ATLASSIAN

The complete guide to Atlassian for ITSM

Reimagine ways of working across IT delivery, operations, and support

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Introduction

Introduction

We live in amazing times. The world is moving at breakneck speed, from super quantum computing to artificial intelligence to self-driving cars. Enterprises across every industry – from traditional banks to pizza delivery – are undergoing massive digital transformation powered by software. At the same time, customers have higher expectations for on-demand services than ever before. When the risk of downtime means billions in lost revenue and customer backlash, the stakes of missing customer expectations for availability and performance are higher than ever. What's more, the rise of the knowledge worker in enterprises demands instant access to information and ways to be productive.

There's so much at stake, and it's not slowing down anytime soon. Yet bounded by complex processes and expensive modules, legacy tools are inflexible and hard to adapt in the face of increasingly dynamic business and technology needs. Siloed systems impose friction and constrain knowledge sharing across teams and modern tools. The growth of modern methodologies like DevOps is putting additional pressure on IT teams to accelerate workflows and reconsider their cultural practices.

As the rise of software-powered services accelerates, IT leaders face a unique opportunity to help their organizations navigate this transformation. You stand at the center of this modernization that's happening across the entire business, from prioritizing and managing demand, to creating seamless processes for internal business teams. There's nothing in an enterprise that isn't running on IT services. The time is now to evolve traditional approaches and lead your teams in navigating transformation and adopting modern ways of working.

In this guide, we're excited to share how Atlassian can support you and your teams on your journey as changemakers. Based on our experience working with leading enterprises, we'll share best practices on how to reimagine your core ITSM practices by combining team-centric practices with Atlassian's best-of-breed ITSM solution.


Jenna Cline,
Head of IT Strategy & Programs, Atlassian

About Atlassian

At Atlassian, we know teams, and what makes them work better, together. We provide the technology backbone with the most critical collaborative workflows – agile project planning, incident management, and response, and service management and support – to help modern IT organizations collaboratively plan, manage and operate, service and support.

Our solution helps teams:

- Deliver transformational technologies with proven agile workflows

- Manage and operate always-on services with unified incident response

- Delight customers with simply powerful service management and support

- Foster a culture of collaboration and trust across all teams
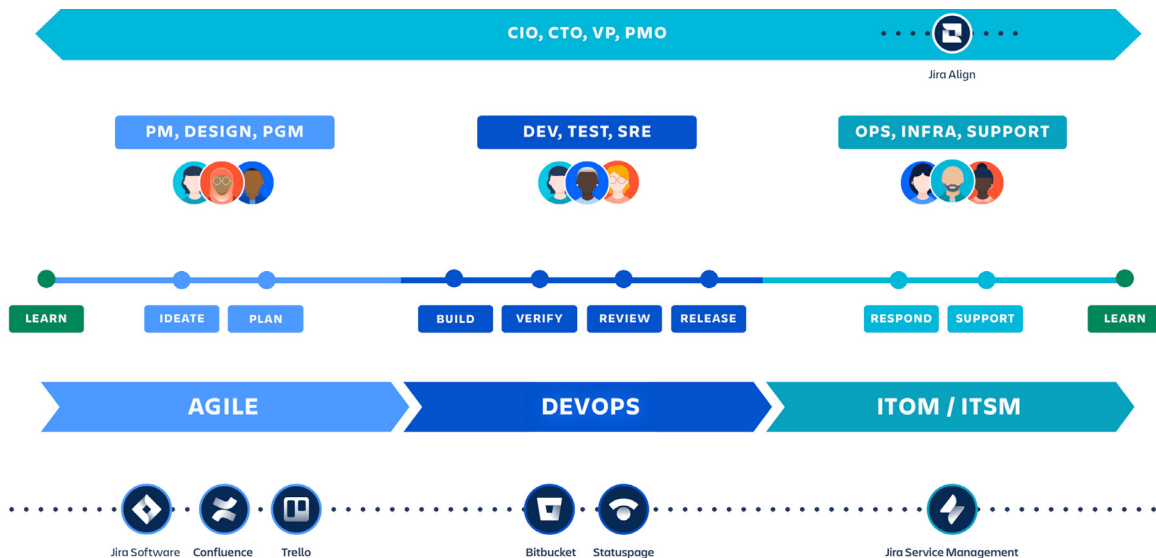
⚡ Jira Service Management

Jira Service Management unlocks high-velocity teams with everything they need to get started fast with PinkVERIFY-certified ITSM practices, such as request, incident, problem, and change management. Offer diverse teams self-service support via a self-service portal, agent queues, SLAs, and multi-channel chat support (with Halp). Easily set up automation to accelerate the flow of work and reduce manual work. Rapidly respond to, resolve, and continuously learn from incidents with on-call scheduling, routing rules, and escalation policies, powered by Opsgenie. Integrate with software development tools to improve the flow of changes to infrastructure and services while minimizing risk. And, if your software teams use Jira Software, you can link IT tickets to the dev team's backlog to get to the root cause of problems before they escalate.

insight

Insight (now by Atlassian) offers flexible asset and configuration management, built on the Jira platform. Store assets in Insight to manage inventory efficiently, track ownership and lifecycles, and reduce costs. Gain visibility into the infrastructure that supports critical applications and services. Use Insight to understand and visualize service dependencies so you can minimize risk.

◆ Jira Software

Jira Software is the #1 software development tool used by agile teams – with customizable requirement types, workflows, permissions, and notifications. It provides virtual scrum and kanban boards for teams to collaboratively and visually manage backlogs, track the progress of work, and use real-time reports. IT teams can use Jira Software to organize large change management projects and problem management initiatives, or with even routine maintenance tasks. This is especially helpful for teams who organize their work in sprints or want to visualize their tasks to be done with scrum and kanban boards.

Confluence

Confluence is a collaborative workspace that changes how modern teams work. Teams can create anything from meeting notes to project plans and product requirements. Create a space for every team, department, or major project to share knowledge and organize work. Use a structured hierarchy and a powerful search engine to find work quickly and easily, and leave feedback with commenting. For ITSM, Confluence is a knowledge base for teams to organize FAQs and documentation, as well as a team workspace to share best practices.

☎ Statuspage

Statuspage lets IT teams report on the real-time status of all IT services, giving the whole company one dedicated dashboard for customers and employees to check on status information and subscribe to relevant notifications. With Statuspage, IT managers reduce the volume of inbound support tickets while internal stakeholders get the information they need pushed directly via SMS and email. Statuspage takes the hassle out of incident communication and is trusted by IT teams within top Fortune 500 companies.

☰ Bitbucket

Bitbucket is the Git solution for professional teams. Bitbucket makes it easy for teams to collaborate using pull requests, inline comments, diff views, and powerful integrations. Bitbucket scales as your team grows, and works well with the tools you already use to help your teams build better software with CI/CD, apps, APIs, and the best Jira integration on the market.

⊞ Jira Align

Jira Align connects business and technology teams to align strategy and business requirements with technical execution at enterprise scale. Mission, Vision, Values, Strategies & OKRs are connected to the actual work being done. As ideas and large bundles of work enter, work remains linked to

a corresponding strategy to support full alignment between the business, technology, and product management organizations. Furthermore, work delivered is measured against outcomes to inform ongoing prioritization and decision-making.

⊞ Trello

Trello improves cross-team collaboration and breaks down barriers, offering a visual way for business and IT teams to collaborate on any project. Trello provides information at a glance where teams can see the big picture, or dive into the details, all on one Trello board. It enables these teams to get out of email and communicate where the work is getting done. Everyone knows the status of tasks as cards move across lists to Done.

▲ **ATLASSIAN** Marketplace

The **Atlassian Marketplace** empowers teams to customize Atlassian products with thousands of different apps and integrations. Tailor your tools to suit the way your teams work with apps that offer additional functionality and integrations that allow you to plug into your existing tools to gain greater end to end visibility. Extend your ITSM solution with best-of-breed apps across categories such as asset management and CMDB, automation, advanced reporting, and more.

Atlassian's approach to ITSM

Atlassian's mission is to help unleash the potential of every team. We believe that behind every great human achievement, there is a team. But great teamwork requires more than just the tools and products used by the team. It also involves the culture and practices teams follow to get work done.

That's why our approach to ITSM begins with teams at the center and combines strong culture, proven practices, and collaborative tools to help IT teams achieve their full potential.

culture (people)

TEAM

tools (products)

practices (work)

Building a strong culture with the Atlassian Team Playbook

Changing your organization's culture can be daunting, and it usually doesn't happen overnight. But through small, incremental steps, impacting the culture on your team is possible. Start with developing a set of "plays" for working through common problems. Based on years of research and experimenting with an open way of working in our organization, we created the **Atlassian Team Playbook**. These step-by-step techniques and exercises remove the naturally-occurring friction teams face, such as assessing your team's health, learning through retrospectives, making high-impact decisions, and more. We even developed **IT-specific plays** to help service and incident response teams become more agile.

Developing proven practices inspired by ITIL 4

When it comes to practices, ITIL 4, the latest update of the widely used **IT Infrastructure Library (ITIL)** framework, is a valuable guide. While ITIL has led the ITSM industry with guidance and training for over 30 years, the newest version brings ITIL into the broader context of customer experience, value streams, and digital transformation, as well as embraces modern ways of working, such as agile and DevOps. One significant change is shifting the interpretation of overly-prescriptive "processes" to more flexible and holistic "practices." ITIL 4 puts service management practices into a strategic context by incorporating service management, development, operations, business relationships, governance, and even culture. For organizations using ITIL 4 as a reference, Atlassian's ITSM solution enables organizations to adopt new, modern practices that fit their needs and deliver higher value to the business.

Unlocking teams with a high-velocity ITSM solution

Built and extended from Jira, the engine for agile work practices for millions of users, Jira Service Management unlocks IT at high-velocity. Empowered teams deliver great service experiences with processes that are continually adapted to their needs. Teams can see and coordinate efforts for more impact through Jira's open platform for work. And integrated, streamlined workflows across development and operations speed both delivery and support at scale.

⚡ Jira Service Management
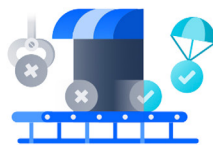
DELIVERY

Project Management
Change Management
Deployment Management

OPERATIONS

Incident Management
Problem Management
Configuration Management

SUPPORT

Service Desk
Service Request Management
Service Level Management
Asset Management

✖ Confluence
Team Workspace & Knowledge Management

PLATFORM
Automation & Orchestration, Reporting & Analytics, and APIs

Atlassian unites teams on one platform: Bringing delivery, operations and support into one collaborative experience.

- With **Jira Service Management** at the core, IT teams, across infrastructure, operations, and workplace support, enjoy a team-centric IT support workspace that matches the way they work with flexible ITIL workflows, a self-service portal, agent queues, automation, SLAs, custom dashboards, and much more.

- Through powerful incident swarming and on-call alerting capabilities (from our popular **Opsgenie** product), teams have modern incident management workflows to proactively respond, resolve, and learn from every incident.

- **Insight** offers a flexible asset and configuration management solution – built on Jira – to automatically discover, map, store, and manage assets.

- Strong integrations with **Jira Software** and **Bitbucket** brings development and IT teams together using a common platform to speed service requests through to changes and releases.

- **Confluence** provides the backbone for knowledge management, providing real-time collaboration and access to support articles, troubleshooting guides, runbooks, templates and more.

- **Statuspage** is the easiest way to communicate incidents and scheduled maintenance to end-users to help reduce support burden and build trust with every incident.

- Outside of IT, the adoption of **Jira Service Managemen**t spreads quickly to business teams, such as HR, Facilities, and Legal, who recognize the value of easily managing and tracking their flow of work.

- Finally, further customize and extend your solution with best-of–breed apps, such as scripting, time tracking, and advanced analytics, from the **Atlassian Marketplace.**

Discover the business impact of Jira Service Management

According to Forrester Consulting's Total Economic Impact™ report on Atlassian for ITSM, companies gain considerable value from day one:

246%
ROI

61%
Improvement in agent productivity

$819K
in savings from retiring legacy ITSM tools

Learn more

Getting started with Atlassian's ITSM solution

Setting a solid foundation before embarking on any journey is critical for success. We recommend these best practices as you get started with Atlassian:

1 Embrace a team-centric approach to ITSM

At Atlassian, we believe that open teams work better together. Many IT teams believe they're using the "right" tools and following the "right" processes, but still fail to achieve results. In fact, these tools and processes can actually create inefficiencies, for example, between IT and Dev teams due to silos and lack of knowledge sharing. We found at Atlassian that establishing a culture around collaboration and transparency is the foundation to a successful ITSM implementation. By using the Atlassian suite, you're already one step closer to leading your organization toward open knowledge sharing. Open and collaborative culture is infused in the Atlassian toolset. For example, Confluence pages have open permissions by default, which enables team members to easily access and collaborate in real-time.

2 Step back, and start where you are

As you define your organization's culture and practices, ITIL 4's Guiding Principles are a great place to begin. (In fact, we found them to be quite similar to the Agile Manifesto!) One of these principles is, "Start where you are." With 34 ITIL 4 management practices to consider, it can feel overwhelming. Instead of building from scratch, take a moment to observe and analyze the services, methodologies, people, and tools you already have. Then use these insights to identify where to start and what to continue, change, or build upon.

3 Take a top-down approach starting with the service layer

When beginning an ITSM deployment, the idea of fully defining your service model down to the infrastructure can be paralyzing. Instead of diving into infrastructure and microservices out of the gate, focus on the top services most critical to your business (such as an e-commerce platform if you're a retailer). To identify these services, review tickets from the past few months to understand which services are most utilized.

4 **Achieve quick wins with a minimal viable product**

For many organizations, getting employees to embrace change can be difficult. Maximize your chances for success by taking an agile approach to deploying your ITSM solution. Instead of rolling a full-blown solution at once, identify your organization's biggest pain points, and focus on the practice, service, or use case that will be most impactful. By starting with a minimal viable product (MVP) and iterating on the solution over time, you'll help your organization overcome the fear of change while satisfying a significant portion of your stakeholders.

5 **Match your software stack to your maturity and needs**

According to Gartner, Infrastructure & Operations (I&O) leaders overpay by $600 million on buying unused features of ITSM tools. Instead of committing upfront to a costly ITSM platform with complex features you'll never use, take an adaptive approach to build your solution. The needs of your business are constantly changing – so buy only what you need. Atlassian's ITSM solution offers out-of-the-box ITIL practices with the flexibility to scale as you grow. And, our broad ecosystem of Marketplace apps allows you to customize and extend your capabilities, without the need for specialized consultants.

6 **Scale your solution and celebrate success**

As you continue on your journey, communication is critical to increasing adoption. Once a service or practice is up and running, shout it from the rooftops. Offer hands-on training, pass out stickers, and incentivize usage through contests. As Jira Service Management gains adoption, business teams, from HR to Legal, will begin to realize the value and request service desks of their own. To manage and scale this growth, treat each request as an endeavor of shared objectives. Seek first to understand the problem each team is facing, and solve it in a consultative manner. Finally, don't forget to celebrate each milestone with your team!

02

Service delivery

IT business management

With the rise of digital transformation comes many innovative ideas from the business side of the organization. IT teams are at the center of this transformation, supporting the demand for new services or application changes. However, this influx of requests often results in unhealthy demand management. As business stakeholders ideate and scope new ideas, they often involve the IT organization too late, missing opportunities for collaboration and leaving IT teams to play catch up. While the business tends to ask for twice the capacity available, IT can only deliver half of the project due to resource constraints determined way before the project started. As the pace of innovation accelerates and business teams move even faster, IT faces an ever-growing backlog and technical debt.

What is IT business management?

IT business management is the discipline of delivering business value from IT workflows and tools. The goal is to create value for customers through technology by addressing business goals, strategies, and needs.

According to ITIL 4

"Successful project management is important as the organization must balance its need to:

- Maintain current business operations effectively and efficiently

- Transform those business operations to change, survive, and compete in the market place

- Continually improve its products and service"

ITIL® Foundation: ITIL 4 Edition, 5.1.8, Project management

As software development begins to play a more prominent role in every company, techniques such as lean, agile, and DevOps are spilling beyond their software origins into the domain of IT project management. Not only do these methods bring modern practices, tools, and jargon, they also introduce crucial questions such as:

- How does the Project Management Office (PMO) strike a balance between incoming business demand and IT's capacity to deliver?

- How do you tackle big, audacious projects while empowering teams to execute them iteratively and incrementally?

- How do software and IT projects fit into the broader context of business

- planning? Do the right teams have a "seat at the table"?

We find that organizations are living with traditional management assumptions that no longer apply. As IT organizations reconsider how to source, prioritize, and flow work to teams, Atlassian offers tools to enable business and IT teams to better communicate, collaborate, and manage project and IT work intake.

- With **Jira Service Management**, IT teams can easily capture business requests for new technology, enhancements, and bug reports. Our tools also use visual boards to see the flow of work and bottlenecks.

- **Jira Software** is used by IT and software teams to manage project work via kanban boards, while business teams use Trello's simple drag-and-drop cards to communicate project status with stakeholders.

- Finally, the **Atlassian Team Playbook** offers practices inspired by agile and DevOps to help IT teams gain a "seat at the table."
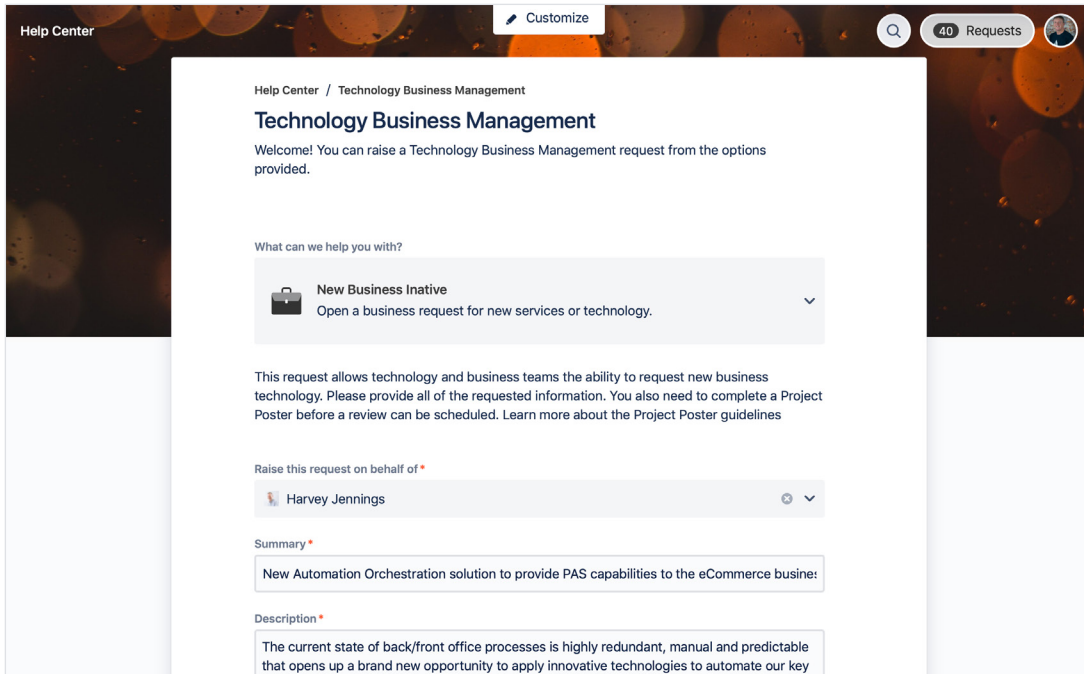
IT business management checklist

- ☐ Easily capture strategic business requests with self-service
- ☐ Adopt practices to open collaboration between IT and business
- ☐ Use queues and automation to prioritize strategic business requests
- ☐ Embrace agile project management to speed up delivery
- ☐ Use visual boards to collaborate and communicate with stakeholders

Easily capture strategic business requests with self-service

Imagine one of your business partners has a great idea for a new service to expand customer reach and accelerate business growth. Or, perhaps a service owner needs a business application upgrade to expand capacity to meet this year's sales objective. How easy is it for them to raise a request with your IT team?

Jira Service Management brings business, IT, and development teams together with a single self-service portal to capture everything from strategic requests to enhancements to bug fixes. This approach makes it easy for business teams to interact with IT and initiate the collaboration process for new services and requests.

Business stakeholders can easily raise a request by filling out an intuitive Jira Service Management form, based on customized questions from the IT team.

Adopt practices to open collaboration between IT and business

As market competition increases, speed is the name of the game. Business units and IT teams can no longer operate in silos. For high performing IT teams, the secret to fast and efficient project delivery is a strong alignment between IT and the business. Not surprisingly, Gartner predicts 50% of organizations will experience increased collaboration between business and IT teams by 2022.

The **Atlassian Team Playbook** offers multiple IT-focused plays to encourage collaboration while working through complex business initiatives. When a new business request arrives in your queue, consider trying out these following plays:

- **IT Project Poster:** This is a living document in Confluence shared with your stakeholders. Update it as you explore your problem space, challenge assumptions, validate solutions, and gather feedback together with your stakeholders.

- **Capacity Planning:** As an IT team, you're continually balancing work on special projects with queue-based work that never seems to go away. This play helps you understand your team's actual capacity and guides estimation and prioritization.

- **IT Project Kickoff:** Set your IT project up for success by aligning your team on milestones, scope, and purpose.

- **Retrospective:** After your project is completed, take time as a team to reflect on what went well and what to improve next time.

Let's take a look at this IT Project Poster for a new e-commerce application to support the company's market expansion. Given the complexity of the initiative, the Project Poster is an excellent starting point to facilitate a collaborative session with your business stakeholders. Together, the service owner and business stakeholders will define the problem to be solved, ideate solutions, create milestones, and assign owners for each task. By breaking down a massive project proposal into more manageable, smaller projects, you'll reduce the amount of unplanned work while improving the quality of the deliverable. As you move from scoping into execution mode, this approach ensures all parties have a shared understanding and vision for the project. Just as important, it can also give business stakeholders increased visibility into your IT team's impact on the overall business.

Use queues and automation to prioritize strategic business requests

The ever-growing demand for new services and enhancements can quickly fill an IT team's backlog. In many cases, these business requests are bundled as major projects with a significant amount of work. This leads to unhealthy demand management that tends to drive larger IT projects and slows down the flow of work.

Jira Service Management queues and automation allow the IT organization to manage requests efficiently and prioritize what's most important. Queues let IT and engineering teams represent the flow of requests to best match their needs. Based on information submitted in the business request, automation can be used to calculate business risk and flag strategic requests that require further review. Managing IT project work intake using Jira Service Management helps business units and IT teams to balance the current load of projects with future capacity.

Queues allow IT teams to move requests through the appropriate review and approval stages.

Embrace agile project management to speed up delivery

While IT teams have traditionally used the Waterfall model of fixed, sequential phases, many teams are shifting to agile project management. Instead of a single, high-risk release, these teams put value in the center and break work into smaller increments and iterations. They are open to change and evolving requirements based on feedback and testing. They also realize the benefits of continuous learning from shorter cycle times.

Waterfall

REQUIREMENTS → DESIGN → DEVELOPMENT → TESTING → DEPLOYMENT → OUTCOME

One big outcome at end

Agile

REQUIREMENTS DESIGN DEVELOPMENT TESTING DEPLOYMENT — OUTCOME

Cumulative outcomes
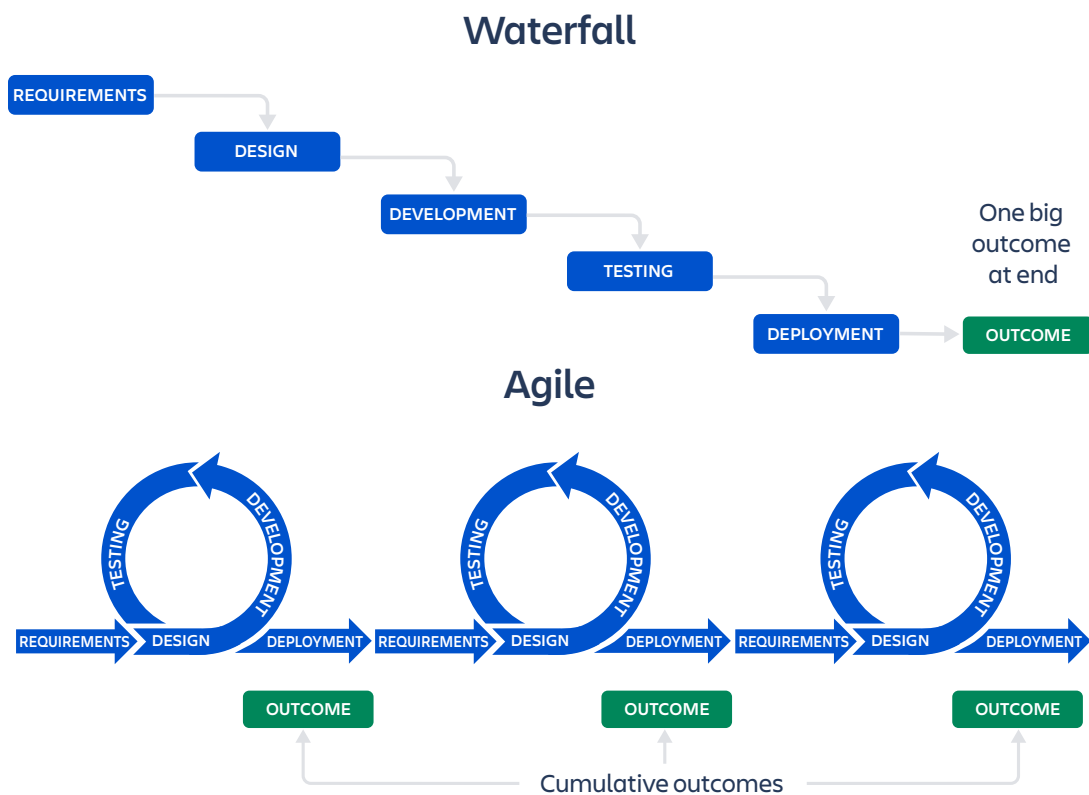
A recent report from Deloitte found that 56% of CIOs expect to implement agile, DevOps, or other flexible delivery models, to increase IT responsiveness and promote innovation. While some companies adopt agile methodologies organization-wide, others take a softer approach. Agility becomes a state of mind that focuses on nimble, flexible practices that allow teams to adapt to changes quickly.

You may not be able to switch entirely to agile, but a hybrid approach to project management is beneficial. According to PricewaterhouseCoopers benchmarks, agile teams experience 20% improvement in time to market, up to 95% productivity, up to 29% lower costs, and lower defect rates.

Not sure where to start? Here are a few agile best practices to try today:

- **Break up project work into smaller pieces.** Instead of upfront requirements and completing them in a "big bang" release, plan in buckets of work organized by your value streams. Test a minimal viable product (MVP) and work iteratively. Gather feedback at each phase to learn, adjust, and build the capabilities for the next phase.

- **Adopt team stand-up meetings.** Start your day with a quick status update where team members can stay informed about each other's progress, flag blockers, and share in individual successes. For distributed or remote teams, stand-ups over video conferencing or chat work equally well. Try the **Stand-up Meetings** play from the Atlassian Team Playbook.

- **Use kanban boards to manage the flow of work.** Jira Software uses kanban boards, a popular framework in agile software development, to visualize work and optimize the flow of the work among the team. Work items are represented visually so that team members can see the status of each piece of work, at any time.

With interactive drag and drop capabilities, kanban boards allow teams to prioritize and progress work through its lifecycle. Each ticket (or card) can be color-coded to bring attention to criteria such as severity or SLAs. Agents use filters to set custom views and quickly find the tickets they need.
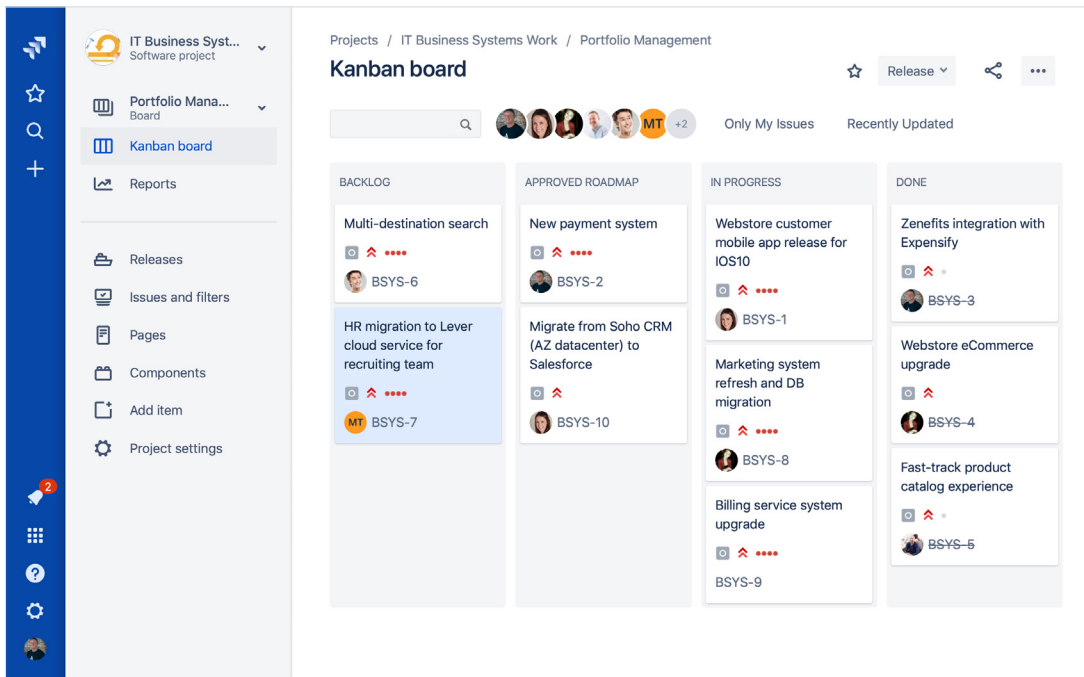
Use visual boards to collaborate and communicate with stakeholders

On the business side, Trello is a great visual collaboration tool to help IT teams communicate and align their projects with business stakeholders. This type of board allows stakeholders to stay informed as IT teams move through scoping, designing, and building out new business services. Drag-and-drop functionality, commenting, and attachments make collaboration seamless. Assigned owners, statuses, and due dates provide visibility and transparent communication.
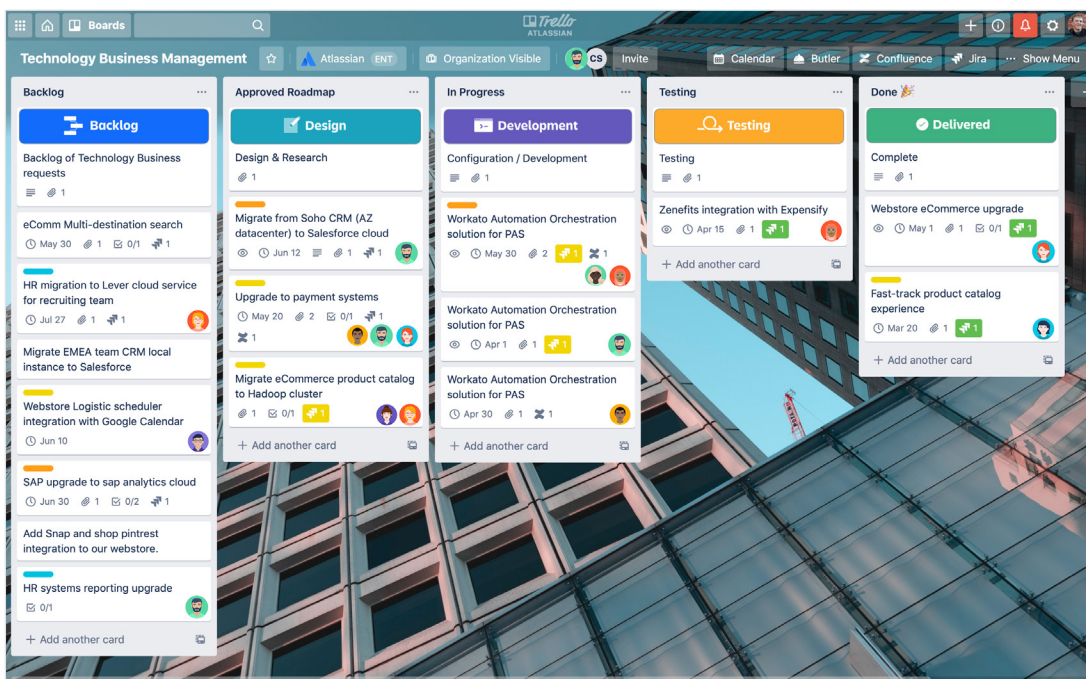
IT and business teams collaborate on a Trello board to manage requests from the business.

Change enablement

We're in an age of cloud and digital transformation, yet many IT organizations are struggling to keep pace with the rate of change. And as the impact of poorly planned changes on outages grows, so does the implementation of formal change processes to protect the business from adverse changes. However, despite these good intentions to reduce risk, improve stability, and track changes for compliance, the result has been a heavyweight, complex, and bureaucratic process for making changes to software and production systems.

What's more, these processes create a different type of risk – the danger of bringing important updates and enhancements to the market too slowly. Traditional change management processes also frustrate and slow down software developers, especially those practicing DevOps. Instead of shipping code that customers will appreciate, they find themselves spending too much time doing paperwork and waiting to see if what they built will get used.

This has led to dysfunctional ways of working, such as:

- Normal changes comprised of large batches of work, which result in long lead times

- Siloed tools that hinder coordination and handoffs between development and IT teams

- Unnecessarily wide freeze windows for changes, which come from the belief that fewer changes result in more stable systems

- Change approvals made by individuals detached from those doing the work, leading to unclear responsibility and accountability

- Overburdened Change Advisory Board (CAB) meetings with long backlogs of change reviews

- The rise of a command and control culture focused on processes and maintaining the status quo

- The lack of continuous improvement practices

- Reactionary decision making based on emotions and politics, instead of metrics and value

What is change enablement?

Change enablement – also known as change management – is an IT practice designed to minimize risks and disruptions to IT services while making changes to critical systems and services. A change is adding, modifying, or removing anything that could have a direct or indirect effect on services.

Common types of changes:

- **Standard change:** Pre-approved changes that are low risk, performed frequently, and follow a documented process. For example, adding memory or creating a new instance of a database.

- **Normal changes:** Non-emergency changes that require further review and approval by the CAB, such as migrating to a new data center or making performance improvements.

- **Emergency changes:** Changes that arise from an unexpected error or threat that needs to be addressed immediately. Think implementing a security patch or dealing with a server outage.

According to ITIL 4

"Change enablement must balance the need to make beneficial changes that will deliver additional value with the need to protect customers and users from the adverse effect of changes... In high-velocity organizations, it is a common practice to decentralize change approval, making the peer review a top predictor of high performance."

ITIL® Foundation: ITIL 4 Edition, 5.2.4, Change enablement

Improve the flow of work with adaptive change enablement

As software development plays a larger role in every company, following an efficient and adaptable change enablement practice is increasingly important. In this dynamic environment, providing a superior customer experience is a key differentiator, and shipping value to customers faster becomes critical for success. It's all about balancing risk with moving fast.

To start, stop treating change as a "one size fits all" approach. Treat each change differently based on the level of risk, and draw on data from previous changes to make better decisions going forward. For example, which changes are most successful, and why? Over time, by leveraging data, you'll be able to use pre-approvals and automation to ship changes faster without compromising on risk.

New service requirements   New regulator requirements   Organizational changes

BUSINESS DEMAND

Business as usual   **OPERATIONAL SPECTRUM**   Disaster

SERVICES AND INFRASTRUCTURE

Maintenance   Minor incidents   Major outage   Business incident
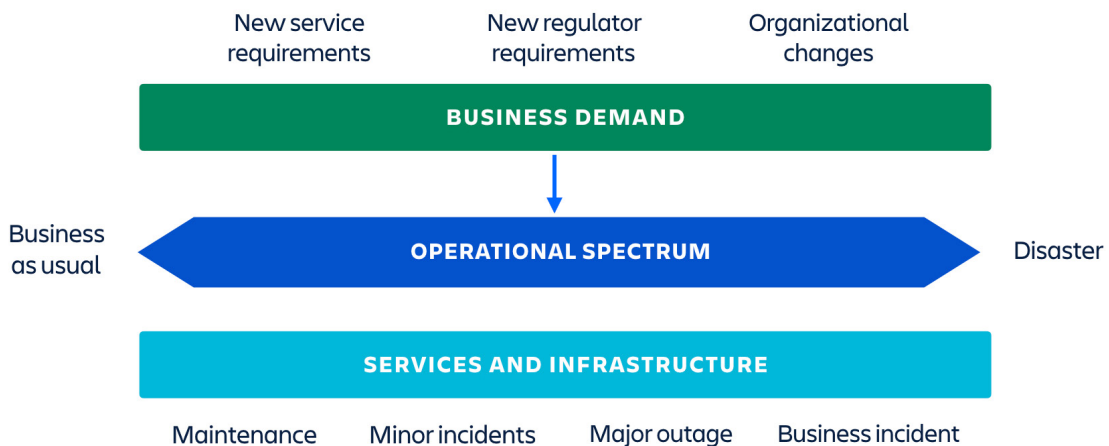
You may also consider evolving the role of your Change Advisory Board (CAB) from a "gatekeeper" to an enabler of business outcomes. Instead of waiting for the weekly CAB meeting, move the approval authority closer to the roles responsible for the technology and service. Start using peer reviews, daily standups, and automation to approve team-level changes. The role of the CAB will begin to change. CABs become trusted advisors responsible for monitoring change trends, developing effective team practices, and coordinating between teams and their needs. Modern tools, such as Jira Service Management, Confluence, and Slack, become the backbone of collaboration and approvals so CAB meetings can be more strategic.

With a collaborative, intuitive, and integrated toolset, Atlassian's platform can support your transition from traditional change management processes to a modern change enablement practice. By using one platform for IT and software development, you can begin bridging the gap between ITSM and DevOps. You can accelerate software delivery while managing risk and maintaining compliance.

- **Jira Service Management** eases the intake of changes with an intuitive service desk and automation for risk assessment and approval routing.

- Streamline workflows by integrating your service desk with CI/CD tools, including **Bitbucket**. Once code is deployed, a change request is created and risk is automatically assessed. If required, the change is flagged for additional review.

- Use **Confluence** for cross-functional planning, templates for change plans, and peer reviews. This reduces the reliance on a formal CAB process, as relevant teams can now collaborate and gain visibility from a shared source of truth.

- Link change requests directly to **Jira Software** for visibility and tracking of software-related work.

- Finally, integrate with the right service and application data from Insight **CMDB**.

> *Tip: Start improving the flow of IT changes*
> Begin by understanding the current state of your practices. Which teams are closest to the work? Which part of the process is slowing you down? If you mapped out your flow of changes in a value stream, where do you expect to find bottlenecks? Answer these questions to uncover insights and know which focus areas to improve.

Change enablement checklist

☐ Embrace practices to make standard change the new normal

☐ Streamline change request intake for IT and developer teams

☐ Adopt an automated risk model to prioritize changes

☐ Break down complex changes into smaller units of work

☐ Unlock learning with change metrics and KPIs

☐ Move to the future of release management with DevOps change

Embrace practices to make standard change the new normal

For many IT teams, the bulk of changes are considered "normal changes," which require longer lead times for initiating, planning, and approving the change. Consider shrinking your backlog of changes by identifying and moving changes into a standard change path.
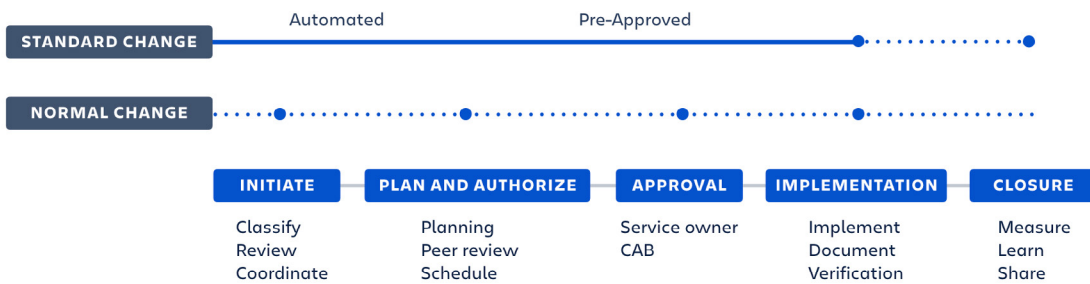
Consider an example from a major European government agency, who is an Atlassian customer and pioneer in digitizing public sector services. In their journey to replace their legacy ITSM tool with Jira Service Management for 20,000 users, they decided to focus on modernizing their change enablement practices. Through carefully analyzing changes from the previous year, they discovered 70% of their changes could be pre-approved and automated through a standard change path using Jira Service Management. This improved the speed of the majority of change requests, while freeing up time to prioritize improvements for the remaining normal changes.

Tip: A step-by-step guide to making standard changes the new normal

1. Review your most common changes from the past three to six months.

2. Select three to five standard changes as candidates to automate.

3. Configure self-service request types for standard changes in Jira Service Management to make it easy for IT and developer teams to initiate a change.

   • Request types should include fields to capture details of the standard changes, such as change reason, dates, and a description.

   • Consider including a field for the impacted service or application, such as from Insight CMDB.

4. Create automation rules to auto-approve the change, transition the change status to implementation, and notify staff with updates.

5. Train your IT staff and development teams on this improved change intake process that streamlines standard changes.

6. Monitor performance and make improvements using Jira Service Management reports.

7. Identify additional standard changes to automate by repeating steps 1-6.

Streamline change request intake for IT and developer teams

Legacy ITSM tools make it difficult for infrastructure, operations, and development teams to raise a change request. Initiating the change request process usually requires a lengthy form, which is time-consuming and frustrating, especially for developers who need to switch between two tools.

With a self-service portal for IT and software teams, Jira Service Management offers a convenient way to intake infrastructure change requests. In this example, IT staff can easily choose from various change request types, such as pre-approved maintenance updates, or production system upgrades requiring further planning and review.
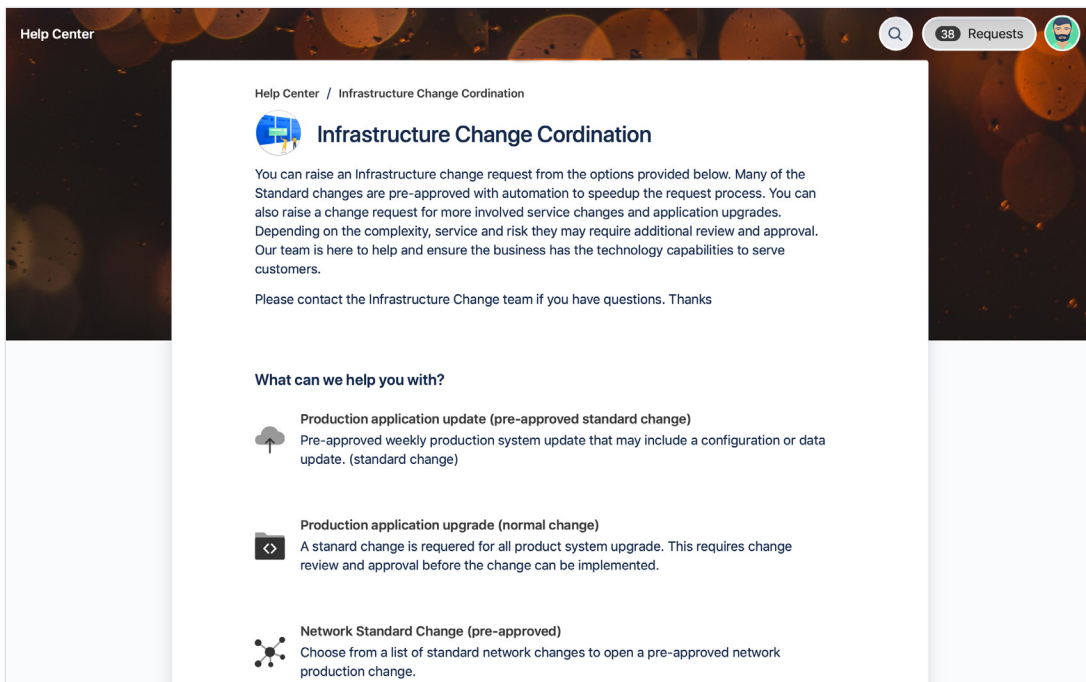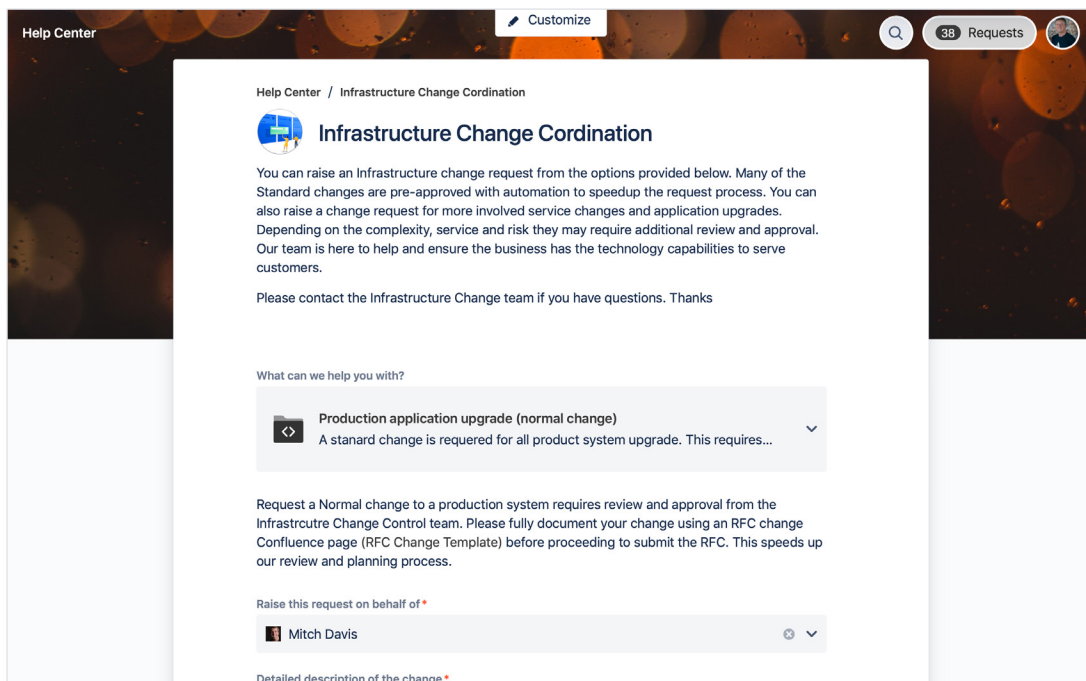
Use automation to take your intake process to the next level. By integrating Jira Service Management with your CI/CD tools, automation allows development code commits to create a change request, which are then triaged effectively based on the appropriate process level for each change.

Adopt an automated risk model to prioritize changes

By its very nature, changes to IT systems are sources of disruption risk. The goal of change enablement is to accelerate the rate of changes while keeping risks at an acceptable level. But to understand risk, you need a model to evaluate the data and identify changes considered to be higher risk. That's where automation in Jira Service Management can help.

Some risk criteria are common across all organizations and found in most change risk models, such as 'urgency,' 'impact,' 'priority,' and 'impacted application and service.' Beyond these core criteria, you may need to consider factors specific to your organization, such as regulatory or compliance requirements. The request form in Jira Service Management allows you to configure the questions and data needed to properly assess the risk of a change.

To determine the risk of an update, include questions such as:

1. Will this change be completed during business hours?
2. Is this change easily rolled back?
3. Is testing completed for this change request?

Based on the responses, automation in Jira Service Management can be used to calculate the level of risk of each change request and set the appropriate risk value. You can also use automation to:

- Classify a change request as 'standard,' 'normal,' and 'emergency,' or by service tier and dependencies

- Route change requests down the right Jira workflow path, such as pre-approvals for standard changes and additional workflows for high-risk normal changes

- Notify assigned stakeholders about high-risk changes which require further review

- Interact with external systems, such as Slack or Workato, via webhooks

Using Jira Service Management automation, drag and drop workflows make it easy to create powerful rules to extend and automate Jira – without the need for custom scripts.

Break down complex changes into smaller units of work

By deconstructing complex changes into smaller units of work, IT teams can more easily control smaller changes, move them faster through the change process, and reduce the level of risk. Confluence brings IT staff and stakeholders together around complex work. They can create change documents as a team, provide peer review and feedback, and iterate in real-time until the change is implemented.

In this following example, a team has broken down a major change into smaller tasks and pre-changes. They can create Jira issues, stories, tasks, and changes right from the Confluence page, and add links to the change request for ease of tracking. Confluence allows teams to turn real-time collaboration into actionable work with ease.

Unlock learning with change metrics and KPIs

Each IT organization has a standard set of reports run on a regular basis to understand the change work that has been completed. When measuring your change enablement performance, focus on metrics that unlock learning and improvements, such as:

Are changes realized in a timely and effective manner?

- Change success and acceptance rate over time

- Average change lead time

- Average length of time for change delivery by change type

What is the impact of changes to services?

- Number and duration of change-related incidents (e.g. change failure rate)

- Business impact of change-related incidents

Are we meeting change-related governance and compliance requirements?

- Number and criticality of change-related audit findings for non-compliance

- Number and impact for change-related compliance incident

To measure and learn from your changes, Jira Service Management provides out-of-the-box reports, along with the ability to build and share custom dashboards. Use Jira Service Management as a source of truth to bring together data across your changes, incidents, services, and code.
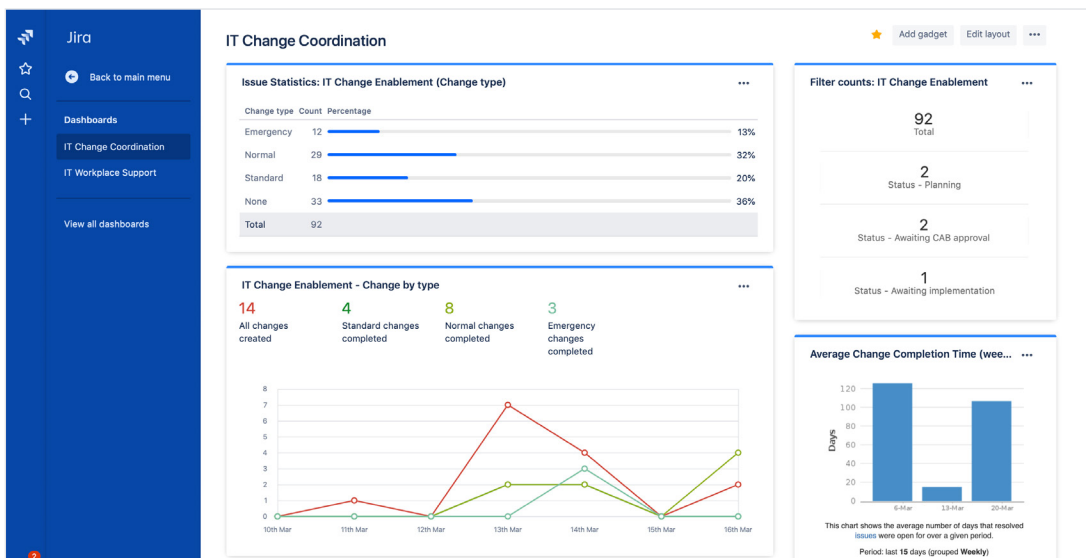
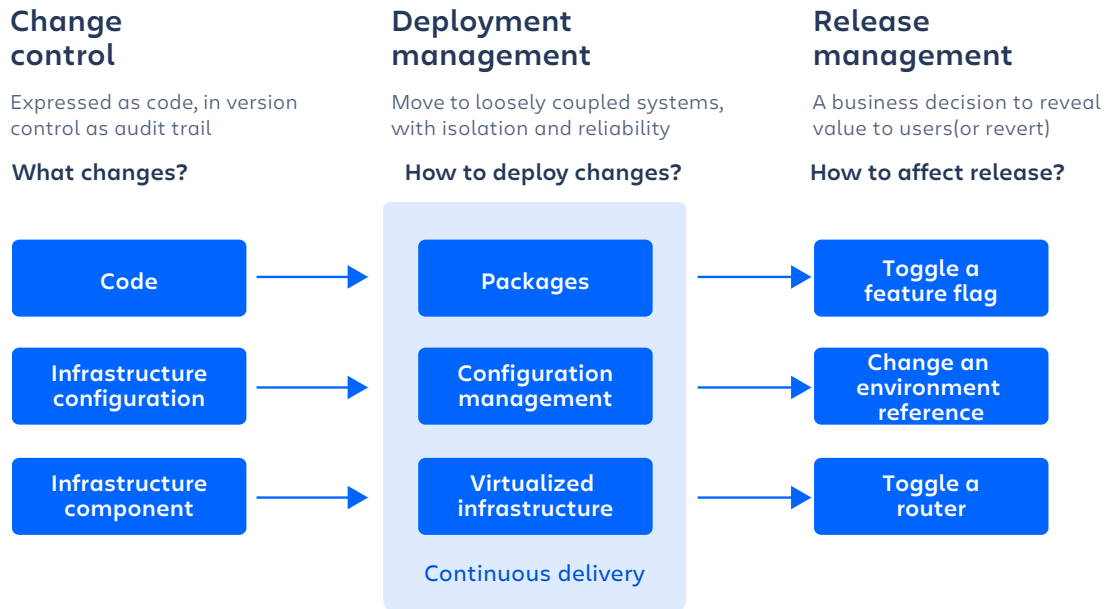# Move to the future of release management with DevOps change

Making changes to production systems can often be complex and bureaucratic. It requires organizing work across multiple teams while managing regulatory needs for critical business systems. But as organizations adopt cloud and platform-as-a-service, the way teams deliver changes to the IT infrastructure is rapidly evolving. Specifically, a growing number of IT organizations are embracing DevOps to manage the release of code and configuration changes effectively.

What is deployment management?

Deployment management is the practice of moving new or changed hardware, software, or any other component to live environments. It may also be involved in deploying components to other environments for testing or staging.

ITIL® Foundation: ITIL 4 Edition, 5.3.1, Deployment management

To balance high stability and faster delivery, ITIL 4 introduces a new technical management practice: deployment management. In short, this approach decouples deployment from release. All three practices are necessary to deliver services. Change enablement helps coordinate technical changes, deployment management looks at how to move service components from one environment to another, and release management focuses on when and how to make the components available to users.
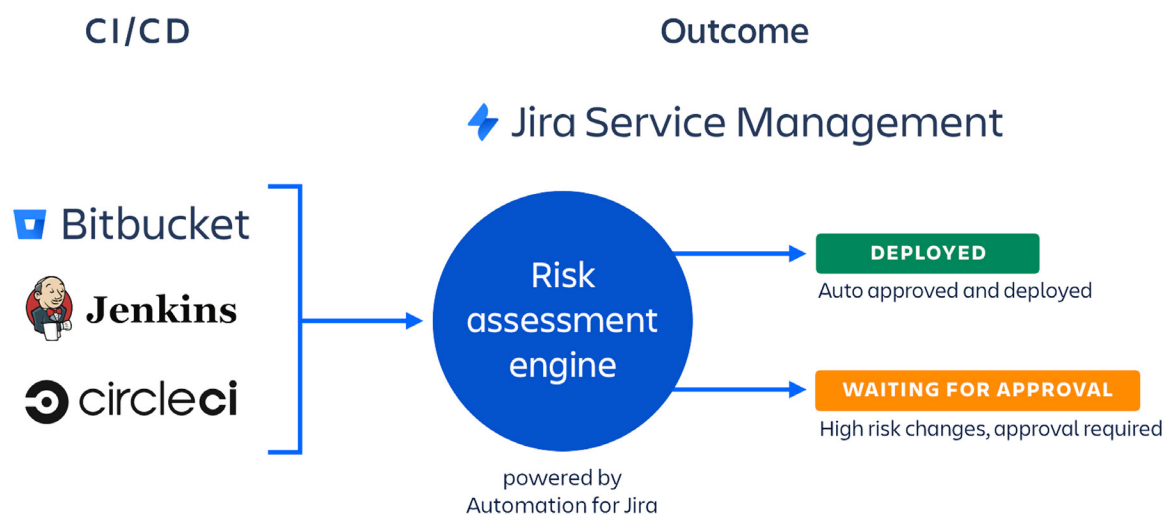
Change control	**Deployment management**	**Release management**
Expressed as code, in version control as audit trail	Move to loosely coupled systems, with isolation and reliability	A business decision to reveal value to users(or revert)
What changes?	**How to deploy changes?**	**How to affect release?**

Code	→	Packages	→	Toggle a feature flag
Infrastructure configuration	→	Configuration management	→	Change an environment reference
Infrastructure component	→	Virtualized infrastructure	→	Toggle a router

Continuous delivery

To balance high stability and faster delivery, ITIL 4 introduces a new technical management practice: deployment management. In short, this approach decouples deployment from release. All three practices are necessary to deliver services. Change enablement helps coordinate technical changes, deployment management looks at how to move service components from one environment to another, and release management focuses on when and how to make the components available to users.

Bundling changes into huge releases increases the possibility of large incidents, and makes it harder to find the source of a problem when one arises. Smaller, more frequent releases can limit the scope of a potential incident. For example, canary deployments are a great way to roll out a release to a small subset of users as a test before fully deploying it.

Another technique is blue-green deployments, which releases applications reliably while reducing any downtime for users. Simply put, you have two identical production environments. The "green" environment hosts your current production apps, while you deploy and run tests for the new app in your "blue" environment. When you're ready to go live, change your load balancer to point to "blue." If there are any failures, you can easily roll back to the "green" environment.

As your organization begins embracing the concept of "DevOps change," you have a unique opportunity to reshape your current change model. With DevOps, you can leverage automated pipelines for Continuous Integration and Continuous Delivery (CI/CD) to shift even more work to the pre-authorized "standard change" path. This requires a shift in mindset for both IT and development teams to ensure their practices come together. From the DevOps perspective, change enablement becomes more tightly coupled to infrastructure as platform-as-a-service (PaaS) becomes a standard. And when dealing with code changes, more detailed specifications, greater collaboration during planning, and increased awareness of compliance needs can help reduce risk, while allowing automation to make the implementation as fast as clicking a button. As a result, infrastructure as code becomes faster, without compromising quality.

Integrate your CI/CD tools with Jira Service Management

Many developers encounter roadblocks as they get ready to ship code for production. They are forced to stop their work, switch tools to create a change ticket, and then wait for someone to approve the code for release. By integrating Jira Service Management with CI/CD tools, such as Bitbucket Pipelines, Jenkins, and CircleCI, developers now have a streamlined change management process right in their existing workflows. Changes are automatically registered as requests in Jira Service Management, and a complete audit trail of changes deployed to production is possible.

CI/CD   Outcome

⚡ Jira Service Management

🪣 Bitbucket

Jenkins

CircleCI

Risk assessment engine

DEPLOYED
Auto approved and deployed

WAITING FOR APPROVAL
High risk changes, approval required

powered by
Automation for Jira

*Available in Jira Service Management Cloud plan
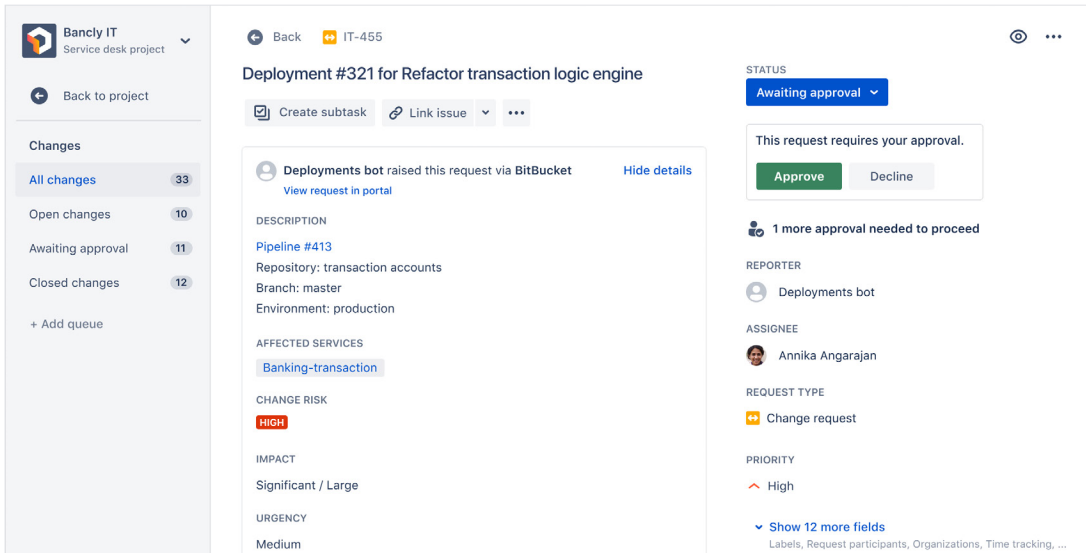
*Available in Jira Service Management Cloud plan

Using Automation for Jira, your organization can configure rules to assess and score the risk of each software change automatically. Set up rules to auto-approve and deploy low-risk changes, while funneling high-risk changes for further review and approvals. There's no more finger-pointing or waiting days on end for a simple change to make its way through. Barriers are removed and agility is realized, all while minimizing risk.

Jira Service Management automatically pulls in the relevant information – such as change details directly from the CI/CD tool, impacted services, the change risk score, and change approvers – right in the change request. Now change managers have all the context they need to approve changes or request additional review. Your developers can also track the progress of the request, right from their CI/CD tool such as Bitbucket.
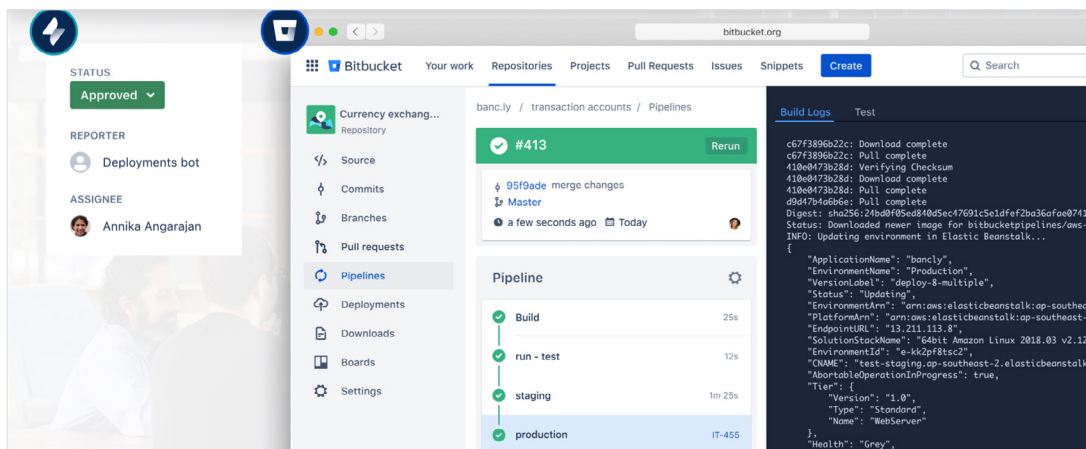
*Available in Jira Service Management Cloud plan

And in the case of an outage, Jira Service Management automatically provides a strong change log for incident management. Through the integration, IT operations and development teams can access all relevant changes in one place, empowering them with detailed context to quickly resolve and recover from the outage. By putting developers and IT on the same platform, Atlassian offers a unique approach to change enablement by automating that last mile that's essential for responding to business changes fast.

Service configuration management

In an era of cloud computing and anything as a service, IT teams are now managing a very different type of IT environment. While they may rely on a Configuration Management Database (CMDB), many IT organizations struggle to find value from their CMDB implementations and have even experienced failed CMDB projects. They're not alone. According to Gartner, 80% of CMDB initiatives fail. The reason stems from starting a CMDB deployment with too wide of a scope. As a result, teams attempt to collect large amounts of information (valuable or not) upfront and struggle to maintain and keep it current. The deployment ultimately shows little value for the organization and, instead, results in lengthy projects and wasted resources.

What is service configuration management?

Service configuration management ensures that accurate and reliable information about the configuration of services, and the **configuration items** (CIs) that support them, is available when and where it is needed. This includes information on how CIs are configured and the relationships between them. This high-level view is often called a **service map** or **service model,** and forms part of the service architecture.

According to ITIL 4

"It is important that the effort needed to collect and maintain configuration information is balanced with the value that the information creates. Maintaining large amounts of detailed information about every component, and its relationships to other components, can be costly, and may deliver very little value. The requirements for configuration management must be based on an understanding of the organization's goals, and how configuration management contributes to value creation."

ITIL® Foundation: ITIL 4 Edition, 5.2.11, Service configuration management

Take a top-down approach to build your service model architecture

To realize more value from your CMDB, focus on pulling in data from only the key services you plan to manage. Take a lean approach by starting with one or two of your most critical business services. This narrow focus helps you learn as your CMDB grows, and quickly build a service map with relevant CIs and dependences. More importantly, you'll avoid the pitfall of overloading the CMDB with unnecessary data.

The concept of data federation has also become a reality for many IT teams. Applications such as AWS Management Console or Microsoft Azure Portal empower teams to quickly access the IT infrastructure supporting their services. This "service-centric" approach to defining and building out your CMDB balances the information required with the value that the information creates. It also avoids the costly efforts of maintaining large amounts of detailed information about every component and its relationships.

Tip: How to embrace a service-focused CMDB strategy

- Connect your service configuration management goals to business goals.

- Work with all relevant stakeholders, from service owners to business leaders to security.

- Think ahead – consider what services you need in the future and where to grow your service model.

- Start where you are. Be selective, begin small, and learn as you grow.

- Embrace agility along with scalability.

- Use discovery and automation to identify CI relationships.

- Adopt a data federation strategy to prevent overloading your CMDB with data.

- Determine an audit mechanism to ensure accurate, real-time data.

- Use retrospectives to learn from changes and incidents.

- Publish your learnings and share improvements with business leaders.

Create a unified service view across your organization

With the Service Registry, Jira Service Management provides the ability to easily register important business and technical services that power your business. Built on the Atlassian Graph platform which connects, queries, and consolidates data across Atlassian and third-party products, the Service Registry increases service visibility across your organization, unifies the work of IT and development teams, and opens up team collaboration around business-critical needs. It provides immediate access to service information, including:

- **Service knowledge base** – Detailed, consolidation information about each service, its dependencies, and how a team's code and responsibilities fit together. This allows developers to understand their code and other teams' code more easily.

- **Service-aware development** – Speeds up development processes by allowing users to track their work against services and quickly access service information where needed.

- **Smarter incidents** – Allows response teams to resolve incidents faster by viewing affected services, blocking pipelines for those services, rolling back deployments, and quickly accessing runbooks.

- **Service-aware reporting** – Identify problems and improve workflows by accessing reports for service health, deployment time, and deployment blockers.

*Coming to Jira Service Management Cloud plan

Extend your solution with a flexible CMDB

With Insight (now by Atlassian), you can build your CMDB within the Jira environment itself and streamline workflows by having everything integrated into one tool. Insight's flexibility allows you to define the data structure your teams need, such as CIs, attributions, relationships, and dependencies. With ease, teams have relevant services and applications they need to inform their IT support practices. You can then link these CIs to Jira issues to provide additional context for agents to solve issues faster. The greater the context, the faster agents can work.

Whether you're analyzing the risk of an upcoming change, fixing an urgent incident, or conducting root cause analysis for a suspected problem, Insight shows your dependencies to make it easier and faster to assess the situation. Use automation to assign issues directly to service or CI owners, create issues if a key service goes down, or add new CIs based on data in a Jira form.

With integrations, importers, and network discovery tools, Insight helps with data federation and getting up-to-date information about your CIs.

Insight is also used by IT organizations to serve their asset and inventory management needs.
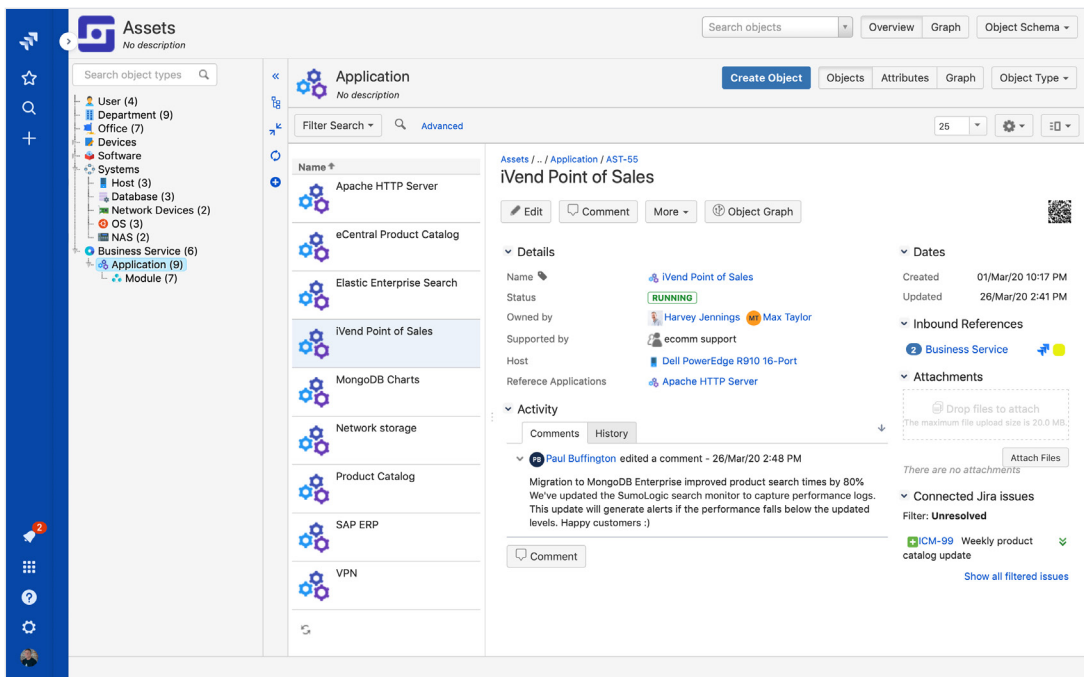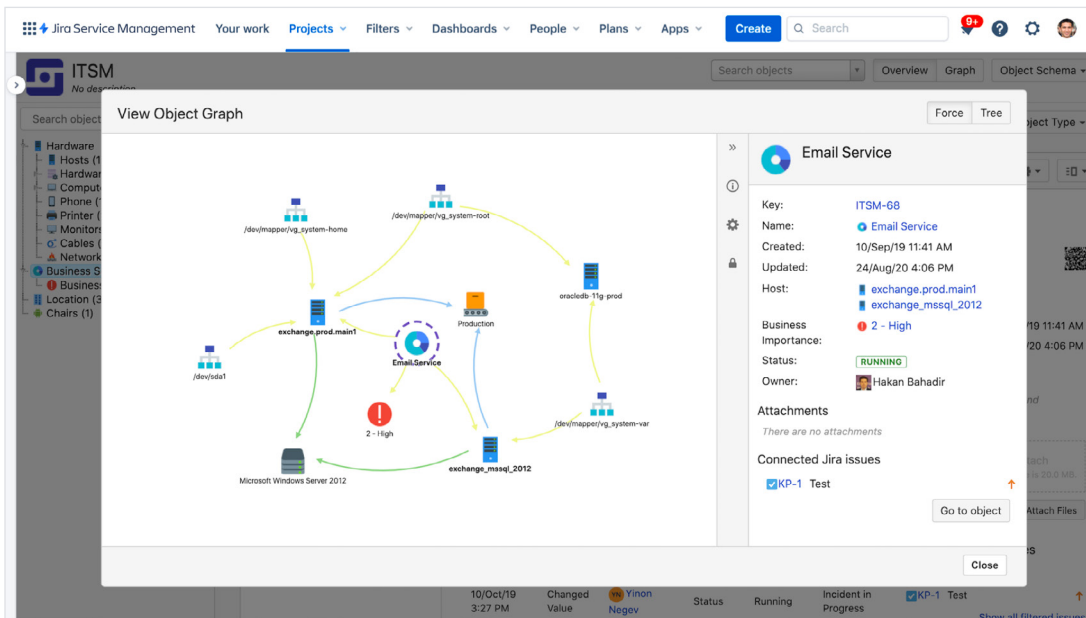
To get all your important data into the CMDB and create a single pane of glass, Insight offers importers for CSV and JSON files and third-party integrations out-of-the-box. Integrations include leading cloud providers (AWS, Azure, and Google Cloud) and other existing solutions for asset management and CMDB (ServiceNow and Device42).

If you don't already have a third-party tool to scan your network, Insight Discovery offers an agentless scanner that can be run on a schedule to build a map of your IP-enabled devices and their dependencies. It can import them into the Insight CMDB and even trigger notifications when it discovers changes!

Insight Discovery can detect a range of CIs, such as devices, appliances, operating systems, CPU information, and users. It can also uncover the various details and relationships among them. If needed, you can also create a custom scanning pattern for Insight Discovery.

By using Insight with Jira Service Management, create a federated CMDB to support your organization's configuration and asset management needs. Empower data teams to manage their IT infrastructure, while enabling business leaders to report on customers, inventories, finances, change management, and more. For IT teams, tracking assets from servers to mobile devices with synced CIs is a breeze.

Knowledge management

Half a decade ago, renowned management consultant Peter Drucker predicted the "the shift to a knowledge society," one where information changed the way people work and value is generated through our minds. Fast forward to today, where we see the reality of knowledge workers. Employees demand more access to information to solve both simple and complex questions daily.

According to Forrester, on average, 20% of a knowledge worker's time is spent looking for information, which disrupts productivity, efficiency, and flow. Modern enterprises are often made up of tangled interactions between IT, suppliers, accounting, procurement, and more – leading to major headaches from employees needing to navigate complex workflows and systems.

What is knowledge management?

Knowledge management is the process of creating, curating, sharing, using, and managing knowledge across an organization.

A **knowledge base** is the foundation of a knowledge management practice. It's a self-serve online library of information about a product, service, department, or topic, including FAQs and troubleshooting guides.

According to ITIL 4

"'Knowledge' is not simply information. Knowledge is the use of information in a particular context. Knowledge management aims to ensure that stakeholders get the right information, in the proper format, at the right level, and at the correct time, according to their access level and other relevant policies.

This requires a procedure for the acquisition of knowledge, including the development, capturing, and harvesting of unstructured knowledge, whether it is formal and documented or informal and tacit knowledge."

ITIL® Foundation: ITIL 4 Edition, 5.1.4, Knowledge management

Knowledge management to empower team culture and collaboration

Knowledge is one of your organization's most valuable assets. Specifically, knowledge is more powerful when sharing is open, when it's no longer an individual's knowledge but the community's knowledge. But as workplace technology evolves, knowledge now exists in so many different places – across email, tickets, and in the minds of individual team members. While aggregating your team's knowledge in a single repository is a great first step, tooling is often not enough unless you have a strong culture of open knowledge sharing.

While company culture can take time to change, building the right knowledge sharing practices into the way that teams, leadership, and individual employees work will set you in the right direction. The first step is understanding how your company views information. Are teams encouraged to be generous, or secretive, with what they're learning? These are the differences between an open-handed or closed-fist approach to knowledge, and it's important to determine where your company lands as you rethink your knowledge management strategy and practices.

At Atlassian, our teams openly share what they're learning. This includes divulging wins and failures from experiments, sharing data from team research initiatives, and being transparent about both positive and negative results of projects. Open sharing also helps teams to grow as they benefit from the knowledge being gathered.

Confluence gives teams a workspace where knowledge and collaboration meet to accomplish great things. IT organizations embrace Confluence as their knowledge management platform to:

- Empower teams to structure information in ways that best fit the way they work.

- Create a source of truth for their organization's collective knowledge and make it easy to find answers.

- Help cross-functional teams tackle complex work and create actionable plans by linking work in Jira.

- Move work forward and speed up the review process through real-time collaborative editing, providing feedback through inline comments, and tagging a team member for help.

- Gain visibility into their team's decision-making by documenting context and key decision levers.
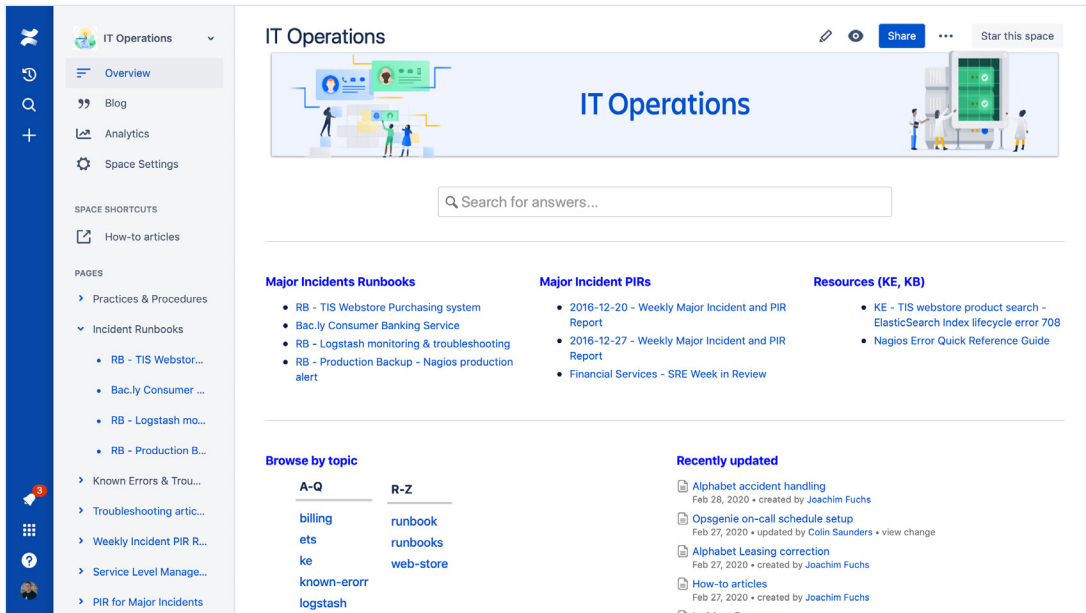
A Confluence page created by an IT Operations team to collect and organize pages related to the team's practices, such as incident runbooks and post-incident reviews (PIRs).

Reimagine your organization's knowledge management strategy

Over the years, we've witnessed thousands of teams held back by inefficient practices, inadequate tools, and negative work cultures. As we studied these teams, we noticed these teams are often siloed, focus on productivity over people, and rely on top-down decision making. In short, these are "closed" ways of working. These teams were capable of far more than they were actually delivering, and that's where we wanted to help.

In contrast, we've encountered high-performing teams defined by positive energy, mutual trust, and incredible agility. On these teams, information flows freely and team members have access to the resources they need to get work done. These teams work "open."

To move towards open ways of working, consider these approaches:

- **Increase transparency with open and shared information.** Knowledge should be easy for your entire organization to search, find, and create. Encourage team members to collaboratively edit pages, give feedback through inline comments, or at-mention teammates for peer review.

- **Make work visible with cross functional team collaboration.** For every major initiative, create a **DACI** (decision making framework) or a **project poster** to share your goals and progress with the rest of the team and stakeholders. This is a living, accessible document that can help you explore your problem space, define your scope, and get feedback.

- **Champion a culture of knowledge sharing.** Reward top Confluence contributors with an on-going recognition program that values both quality and quantity. Your leadership team can set a positive example by regularly contributing updates and blogs in Confluence. Go a step further, and encourage employees to interact directly with leadership by giving feedback and adding comments on Confluence pages.
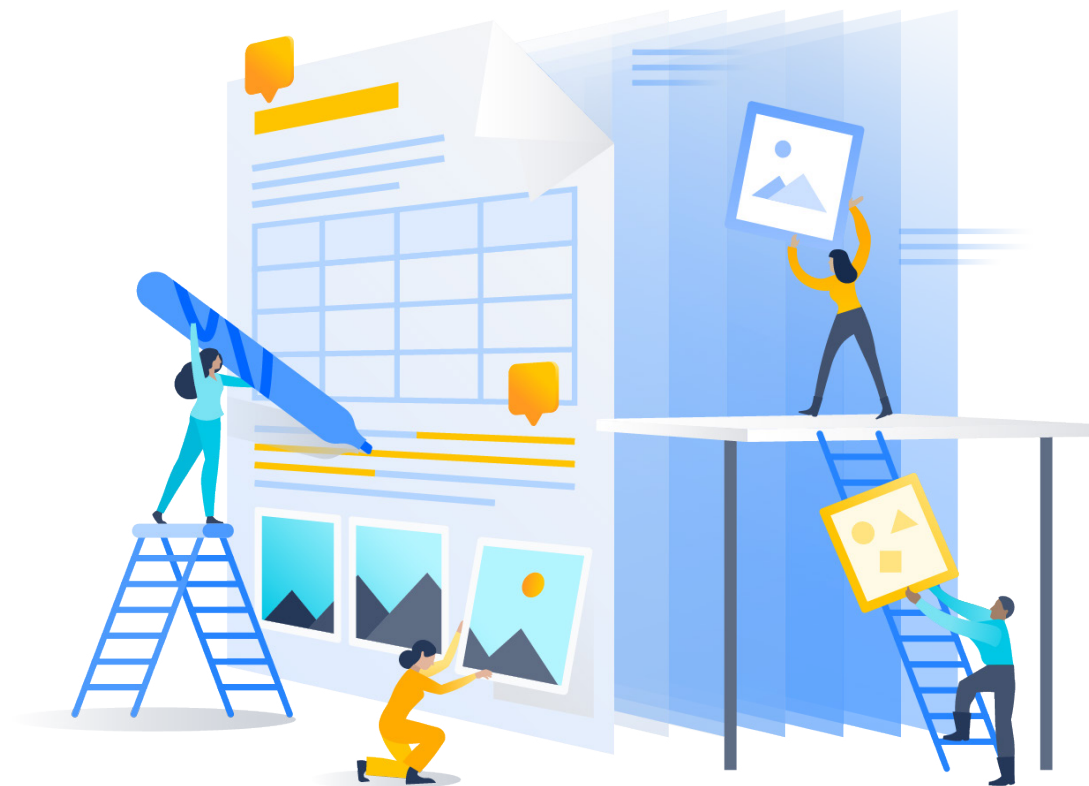
03

Service operations

Incident management

In a software services world, it's crucial to keep services up and running. More and more customers are relying on your services to keep their own business running, which means the pressure to keep the lights on is higher than ever. According to a study by Gartner, the average cost of downtime is $5,600 per minute, which equates to over $300,000 per hour depending on your company's size, vertical, and business model. Every minute that passes during an incident can be damaging to revenue, reputation, and end-user productivity.

What is incident management?

Incident management is the process of responding to an unplanned event or service interruption to restore the service to its operational state.

- **Incident:** An unplanned interruption to a service or reduction in the service quality.

- **Major incident:** An incident with significant business impact, requiring an immediate coordinated resolution.

According to ITIL 4

"Effective incident management often requires a high level of collaboration within and between teams. These teams may include the service desk, technical support, and vendors. Collaboration can facilitate information-sharing and learning, as well as helping to solve the incident more efficiently and effectively."

ITIL® Foundation: ITIL 4 Edition, 5.2.5, Incident management

When running technology services today, IT teams are expected to maintain 24/7 service availability. But without the right data integrations, support teams grapple with a lack of context to manage and solve incidents effectively. For example, when a potential incident is raised, teams are frantically searching for information across disconnected data and siloed tools. Without real-time information that's easily accessible, both IT Ops and Support teams face stress levels at an all-time high.

Outside of tooling, how does your team respond when a major outage happens? Establishing a strong incident management process is crucial to reducing the impact of the incident and restoring services quickly. The key to improving response is lowering mean time to resolution (MTTR) and streamlining root cause analysis to prevent future outages. In fact, Forrester has found that 70% of incident response time is spent within the Investigation and Diagnosis phase.

DETECT + COMMUNICATE	RESPOND + INVESTIGATE	RESOLVE + RECOVER	LEARN + IMPROVE
Classification	Investigation	Recover	Learning
Prioritization	Collaboration	Verify	Sharing
Coordination	Document	Resolve	Reporting
Communication	Troubleshooting	Document	KPI

Mean Time to Recovery (MTTR) **Continuous Improvement**

Respond, resolve, and learn from every incident

As software and services become increasingly complex, Atlassian has found that high- performing teams adopt a collaborative and proactive approach to plan, respond, and learn from every incident. Before an incident even happens, start by establishing an incident plan that expedites your response to major outages. During an outage, build customer trust with effective external communications. Use open collaboration and knowledge sharing to investigate and resolve the incident. Finally, learn from major outages through post-incident reviews (PIRs).

Atlassian's platform for incident management brings all of the context and data you need to resolve an incident right into your ITSM tool.

- Within a single portal, agents can manage issues and user-reported incidents in **Jira Service Management.**

- Agents can quickly escalate major incidents as an alert to the on-call IT Operations team. Through capabilities from our popular **Opsgenie** product, **Jira Service Management** empowers IT and DevOps teams to stay in control during an incident by centralizing alerts, notifying the right people, and enabling them to collaborate and take rapid action.

- When it comes to communication, **Statuspage** helps build trust with every incident by allowing teams to easily communicate when services break.

- Finally, **Confluence**'s shared workspace captures incident practices, processes, and procedures in one place – from runbooks, knowledge bases, and PIRs.

This seamless end-to-end incident management solution helps IT teams escalate, bring in the right responders, swarm, and ultimately minimize downtime.
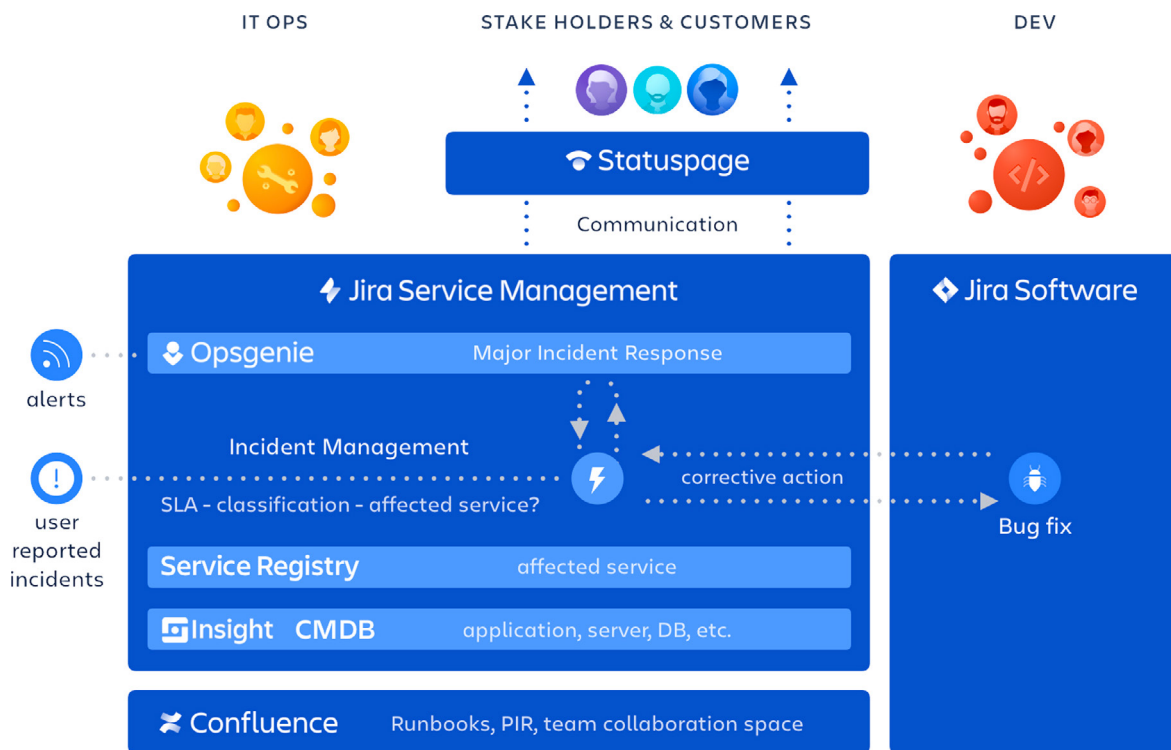
Beyond the technology, the **Atlassian Incident Management Handbook** offers a great starting point to develop a complete practice for incident response.

Incident management checklist

☐ Establish a proactive incident management playbook

☐ Make it easy to capture user and system-reported issues

☐ Reduce alert fatigue with smart on-call scheduling

☐ Use ChatOps and runbooks to improve team coordination

☐ Build trust with centralized external communication

☐ Learn from the incident with a post-incident report

Establish a proactive incident management playbook

Plan your incident response strategy in advance. You'll alleviate stress, keep your team focused during the incident, and shorten time to resolution. Make sure to include both operational and team-based collaboration practices:

- Identify your team's Incident Values, such as collaboration, communication, and "blameless" postmortems.

- Clearly define what qualifies as a major incident.

- Document your major incident practices.

- Establish your Incident Response Communications, such as response templates and communications for stakeholders (both external and internal).

- Determine the core team members on your incident response team-of-teams.

- Establish your PIR practices.

- Conduct blameless PIRs for all major incidents.

- Publish and share PIR learnings.

- Conduct major incident simulation drills.
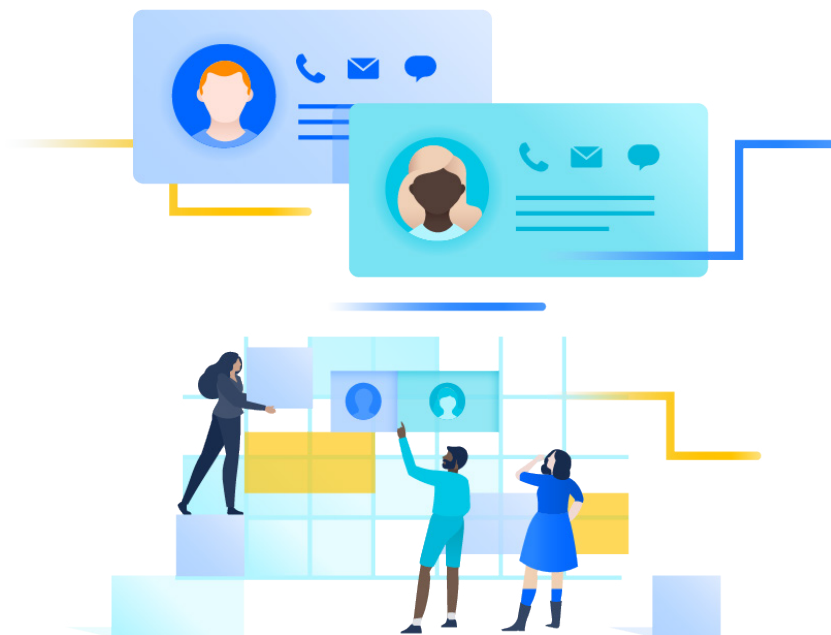
Make it easy to capture user and system-reported issues

Jira Service Management is the source of truth for both minor and major incidents. The customer portal captures user-reported issues in a complete and consistent manner, with all of the necessary information the support team needs to evaluate the incident. When employees or customers see an incident, they can report it in Jira Service Management. From there, issues are ticketed and routed to the right agent queues.

When it comes to detecting issues and outages early, effective monitoring is the eyes and ears for IT Operations. For system-detected incidents, Jira Service Management easily integrates with over 200 app and web services, such as Datadog, Sumo Logic, and Nagios, to sync alert data and streamline your incident workflow.

And if your IT support agent in Jira Service Management determines that an incident may require more attention, they can simply escalate it to the incident management team – while retaining all of the valuable context – so that the proper service team can begin swarming on the issue.
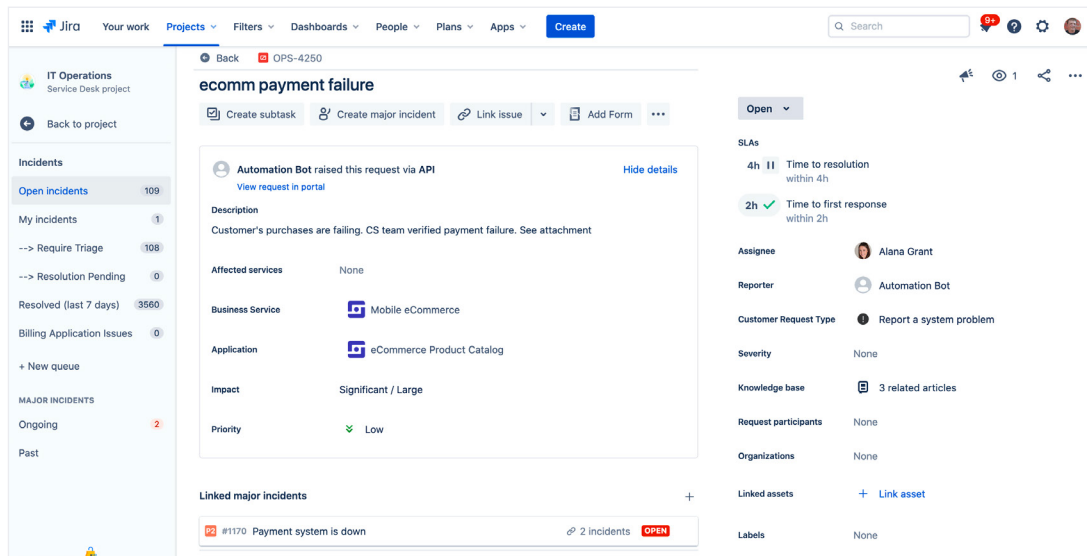
Jira Service Management brings in all of the context you need from Opsgenie so agents can even search to see if a related major incident is already occurring in Opsgenie and link to it.

There's no more jumping between your ITSM tool and your monitoring and alerting system. All major incidents in Opsgenie are automatically pulled into Jira Service Management, providing a holistic view of all current and past major incidents.

Reduce alert fatigue with smart on-call scheduling

When on-call staff are inundated with irrelevant alerts, they start getting alert fatigue and miss important notifications. Jira Service Management's built-in capabilities from ensures your team never misses a critical alert. By building schedules and defining escalation rules within one interface, your team always knows who is on-call and accountable during incidents. The solution groups alerts, filters out the noise, and notifies team members using multiple channels, such as text, phone call, mobile push or email, along with the relevant context needed to immediately begin resolution.

Easily create on-call schedules, routing rules, and escalations, so you can be confident that critical alerts will always be acknowledged.

Use ChatOps and runbooks to improve team coordination

Do you dread the 3 AM phone bridge to troubleshoot a major outage? Gone are the days of physical war rooms and NOC call lists. IT teams have now adopted integrated communication tools and processes, like ChatOps, to improve support operations and flow.

Tip: How to shape team collaboration with ChatOps

1. Drop your phone bridge and use ChatOps, such as through Slack, for service outage incident response.

2. Deliver amazing service beyond your ticketing system with dedicated chat rooms.

3. Make change management manageable with improved collaboration.

4. Add chatbots and automation to save time completing manual tasks.

5. Instead of throwing tasks over the wall, improve IT and developer collaboration by working on the same platform.

With Jira Service Management, teams have a centralized place to collaborate, share real-time information, and fast track resolution. Instead of navigating fragmented one-on-one chat updates or scrolling through long conversation histories, pre-define a video conference room for teams to chat dynamically, assign roles, and even take decisive actions right in the interface. By attaching runbooks to alerts, teams can quickly launch standard remediation tasks, either automatically or on-demand.

With Opsgenie, teams have a centralized place to collaborate, share real-time information, and fast track resolution. Instead of navigating fragmented one-on-one chat updates, or scrolling through long conversation histories, Opsgenie pre-defines a video conference for teams to chat dynamically, assign roles, and even take decisive actions right in the interface. By attaching runbooks to alerts, teams can quickly launch standard remediation tasks, either automatically or on-demand.

Runbooks are great for documenting common troubleshooting methods to address alerts and resolve outages. By using Confluence for runbooks, your IT staff has all the information they need to quickly triage an incident, right at their fingertips. In many cases, teams can reduce incident resolution times by 40%.

Build trust with centralized external communications

While communication within your response team is important, don't forget about keeping your customers and employees in the loop. With today's increasing number of managed services, maintaining mailing lists and fielding individual responses are simply not scalable.

Get ahead of the surge of inbound support inquiries. Many IT teams use a centralized dashboard, like Statuspage, to report on the status of critical services. Statuspage works as a single channel for clear and proactive mass communication, along with automated notifications and updates. Instead of worrying about sending announcements, IT teams can focus on fixing the incident at hand.

Statuspage keeps internal teams informed of both scheduled and unplanned downtime as well. Employees can subscribe to updates, which promotes consistent communication and reduces manual updates.

Additionally, you can add a banner in your Jira Service Management portal to communicate with both internal and external stakeholders. This reduces incoming support tickets and builds trust with your customers.
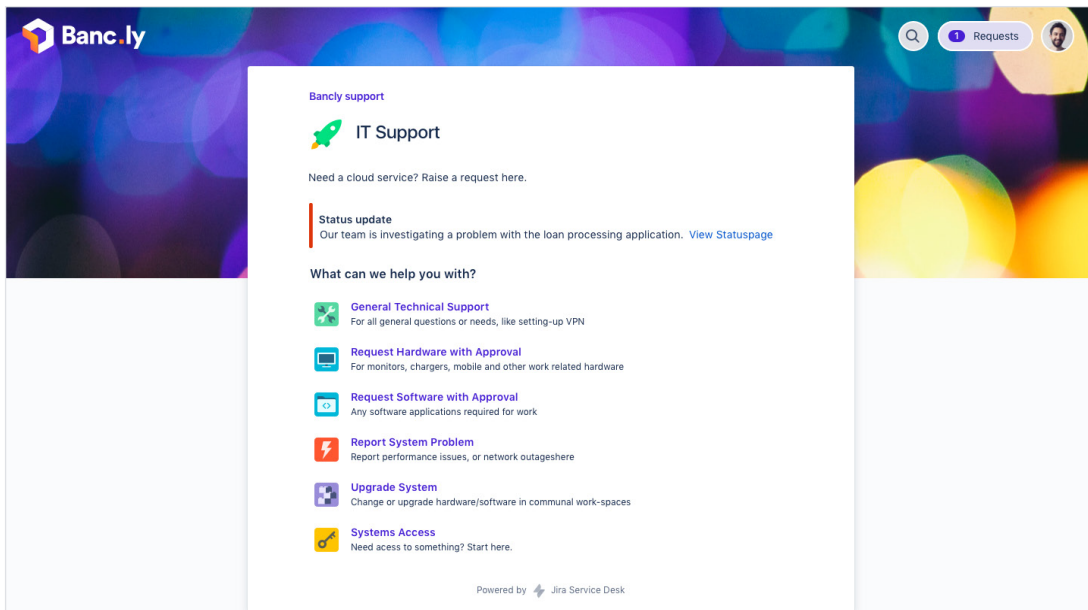
Finally, through an integration, Jira Service Management will trigger all incidents to automatically update Statuspage and your customer portal Jira Service Management when the incident is resolved.

Learn from the incident with a post-incident review

When service is restored and the incident is marked resolved, many teams will dust off their hands and consider their job complete. But not so fast! Conducting a post-incident review (PIR) is a crucial part of the incident management practice to improve processes and prevent future outages. Going through a PIR helps teams understand the contributing root causes and document the incident for future reference. By identifying preventative actions to implement, they can reduce the likelihood of recurrence and improve future service quality.

Yet, according to Google, 70% of incident reviews are forgotten. Most PIRs are buried in service tickets, chat threads, emails, or someone's document folder. The tasks that were key to preventing service outage from reoccurring never

Tip: Best practices for implementing a formal PIR process

- Establish a "blameless postmortem" culture where the goal is team learning, not finding blame.

- Develop a repeatable PIR process which is simple to follow and encourages collaboration.

- Improve visibility by linking all related items created from the PIR to the original incident.

- Create troubleshooting documents and runbooks in your knowledge base for future reference. Review often and keep them updated.

- Identify preventive actions to reduce the likelihood of the incident happening again. These should be worded in a way that is actionable, specific, and bounded by time.

- Share your PIR results and progress with other teams through reporting and dashboards.

During an incident, it's hard to stop during all of the action to get visibility into what actually happened. With Jira Service Management, everything is recorded so you get full visibility into the entire incident lifecycle with an automatically generated incident timeline. Jira Service Management also automatically creates a postmortem report with all the relevant fields from root cause, lead-up, mitigation, resolution, and lessons learned.

Finally, don't let your learnings fall to the wayside. Confluence provides an environment for cross-functional teams to collaborate on a PIR. Standardize your PIR process using a Confluence template to capture insights such as:

- What was the root cause of the incident?

- What was the overall impact of the incident?

- Did a change impact this outage? Does it require a problem investigation?

- What knowledge base articles do we need to publish?

- Should the team report any software defects to the development team?

- What followup IT tasks should we track?

To make reporting and documentation even easier, teams can export Opsgenie PIRs right into Confluence pages. Dashboards and reports can also be created for management to provide visibility and showcase the progress made for improving key services.

Problem management

Problem management is essential for identifying and understanding the underlying causes of an incident as well as identifying the best method to eliminate that root cause. An incident may be over once the service is up and running again, but until the underlying causes and contributing factors are addressed, the problem remains.

Traditionally, once an incident is resolved, many IT teams will create a problem ticket and throw it over the fence to a problem management team. While the intention to solve root causes and reduce incidents is correct, this model often leads to gigantic backlogs of problem tickets and technical debt. Root causes are often not investigated until long after the incident has happened.

What is problem management?

Problem management is the process of identifying and managing the causes of incidents, in order to reduce the number and impact of future incidents.

According to ITIL 4

"Problems are prioritized for analysis based on the risk that they pose…. It is not essential to analyse every problem; it is more valuable to make significant progress on the highest-priority problems than to investigate every minor problem that the organization is aware of."

ITIL® Foundation: ITIL 4 Edition, 5.2.8, Problem management

In many cases, your team may benefit from integrating your incident management and problem management practices. This proactive approach allows you to understand what led to the incident at the same time you work to resolve it. By viewing problem management as an extension of your incident management practice, you now have a single stream of work, instead of a backlog. Prioritize problem management for major incidents and incidents affecting your mission-critical services. And when teams are not in response mode, downtime may be a good time to get ahead of problems and prevent future incidents.

Blend incident and problem practices to improve service quality

During an incident, IT teams are focused on restoring service as quickly as possible. They don't have time to slow down and search for the underlying root cause. This is where the post-incident review (PIR) can help. By prioritizing PIRs as part of your incident management practice, you can ensure all underlying causes and contributing factors are addressed. A problem record in Jira Service Management allows teams to track the progress of a PIR and gain metrics on whether teams are delivering service improvements or stalling out when a root cause is difficult to find.

Use Jira Service Management problem records to track and share progress of a PIR.

Jira Service Management allows your IT operations team to easily link incidents and changes that are related to the outage. You can also attach corrective actions that resulted from the PIR, and track their progress. Jira Service Management bringing IT and software teams together in one place, they have full visibility to solve issues and ship service improvements quickly.

Link and view all issues, changes, bug fixes, and corrective measures related to the incident in one place.

Share lessons learned and improvements shipped

Easily share the status and results of your problem investigations using Jira dashboards. Insights may include volume of resolved problems, active problem investigations, and common reasons for incidents. This allows stakeholders to follow your progress and successes over time.

Confluence serves as the source of truth for your organization when it comes to documenting and sharing insights from problem investigations and PIRs. Keep service owners and business stakeholders updated by creating a single Confluence page to share insights such as problem work completed, improvements shipped, and potential blockers.

Use Jira dashboards to visually share problem investigation trends with stakeholders.
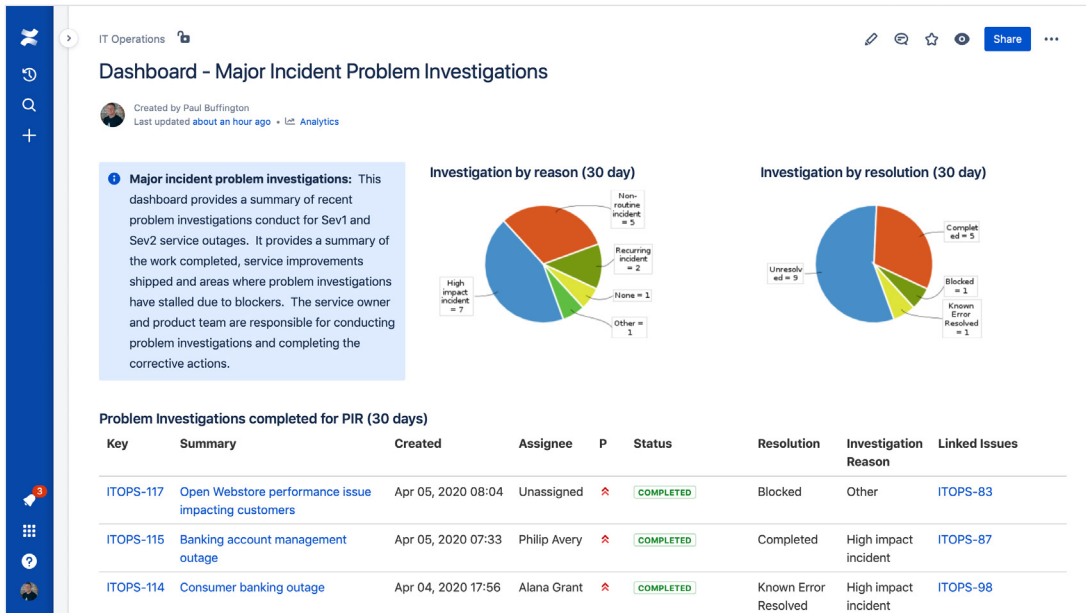
Use Confluence to provide stakeholders with visibility across your major incident problem investigations.

> *Tip: How to redefine your problem management practice*
>
> - Review trends in your problem investigation backlog, then identify what types of work should continue or stop. Focus on problems that deliver value and improve services.
>
> - Establish a problem investigation standard for major incident PIRs.
>
> - Implement automation rules to proactively create problem investigations for PIRs.
>
> - Try a **retrospective** to improve your team's post-incident learning and communication.
>
> - Develop metrics and dashboards to provide service owners and stakeholders with more visibility.
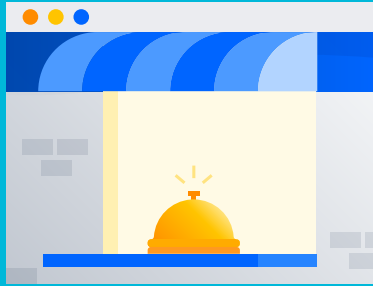
04

Service support

Request management

The consumerization of technology has forever changed employee expectations and impacted the way IT and services teams support users. In today's world of on-demand services, employees now demand the same speed and ease of support from their IT organizations that they've come to expect from services like Netflix and Amazon.

Yet, many IT organizations still struggle to meet their customers' lofty expectations. For employees, the primary contact with IT support is often email, and the ability to self-serve is nowhere to be found. On the backend, IT teams struggle with configuring a service request catalog and keeping a knowledge base updated. When siloed tools abound, coordinating service requests across multiple teams becomes a major challenge.

What is incident management?

Request management practice helps organizations standardize the way they respond, coordinate, and fulfill support requests.

- **Request fulfillment** is the process of resolving a customer's service request and refers to managing the entire lifecycle of all service requests.

- The **service desk** provides the primary contact point with IT, where employees ask for help or request services.

According to ITIL 4

"With increased automation and the gradual removal of technical debt, the focus of the service desk is to provide support for 'people and business' rather than simply technical issues.

Service desks are increasingly being used to get various matters arranged, explained, and coordinated, rather than just to get broken technology fixed, and the service desk has become a vital part of any service organization."

ITIL® Foundation: ITIL 4 Edition, 5.2.14, Service desk

Delivering delightful, consumer-grade service and support

The days of manual, untraceable IT support through email or walk-up help desks are over. Modern service desks have evolved to embrace self-service and multi-channel support. Technology enables the ability to "shift-left" to deliver more value, while offering ease of access to channels like email, service portals, chat, and knowledge bases. Automation drives faster request fulfillment and empowers teams to auto-provision services, such as password resets, account access, and software requests.

At Atlassian, we believe a strong Service Request Management practice is customerfocused, knowledge-centric, and streamlined with automation. We also encourage learning from metrics and KPIs to make data-driven decisions and optimize service.

- **Jira Service Management** is where support teams receive and track requests. User-friendly workflows classify each request and seamlessly automate approvals or assign them to proper agent queues. Teams collaborate to fulfill requests, and then measure and learn from critical metrics to improve customer satisfaction.

- When **Jira Service Management** is combined with the power of Confluence, knowledgecentric support becomes a reality. Support teams are empowered to author and share knowledge articles and FAQs, process and troubleshooting guides, team documentation, and more.

Outside of IT, the same request management practices can be scaled and customized for **Enterprise Service Management** workflows, such as employee onboarding, legal contract review, office supply ordering, and more.

> *Tip: Apply "value streams" to your service desk*
>
> To manage the flow of your work, map out a **value stream**, or journey through various activities of the value chain, for your service desk. First, identify request bottlenecks that slow down your request fulfillment. Then add automation to streamline your workflow.

Email   Self Service Portal   Mobile

KNOWLEDGE

⚡ Jira Service Management

? ···· **REQUEST** ········· **RESPOND** ········· **FULFILL** ···· ✓

Knowledge	Classify	Complete
Approval	Assign	Survey
Automate	Collaborate	Measure

❖ Confluence

Practices
Procedures
Process guides

Knowledge
How to's
Troubleshooting
FAQs

Team documents
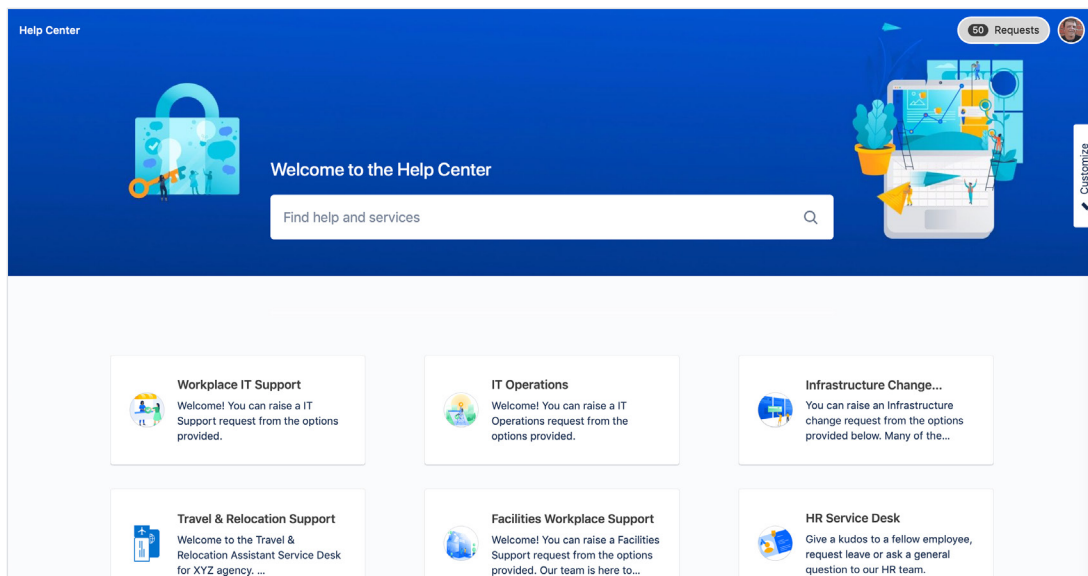Meetings
Retros
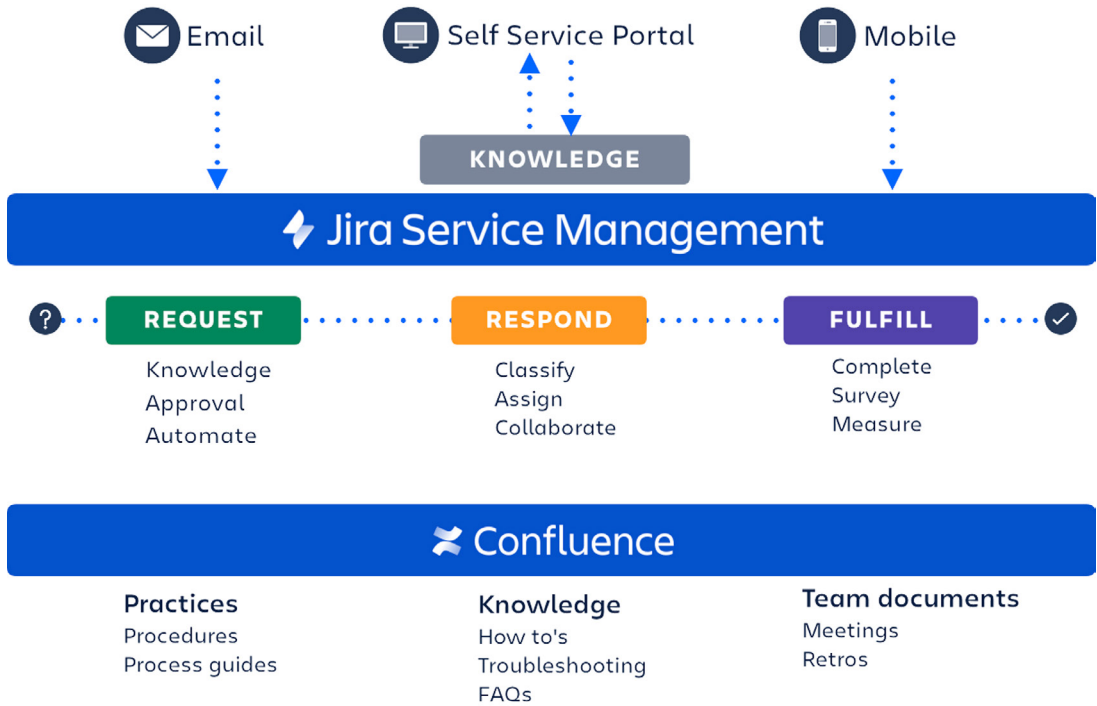
Service management checklist

☐ Shift left with self-service

☐ Build a knowledge-centric service desk

☐ Measure your support service with KPIs

☐ Track assets by integrating with a flexible solution

☐ Automate where you can, and streamline where you can't

☐ Extend service management beyond IT

Shift left with self-service

We experience self-service in our everyday lives, from self-checkout lines to using an ATM. Now, these expectations for self-service are being applied to IT organizations. To meet these expectations, try "shifting left" – the concept of moving request fulfillment as close to the front line (and the customer) as possible. For instance, a knowledge base with searchable articles can work wonders in deflecting tickets. Customize your intake request forms to capture all relevant information upfront, so you eliminate long back-and-forth conversations. As your organization grows, shifting left not only improves user satisfaction, it also drives down your costs.

Shift left: lower cost and improved customer satisfaction

Level Zero support

Level One support

Level Two support

Level Three Support

Increasing support costs

Jira Service Management offers users a single place to go for help. Through a centralized global customer portal, employees can easily access every service desk, from IT Support to HR and Facilities. And if an incident occurs, IT teams can post general notifications or outage announcements on the portal homepage to keep employees informed. Users can track the status of their requests at every step, view expected SLAs, and communicate easily with support teams.

Help Center

50 Requests

Welcome to the Help Center

Find help and services

Customize

Workplace IT Support
Welcome! You can raise a IT Support request from the options provided.

IT Operations
Welcome! You can raise a IT Operations request from the options provided.

Infrastructure Change...
You can raise an Infrastructure change request from the options provided below. Many of the...

Travel & Relocation Support
Welcome to the Travel & Relocation Assistant Service Desk for XYZ agency. ...

Facilities Workplace Support
Welcome! You can raise a Facilities Support request from the options provided. Our team is here to...

HR Service Desk
Give a kudos to a fellow employee, request leave or ask a general question to our HR team.

Build a knowledge-centric service desk

As services grow in complexity, knowledge management can be one of IT's most valuable assets. Every employee needs fast access to information to be productive in their jobs. And every agent needs to keep up with changing technologies and processes to support users effectively.

When support teams integrate Confluence with Jira Service Management, knowledge is put to work by deflecting requests or streamlining the request process. Designed around search, Jira Service Management uses machine learning technology called Smart Graph to recommend the right knowledge base articles and request types as users search for answers or complete request forms. The more users search in the portal, the better the results become. When support teams put answers to common questions directly at users' fingertips, they encourage self-service that satisfies customers and reduces request volume. This frees up time for agents to focus on solving more critical issues.
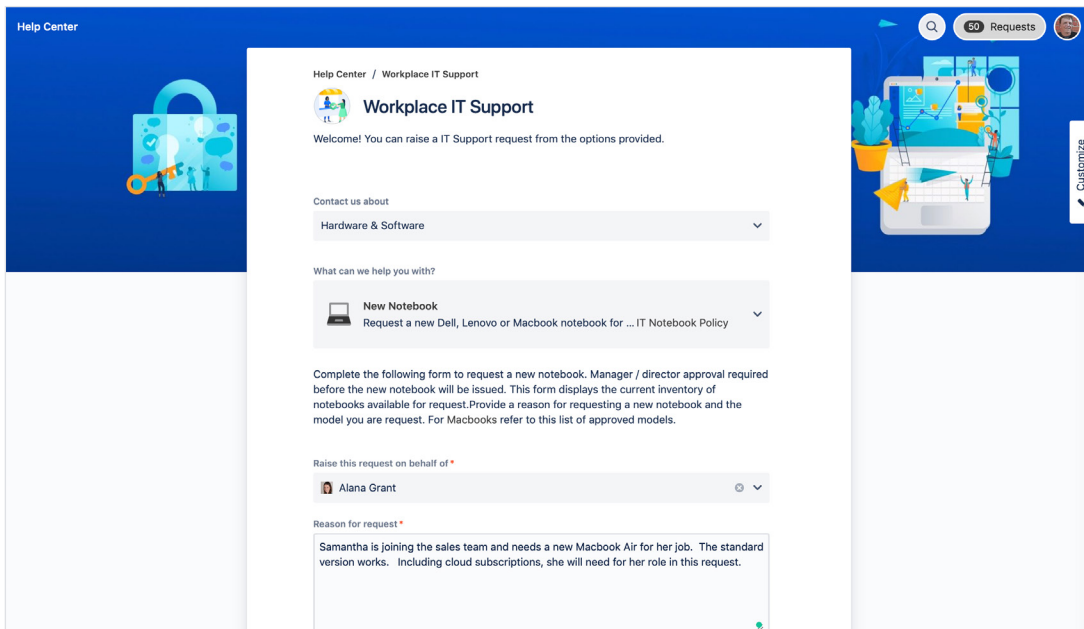
Jira Service Management also improves agent productivity by providing immediate access to knowledge base articles right from an issue or request. Based on the type of request, agents can choose from recommended knowledge articles or search within existing articles to respond to the user's request. With Jira Service Management and Confluence, IT teams can easily author new knowledge base articles and build a knowledge base library that fits their users' needs.

Tip: Learn from your knowledge base to improve self-service

In Jira Service Management, run a report to understand the most common support requests. Use the data to identify new knowledge base articles that can be published to reduce ticket volume.

Bonus tip: Use Confluence analytics to find out which articles received the most views and positive feedback. Recognize the authors with rewards to encourage team members to contribute to the knowledge base.

Measure your support service with KPIs

Measuring IT performance is critical – not only for tracking work against team objectives – but also for demonstrating your team's value to the rest of the business. But with email, requests are scattered with no way to capture even the most basic metrics like SLAs or size of backlog. For organizations using legacy ITSM tools, disjointed tools across teams, such as Dev and IT, prevent a single view for reporting. Building dashboards on these traditional platforms is often cumbersome and complex.

What are Key Performance Indicators (KPIs)?

Key Performance Indicators (KPIs) are the metrics chosen to gauge how well a team performed against agreed standards, such as uptime, first-call resolution, and time-to-recovery after service outages.

Besides, how do you know which IT metrics to choose? By attempting to track every metric possible, IT teams sometimes lose focus. We suggest measuring activities that are both aligned to the goals of the business and encourage the right behaviors. For example, tracking mean time to resolution (MTTR) is helpful. But in an effort to improve MTTR metrics, you don't want to incentivize your first-level support to close tickets too quickly before solving the customer's issue to their satisfaction.

Every team has different tracking and reporting needs. As a starting point, we recommend these commonly used KPIs:

Service support metrics

1. Mean time to resolve
2. Mean time to respond
3. Size of request backlog
4. Created versus resolved
5. SLA success rate
6. Cost per ticket
7. CSAT (customer satisfaction)

Incident management metrics

1. Incidents over time
2. Mean time between failures
3. Mean time to acknowledge
4. Mean time to resolve
5. % of incidents resolved within SLA
6. % of outages due to incidents
7. Uptime

With powerful real-time reporting in Jira Service Management, you have visibility into your team's performance metrics to learn, adjust, and improve your service. Use default reports to quickly compare metrics, such as issues created versus resolved, time to resolution, met SLAs versus breached, and more. Then build custom reports to query additional data combinations. Compared to legacy platforms, many teams find creating and sharing dashboards in Jira Service Management more intuitive.

Here are examples of reporting capabilities in Jira Service Management:

CSAT

To understand users' satisfaction with the quality of support, CSAT (customer satisfaction) is an important metric to measure. Customer feedback helps identify strengths and weaknesses in service quality, engage and motivate agents to improve scores, and understand if agents need mentoring and training.

Short, simple surveys are most effective in generating customer responses. Jira Service Management provides a built-in satisfaction survey, consisting of a 5-star rating with a brief comment field.

SLAs

Service Level Agreements (SLAs) are great for tracking day-to-day progress. SLAs define agreed-upon terms for services and manage customer expectations, such as promising a response from support within 24 hours.

In Jira Service Management, teams have the flexibility to create SLA goals for just about any combination of parameters. Instead of relying on consultants for custom queries or updating hard-coded SLAs, configuring SLAs can be done in-house and changed on the fly. Don't even think about building elaborate Excel spreadsheets. Easily track SLA performance with pre-built reports that update in real-time.

Jira Dashboards

Jira Dashboards provide another alternative to configure and display accurate, detailed information at a glance. Dashboards can be created system-wide or shared with a group of users. To extend your reporting capabilities, explore Atlassian Marketplace apps such as eazyBI.
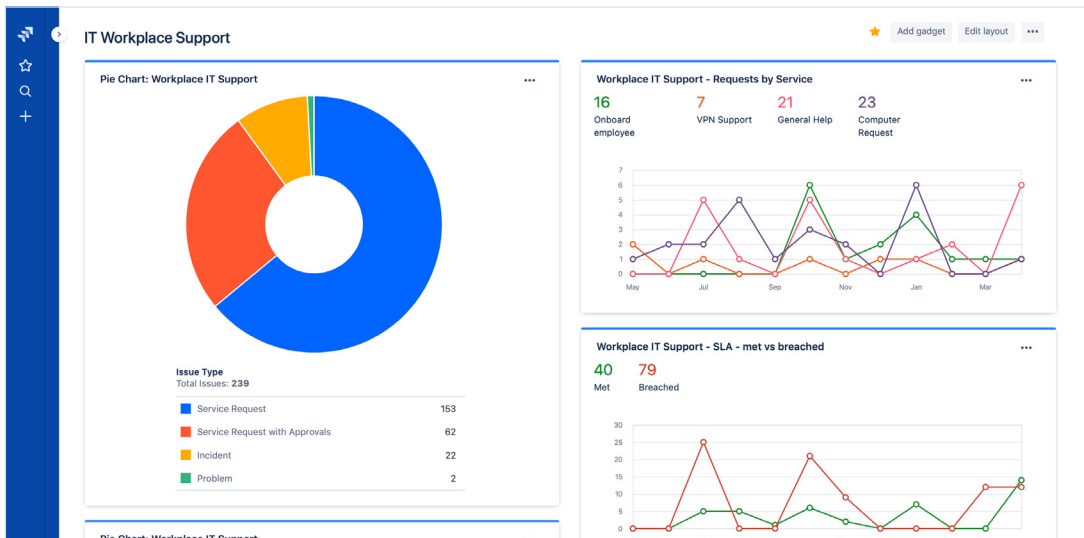
Track assets by integrating with a flexible solution

Too often, IT assets are tracked in many different places, by many different people. Naturally, chaos and inaccuracy follow, and IT teams can't make informed decisions. As IT evolves, teams become more reliant on SaaS vendors for critical services, and it's necessary to track the consumption of "on-demand services" in dynamic cloud environments. Asset management must adapt from spreadsheets to more effective, modern practices.

With increased control, visibility, and assigned responsibility, teams can reduce excess consumption, including overprovisioning and idle instances, to avoid unnecessary costs. On average, software and hardware spending accounts for 20% of IT's budget, which is why asset management is crucial to master.
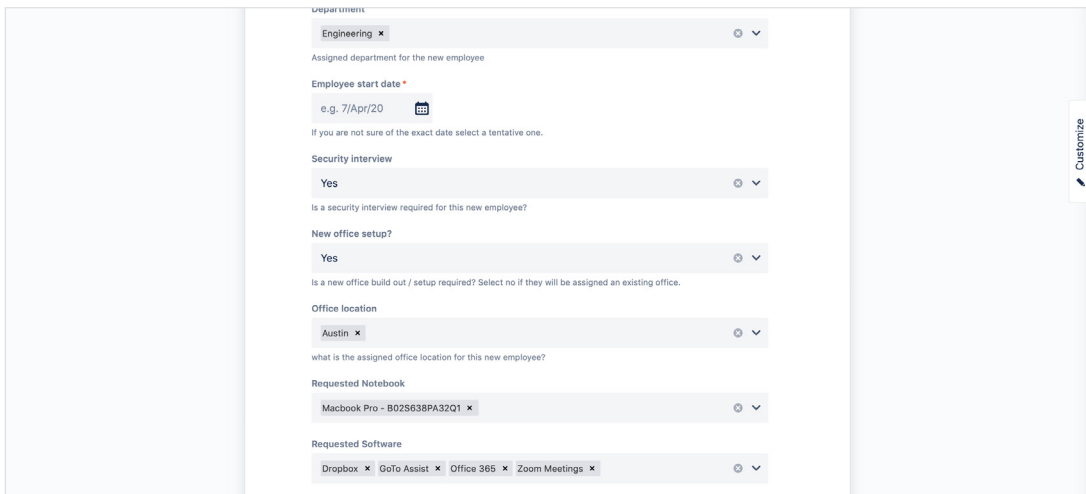
What is asset management?

IT asset management (also known as ITAM) is the process of ensuring an organization's assets are accounted for, deployed, maintained, upgraded, and disposed of when the time comes. Put simply, it's making sure that the valuable items, tangible and intangible, in your organization are tracked and being used.

Every organization is different. Maybe you need to map complex dependencies across an enterprise. Or you want to keep a record of intangible assets like licenses and compliance documents to reduce risk. Or perhaps your requirements are more straightforward and involve tracking an inventory of computers.

Insight's CMDB has the capabilities required for asset management, in addition to configuration management. Whether you're looking for a lightweight tracker or an enterprise-grade system, Jira Service Management and Insight empowers you to define your assets how you like and work with them in whatever way suits you and your business best.

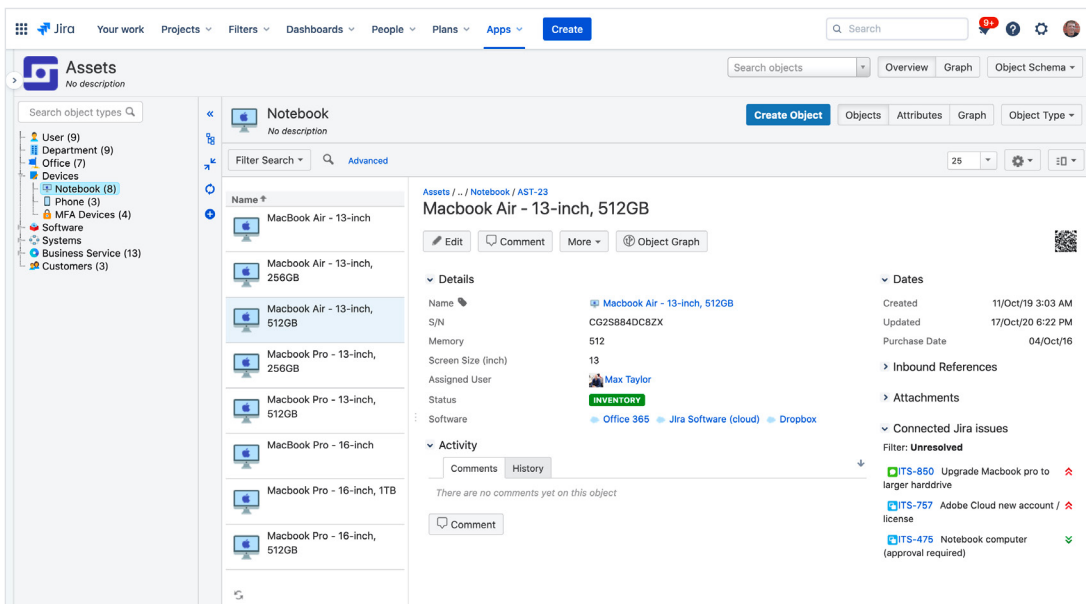# Help employees help you with easy asset selection

As the first line of interaction with your customer, your service desk should offer exceptional user experiences through self-service. With Jira Service Management and Insight, employees can easily select the right assets to associate with their request. Agents will receive all the necessary context to resolve the request, such as purchase date and previous issues linked to that asset. The more context agents receive, the faster they can resolve customer issues.

In this employee onboarding example, a manager can select the required hardware and software right in the Jira Service Management request form.

A support agent can quickly view the assets and software needed to onboard a new employee. This example is using data from Insight.

Use automation to track assets and monitor inventory

Use automation rules and input from Jira issues to update the Insight CMDB with the required information to track your assets. When an employee requests hardware, use automation rules to assign them as the owner of the chosen item. No more wasting time on hunting down who has what or updating spreadsheets!

Automation rules can also be used to assess what inventory you have in stock, and trigger a request to ship hardware from another location or raise a purchase order for the desired item.

Automate where you can,
and streamline where you can't

According to a McKinsey study, 45% of work activities can be automated with currently demonstrated technologies. These time savings represent $2 trillion in annual wages. Imagine if you could take your current IT support activities and automate a small fraction of them. What would that be worth to the way your teams function? What would that mean to the business?

As enterprises feel increased pressure to stay ahead of the competition, they can't afford to waste time on manual tasks or navigating operational silos. That's where automation can transform the workplace by efficiently scaling IT operations and support. While automation is a cornerstone of ITSM success, many organizations find automation costly and hard to implement.

Jira Service Management provides a handful of out-of-the-box automation rules to help teams get started. With a simple, intuitive UI, they can build custom automation workflows without the need for programming or a consultant. Over 60% of Jira Service Management customers rely on automation to get work done. In fact, some customers use over two million automation rules per month.
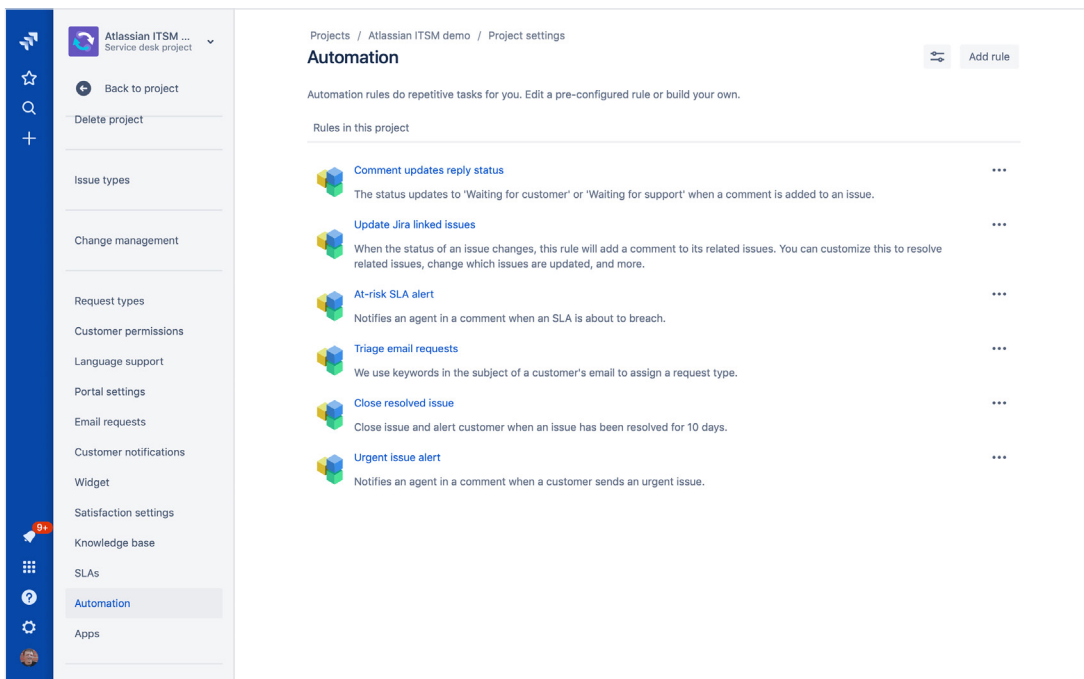
Get started quickly with pre-configured automation rules in Jira Service Management.

Through platform-level automation, Atlassian's solutions can coordinate and orchestrate workflows that span across all your teams – from developers to IT operations to the rest of the business. This ensures all teams focus their time on tasks that provide value to the business.

Tip: Recommended tasks to automate

- Common requests with the greatest pain points

- Requests that need additional attention from an agent or approver

- Requests that can be fulfilled through self-service

- Common incident management activity

- Standard change request approvals

- Keeping linked issues updated

Don't forget to start small, learn from results, and build on your success!

No code, just drag and drop

Automation in Jira Service Management is a "no-code" capability. Drag and drop "if-this-then-that" rules to automate your work and solve countless use cases, without adding any complexity. It only takes a few clicks, whether you need to auto-close old issues, keep service requests and tasks in sync, or automate your entire release process across Jira Software and Bitbucket.

Example automation rules for common use cases

| Use case	Example rule
Keep Jira Service Management requests up to date	If a task is associated with a completed request, update the parent request to "Done," and notify the assigned support team.
Surface potential problems before they escalate	If the CTO raises an urgent issue, send a Slack message to the support channel. Then reclassify the issue with a higher priority SLA.
Automate releases across your teams	When a new product feature is released, close all dev issues and notify sales and marketing teams about the shipped feature.
Provide advanced customer support	When a customer comments on a closed issue, respond with a personalized note and notify the assigned support team.

Streamlining employee service requests

Start by automating your response to common requests, such as reclassifying requests, adding comments, or routing requests to the appropriate queues. Automation not only saves time for the IT team, but also improves communication with internal customers and their overall satisfaction with support.

Employee onboarding is a use case that requires coordination across multiple teams, from IT to HR to Facilities. Instead of creating separate requests for desk setup, software provisioning, and more, a hiring manager can raise a single request in the customer portal to prepare everything needed for a new employee.
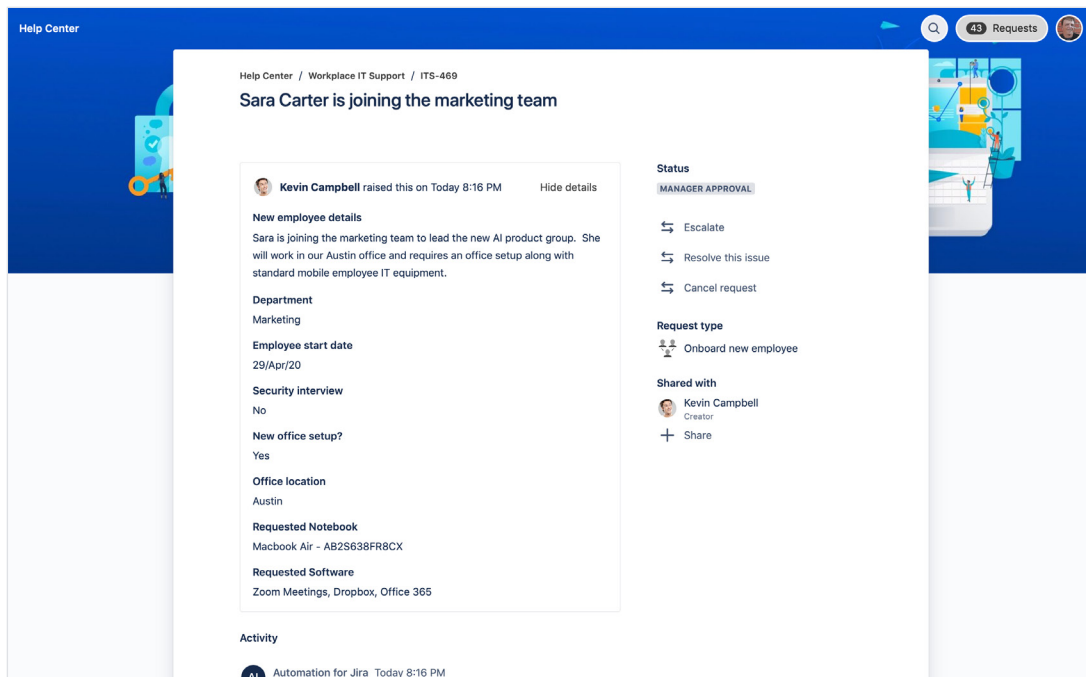
After the request is raised, an automation rule creates a corresponding service request in the Facilities team project. The rule copies the description from the original issue and adds a comment to the parent request to acknowledge receipt. The two requests are linked to keep both sides updated on progress.
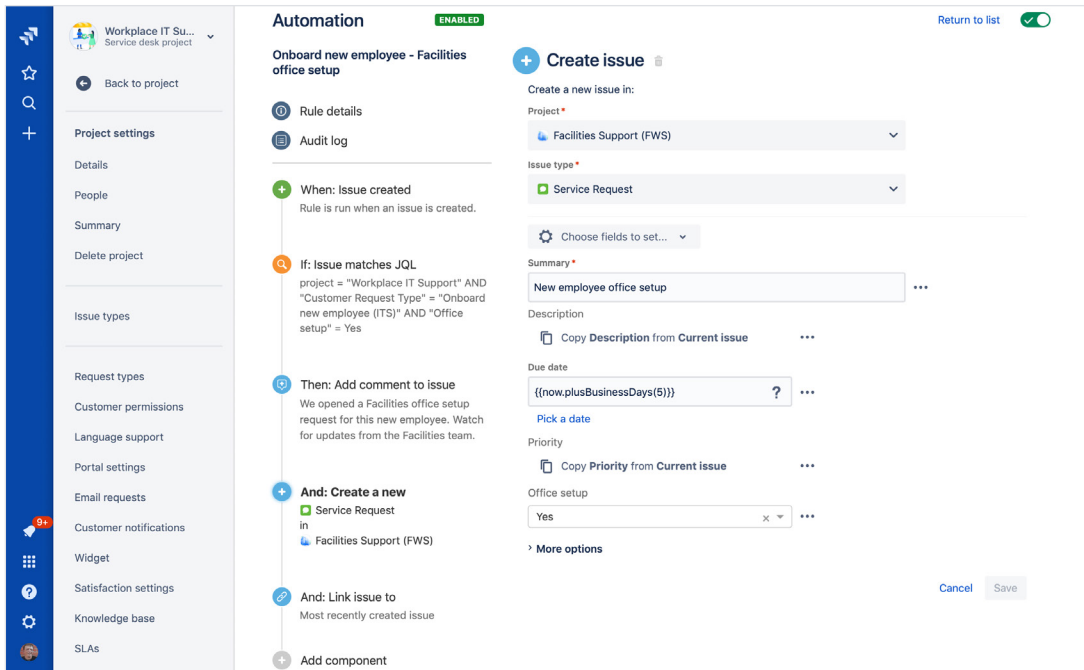
Atlassian's automation capabilities can be extended with integrations to help HR teams create consistent first-day onboarding experiences. For example, when a new employee is added to BambooHR, a ticket is automatically created in Jira Service Management to kick off onboarding. At the same time, the employee is provided with the right user access permissions in Okta.

And when employees depart or hardware is misplaced, automation can reduce security and compliance risks. For example, when a hardware device status in Insight CMDB is changed to "Lost," a corresponding Jira Service Management issue is created, which sends an update to Jamf, a device management solution. Jamf can lock and wipe the device to prevent any security violations.

Automation across Dev and IT

Atlassian's automation engine plays a vital role in improving cross-functional work between Dev and IT teams. Consider this scenario: your IT team discovers a software bug during a problem investigation. By creating a linked issue and an automation rule to keep the linked issues synced, both software and IT teams have real-time visibility into the status of the bug fix. When the software team transitions to the bug from "Backlog" to "In Progress," the problem investigation ticket is automatically updated to notify the IT team.

By linking issues, software and IT teams are always on the same page.

This automation rule example keeps linked issues synced, then notifies the IT Operations team's Slack channel when the bug fix is completed.

With Jira automation, IT and development teams shift from spending time on reactive, manual work, to concentrating on more complex tasks. Automation saves time for teams and delivers immense value to the business. problem investigation ticket is automatically updated to notify the IT team.

Extend service management beyond IT

Today's knowledge workers want easy access to information to get work done and stay productive. However, navigating complex workflows and systems across IT, accounting, procurement, and more, can be a massive headache. To streamline these processes, many IT organizations are looking at their existing ITSM solution to help solve non-IT issues. This growing market is called Enterprise Service Management.

What is Enterprise Service Management?

Enterprise Service Management (ESM) extends ITSM processes and tools across an organization to all teams. It defines operational best practices for both internal teams and their customers, while removing organizational silos. Common ESM use cases include human resources, facilities, and legal.

Jira Service Management offers an intuitive, cost-effective solution that's quickly scalable and easily maintained by non-technical teams. With codeless setup and configuration, teams can spin up new services, a customer portal, and related request forms, workflow rules, and reports almost instantaneously. Instead of purchasing dedicated modules for each team, Jira Service Management customers enjoy a single adaptable solution that's flexible enough to solve a wide variety of business problems.

Plus, integrations across the Atlassian platform connect requests across a comprehensive digital pipeline, from planning, collaboration, task and product development (Jira Software and Trello) to continuous delivery (Bitbucket), knowledge management (Confluence), operations (Jira Service Management and Statuspage). and asset tracking and inventory management (Insight).

The use of Jira Service Management tends to spread organically across companies. Most often, IT is the first team to leverage Jira Service Management for service management. As business teams interact with the service desk as end-users, they quickly understand the value and begin to request service desks for their teams, such as HR, Facilities, and Legal. Eventually, Jira Service Management will expand even further to other departments and use cases, from event planning to procurement to security.

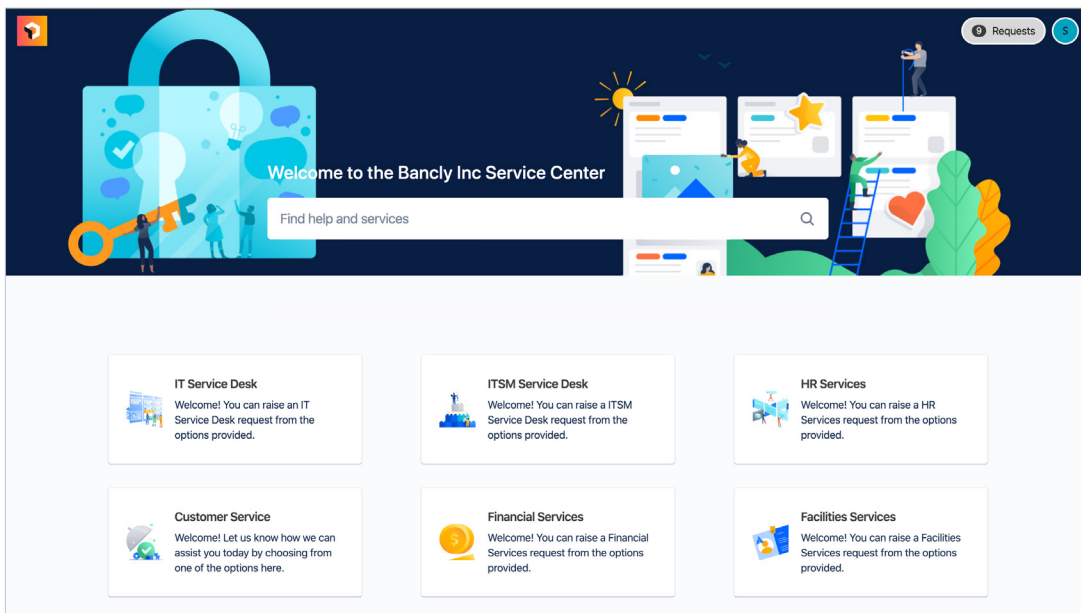## Enterprise Team workspace that fit the team and the mission

> **Did you know?** In the Forrester Wave™: Enterprise Service Management, Atlassian is recognized as a "Strong Performer" with the strongest overall strategy and a rapidly expanding market presence. **Download the report.**

A single place to find and ask for help

For your internal customers, first impressions happen in your customer portal. It's where employees go to troubleshoot, submit requests, and view a list of services offered. In Jira Service Management, match your brand by customizing the look and feel of the portal with a banner and color combinations.
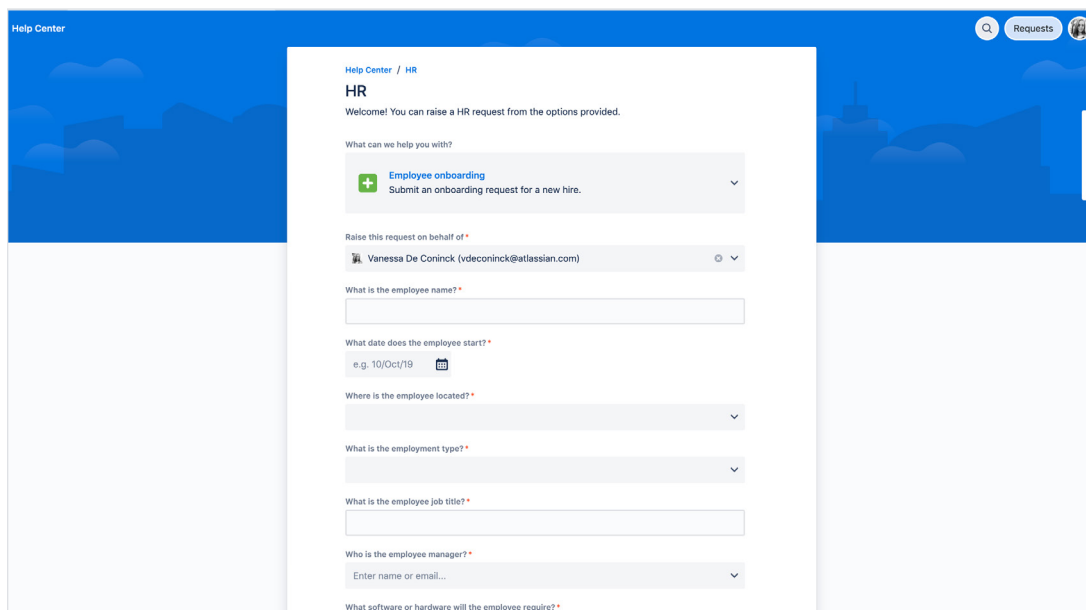
Get started quickly with purpose-built templates

Customers can leverage templates and workflows in Jira Service Management that are purpose-built for business teams in HR, Legal, and Facilities. These out-of-the-box capabilities give business teams autonomy to create, update, and maintain their own service desk with minimal IT involvement.

HR and Facilities teams can use Jira Service Management to efficiently manage tasks such as employee onboarding and fielding maintenance requests. Legal teams can shift from manually chasing down signatures to working collaboratively with an automated digital workflow.

HR teams can create an onboarding template and associated workflows within minutes.

Balance self-service cloud provisioning with compliance and security

As the demand for cloud services grows, administrators need to balance the high demand with managing risk and security. With the **AWS Service Catalog Connector**, administrators can provision requests by connecting their AWS portfolios and products to Jira Service Management workflows. Users can self-service cloud products right in Jira Service Management, while administrators maintain governance and oversight over AWS resources.

05

Resources

Atlassian Team Playbook and IT Guides

Having the "right" tools and following the "right" processes often aren't enough. By building a strong culture and adopting team practices based on collaboration and transparency, organizations can develop behaviors that can make them resilient and more adaptable to change. Take your IT team practices to the next level with these resources:

The Atlassian Team Playbook

With the Team Playbook, you'll find tool-agnostic techniques Atlassian teams use every day to improve the way our teams work together. Start by assessing your team's health against common attributions, and experiment with self-guided workshops (called Plays) to uncover team blindspots, improve processes, and start important conversations for the future.

Take the Team Playbook for a spin

Atlassian's Guide to ITIL 4

ITIL 4, the latest update to the popular ITSM framework, is here! In this guide, Atlassian and AXELOS partnered to explore what's new in ITIL 4, and share tips and tricks for bringing agility and collaboration into ITSM.

Get the guide

Atlassian's Incident Management Handbook

In a world where always-on services are expected, it's critical to have a fast, straightforward incident management process. In this handbook, we're sharing our strategy for responding, resolving, and learning from major incidents.

Get the handbook

Extend your ITSM solution with Marketplace Apps

Customize your ITSM solution with over 1,000 apps from the Atlassian Marketplace across categories such as portal customization, advanced analytics, and time tracking. Explore the most common apps used by Atlassian customers to extend their ITSM solution:
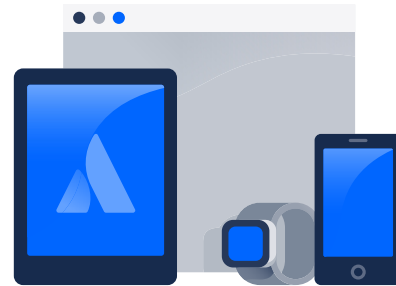
Service Request

✔ **Extension for Jira Service Management**
Extension for Jira Service Management improves security, usability and appearance of the solution for customer support teams. Display more issue details on the Customer Portal, set up permissions for various elements, and build dynamic request forms.

✔ **ProForma**
As service request catalogs grow in Jira Service Management projects, the number of custom Jira fields can be burdensome for Jira admins. ProForma provides dynamic forms and checklists in Jira and Jira Service Management, without the need for custom fields. ProForma is great for customers exploring enterprise service management (ESM).

Portal Customization

✔ **Refined for Jira**
Refined for Jira provides tools to customize the customer portal – without needing to code. Organize your service desk with a purpose-fit site structure, use a simple, inbuilt theme editor to customize the layout, and engage customers with a branded and user-friendly interface and themes.

Asset & Configuration Management

✓ **Insight – Asset Management**
Insight (now by Atlassian) is an enterprise IT service and asset management solution built for Jira. It provides flexible asset structures, a highly customizable CMDB, seamless automation, and real-time reporting. When used in conjunction with Discovery, Insight's agentless network scanning app, customers can automate asset discovery and dependency mapping.

✓ **Device42**
Device42 is a comprehensive agentless discovery system used for asset management. Continuously discover, map, and optimize infrastructure and applications across your physical, virtual, and cloud infrastructures, providing accurate views of your IT ecosystem.

Reporting

✓ **eazyBI**
eazyBI enables customers to create business intelligence data reports and dashboards in Jira. It provides an easy-to-use report builder, custom charts and dashboards, and powerful calculations. Analyze and visualize data from Jira Software, Jira Service Management, and external data sources – all in one place.

✓ **Arsenale Dataplane**
Arsenale Dataplane delivers powerful, intuitive Jira reports, allowing customers to reach back in time and look at historical trends, the timing of transitions, and project and team performance. It is equipped with both out-of-the-box and custom reporting capabilities.

Automation

✓ **Automation for Jira**
Automation for Jira (now by Atlassian) makes it easy to configure automation rules in Jira without the need for custom scripts. For example, service teams can use it to auto-assign issues or auto-close old support tickets.

✓ **ScriptRunner for Jira**
ScriptRunner for Jira is a leading toolset for automating, enhancing, and extending Jira. It allows the use of scripts to automate workflows, update fields, and perform other actions in Jira. It also expands the functionality of other apps using APIs.

ChatOps

✓ Halp
Halp (now by Atlassian) is a conversational ticketing solution for modern teams. Capture, prioritize, manage, track, and report on Jira issues and Jira Service Desk requests directly from your team's native communication environment such as Slack.

✓ Microsoft Teams for Jira
For teams using Microsoft Teams, integrating with Jira Service Management makes it easy to collaborate and communicate. Create tabs with issues and track and discuss your team's progress in your channel without leaving Microsoft Teams.

Integrations

✓ Elements Connect (formerly nFeed)
Elements Connect pulls data from any source, such as SQL databases or REST APIs, and then populates custom fields in Jira. Common uses cases include fetching data from a CRM or querying a CMDB for assets.

Knowledge Management

✓ Comala Workflows
For teams using Confluence with Jira Service as a knowledge base, Comala Workflows ensures your Confluence content is validated before publishing. It enables teams to add reviews, approvals, and document control to Confluence documents.

Time Tracking

✓ Tempo Timesheets
Tempo is the market leader in automated time tracking and resource planning solutions, giving organizations the insight they need to keep on top of project costs, plan resources, and track customer costs and CAPEX.

Enterprise Services

Each deployment of Atlassian's ITSM solution is unique. That's why we offer a breadth of enterprise services to design, implement, and optimize solutions for scale.

Enterprise Partners

Consulting, best practices, and technical configurations to ensure success in ITSM deployments of all sizes. Enterprise Partners can help conduct hands-on system integrations, deployments, and upgrades. They'll also work with your team to customize Atlassian software to your specific needs.

Find an Enterprise Partner

Support Services

Different levels of access to a dedicated team of support engineers, providing flexible coverage for your mission-critical Atlassian applications. Our experienced support team has strong knowledge of all products, known issues, and workarounds ensuring the quickest time to resolve your issues.

Learn about our Support Services

Technical Account Managers (TAMs)

Experienced solutions advisors from Atlassian who partner with customers to shape successful outcomes. TAMs can help you navigate your ITSM journey, align your teams, and provide regular updates on product roadmaps.

Get started with a TAM

Atlassian's cheat sheet for high-velocity ITSM

We'd like to leave you with a cheat sheet that summarizes best practices needed to unlock high-velocity collaborative ITSM. Feel free to print out and hang by your desk, or share with your colleagues!

Getting started with Atlassian's ITSM solution

- ☐ Embrace a team-centric approach to ITSM
- ☐ Step back, and start where you are
- ☐ Take a top-down approach starting with the service layer
- ☐ Achieve quick wins with a minimal viable product
- ☐ Match your software stack to your maturity and needs
- ☐ Scale your solution and celebrate success

Key Metrics

Service support metrics

- ☐ Mean time to resolve
- ☐ Mean time to respond
- ☐ Size of request backlog
- ☐ Created versus resolved
- ☐ SLA Success Rate
- ☐ Cost per ticket
- ☐ CSAT (customer satisfaction)

Incident management metrics

- ☐ Incidents over time
- ☐ Mean time between failures
- ☐ Mean time to acknowledge
- ☐ Mean time to resolve
- ☐ % of incidents resolved within SLA
- ☐ % of outages due to incidents
- ☐ Uptime

Service delivery

IT business management

- ☐ Easily capture strategic business requests with self-service
- ☐ Adopt practices to open collaboration between IT and business
- ☐ Use queues and automation to prioritize strategic business requests
- ☐ Embrace agile project management to speed up delivery
- ☐ Use visual boards to collaborate and communicate with stakeholders

Change enablement

- ☐ Embrace practices to make standard change the new normal
- ☐ Streamline change request intake for IT and developer teams
- ☐ Adopt an automated risk model to prioritize changes
- ☐ Break down larger changes into smaller units of work
- ☐ Unlock learning with change metrics and KPIs
- ☐ Move to the future of release management with DevOps change

Service configuration management

- ☐ Take a top-down approach to build your service model architecture
- ☐ Create a unified service view across your organization
- ☐ Extend your solution with flexible CMDB apps

Knowledge management

- ☐ Increase transparency with open and shared information
- ☐ Make work visible with cross-functional team collaboration
- ☐ Champion a culture of knowledge sharing

Service operations

Incident management

- [ ] Establish a proactive incident management playbook
- [ ] Make it easy to capture user and system-reported issues
- [ ] Reduce alert fatigue with smart on-call scheduling
- [ ] Use ChatOps and runbooks to improve team coordination
- [ ] Build trust with centralized external communications
- [ ] Learn from the incident with a post-incident report

Problem management

- [ ] Blend incident and problem practices to improve service quality
- [ ] Share lessons learned and improvements shipped

Service support

Service management

- [ ] Shift left with self-service
- [ ] Build a knowledge-centric service desk
- [ ] Measure your support service with KPIs
- [ ] Track assets by integrating with a flexible solution
- [ ] Automate where you can, and streamline where you can't
- [ ] Extend service management beyond IT

Atlassian Team Playbook

Top Plays

- [ ] **Health Monitor**
- [ ] **IT Project Poster**
- [ ] **IT Project Kickoff**
- [ ] **Capacity Planning**
- [ ] **Retrospective**

Find more plays:
atlassian.com/team-playbook

About the authors

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As a member of the Atlassian
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responsible for helping
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the technology to helping teams
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Paul enjoys spending time with
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Hiking and photography are a
perfect weekend fo

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Teresa Fok is a product marketer
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UC Berkeley.

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Jenna Cline is the Head of IT Strategy & Programs at Atlassian. In this role, she uses a strategic and programmatic approach for solving business problems with technical solutions, working directly with the CIO to use IT as a business enabler.

Jenna has more than 20 years of experience from a variety of communications and IT roles, ranging from early-stage startups to Fortune 100 companies. She holds a B.A. in Organizational Communications from North Central College.

Whether you're making the switch from a legacy ITSM tool or implementing a solution for the first time, Atlassian can help you modernize your IT practices and keep up with the pace of business.

Ready to unlock high-velocity service management? Learn more about Atlassian's ITSM solution on our website.

Additional resources

- **Case Studies: Reimagining ITSM with Jira Service Management**

- **Forrester Wave™: Enterprise Service Management**

- **Forrester's Total Economic Impact™ of Atlassian for ITSM**

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