# 5 EASY STEPS for Choosing the Right QA Management System for Your Team

If you are reading these lines then you're probably thinking about getting a new QA Management tool, either to upgrade your old one or simply to start working professionally instead of relying on Word, Excel and Email to do the job.

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1 **You will start** by googling some tools, spend half a day registering for a few online demos, downloading and installing a few more until you reach about seven different tools and feel you've had enough.
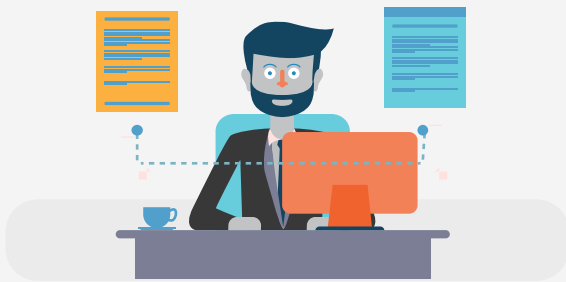
2 **You plan** to go through the demos tomorrow and make a comparison table, but something comes up and you have to put the project on hold for 3 to 5 days.

3 **You're back!** But now you really don't have a lot of time so you plan to review 2 or 3 of the demos, at most.

4 **You work** on this for about 30 minutes, making a few clicks on each system but then you stop and go back to your testng tasks because your test-lead started giving you the look that means:

**"make-sure-we-don't-delay-the-release-again!!!"**

If the **"process"** above sounds familiar you're not alone. It happens to many (if not most) evaluation projects, but this need not be the case with yours.

Below, we provide you with a simple 5-STEP WORK plan to help you evaluate and select the appropriate QA Management System for your team and your company's needs.

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STEP 1 - PROJECT LEAD SELECTION

If the team leader is not going to do the evaluation him/herself, s/he should select one person from the team to lead this project. This person will be dedicated to the task, needs to have the required time allocated on their schedule, and it is their responsibility to make sure it is completed, otherwise, months will go by wasted without achieving any real progress.
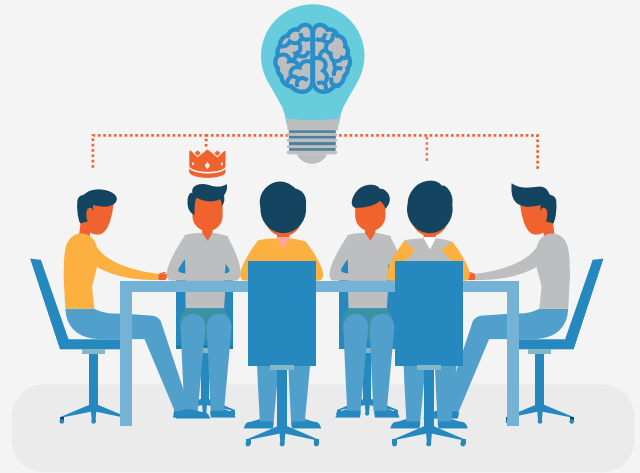
STEP 2 - CREATE AN EVALUATION CHECKLIST

It is highly advisable to create a require-ments list that describes/defines your expectations from the new tool. Think about the reasons that made you start looking for a new tool and write them down. You can even use a checklist table, making it easier to compare your options further on down the line. Make sure the list includes not only features but also criteria such as: trustworthiness of the vendor, user recommendations, training, etc.

Very important - if there are any limitations
(budget / SaaS / OS support / ...) set by your company management / security team / your boss /... now is the time to define them so you won't waste time on some super exciting platform which turns out to be irrelevant for your team

PractiTest has prepared a features comparison checklist that you can use as a reference for your own requirements checklist. **Click here to download it for free.**

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STEP 3 - VENDOR RESEARCH

There are many vendors and tools out there; to make sure you don't drown in the sea of options, use predefined criteria when browsing the sites.

For example, use the features and limitations checklist you created earlier, look at user stories as well as customer lists. You can even look up external recommendations or complaints/gripes in external sources like QA groups (e.g., LinkedIn QA groups) or forums (e.g., STC, SQA forums).

Try to come up with 4 to 6 vendors that appear to have what you are looking for and email them your checklist to verify that their solution indeed complies with your needs.

STEP 4 - VENDOR SHORTLIST

The checklist answers will help you narrow your list down to 2 to 3 vendors.* Now you can sign up to work with an actual trial project and begin the real evaluation of each of your tools.

If possible, ask the vendors to set up an introduction session **BEFORE** you start working with the tool. One hour with their representative can save you a lot of time **"playing"** with the tool and you will get a good idea of whether it fits your needs or not. It will also give you time to ask specific questions, validate your checklist, and see their process.

Here is where you might want to get your team involved. Invite them to listen in on the demo too and discuss it afterwards to figure out the pros and cons of each solution

***Tip** - if you still have more than 2 or 3 vendors, try to send a question to support, see how fast they answer, or try the product in another browser and see how fast it runs. In any case you should not have more than 3 vendors in your shortlist.*

STEP 5 - LIVE TRIAL

There's no way around it! To really understand the ability, the limitations and the general for, you will need to work with the tools.

Probably the best way is to take one small feature or component from your everyday testing tasks and use the tools that still seem relevant in a limited but realistic end-to-end evaluation:

- Customize fields and workflow
- Add a few requirements
- Create some test templates
- Run some tests
- Report issues
- Create a couple of dashboards and reports
- etc.

At this point, once you can really define the pros and cons of each tool, together with your team you should be able to decide which tool to choose and deploy!
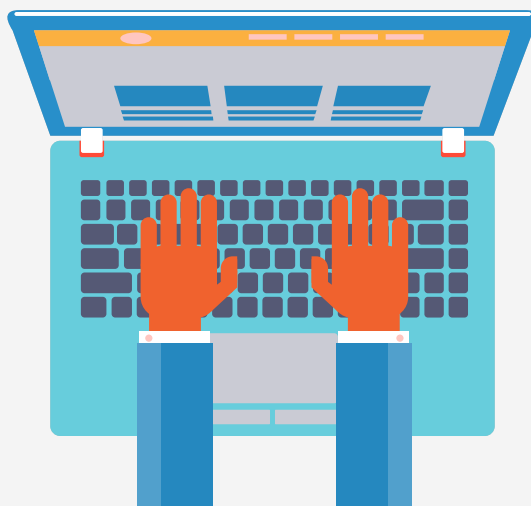
BUT WE'RE AFRAID IT'S NOT OVER YET...

Even after you have successfully evaluated and selected the right tool for your team, you should understand that the evaluation is not the final (or even the toughest) part of the process.

The real work starts after you've selected the QA management tool and begin deploying it so your team can work successfully with the new system.

This includes the job of adapting the process of each of your team members to conform to the logic of the tool you selected. You will need also to review and update your texts, deleting irrelevant or duplicate data. Train your team and the rest of the people who need to use or retrieve information from the system, etc.

But we'll save those issues for another paper: The deployment process.

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