



Financial Forum

NEW YORK

Technologies for DevOps, automation and AI



May 24th 2023
The Harvard Club

WELCOME

Dear Delegate,

QA Financial is pleased to welcome you to the Harvard Club and the 2023 QA Financial Forum New York. You will be hearing some very interesting insights from experts from financial firms at different stages of the DevOps and Cloud transitions.



Our Forum events are Chatham House Rule - or "background only" - to ensure that our speakers can share as much information as possible, so I do ask you to respect that.

We will leave a few minutes for questions after each session. Do have your questions ready, wait for a microphone so everyone can hear your question, and do please introduce yourself.

If speakers have agreed, their presentations will be available for you to download from our website after the event. We will send you the details.

I would like to thank our Forum sponsors that have made this event possible. We have the privilege of working with vendor companies that are working at the leading edge of automation technologies. We have left plenty of time in today's agenda for networking and for discussion at their exhibition stands, so do take the opportunity to talk to them in the breaks.

We hope you enjoy the day and we will welcome your feedback after the Forum. And if you would like to speak at our QA Financial Forum NY 2024, do let us know.

Regards,

A handwritten signature in purple ink, appearing to read "Matthew Crabbe". The signature is fluid and cursive.

Matthew Crabbe
CEO, QA Media

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amdocs.com

Amdocs helps those who build the future to make it amazing. With our market-leading portfolio of software products and services, we unlock our customers' innovative potential, empowering them to provide next-generation communication and media experiences for both the individual end user and enterprise customers. Our 31,000 employees around the globe are here to accelerate service providers' migration to the cloud, enable them to differentiate in the 5G era, and digitalize and automate their operations. Listed on the NASDAQ Global Select Market, Amdocs had revenue of \$4.58 billion in fiscal 2022. For more information, visit www.amdocs.com



icedq.com

iceDQ is an integrated DATA TESTING and MONITORING platform. Banks, Insurance, Healthcare, and other enterprises rely on iceDQ to identify and fix data issues early in the data development lifecycle. It prevents both bad quality processes and data from moving into production. iceDQ is the only data platform that works in both development and production enabling a unified data quality goal.



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.

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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.



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.



practitest.com

PractiTest is an end-to-end SaaS test management platform that centralizes all your QA work, processes, teams, and tools into one platform to bridge silos, unify communication, and enable one source of truth across your organization. With PractiTest you can make informed data-driven decisions based on end-to-end visibility provided by customizable reports, real-time dashboards, and dynamic filter views. Improve team productivity; reuse testing elements to eliminate repetitive tasks, plan your team's work based on AI-generated insights, and enable your team to focus on what really matters. PractiTest helps you align your testing operation with business goals, and deliver better products faster.

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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



element34.com

During the application testing process, are you exposing your data to an external SaaS provider outside your firewall? Any risk in that? And are you compliant? Element34 is uniquely positioned to address financial institutions' ever-increasing need for compliant, secure, cross browser/mobile application testing solutions. The company has developed the world's most advanced enterprise application testing solution that lives behind the corporate firewall, never exposing clients' critical data to any risk or potential breach of compliance. Our flagship solution SBOX has been specifically designed to keep your data within your secure infrastructure at all times, while delivering a highly robust and low maintenance, intuitive, automated testing experience. SBOX removes risk of data breach and non-compliance, promotes upstream agile testing and delivers unparalleled speed and reduced time to market.



keysight.com

Keysight Technologies, Inc. (NYSE: KEYS) delivers advanced design and validation solutions that help accelerate innovation to connect and secure the world. Keysight's dedication to speed and precision extends to software-driven insights and analytics that bring tomorrow's technology products to market faster across the development life cycle. Keysight's Eggplant test and automation intelligence solutions deliver continuous testing of applications, devices, and digital services enabling your teams to deliver higher quality applications faster than ever before.

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k2view.com

At K2View, we believe that every enterprise should be able to leverage its data to become as disruptive and agile as the best companies in its industry. We make this possible through our patented Data Product Platform, which creates and manages a complete and compliant dataset for every business entity – on demand, and in real time. The dataset is always in sync with its underlying sources, adapts to changes in the source structures, and is instantly accessible to any authorized data consumer. Data Product Platform fuels many operational use cases, including customer 360, data masking and tokenization, test data management, data migration, legacy application modernization, data pipelining and more – to deliver business outcomes in less than half the time, and at half the cost, of any other alternative. K2View Test Data Management tool ingests data from production sources, and organizes it according to your organization's primary business entities, for example, customers, orders, products, etc. A self-service web portal enables DevOps and QA teams to quickly create tailored and masked test data subsets without code.



mabl.com

Mabl is the leading intelligent test automation platform built for CI/CD. It's the only SaaS solution that tightly integrates automated end-to-end testing into the entire development lifecycle. With mabl creating, executing, and maintaining reliable tests has never been easier, allowing software teams to increase test coverage, speed up development and improve application quality.



AGENDA

WEDNESDAY MAY 24TH 2023

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 - 09:30

Hyperscale to cognitive quality engineering and business driven testing: Featuring banking case studies

Speakers:

- *Dror Avriilingi, VP, Head of Amdocs Quality Engineering International & Strategy*
- *Reuven Ben Menachem, Co-Founder and CEO, Fundtech*
- *Gabriella Szasz, Global Head of Agile Test Management, Citi*

Dror Avriilingi will share his insights on how financial firms, both large and small, can accelerate transformation and modernization, and what truly cognitive quality engineering is going to mean for your business. We'll hear how Amdocs is working with bank clients to produce a road-map for modernizing and scaling quality engineering.

We will focus on how banks at the leading edge of DevOps are progressing from the established centre-of-excellence software engineering platform model to a centre-of-enablement - a transition to business-driven development.

We'll also hear from fintech pioneer and banking expert Reuven Ben Menachem why this transition reflects broader, industry-wide requirements, and what challenges in DevOps he believes banks will be tackling over the coming 12 months.

09:30 - 10:00

Data, Security and DevSecOps - How cyber risks can be managed

Speaker:

- *Stephen Ramey, VP Cyber Risk Engineering, Sompco International*

Stephen will review how Sompco has evolved its cyber risk insurance products in the wake of the President's 2021 executive order on cybersecurity, recent high-profile vulnerabilities including Log4j and the Microsoft Exchange Zero Day vulnerabilities, and how financial firms can best embed security into their DevOps platforms and processes. These major cybersecurity events generate countless data points that can be aggregated, analyzed, and interpreted to assess the maturity of cybersecurity practices within an organization or as an industry whole. Structuring the information is critical to the successful detection of trends and improvement of cybersecurity practices.



AGENDA

WEDNESDAY MAY 24TH 2023

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

10:00 - 10:30

Achieving rapid test execution speeds for mobile: How Goldman Sachs fueled app testing with Perfecto

• *Speakers:*

Shadman Fahim, Vice President & Private Wealth Management Digital Mobile QA Lead, Goldman Sachs, introduced by Gregg Swensen, Senior Account Executive with Performce

Applications designed for private banking customers have to combine a 5-star user experience with advanced and complex features. Shadman will be explaining how Goldman Sachs accelerated test execution, in partnership with Perfecto and the Perfecto "Black Belt" team - a team with a long history of helping financial firms boost their mobile and web application. In this session, we'll be looking at the high level testing adopted by Goldman Sachs and zooming in on the example of the iOS 15 security upgrade surrounding passcode entry requirements.

10:30 - 11:00

Chaos engineering for scale and software risk management in the cloud: Citi's instant payments platform as a case study

Speaker:

Ramkumar Ayyadurai, Director, Engineering Productivity and DevOps, Equities, Prime Service and Futures, Citi

All large financial enterprises face a similar challenge as they modernize their legacy stack; how to build a scalable and reliable application in the distributed cloud infrastructure and microservices world.

Standard software and performance testing is not enough to meet these demands, particularly when it comes to finding the "unknown unknowns" in software risk management across the thousands of apps large firms typically have to manage.

Ram believes that chaos engineering could be a big part of the answer to these questions. He'll provide a general introduction to chaos engineering, and share his experience of how teams can integrate chaos engineering into their SDLC and manage a "mindset shift" across development and production support in their organization for improving reliability. He will dive deeper into how Citi's chaos engineering platform works, using the example of chaos testing for low latency trading and payment platforms. He'll cover tests for different layers of app complexity (the application, the network and the infrastructure), and how you can automatically create and automate chaos testing scenarios based on your systems design.

11:00 - 11:30

Coffee & networking break



AGENDA

WEDNESDAY MAY 24TH 2023

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

11:30 - 12:00

Automating data migration testing: A case study of an investment banking merger

Speaker:

- **Sandesh Gawande, CTO, iCEDQ**

Recent history has taught us that major data migration programs following banking mergers can be hugely challenging and problematic. In this session Sandesh Gawande, will take us through a detailed case study involving a major investment bank which had acquired a brokerage firm. Following the merger, the bank decided to maintain an independent order management system, but merge the trading and settlement systems into a single platform. Sandesh will explain how iCEDQ's automated test creation platform - helped certify the data migration. The need to run both settlement systems in parallel during the migration was one key challenge. A tight timeline was another. And Sandesh will demonstrate how the migration was accomplished in record time, with minimum resources and in compliance with regulatory requirements.

12:00 - 12:30

How to deliver software on time and under budget with service virtualization

Speakers:

- **Roya Montazeri, Sr. Director Software Test Automation, Cox Automotive**
- **Rolando Martinez, Software Engineer, FIS**
- **Kenny Austin, Chief Customer Officer, Parasoft**

To deliver financial services software applications on time and under budget, a well-defined automated testing strategy is crucial for finding and fixing defects early in the development cycle. Cox Automotive and FIS Global will discuss how they utilized service virtualization to reduce defects, increase software quality, and streamline development by minimizing downstream dependencies.

Learn how to measure the ROI of test automation, automate the ability to create and reuse virtual assets, and scale test automation and service virtualization in your organization.

12:30 - 13:30

Lunch & networking break



AGENDA

WEDNESDAY MAY 24TH 2023

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

13:30 - 14:00

Managing security for test data in the Cloud: How to take the first steps

Speaker:

• **Ilker Taskaya, field CTO, Delphix**

Firms face two key challenges in managing data for DevOps. First, they have to decide where to start: the challenge is whether to overhaul data management for possibly thousands of applications in one massive effort, or manage the process in stages. The second key challenge is how to manage the security of the firm's information walls as its Cloud-based data warehouse is rapidly growing. Ilker Taskaya and our panellists will take you through the process steps that they have taken to ensure access to secure data sets across the entire software development lifecycle, with particular attention on how the challenges vary between on-prem and public Cloud alternatives.

14:00 - 14:30

"Design thinking" - Cutting-edge UX for apps across the enterprise

Speaker:

• **Neil Pradhan, Lead UX Designer, Morgan Stanley**

How can large financial firms achieve consistent, five-star, customer experience across hundreds or even thousands of applications? There are methodologies for aligning varied development teams and their apps in a common objective, and Neil will draw on his experience working at leading investment banks to demonstrate how to use them. He'll be covering the technique of journey mapping, managing the balance of outcomes and output requirements, design systems, and use of performance metrics to provide evidence of progress. Firms need to establish new ways of collecting information and new ways of thinking about UX, and Neil will help you establish your new agenda.

14:30 - 15:00

Panel session: Consolidate and orchestrate your test tooling: Create the TCoE you need for risk, audit, and compliance reporting

Speakers:

• **Kannan Kuppuswamy, Corporate Vice President, New York Life Insurance**

• **Shilpa Khurana, Director-Head of QA: Managed Services, KPMG US**

• **Joel Montvelisky, Co-Founder and Chief Solution Architect, PractiTest**

We'll be discussing two key, interlocking, trends. Financial firms are consolidating their test tooling for cost and efficiency reasons. They are also responding to the broader challenge of establishing new standards for enterprise IT risk management and digital resilience. Our panelists will cover tooling and platform decisions they are making, with a focus on release orchestration and the development of test centers of excellence (TCoEs) that enable leading insurance companies such as New York Life to facilitate reporting of key data for internal risk management and audit requirements. Separately, we'll also be discussing how the consolidation of your test automation toolkit can facilitate regulatory external reporting requirements as supervisors increase their scrutiny of how leading firms are benchmarking their digital resilience. The aim of this session is to provide you with some fresh ideas on how you can manage your QA and testing technology assets effectively.

15:00 - 15:30

Coffee Break



AGENDA

WEDNESDAY MAY 24TH 2023

SOFTWARE RISK MANAGEMENT AND TECHNOLOGIES FOR CONTINUOUS APP

15:30 - 16:00

Quality coverage with the user's lens: A case study with S&P Global

Speaker:

- **Anupama Malladi, head of quality engineering, structured finance and US public finance, S&P Global Ratings**

S&P Global Ratings, a globally respected credit ratings agency, providing a range of products and services for investors, issuers, intermediaries, and beyond to make decisions with conviction, has re-focused its software engineering practices around business value delivery and improved end user experience. Anupama will explain how adoption of a customer-centric approach has impacted on the organization of Quality Engineering, helping deliver measurable business outcomes. A particular focus on how S&P Global Ratings has changed its benchmarking for Test Coverage and its measures of success. She will also take a deep dive into the approach of determining the Quality Sentiment map for end-to-end business processes, making smarter automation investments, and how complex test data management is organized to support a global business.

16:00 - 16:30

Extreme programming and Generative AI: How to move to next-level Agile and test-first development

Speaker:

- **Vidya More, Head of Engineering, Xero**

In this session Vidya will demonstrate how Extreme programming and Generative AI can be used to generate AI-aided test cases to move to the next level of Agile. She will also explain how DevSecOps and compliance requirements can be embedded in this new framework, and will discuss some of the challenges - and potential solutions - in testing with the help of GPT-4 and other AI applications. Xero is a leading Cloud-based accounting software provider to smaller businesses and Vidya is leading engineering teams building tax products for the USA, Canada and EMEA. Xero has been Cloud-based since its launch in 2006 and has been focused on creating sustainable engineering excellence, and Vidya has been an evangelist for new engineering methodologies at Xero as well as at her previous consulting role at EY. Vidya is currently exploring how to leverage extreme programming and generative AI to accelerate product development and fully embed QA testing as an integrated part of the engineering process.

16:30 - 17:00

Maximizing the potential of 5G: Network and testing requirements at banks, investment and capital markets firms

Speakers:

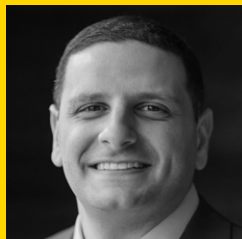
- **Tony Lutz, Managing Partner, Global Solutions, Verizon**
- **Chris LaBarbera, Senior Innovation Principal, Verizon**

Right now, around 30% of Americans have access to 5G. The real revolution in connectivity has yet to happen - but it will happen fast, and the potential is enormous. How will financial services applications have to change to realise that opportunity and what will be the software and network testing requirements? Tony and Chris will take us through the key challenges involved in the 5G transformation and explain how some of Verizon's largest financial services clients are progressing, both in terms of internal-facing and customer facing app development.

17:00 - 18:00

Cocktail reception

SPEAKERS



Stephen Ramey
Sompo International
VP Cyber Risk Engineering



Shadman Fahim
Goldman Sachs
Vice President & Private Wealth
Management Digital Mobile
QA Lead



Gregg Swensen
Perforce
Senior Account Executive



Ramkumar Ayyadurai
Citi
Director, Engineering Productivity
and DevOps, Equities, Prime
Services and Futures



Sandesh Gawande
iCEDQ
CTO



Kenny Austin
Parasoft
Chief Customer Officer



Roya Montazeri
Cox Automotive
Sr. Director Software Test
Automation



Ilker Taskaya
Delphix
CTO



Neil Pradhan
Morgan Stanley
Lead UX Designer

SPEAKERS



Joel Montvelisky
PractiTest
Co-Founder and Chief Solution Architect



Kannan Kuppuswamy
New York Life Insurance
Corporate Vice President
Test Tools Process Architect



Reuven Ben Menachem
Fundtech
Co-Founder and CEO



Anupama Malladi
S&P Global Ratings
Head of Product Engineering QA



Vidya More
Xero
Head of Engineering



Dror Avrilingi
Amdocs
VP, Head of Amdocs Quality Engineering International & Strategy



Chris LaBarbera
Verizon
Senior Innovation Principal



Rolando Martinez
FIS
Software Engineer



Tony Lutz
Verizon
Managing Partner, Global Solutions

SPEAKERS



Gabriella Szasz

Citi

Global Head of Agile Test
Management



Shilpa Khurana

KPMG US

Director-Head of QA:
Managed Services

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at the QA Financial Forums**

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NOTES

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