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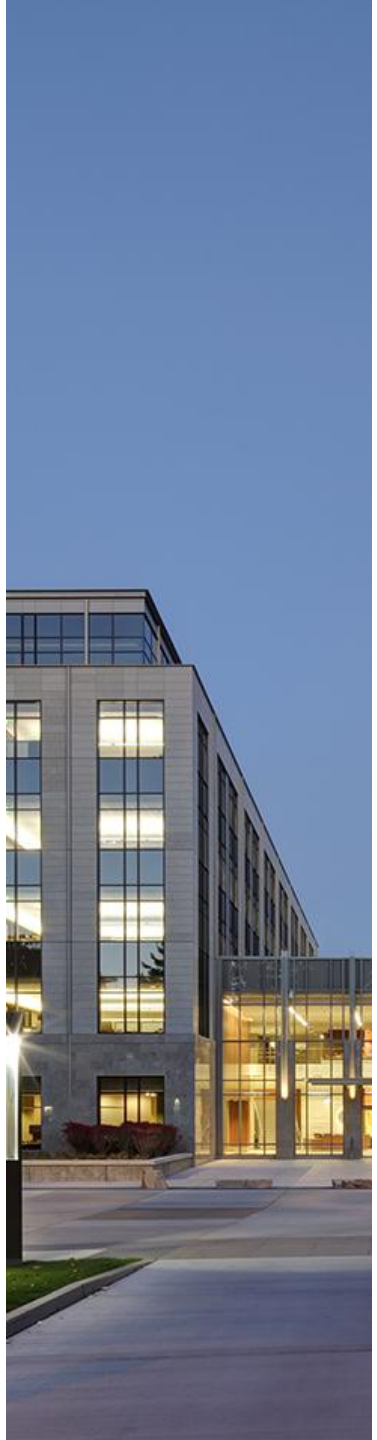
We will begin at 10:05

IT Project Resources Delivery Cohort

September 16th, 2026

Deep Dive Testing Planning and Master Test Plan



Introducing the WaTech IT Project Resources Framework Team

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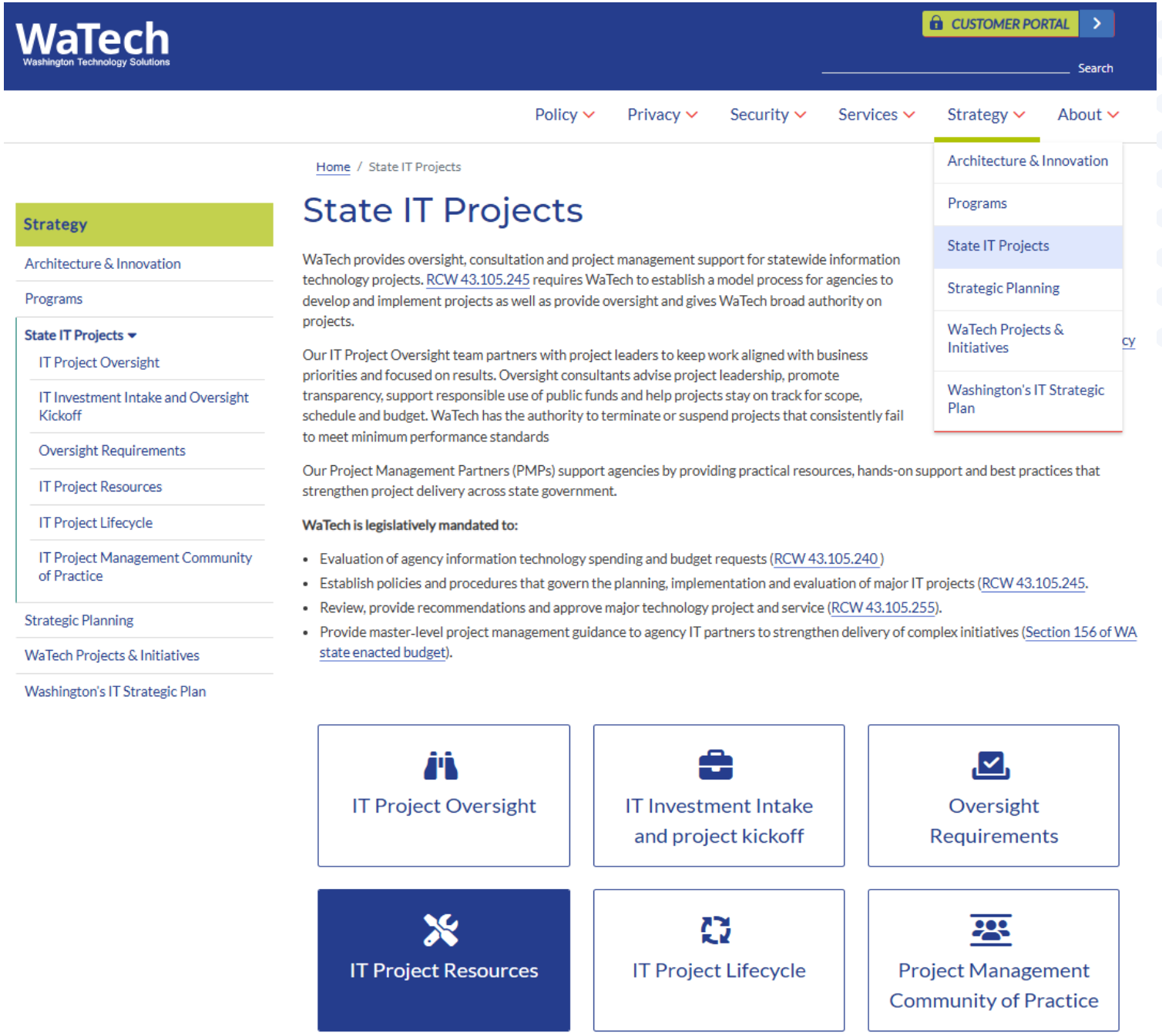
Your WaTech Project Management Partners, Statewide Business Architect, and Oversight Consultant Team providing guidance and support to project management professionals across the state of Washington

"A successful implementation is not measured by the day it goes live – but by the lasting value it delivers to the people it serves."

How to access the IT Project Resources Framework

1. Select State IT Projects
2. Click on IT Project Resources



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How to Use This Framework

Choose your own adventure!

PROVIDES	DEFINES	ENSURES	GUIDES
A high-level roadmap for your project	Each stage's purpose, key activities, required outputs	Consistency and alignment with enterprise expectations	Teams through consistent, repeatable activities

Use of this framework and associated documentation is voluntary for agencies to use as they see fit.

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Summary:

- Voluntary framework for agency use
- Defines each stage's purpose and outputs
- Includes readiness checkpoints
- Guides teams through consistent repeatable activities

Jeremiah Whitehall, PMP

Testing Director, One Washington | Founder & Partner, Liberum

- 20+ years leading complex technology and business transformations
- Expertise in program/project management, PMO, organizational change and Lean Six Sigma
- Extensive Washington State experience, including: OFM OneWA, DSHS, Ecology, and WSDOT

Agenda for Today

Deep dive: test planning and the master test plan

1. **Why test planning is important**
   The four ways projects fail, and why none of them are testing failures
2. **What are you testing?**
   Defining the thing under test before anything else
3. **How will you test it?**
   Test levels, test types, and the definition of done
4. **Who tests it?**
   Ownership, and why it is not the testing team
5. **Documenting it**
   What a master test plan is, and what hangs beneath it
6. **Where this fits your framework**
   Test planning against IT Project Resources Stages 0 to 9

Then questions and discussion.

Testing spans Workday, the Transformation Layer, agency legacy systems, and statewide enterprise systems

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Why Test Planning Is Important

Projects without a test plan fail the same four ways

Testing becomes the schedule's shock absorber

Every upstream delay is absorbed by the one activity scheduled last. Test execution gets compressed, and the compression is never planned for.

Nobody agrees what "tested" means

Without written criteria, "are we done?" becomes an opinion. The loudest opinion in the room wins, and it is rarely the best-informed one.

Defects surface at the worst possible moment

A design defect found during integration testing costs far more to fix than the same defect found during design review. Late discovery is a planning choice, not bad luck.

Go-live becomes a judgment call

The decision to launch should be an evidence review against pre-agreed criteria. Without a plan, it degrades into a confidence vote.

None of these are testing failures. They are planning failures that only become visible during testing.

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You Cannot Test Everything

ISTQB Foundation Level, testing principles 1 and 2

10,000,000,000

Input combinations in a single form with ten fields and ten possible values each. One form. Not even one system.

So the question is never "did you test everything?"

It is "**did you test the right things**, and **can you show your work**?"

This principle licenses every prioritization decision a testing organization ever makes. It is also the honest answer when leadership asks why a defect was discovered in production.

What follows from this

- Testing is a risk exercise, not a coverage exercise. You are buying down risk with a finite budget.
- That means someone has to decide what matters most — and that decision belongs in a written plan, not in a tester's head.
- A test plan is therefore not a schedule. It is a written argument that you tested enough of the right things.

Two principles worth memorizing

- Exhaustive testing is impossible. Testing everything is not achievable except in trivial cases.
- Testing shows the presence of defects, not their absence. Passing tests never prove a system is defect-free.
- ISTQB is the International Software Testing Qualifications Board. Its Foundation Level syllabus is the closest thing testing has to a common vocabulary.

So What Has to Come First

Most test plans start at the last question

1

WHAT

What is the thing under test? Enumerate it. You cannot cover what you have not listed.

2

HOW

At what level, in what order, against what definition of done?

3

WHO

Who owns each piece? Ownership follows from the inventory.

4

WHEN

How long, in what sequence, with what resources.

Only the fourth question is a schedule question — and it is the one most plans open with. A date set before the first three are answered is not a plan. It is a guess with a deadline attached.

Everything for the rest of this session sits under question one and question two.

When a plan opens with a schedule and a headcount, it is answering questions nobody can answer yet.

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First Question: What Are You Testing?

"We are testing Workday" is not a scope statement

1 Systems

The applications themselves. Workday, the Transformation Layer, agency legacy systems, statewide enterprise systems, and external systems such as federal system connection points.

2 Data Integrations

The connections between systems. A system and its integrations are counted separately — an application can be healthy while the pipe into it is broken.

3 Data

Reference data (codes and lookups), master data (vendors, accounts, organizations), and transactional data (invoices, payments, journal entries).

4 Reporting

Workday reports, agency-specific reports, and enterprise reports. A report that returns the wrong number is a defect even when every system behind it works.

5 Business Processes

The work people actually do. Statewide and agency-specific, inside Workday and outside it. This is the category most projects forget until user acceptance testing (UAT).

What do we test?

Five main categories.

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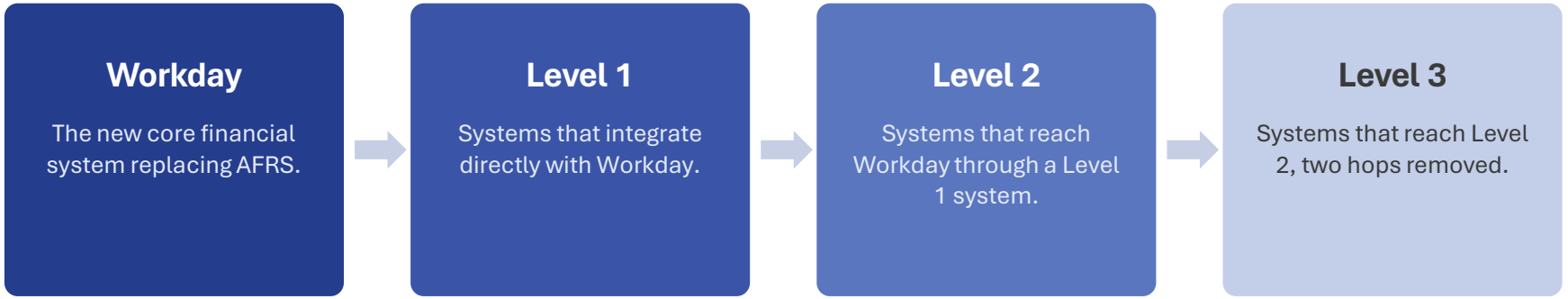
The Ecosystem

Connection levels, measured in hops from the new system



The planning consequence

Replacing one system does not mean testing one system. It means testing everything that touches it, and then everything that touches those. On OneWa the scope is not a list somebody handed us — it is something we have to go find, agency by agency, which is why identifying Level 2 and Level 3 systems is critical to success.

Why this matters for planning

- Scope grows outward from the new system, not inward from your project boundary
- A Level 3 system belongs to an agency that may not know it is affected yet
- Discovery of Levels 2 and 3 is itself a planned activity that must be completed to understand the scope of our testing

Second Question: How Will You Test It?

Isolation before integration — ISTQB test levels applied

IST	**Individual System Testing**	Each system on its own. Does this system still work correctly by itself after the changes made to it?
MST	**Multi-System Testing**	Systems together, without Workday. Does data survive the handoffs between agency and enterprise systems? (SIT focused on non-Workday systems)
WT	**Workday Testing**	The new system itself — configuration, its direct integrations, its reports, and user acceptance testing. (SIT focused on Workday and the systems its connected to)
E2E	**All Systems End-to-End**	The entire ecosystem, running real business processes. This is the go-live gate.

The first three run concurrently wherever dependencies allow. End-to-end is sequential and gated — it cannot start until the other three are complete across every participating agency. Regression testing runs continuously underneath all of them, triggered by change rather than by phase.

Connect everything on day one and every failure has forty root causes. Isolate first and it has one.

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Test Types: What Question Are You Asking?

A test object plus a test type is an executable test

Test type	What it asks	IST	MST	WT	E2E
Functional	Does it behave the way the requirement says it should?	✓	✓	✓	–
Integration	Did the data leave one system and arrive correctly in the next?	✓	✓	✓	–
Data Quality	Is the data accurate and complete, and do the balances reconcile?	✓	✓	✓	–
Regression	Did a recent change break something that already worked?	✓	✓	✓	✓
Performance	Does it hold up at real volume, at peak, and with growth headroom?	–	–	✓	✓
UAT	Will the people who do this work every day accept it?	–	–	✓	✓
End to End	Do sequential business processes work from start to finish?	–	–	–	✓
Accessibility	Can every employee use it, including with assistive technology?	–	–	✓	–
Security	Can the right people do the right things, and no one else?	–	–	✓	–

Unit testing/build validation sits before all of this and belongs to the people making the changes.

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Test Object vs. Test Type

- A test object tells you the thing that needs to be tested
- A test type tells you what result you are trying to prove
- One object paired with one type is an executable test. That pairing is what actually fills a test plan.
- Test levels (phases) decide when each pairing runs
- Types are not phases. The same type reappears across several phases.

How You Know You Are Done

Entry and exit criteria

Entry criteria

What must be true before testing can start

- The environment exists and is stable
- Test data is loaded and represents reality
- Test coverage levels assigned to test objects
- Test cases are written and approved
- Testers are identified, trained, and have access

Exit criteria

What must be true before testing can stop

- Planned test cases executed, with results recorded
- No open critical or high defects
- Remaining defects reviewed and accepted by a named body
- Coverage traced back to requirements

Entry criteria protect the schedule. Starting a test phase before the environment is ready does not save time — it spends the phase discovering environment problems instead of product defects, and the phase has to be run again.

Exit criteria protect the decision. They turn go-live from a confidence vote into an evidence review.

Criteria negotiated after execution has started are not criteria. They are a negotiation you will lose.

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Test Planning Responsibilities

Ownership falls out of the inventory — it is not assigned separately

Test object	Who is best placed to say whether it works
Workday configuration and business processes	Program and System Integrator, validated by the business users who will run the process
Agency legacy systems	The agency that owns and operates the system. Nobody else knows what correct looks like.
Integrations	Both endpoints jointly. An integration with one owner is an integration with no owner.
Data	The data steward for each domain, not the testing team
Reporting	The people who consume the report and can spot a wrong number
The plan, the coverage agreement, and the gates	**The testing organization**

Testing is a unified effort combining all parties involved in the change. Mutually assured success.

RASCI

- Responsible — does the work
- Accountable — one name, owns the outcome
- Supporting — provides effort to the responsible party
- Consulted — has input before the decision
- Informed — told after the decision
- The value is not the letters. It is being forced to name one accountable person per deliverable before work starts.

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Documenting the Testing Plan

One strategy at the top, many plans beneath it

Why split it up

- A single document covering environments, data, four test phases, regression, and defects becomes unusable and unmaintainable
- Subordinate plans inherit their authority from the strategy — change the strategy and everything beneath it moves
- Each plan has its own owner, its own review cycle, and its own approval record
- Scale it down honestly: on a small project this may be one document with named sections

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Where This Fits in the Framework

Stage 7 is when you test. Stage 1 is when you plan to.

Stages 1 – 2	Define what is being tested and how. Build the inventory, rank by risk, choose test levels, choose the appropriate test types, write entry and exit criteria, name owners.
Stage 3	Environments and data — the two entry criteria most often missed.
Stage 4	Confirm readiness against the criteria written at Stage 1. Not a new conversation.
Stage 6	Validation before formal testing. Catches configuration problems while they are still cheap.
Stage 7	**Execute the plan. If the plan is being written here, it is already too late.**

Stage labels are WaTech's IT Project Resources Framework.

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The trap

- The framework names testing at Stage 7, and that is correct — Stage 7 is test execution
- Test planning is not a Stage 7 activity. It belongs at Stages 1 and 2, alongside scoping and requirements
- If the first test-planning conversation happens at Stage 7, what gets produced is a schedule, not a plan
- By then the inventory, the criteria, and the ownership decisions are all late

Summary: What to Focus on First

Five steps, in order. Each one is a precondition for the next.

1	**Inventory what is in scope for the project (and could require testing)**	List every system, integration, data domain, report, and business process in scope. You cannot cover what you have not listed.
2	**Rank by risk and business criticality**	Exhaustive testing is impossible, so prioritization is not optional. Decide deliberately and write down why.
3	**Assign a test type and test level (phase) to each thing that needs to be tested**	Alone, connected, or end-to-end. Isolation before integration, every time.
4	**Write entry and exit criteria**	Before anyone writes a test case. Define done while it is still a design decision rather than a negotiation.
5	**Name an owner for each item**	One accountable name per test object. It falls out of step one.

You cannot plan testing until you know what you are testing and how you intend to test it.

Only after these five steps does a date mean anything. Everything before that is a guess with a deadline attached.

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Questions?

Reminder – September 30th Agenda is posted, click here to add to your calendar

Online Meeting Information
09/30/26 AGENDA: Governance in Delivery

Contact: WaTechProjectMgmtPartners@watech.wa.gov