

# PlanTech Consulting Group Improves Software Quality and Saves Staff Time with IBM Rational®

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## Overview

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### ■ The Challenge

*PlanTech was converting its flagship client-server application into a larger enterprise-level system and needed to introduce discipline into its software development processes.*

### ■ The Solution

*PlanTech used IBM Rational RequisitePro™ as a framework for documentation and specifications, Robot to automate product testing and ClearQuest™ for its helpdesk operations.*

### ■ The Benefits

*Using IBM Rational software development tools, PlanTech Consulting Group has improved development efficiency and change management processes by putting in place more rigorous processes for documentation and requirements management. It has automated product testing, leaving staff more time to work on other projects. PlanTech has also streamlined its call centre operations, ensured it can report on every call made to its helpdesk and improved customer satisfaction.*



### About PlanTech Consulting Group

Since starting in 1997, PlanTech Consulting Group has become one of the leading providers of integrated technology solutions for financial advisors and distribution networks in Australia, New Zealand and South Africa.

PlanTech's products including ProPlanner, Risk Researcher, SuperSolver and 4Cast help financial advisors keep track of interactions with their clients, evaluate and compare multiple insurance products or superannuation funds, and plan for clients' future needs.

The company employs more than 70 people, including 25-30 software development staff and 12 call centre staff.

### A more formal and disciplined development process

Beginning in 2002, PlanTech Consulting Group wanted to expand its flagship ProPlanner package from a client-server application built using Microsoft® Visual Basic 6 to a scalable, enterprise-level Web application developed under Visual Studio .NET. To make the transition easier, PlanTech evaluated a range of tools to formalise its development processes.

*“As a growing company, we needed to introduce and mandate some discipline into our development process,” said Mark Young, Director of Operations. “We had ad hoc ways of tracking and reporting information.”*

*“Because we’re an IT house, we initially thought ‘Why shouldn’t we just build our own requirements tracking software?’ We realised it would be too time-consuming to develop our own systems because that wasn’t our core strength. We needed an off-the-shelf solution, so we could concentrate on our core business which was making financial software.”*

**IBM Rational RequisitePro leaves less room for misinterpretation**

PlanTech Consulting Group chose RequisitePro from IBM Rational for documentation and requirements management.

“With RequisitePro, we gained control over the entire software development lifecycle,” said Young. “Now we can manage our requirements gathering, requirements management and the early stages of development including prototyping, re-engineering and change management.”

Although writing the initial product specifications sometimes takes longer, this is because the framework

provided by RequisitePro forces the development team to be more thorough. However, being more detailed upfront saves costs, time and difficulties further down the track.

“Because we can then track the specifications through the development and through to testing, we know that a change in any of those areas needs to flow back through the process. We can very quickly track the impact of a change, and make sure the development, documentation and testing are all kept in sync,” said Young.

“The time we take now will be reflected in the quality of our software down the track. The developers write it correctly the first time because there’s less room for misinterpretation.”

Avoiding a defect at the requirements phase can be 100 times less expensive than fixing it in testing or once the system is deployed.

**Saving staff time and improving quality with IBM Rational Robot**

After evaluating products from a number of competing vendors, PlanTech Consulting group chose IBM Rational Robot to run automatic tests on all user screens. Because it was PlanTech’s first project designed for 1,000 or more concurrent users, it brought in IBM business partner TestPro to help design the testing systems.

“As the development department puts a release out to the rest of the business, we use IBM Rational Robot to make sure all the requirements have been met and everything is holding together,” said Young.

Like RequisitePro, Robot takes some preparation up front but saves considerable time in the long run.

“Although it has taken us time to write the scripts, we have dramatically shortened our test cycles. We will make significant savings by running automated test scripts overnight rather than having ten or more people running tests manually,” said Young. “Taking into account the automation and the price, Robot offered us the best value for money.”

**IBM Rational ClearQuest: a powerful incident management framework**

While PlanTech Consulting was evaluating software to aid its development processes, its call centre software was also due for a refresh.

“We have approximately 4,000 users that use our freecall number and we want to keep track of every call we get. We were struggling to report accurately on what was happening in our call centre,” said Young. “We also knew what it would cost us to build and maintain our own call centre software.”

When compared with dedicated call centre software, ClearQuest from IBM Rational proved the most cost-effective choice.

“ClearQuest is very powerful in incident tracking. We had to build some utilities around it to support the concept of a call centre, but it had all the basic structure there to track and report on incidents, which is what a call centre needs to do,” said Young. “When we introduced ClearQuest into our call centre, it forced us to refine and document our business processes.”

“ClearQuest already had very good reporting so it was pretty easy for us to put it in place and give ourselves some structured management reporting of how well we’re handling incidents.”

Using ClearQuest for the call centre also allowed PlanTech Consulting Group to start gaining in-house skills so that it could use ClearQuest as an incident tracking system for software development in the future.

#### **Future Plans**

Having put in the hard yards developing test scripts, PlanTech Consulting Group can now reap the benefits and free up testing staff to work on other projects.

The company will extend the use of RequisitePro to more of its development and project management staff. It will also begin using ClearQuest as an internal incident management system for software development.

“We are very pleased with the consulting and customer service from IBM Rational,” said Young. “We have an account manager who is a one-stop shop for all our calls.”

*“For the last three years we have seen our efficiency levels increase dramatically. We can service our clients better. We can easily generate reports on all customer contact with the helpdesk and speak to them with confidence. We have been able to give clients access to data through the Internet,” said Young*



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