

# NORTH AMERICA

*On track – and accelerating*

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**Sathish Natarajan**

Group Vice President, Quality Engineering & Testing, Capgemini & Sogeti, Americas

**Kirthy Chennaian**

Vice President & Head of Quality Engineering & Testing, Capgemini Americas

**Shivakumar Balasubramaniyan**

Vice President, Leader Quality Engineering & Testing, Capgemini FS

# WORLD QUALITY REPORT

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THE CLOSER  
YOU LOOK

# THE MORE YOU SEE

There's a difference this year in North American quality engineering (QE) – but not in the course it's taking. The direction is very much the same: the region continues to lead the way in agile adoption, and the use of artificial intelligence (AI) and machine learning (ML) in QE.

So where, then, is the difference? It's in the rate of change. The pace is accelerating. Now more than ever, organizations are looking to achieve quality at speed, and optimize total cost of ownership (TCO) at the same time. Partly, this is because of the economic climate: with inflation high, pressures on energy prices, and the disruption to trade caused by international conflict, businesses are keen to do more with less. It's also partly because of the decline of the pandemic: all those digital transformation projects that slowed down or were put on hold are now being pursued vigorously.

We're seeing a greater demand for testing now than at any time in the last few years. Things are shifting both left and right, and non-functional quality assurance (QA) is growing too. What's more, there's a greater emphasis now on ML and data science, an automation-first approach is pretty much de facto, and so too is the transition to the cloud across all sectors. Industry-specific cloud capabilities are being rolled out by the hyperscalers, which we've found is creating a demand for service providers with sector-specific chops to ensure quality and regulatory compliance.

Further drivers for quality are the rising momentum behind transitions to SAP S/4HANA, and the increasing need to align business processes to customer experience (CX) while maintaining commercial objectives. Indeed, QE is increasingly acting as the champion for business within technology circles. For example, we've seen quality teams ensure that personalized healthcare solutions cater to the needs of different demographics, which is a customer imperative, while still meeting technology and business targets. It's QE that's turning these targets into actionable IT initiatives.

## New norms

We've already noted that test automation is becoming the norm. It's being used in several ways: to quantify customer stories, rationalize data, and achieve end-to-end consistency across multiple developments. Smarter approaches are more prominent now.

We've also noted the continuing rise of agile adoption, and alongside this, we're seeing DevOps moving into its next phase – DevSecOps. The consolidation of these environments has meant that QA is increasingly embedded in teams – but that doesn't necessarily mean that all team members have hybrid skills in both development and test. While there may not now be as many testing centers of excellence as there once were, we still see a need in many large North American organizations for a discrete, horizontal quality and test function.

## Skills in demand

Last year, we observed that there was an appetite for skills in general and strengths in collaboration in particular. If anything, these gaps are even greater now. The prevalence of test automation doesn't make this need go away and collaborative skills are even more critical for organizations seeking to resolve disparate application priorities.

In our increasingly digital world, there are ever more data-driven projects, so skills in test data and test environment management are in high demand. QE service providers are seeing many requests for support in this area.

## Preparing for the future

Sustainability is growing in importance. It's well established as a principle in the IT function as a whole, but it's still being defined in QE specifically. However, that's already beginning to change, as organizations realize that quality contributes to their IT-wide sustainability initiative, and many of them are turning for help to service providers.

Similarly, we're not yet seeing much demand for QE support in the development of emerging technologies such as quantum computing. However, we have been having several conversations about the development of the metaverse, especially in the gaming domain. Organizations are worried about what to do and how to approach these developments to ensure quality and a satisfying customer experience. These and other new technologies are joining the IT mainstream, and major service providers are preparing in anticipation.

What we do see, though, is momentum. There's an increased focus on business outcomes, and the confidence we noted last year is, if anything, greater than ever. It's clear that in North America, the commitment to quality is here to stay – and it's growing.

## Survey watch: Agile Quality Maturity of US organizations

58%

of agile teams have professional quality engineers integrated

60%

of agile teams have test automation implemented

58%

of teams achieved better reliability of systems through test automation

58%

of teams achieved faster release times through test automation



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**Sathish Natarajan**  
Group Vice President, Quality Engineering & Testing, Capgemini & Sogeti, Americas  
[sathish.n@capgemini.com](mailto:sathish.n@capgemini.com)

### Contact Micro Focus

If you desire more information about testing tools, please contact:

**Bill Weinberg**  
ADM Presales Leader, Micro Focus  
[bill.weinberg@microfocus.com](mailto:bill.weinberg@microfocus.com)  
+1 317-439-7835

