Ad hoc testing (AKA exploratory testing) relies on tester intuition. It is unscripted, unrehearsed, and improvisational.

But...

How do I, as test manager, understand what’s happening, so I can direct the work and explain it to my clients?
One Solution: Test in Sessions

1) Charter  
2) Time Box  
3) Reviewable Result  
4) Debriefing

Normal

Charter:
A clear mission for the session

- A charter may suggest what should be tested, how it should be tested, and what problems to look for.
- A charter is not meant to be a detailed plan.
- General charters may be necessary at first:
  - “Analyze the Insert Picture function”
- Specific charters provide better focus, but take more effort to design:
  - “Test clip art insertion. Focus on stress and flow techniques, and make sure to insert into a variety of documents. We’re concerned about resource leaks or anything else that might degrade performance over time.”
**Time Box:**
*Focused test effort of fixed duration*

Short: 60 minutes (+-15)

**Normal: 90 minutes (+-15)**

Long: 120 minutes (+-15)

- Brief enough for accurate reporting.
- Brief enough to allow flexible scheduling.
- Brief enough to allow course correction.
- Long enough to get solid testing done.
- Long enough for efficient debriefings.
- Beware of overly precise timing.

**Debriefing:**
*Measurement begins with observation*

- The manager reviews *session sheet* to assure that he understands it and that it follows the protocol.
- The tester answers any questions.
- Session metrics are checked.
- Charter may be adjusted.
- Session may be extended.
- New sessions may be chartered.
- Coaching happens.

**Agenda: “PROOF”**
1. Past
2. Results
3. Obstacles
4. Outlook
5. Feelings
Reviewable Result:
A scannable session sheet

- Charter
  - #AREAS
- Start Time
- Tester Name(s)
- Breakdown
  - #DURATION
  - #TEST DESIGN AND EXECUTION
  - #BUG INVESTIGATION AND REPORTING
  - #SESSION SETUP
  - #CHARTER/OPPORTUNITY
- Data Files
- Test Notes
- Bugs
  - #BUG
- Issues
  - #ISSUE

The Breakdown Metrics
Testing is like looking for worms

Test Design and Execution
Session Setup
Bug Investigation and Reporting
Reporting the TBS Breakdown
A guess is okay, but follow the protocol

- Test, Bug, and Setup are orthogonal categories.
- Estimate the percentage of charter work that fell into each category.
- Nearest 5% or 10% is good enough.
- If activities are done simultaneously, report the highest precedence activity.
- Precedence goes in order: T, B, then S.
- All we really want is to track interruptions to testing.
- Don’t include Opportunity Testing in the estimate.

Activity Hierarchy
All test work fits here, somewhere
Work Breakdown: 
Diagnosing the productivity

- Do these proportions make sense?
- How do they change over time?
- Is the reporting protocol being followed?

Coverage: 
Specifying coverage areas

- These are text labels listed in the Charter section of the session sheet. (e.g. “insert picture”)
- Coverage areas can include anything
  - areas of the product
  - test configuration
  - test strategies
  - system configuration parameters
- Use the debriefings to check the validity of the specified coverage areas.
Coverage:

Are we testing the right stuff?

- Is this a risk-based test strategy?

  or

- Is it a lop-sided set of coverage areas?
- Is it distorted reporting?

Distribution of On Charter Testing Across Areas

Using the Data to Estimate a Test Cycle

1. How many perfect sessions (100% on-charter testing) does it take to do a cycle? (let’s say 40)
2. How many sessions can the team (of 4 testers) do per day? (let’s say 3 per day, per tester = 12)
3. How productive are the sessions? (let’s say 66% is on-charter test design and execution)
4. Estimate: 40 / (12 * .66) = 5 days
5. We base the estimate on the data we’ve collected. When any conditions or assumptions behind this estimate change, we will update the estimate.