beyond functional testing to encompass automation, reliability, usability, AI, and other innovations.



qyrus.com

Deliver high-quality software faster and more efficiently with codeless, self-healing, and predictive test automation Qyrus is a comprehensive, codeless, and highly intelligent test automation platform for all things digital. It efficiently tests Web, Mobile, and APIs with a single AI-powered cloud-based platform that detects and eliminates bugs much earlier in the software development lifecycle. Its codeless, taxonomy driven interface helps increase test coverage and eliminates the need for time-consuming custom frameworks and expensive test infrastructure. Qyrus uses AI to empower everyone. It empowers testers, developers, and business teams to produce higher-quality products for an exceptional user experience. It helps to maximize human ingenuity, minimize unnecessary dependencies across the testing lifecycle, reduce human error, increase scale when needed, and decrease operating and testing costs.



sealights.io

The SeaLights Software Quality Intelligence platform revolutionizes the way software teams deliver software changes. It protects the integrity of production and ensures that quality risks are mitigated as early as possible in the process. With SeaLights, software and QA teams can focus their testing efforts where it matters, and deliver quality software at scale.



AGENDA

TUESDAY 5 APRIL 2022

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

08:00 - 08:45

Arrival, Refreshments, and Networking

08:45 - 09:00

Welcome Address

Matthew Crabbe, CEO and Founder – QA Media

09:00 - 09:35

Accelerating continuous delivery, risk-based testing and enterprise software quality at Northern Trust

Speaker:

• **Subhadeep Bhattacharjee, Senior Vice President, Global Head of Quality Engineering, Northern Trust in conversation with QA Financial's Matthew Crabbe**

In this Q&A interview session, Subhadeep will describe how Northern Trust has developed a new blend of centralized services and federated development, and how it manages quality gates for apps in the DevOps era. The objective is to ensure that testing can be risk-managed, in order that regular and minor changes to trading software can be managed quickly, for example, while enterprise-critical software can be given the full attention it requires. We'll be discussing the new diagnostics and dashboards for code quality that are critical to the development of CI/CD at Northern Trust, in particular the bank's Automated Production Validation System. Subhadeep will also be taking a deeper dive into the growing challenge of non-functional testing as banks move more and more development to the Cloud, where traditionally-defined performance testing is no longer enough.

09:30 - 10:00

The 2022 Test Pyramid Review: How banks can manage DevOps in the Cloud

Speaker:

• **Eran Kinsbruner, DevOps Chief Evangelist, Perfecto/ Blazemeter**

Yes, automation means we can test faster and faster. But does the test pyramid include upgrades for mock test coverage and data management? It is time to review the standard test pyramid to ensure we know which tests and resources really matter.

Join this session with Eran Kinsbruner as he explores what "shift left and shift right testing" in the cloud means for financial firms.

Eran will share detailed, real-life, case studies and his insight on:

- The test habits of leading U.S. and international banks.
- How their testing can be optimized as they move towards continuous delivery.
- And how to become more efficient without impacting customer service.

Bring your questions and experiences - we'll be leaving time for live discussion.



AGENDA

TUESDAY 5 APRIL 2022

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

10:00 - 10:30

How to put a value on software quality assurance: The Morningstar journey to DevOps

Speaker:

• **Stephen Weinberg, Senior Director of Engineering, JLL Technologies (formerly Morningstar)**

We can all agree that "DevOps: is a great objective. But how do we actually put a value on the changes we make to our quality assurance processes?

Too often, Stephen argues, firms get bogged down in false dichotomies such as quality assurance and DevOps and "production" and "pre-production". We can agree these are great objectives, but there are years of tradition and regulation holding up progress - especially at larger firms with personal fiefdoms built up and protected.

How do we approach this sort of change and how do we measure the need, the effort and the reward of making it? Stephen will walk through various approaches his teams have taken. How some teams are using subsets of automation to install quality gates in each environment and move quality assurance away from being the people who run testing and toward the being the people who design fast confident systems.

These feedback loops give code quality results to developers so they can adjust code without context switching and QA team a foundation to redefine their value proposition. The objective? To reach improved, and defined, returns from risk-based testing and ascribe true value to QA.

10:30 - 11:00

Coffee & networking break

11:00 - 11:30

Building the CME Group Test Automation platform: The route to automation and test metrics at the CME

Speaker:

• **Miguel Muniz, Director of QA, Chicago Mercantile Exchange**

In 2019, the CME embarked on a program to accelerate test automation. Miguel will share that journey and the progress the CME has made in automated app deployment and testing automation. He'll explain how the CME created a shared test automation platform that facilitates test execution, capturing of test metrics and how code coverage plays an integratal part in the exchange's CI/CD process and in its regression and functional testing. Miguel will also explain how automation has helped fulfill the CME's regulatory reporting requirements.



AGENDA

TUESDAY 5 APRIL 2022

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

11:30 - 12:00

How to manage Quality-as-a-Service and best practice in the post TCOE world

Speaker:

• **Mark Beauvais, Director Strategic Accounts, Tricentis**

The pandemic has accelerated digital transformation programs and many financial services firms have made swift decisions on cloud infrastructure for software modernization projects. Today, corporations are facing pressure to release applications faster with added functionality that needs to be tested, often with the same staff constraints.

The Testing Centers of Excellence (TCOE) role is changing in many companies as more development and testing is federated and rolled out to different business lines. The TCOE is now often referred to as the “Standards” or “Tools” team. Having the business lines manage their own application suites has allowed different operating divisions to move quickly, but sometimes with little insight to cost management to maximize the business value.

Mark will describe what lessons banks and asset managers can learn about the most effective way to design, build, manage and deliver quality engineering as a service.

12:00 - 12:30

The world beyond Test Automation – AI powered intelligent testing for modern applications

Speakers:

• **John Kelly, Chief Strategy Officer, Sauce Labs**

• **Vikul Gupta, Executive Vice President, Qualitest**

Web and mobile apps are now your primary connection with your customers. Staying relevant and winning market share requires that firms can make constant changes to these apps. But how can you deploy many more small changes - often many per day - with confidence and with managed risk?

In the company of two software industry leaders, we'll take a closer look at how a modern testing toolchain combines both production safety nets - from canaries, to feature flags, to error reporting - with AI powered quality insights to engineer quality at speed for both developers and quality engineers.

John and Vikul will show how it's possible to measure and predict and limit the risk of a change by using AI on the combined data from these tools. And they will explain how Sauce Labs and Qualitest are working together to help customers shift left as part of their Quality Engineering transformation.

12:30 - 13:30

Lunch & networking break



AGENDA

TUESDAY 5 APRIL 2022

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

13:30 - 14:00

Data for DevOps: The Intersection of Data Automation and Data Security

Speakers:

- **CJ Murzyn, VP, Global Delivery, ABN Amro Clearing Chicago, LLC**
- **Alex Hesterberg, Chief Customer Officer, Delphix**

For many financial firms, data management is the last frontier on the route to full automation, and the key to competitive advantage. Digitally-driven, data-enabled banks are poised to compete with Fintechs and neo-bank challengers through a new generation of application-driven services. And in the race to release applications faster, banks have embraced high-velocity, cloud-based development where code, compute, networks, and storage have all been automated.

However, even for cloud-savvy banks, data for development and testing is still heavy, complex, and filled with risk. The rise of new Data Compliance and regulatory requirements combined with Board-level mandates for protection against Ransomware and Exfiltration has complicated this landscape even further. Our panel session features a discussion of how ABN Amro has confronted this challenge with a new breed of data and cloud technologies to accelerate software releases, and ultimately achieve higher rates of banking innovation.

14:00 - 14:45

Panel session: Managing digital resilience and IT risk: The changing role of quality assurance

Speakers:

- **Peter Tessin, Senior Manager, Business Technology Risk and Compliance, Discover Financial Services (chairing the session)**
- **Reena Bajowala, Partner, Ice Miller**
- **Sejal Patel, Vice President of Compliance, Synapse (formerly CURO Financial Technologies)**

Digital operational resilience is now a regulatory priority for financial firms. But who takes executive and compliance responsibility for the assurance of software, including open source software and software supplied by third party vendors? Our panel will update you on the impact of President Biden's May 2021 Executive Order on Improving the Nation's Cybersecurity; the role of the Cybersecurity and Infrastructure Security Agency and the growing scrutiny by the OCC of software risk management processes at banks and insurance companies.

We'll hear from our panellists how firms are introducing new standards of transparency and new controls in response to that scrutiny, and how quality engineers are meeting the challenge of a growing burden of risk reporting.

In particular, our panellists will discuss the challenges of assessing and managing the risks associated with: development and testing in the Cloud, open source licence management and third-party vendor management.



AGENDA

TUESDAY 5 APRIL 2022

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

14:45 - 15:15

Supercharging digital transformation at CNA Financial

Speakers:

• **Tom Kottwitz, AVP, IT Quality Engineering and Governance at CNA Insurance, in conversation with Vidur Amin, CEO of Avo Automation**

Session chairperson: QA Financial's Matthew Crabbe

Hear how CNA Financial, one of the largest insurers in the United States, has transformed its software quality assurance with test automation. Tom will explain how new DevOps technologies were integrated with legacy platforms to ensure a manageable evolution in a three-year program.

We'll take a close look at how CNA Financial has dramatically increased rates of test automation while more efficiently building business requirements into the SDLC, and how this transformation has fostered closer links between the quality engineering team and business lines.

Tom will also share his insight on how best to manage third party vendor costs on the road to CI/CD; how to choose automation partners and how to benchmark the return on investment from automation.

Also on stage will be Vidur Amin, CEO of Avo Automation, the test automation partner that has worked with CNA on its transformation program. Vidur will cover in detail how the technologies for accelerating automation work in practice.

What are the roadblocks your team is facing right now? This session is designed to help you plan ahead.

15:15 - 15:45

Coffee & networking break

15:45 - 16:15

The Cloud transition at TransUnion: How a leader in credit data manages quality engineering

Speaker: Demoda Ogunsanya, Senior Advisor, TransUnion

TransUnion collects and aggregates information on over one billion individual consumers in over thirty countries and is a leading credit reporting agency, with credit files on more than 200 million individuals in the United States and the majority of the country's financial services providers are customers. How is this vast amount of data managed -- in particular for software development and testing?

Demoda will share how TransUnion is making critical decisions on its DevOps architecture as it begins a major Cloud transition program, and how it applies a risk assessment of its applications to prioritize testing and delivery. She will also provide an overview of the four tenets of their Cloud migration (i.e., Globalization, Scalability, Security, and Innovation) and how technical decisions are communicated and explained to the company's legal and compliance leadership



AGENDA

TUESDAY 5 APRIL 2022

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

16:15 - 16:45

How AI and platform management is "changing the game" for quality engineering: A cross industry perspective

Speaker:

• *Jason Jerina, Vice President, Quality Engineering at Change Healthcare*

Now in the healthcare industry, Jason's career in software quality management has also included test leadership tenures at the Options Clearing Corporation (OCC) and the New York Life insurance company.

Drawing on this rich experience, Jason will describe how effectiveness scores for risk-based testing are now possible with a management platform that can integrate new AI and machine-learning methodologies.

Jason will start by describing how the challenges of testing financial and healthcare apps compares, and then drill down into the methodologies he used for testing apps for cleared options trading at OCC and the particular challenges around stress-testing for algo trading apps. He'll then move on to review with you what he regards as the cutting-edge in quality engineering technology.

16:45 - 17:45

Cocktail reception

SPEAKERS



Subhadeep Bhattacharjee
Northern Trust Corporation
Senior Vice President - Global
Head of Quality Engineering



Eran Kinsbruner
Perfecto/Blazemeter
Chief Evangelist and Product
Manager



Stephen Weinberg
JLL Technologies
(formerly Morningstar)
Senior Director of
Engineering



Miguel Muniz
CME Group
Director of Quality Assurance



Mark Beauvais
Tricentis
Director Strategic Accounts



John Kelly
Sauce Labs
Chief Strategy Officer



Vikul Gupta
Qualitest
Executive Vice President



Alex Hesterberg
Delphix
Chief Customer Officer



Peter Tessin
Discover Financial Services
Senior Manager, Business
Technology Risk and Compliance

SPEAKERS



Reena Bajowala

Ice Miller

Partner, Data Security
and Privacy



Sejal Patel

Synapse

(formerly CURO Financial
Technologies)
Vice President of Compliance



Tom Kottwitz

CNA Financial

Assistant Vice President,
IT Quality Engineering
& Governance



Vidur Amin

Avo Automation

CEO



Demoda Ogunsanya

TransUnion

Senior Advisor



Jason Jerina

Change Healthcare

Vice President, Quality
Engineering



CJ Murzyn

ABN Amro

VP, Global Delivery

NOTES

This image shows a single page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, leaving small margins at the top and bottom. There is no handwriting or other markings on the page.

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