

Guide to work management:

Tools for teamwork

Breaking down silos and boosting collaboration for teams everywhere



Atlassian Platform & Products



Great projects come from great cross-functional teams

Working in collaboration, no matter where they are.

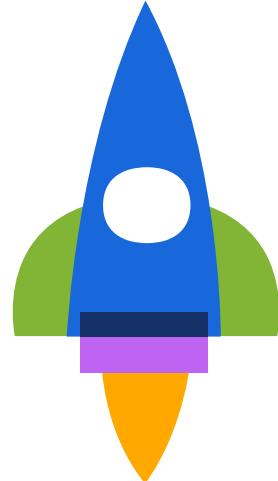
Think of the most successful, most satisfying project you've ever been a part of – whether it was a new product, a transformative innovation, a big initiative, a major launch, or something completely different.

Whatever it was, one undeniable truth remains: you didn't do it alone. No one does it alone. Great projects are the result of great teams and great teamwork. Common goals. Effective planning. Outstanding execution. Strong alignment.

You also know that great teams and teamwork are rare. Executing major initiatives is hard. Lack of alignment is common.

Why? There are universal challenges in working collaboratively. Silos – organized by teams, functions or location – that make it possible for work to fall through the cracks. Meetings, inboxes and other sources of digital noise. Geography – teams spread out all over the world. And, the inherent challenges of working cross functionally, from product owners to software developers and engineers to designers to sales and marketing to human resources to leaders and decision-makers of all kinds.

In this guide, we'll explore how Atlassian's portfolio of products can help your team breakthrough silos, cut down on distractions, and focus across teams on doing the work that matters, no matter where you are in the world.



Breaking Down Silos

If the workplace had supervillains, one of them would probably be named “Silos” for their ability to wreak havoc on company productivity and collaboration. Silos appear when companies decide to use too many disconnected tools to get work done, taking teams hours to get on the same page about anything. This barrier to communication and collaboration causes work to slip through the cracks.

The superhero stepping up to defeat this evil foe is a unified work management system. Tools that enable all work to get done in one connected place are the best weapon to break down silos between teams. A work management system is the use of tools and working techniques to manage time, resources, teams, and tasks. It aligns companies on a clear and strategic path to improve team collaboration, communication, and connection.

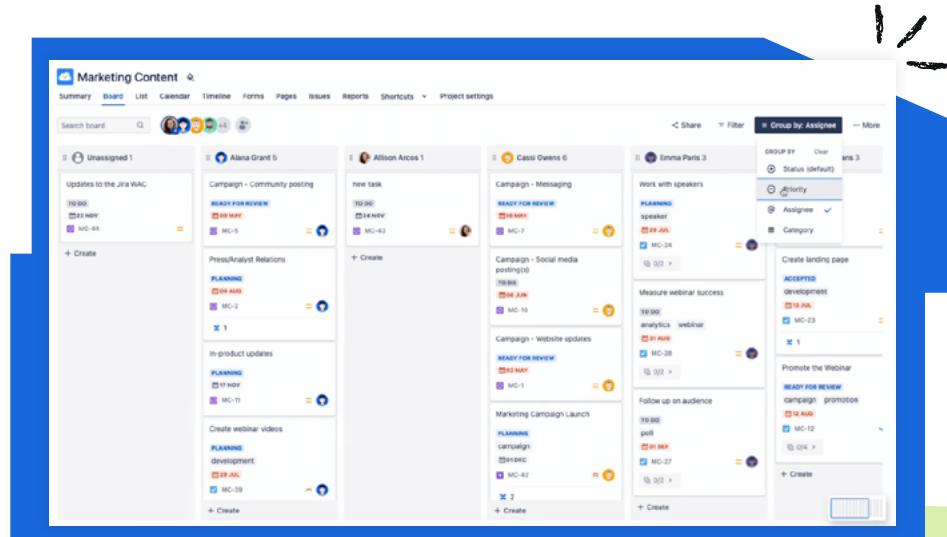
Below, we'll cover these Atlassian tools and features: Jira (for project management), Confluence (for a connected knowledge hub), Jira Product Discovery (for ideation and prioritization), and Goals in Atlassian Home (for instant updates across teams, projects, and tasks). Let's dive into how you can use these four superpower tools to defeat the villainous force of silos.

1. Get real-time visibility on work across teams

See work any way you want with Jira. People across your organization can visualize and track work progress in a way that works best for them.

Jira board and list view

Let's say you're a marketing manager running a meeting with all of the teams that are involved in a project.



Start with the board or list view and filter that view with the “group by” feature to review aspects like:



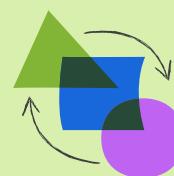
Status updates

To see what pieces are ready for review.



Assignees

To run through what everyone is working on across the team.



Priority level

To cover the most important tasks and action items first.

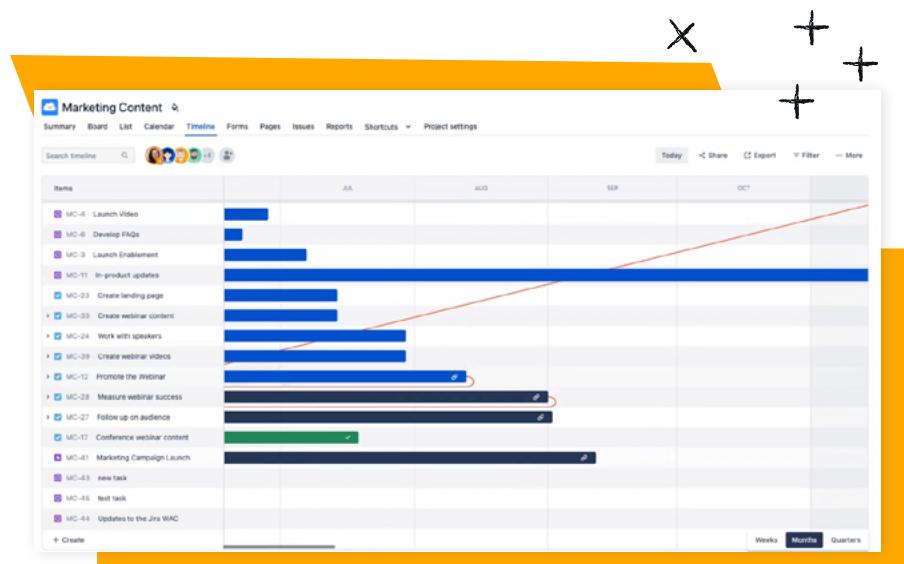


Jira timeline view

Another helpful Jira feature is the timeline view, which works much like a Gantt chart. In this view, you'll see the list of tasks and subtasks organized by date, which you can extend or take down as you update the progress.

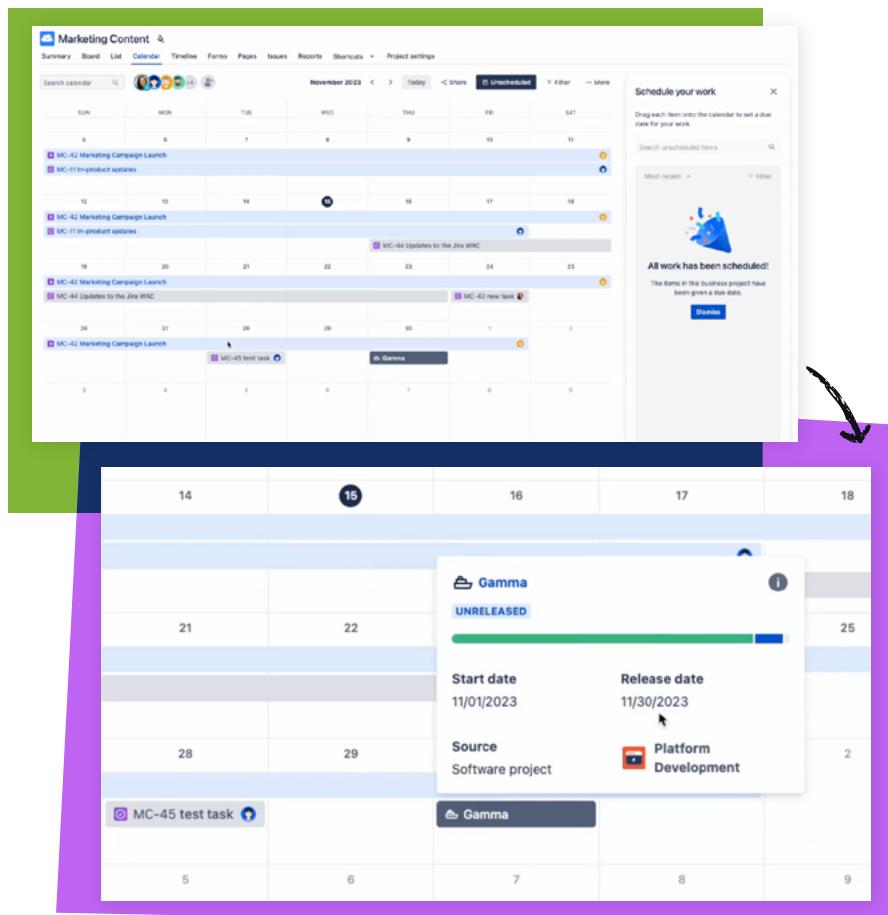
You can also create dependencies in this view that will automatically adjust the start and end dates on the timeline accordingly, ensuring one task doesn't start until another is finished.

This helps team members stay on top of their work and deadlines while allowing you, as the manager, to make sure tasks are completed in the right order and without overloading team bandwidth.



Jira calendar view

The calendar view in Jira allows you to easily see all task deadlines both within and across teams, saving time and avoiding unnecessary meetings.



For example: The Jira calendar allows you to pull in a calendar from a different team, say the “Platform Development” calendar. Now, you can see the release date and how they’re tracking toward it, leading to enhanced collaboration with the software team.

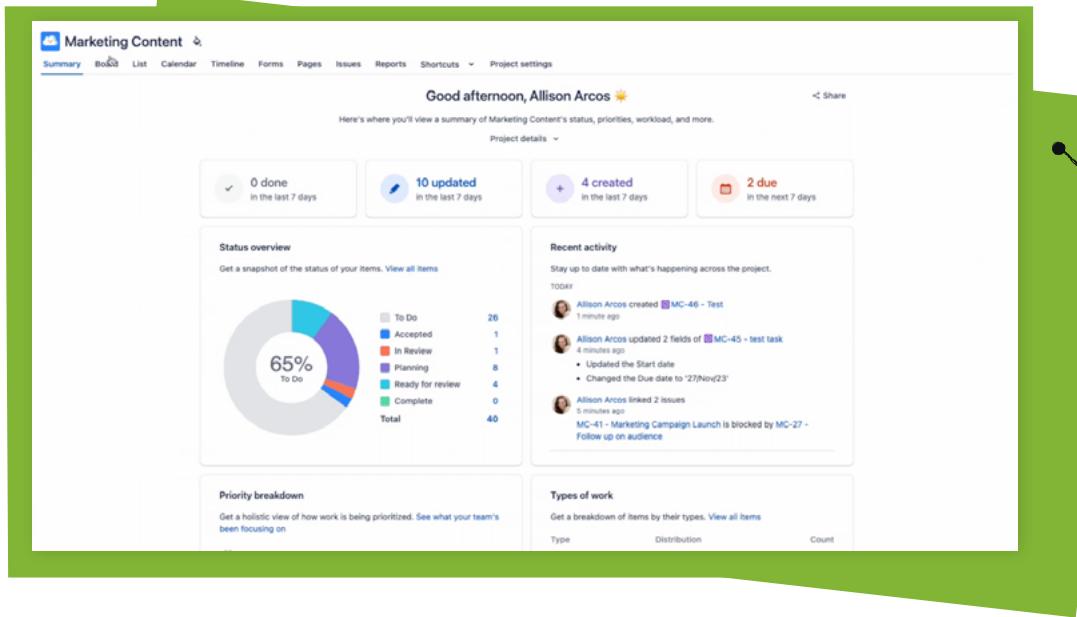
Plus, if you want to double-check that all tasks are covered, organize the calendar view by “unscheduled” and find any tasks without a due date.

Then, assign someone to the task who has the bandwidth to get it done. That team member will then get notified about the new assignment and can reach out to you async if they have any questions.



Jira summary view

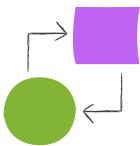
The Jira summary view provides an overview of your project in the form of a progress dashboard. It's an easy way to get a big-picture view of the progress that has been made on your project all in one place. In the summary view, you'll see:



The screenshot shows the Jira Marketing Content summary view. At the top, it greets the user with "Good afternoon, Allison Arcos" and displays project statistics: 0 done in the last 7 days, 10 updated in the last 7 days, 4 created in the last 7 days, and 2 due in the next 7 days. Below this is a "Status overview" section with a pie chart showing 65% To Do, 26 Accepted, 1 In Review, 8 Planning, 4 Ready for review, and 0 Complete, totaling 40 items. To the right is a "Recent activity" feed showing recent events like item creation, updates, and links. Below these are sections for "Priority breakdown" and "Types of work".



A snapshot of task status, such as “To do,” “In review,” or “Complete,” to determine where there might be either bottlenecks or causes for celebration.



A priority breakdown to understand which tasks take precedence over others and ensure it's an accurate distinction.



The types of work involved in the project to evaluate whether to enlist additional team members with unique functions.



The overall workload to help you see the bandwidth of team members, ensuring no one gets burnt out.

2. Manage cross-functional work requests with forms

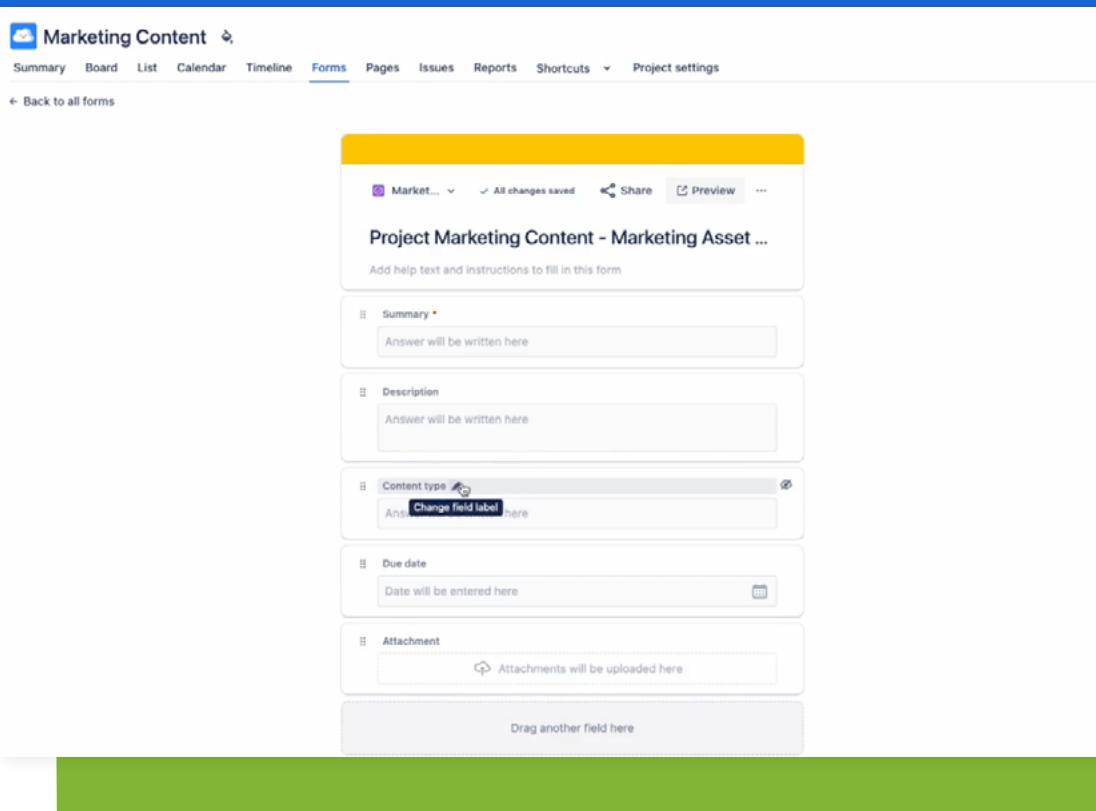
Forms are a straightforward and effective way to improve cross-functional team communication and information exchange. In Jira, the forms feature enables teams across the organization to request a task, story, or asset or collect other information.

With Jira forms, you can:

- Help people outside of your immediate team send work or task requests to your project team.
- Collect the right information from other teams and stakeholders, helping you streamline dependencies within a repeated workstream.
- Organize forms by type, ensuring that requests are categorically clear so they're assigned to the right people.

For example: Say your company is launching a new product. As a marketing team lead, you need additional context from other departments to do your job well. In Jira, create an asset form and share it with product managers, designers, and engineers. For the designers and engineers, add specific instructions requesting images and screenshots. For the product managers, request key talking points and product features to highlight in the marketing materials.

Each form has the option to include other key fields that will keep everyone on the same page and on track. From due dates to priority levels, keeping your forms consistent with the same key information filled out will help you maintain effective communication and collaboration across teams.



The screenshot shows a Jira asset form titled "Project Marketing Content - Marketing Asset ...". The form includes fields for "Summary" (with placeholder "Answer will be written here"), "Description" (with placeholder "Answer will be written here"), "Content type" (with placeholder "Ans... Change field label here"), "Due date" (with placeholder "Date will be entered here"), and "Attachment" (with placeholder "Attachments will be uploaded here"). There is also a footer placeholder "Drag another field here".

3. Offer org-wide updates to keep everyone in the loop

Add org-wide updates to a centralized source of truth where everyone can get on the same page and drive business impact. In Confluence, the space to post updates is in the Home page. Home is like a virtual hub where teams can get a quick pulse on what's going on in the company or jump straight back into recent work.

From Home, you can view recent articles or tasks left to do, navigate to the various spaces you're working in, or create a new Confluence page using a template or starting from scratch.

For example, say you're a program manager who needs to put together an All-Hands meeting summary doc. You can create a new Confluence page and use a meeting template. This includes updates on what each team has accomplished so far and what still needs to be worked on. Highlight the problems to solve, and leave an empty section to discuss ideas on building the new product, as well as action items for next steps.

Remember, this is a living document that can be updated and organized even after the meeting is over. Tag relevant stakeholders where necessary to get their input or request follow-ups. Back on the Home page, everyone in the company will be able to refer to the page to learn more about how the meeting went and easily see how projects are moving along.

The screenshot shows a Confluence page titled "Meeting notes". At the top, there's a toolbar with various editing icons. Below the title, there's a "Date" section with the date "Mar 19, 2020". Under "Participants", it says "List meeting participants using their @mention names:" followed by a list: "@Chan Kim" and "@mention a person to add them as an attendee and they will be notified.". There's also a "Goals" section with the placeholder "List goals for this meeting (e.g., Set design priorities for FY19):".

4. Embed relevant work from other tools via smart links

Confluence smart links are another convenient feature that helps break down silos between teams. Smart links allow users to embed relevant work from other Atlassian tools in any Confluence page. This enables teams to share various dynamic project views and calendars so that others are immediately informed of changes from within the same central doc in Confluence. In other words, you're never losing context and are always up to date, even when changes are made in other tools or pages.



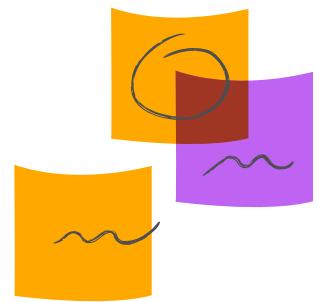
When a smart link is added, you can either preview the linked page by hovering over the link or insert it as an embedded view. Moreover, you can edit that embedded page directly from within the Confluence page.

For instance, say your design team is working on a Design Sprint page in Confluence. Within the page, they can copy and paste a link to a calendar from Jira so everyone can see all the due dates and tasks from within the Design Sprint page. Any changes you or any other team member make to the calendar will automatically reflect in both the embedded calendar and the corresponding one in Jira.

Another option is to add a roadmap smart link from Jira Product Discovery into the Confluence page to show how this Design Sprint fits into the broader roadmap of all product ideas currently in the works.

5. Brainstorm and vote on product ideas from a central location

Part of improved collaboration between teams involves coming to a consensus on an idea in a transparent and efficient manner. The ideas feature of Jira Product Discovery helps you do just that.



When you add an idea to Jira Product Discovery, it's important to provide context to other team members. This might include links to relevant documents of a previous Design Sprint or a roadmap so stakeholders can see how the project would fit in your timeline. Those stakeholders can then add their own insights, leave comments, or debate the viability of your idea. Product team members and stakeholders can also rate the impact and effort it will take to make those ideas a reality.

Let's say a marketer adds an idea for a loyalty program that they'd like to see applied to your company's product. The goal of the idea, in this case, is to "delight customers." This gives others a clear understanding of the purpose of the suggested idea. If there is research to back up the suggestion, they can leave that link in the comments or add their own insights to bolster their support of the idea.

Team members from the product and engineer teams can then vote on whether they like the idea or not and include their reasons why they're voting for it. The product manager makes the final decision if it has enough upvotes, is feasible, and is worth working on. They can then add an epic in Jira and connect it to their Platform development team. This adds it to the queue for software engineers to begin working on, once again showing the seamless connections between Atlassian tools and the cross-functional teams that use them.

Goal	Comments	Insights	Impact	Effort	Roadmap	Documents
Increase revenue	2	5	1	Now		
Win enterprise customers	1	4	1	Next		
Delight users	2	4	2	Next		
Become a top rated product	2	3	2	Later		
Expand horizons	2	1	1	Won't do		
New rewards program	1	1	1			
Express checkout	1	1	1			
Improve waiting list experience	1	1	1			
Refactor user profile data	1	1	1			
Explore VR travel features	1	1	1			
No field value	1	1	1			
Test idea	1	1	1	Next		

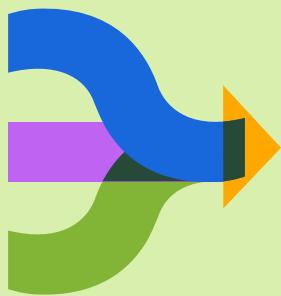
6. Set and track team goals across your organization

Goals in Atlassian Home is a great way for teams to be transparent about meeting organization-wide objectives. With Atlassian Goals, managers and executives can view the incremental progress made toward a goal.

Let's say you determine during an annual planning meeting that your main goal is to adopt AI technology across departments. Each department needs to add and organize milestones to reach that goal.

Atlassian Goals are mapped to work, visible to everyone and updated regularly, so everyone is in sync and up-to-date on how it's going, and it's easy to drill down into the details – who, what, and when with a few clicks. Team- and organization-wide objectives are no longer a "set it and forget it" motion – they get updated on a monthly cadence. Atlassian Goals now live on the new personalized Atlassian Home available to every leader and teammate.

Goal	Status	Due date	Owner	Following	Last updated
Aipaca travel android app refresh	ON TRACK	August	[User]	Following	Last week
Go to market campaign	OFF TRACK	Jul-Sep	[User]	Following	4 weeks ago
Travel cost estimation refactor	AT RISK	August	[User]	Following	Last week
Catering options	AT RISK	July	[User]	Following	2 weeks ago
Aipaca Travel merchandise	ON TRACK	Aug-Oct	[User]	Following	2 weeks ago
New employee onboarding update	AT RISK	23 Aug	[User]	Follow	-
Pricing and packaging	COMPLETED	Jan-Mar	[User]	Follow	Last week
Go to market campaign	OFF TRACK	Jul-Sep	[User]	Following	4 weeks ago
Aipaca travel android app refresh	ON TRACK	August	[User]	Following	Last week
Go to market campaign	OFF TRACK	Jul-Sep	[User]	Following	4 weeks ago



Don't let silos hold your org back

Silos are the kryptonite of any organization. But just because they harbor the evil power to cripple the success of your workforce doesn't mean that you are powerless against them. With the right Atlassian tools and processes in place, you can do away with the evil forces of silos.

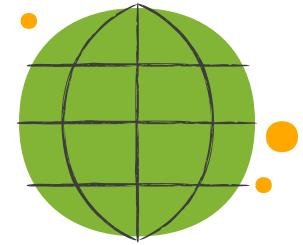


Working in a distributed world

The traditional workday is not working anymore. Today's workers are plagued by back-to-back meetings, overflowing inboxes, and minimal clarity on how to drive projects forward.

With 78% of people struggling to juggle meetings and tasks, it's clear that work methods and the way teams collaborate need an update. As work becomes more complex and teams more distributed, the ability to navigate through distractions is harder than ever. The world is changing but the way people collaborate hasn't caught up yet. It's time to reconfigure and redefine our collaboration methods.

Next, we'll cover how Atlassian tools like Confluence, Loom, Atlassian Intelligence and the newly-announced Rovo make it easier for your team to work together no matter where they are.



78%

of people are
struggling to juggle
meetings and tasks

25%

boost in team outcomes is achievable with weekly written and video check-ins from manager

Focus on a few, clear priorities

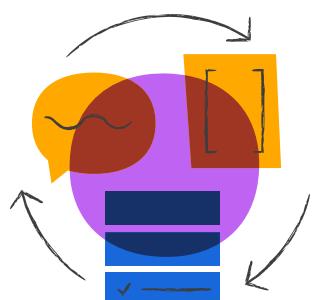
To ensure your team is focused on what truly matters, you must set clear and visible goals. Many teams struggle with contradictory goals that aren't well-tracked or understood. At Atlassian, we streamline our focus with only three company-wide objectives, and all key results align with these. Through our goal platform, Atlassian makes every team's goals and progress visible to everyone.

Once the goals are clear, build rituals that remind your team to always focus on what matters. Instead of endless to-do lists, start by asking yourself: "What is my top work priority for tomorrow?" Clearly identifying your focus will instantly improve the quality of your workday. Additionally, managers can further enhance team connection and clarity by sending brief written and video check-ins each week, boosting team outcomes by 25%.

Make time to do the work, together and independently

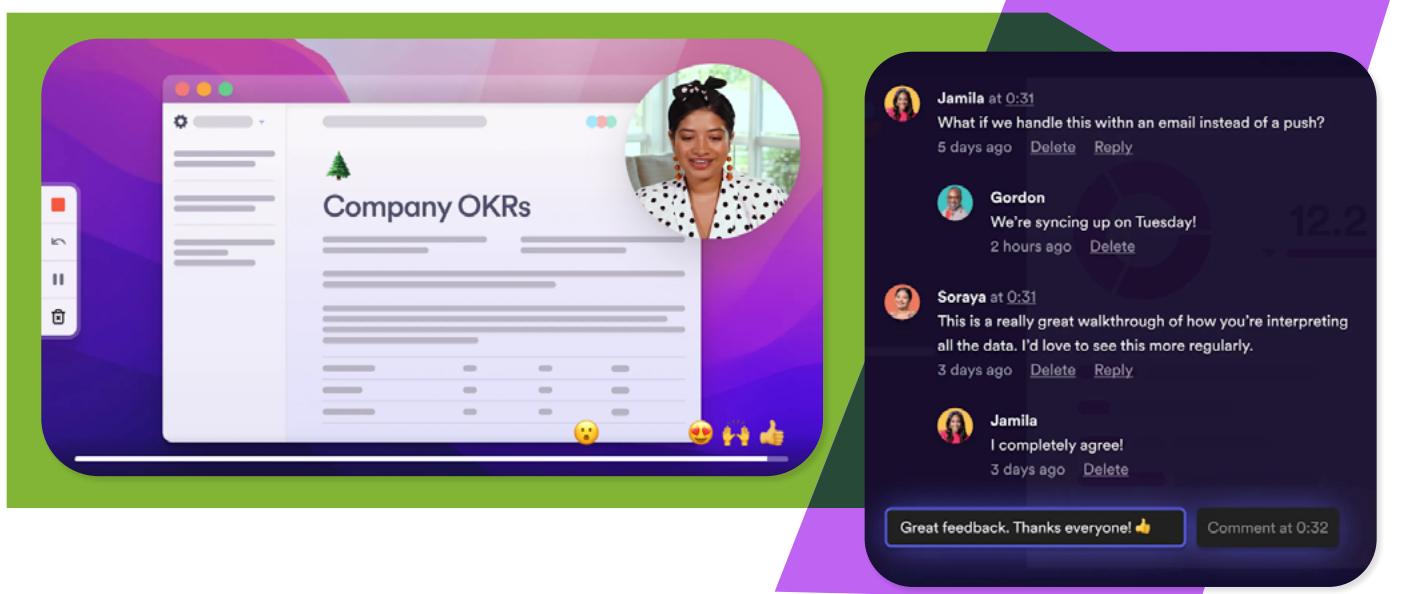
Great teams design their workday to deliver results. The most valuable asset teams have is their time, yet it often feels like there's never enough of it. To be more intentional with our time, we need to intentionally design our weeks. Top teams don't let their calendars control them; they know how to make progress and collaborate effectively.

At Atlassian, we ran an experiment encouraging people to redesign their work week. Participants were asked to ensure no more than 50% of their day was reserved for meetings. This approach had both immediate and lasting impacts—68% of those who adopted these new norms felt they made more progress on their most important work.



One way to improve meeting efficiency is by using Confluence for page-led collaboration. This method allows team members to understand the full context of discussed topics and lets you quickly share information with those who couldn't attend.

Loom enables asynchronous communication for global teams across time zones and for delivering thorough feedback when meetings aren't possible. From all-hands updates to sharing monthly priorities and wins to making major announcements and allowing team members to engage with the content at their convenience, Loom enables communication to be more flexible and accessible. Teammates can change playback speed, pause when needed, and add comments at specific points, making communication more flexible and accessible. This approach fosters connection within the team, allowing for more meaningful interactions without the need for constant synchronous time.



Make knowledge accessible and actionable

Great teams make information easy to self-serve. By making sure that information is easily accessible and well-documented in Confluence, users will automatically create a centralized knowledge base where team members can eliminate the need for less-useful meetings that can often result in wasted time.

That's when AI can do the heavy lifting by finding the right information for you. Powered by Atlassian Intelligence, Rovo accelerates the process of finding, learning, and acting on information scattered across various internal tools. With Rovo, you can ask natural language questions, and it will summarize the information along with relevant supporting documents.

Stop trying to manage the overwhelming volume of documentation yourself—it's simply not feasible. Instead, let AI streamline the process and make information accessible to your team.

Have a workday that is sane and manageable

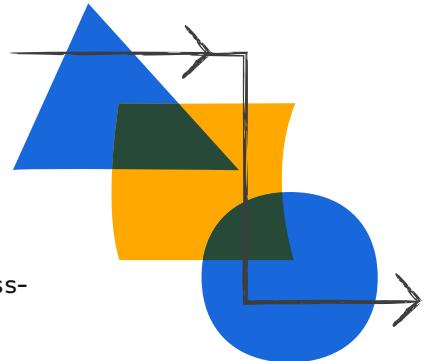
Atlassian's Work Management tools can help your teams increase efficiency, quality, and speed of collaboration. By adopting modern solutions like AI-driven information management and intentionally designing our work weeks, we can create a more productive and connected work environment for everyone.

These tools empower teams to focus on what truly matters, streamline workflows, and reduce the noise that clutters the workday. With clear goals, better meeting practices, and innovative communication methods, we can navigate the complexities of the modern workplace with ease.

Better workdays are here. Even though the world is getting more complex, we don't need to rely on the outdated tools and practices of yesterday to drive our teams forward today.

Great projects come from great teams, working in collaboration

Not only do major projects require effective teams, but they usually require cross-functional teams with talented, committed individuals from various disciplines.



A typical cross-functional team might include a product leader, someone from engineering, and a designer, along with representatives from sales, marketing, and other functions, depending on the industry.

It is common for each function to operate within their own silo, with distinct goals, data, tools, and cultures. Such differences can result in miscommunications, friction, frustration, missed timelines, and difficulty executing projects that will move the needle in the organization.

Most of us who have worked on successful cross-functional teams have also worked at some point on a dysfunctional team, or on a well-intentioned team that simply wasn't operating to its full potential. We knew that the barriers that impeded the ability of the team to work together effectively were holding back the team and the entire organization.

Enabling better teamwork and collaboration

Atlassian knows that great teamwork is built on shared goals, coordinated work, and the free flow of information across teams. Looking to the future, Atlassian is designing a system of work for helping organizations unleash the full potential of each team's efforts. Atlassian tools, from Confluence and Jira to Loom and Rovo, are designed to help cross-functional teams throughout an organization come together. The results are stronger connections among teams and better products, services, and solutions for customers.

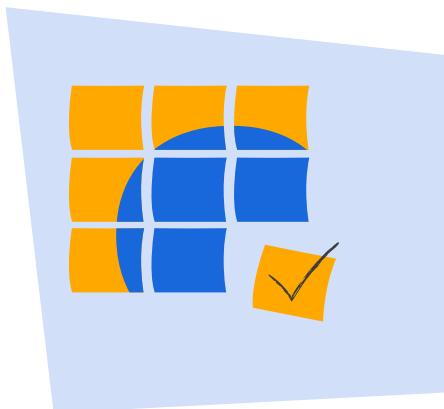
Atlassian's tools support more effective collaboration throughout the entire lifecycle – from ideation, to planning and tracking, to execution, and encompass alignment.

Ideate

Successful projects start with great ideas, and great ideas often begin with brainstorming and whiteboarding sessions. But, while such sessions can produce great ideas, they are often chaotic and disorganized. Who captures the ideas or notes on the whiteboard? Who follows up? What are the next steps?

Atlassian is taking brainstorming to the next level, with AI-powered whiteboards in Confluence, powered by Atlassian Intelligence.

When using AI-powered whiteboards, cross-functional teams don't need to start their brainstorming from scratch. Atlassian Intelligence can pull together information from multiple sources – customer feedback in Jira Product Discovery, customer call notes in Confluence, customer support conversations in Jira Service Management. This information jumpstarts the brainstorming process.



As brainstorming is occurring, Atlassian Intelligence can sort ideas and group together related content, so participants can see themes and trends. AI-powered whiteboards are next-generation brainstorming.

Then, when teams want to turn their best ideas into action, Atlassian can help. New Integrations in Jira and Confluence will pull content directly from the whiteboard, enable voting, map relationships and dependencies, and assign tasks to the right members. Integrations helps cross-functional teams turn ideas into work.

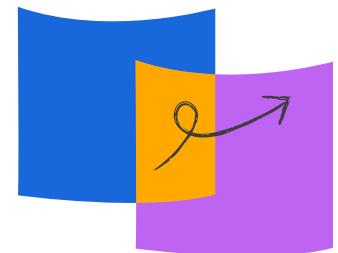
Big ideas start with Jira

A major evolution at Atlassian, to better enable cross-functional teams to work together, is combining the best of Jira Work Management (list, calendars, inline editing, color) and Jira Software into Jira – the only project management solution that organizations will ever need.



Plan & track

Once projects are initiated, planning and tracking as a cross-functional team is critical. Atlassian is introducing or enhancing several products to help teams work more closely together in planning and tracking projects.



One enhancement is Lists in Jira. With Lists, team members can easily see all work items in a familiar, powerful view. Tasks can be assigned and pinned with context and the details behind the work item. And boards can be organized by nesting subtasks or epics. Also, work can be grouped with filters. Lists will be a gamechanger for viewing, organizing, and managing a team's work across any project.

Another tool to improve planning and tracking is Shared release dates in Jira. This enables teams to keep track of work items in their calendar view.

In addition, new AI features – like AI Work Breakdown and AI Editor – will help teams take the knowledge and data in Jira and recommend better ways to plan and track work. With AI Work Breakdown, the AI recommends subtasks and breaks work down into small, achievable sub-tasks.

The bottom line: Atlassian is transforming Jira to make cross-functional collaboration easier.

The screenshot shows the Jira software interface. On the left is a sidebar with navigation links: Your work, Recent, Starred, Apps, Goals, Plans, Projects, Help portal, Idea Thread dev (highlighted with a yellow star), Idea Thread Storefront, Distribution center, View all projects, Filters, Dashboards, Teams, and Customize sidebar. The main content area displays a project titled "Develop website frontend". The description text reads: "Currently, the process of designing custom apparel can take weeks. This new frontend connects customers and designers live to reduce feedback time." Below the description are "Save" and "Cancel" buttons. To the right of the description is a "Details" panel showing fields for Assignee (Unassigned), Reporter (Brooke Hardwar), Priority (High), and other show more fields. At the bottom of the main content area is a "Child issues" section listing IDT-257 through IDT-261. The bottom right corner of the screenshot features a stylized blue and white winged creature logo.

Execute

There are multiple hurdles that make it difficult for teams to execute and deliver projects. Team members work in different geographies, in different time zones, using different applications. On average, enterprises have 291 applications. These differences make it hard to organize workstreams and business processes.

Also hindering execution is that team members must spend so much time – up to 40% – searching for the information they need to do their job.

To improve execution, Atlassian provides new ways for teams to communicate efficiently, discover the information they need, and eliminate time-consuming tasks.



Communicate effectively



Discover what they need



Eliminate busywork

Loom video communications drives better async work

29%

fewer meetings

74%

feel more efficient

64%

feel more connected

Loom is an exciting tool for improving cross-functional execution. With Loom, a team member can easily create, edit, and share a video, as a way of communicating with other team members. Loom drives better async communication, reduces ineffective meetings, and makes people feel more efficient and connected.

Other improvements Atlassian is making to help teams connect better include:

- **Smart Links** in Content Tree (in Confluence)
- **Unified Search** (in Confluence)
- **AI summaries** (in Jira and Confluence)

Align

Aligned teams are less likely to face derailments and more likely to succeed.

Atlassian saw the opportunity to create a better way for team leaders to get updates and keep projects on track.

A great way for teams to stay aligned is use of **Goals** in Jira. Deep integration of Goals into Jira makes it easier for teams to plan, track, and share goals with colleagues. For example, a marketing lead can see goals for her team's work and can connect individual tasks to the overall outcome of the work. She can follow a goal to receive weekly updates or filter down to see what a team is working on. Goals work across both projects and teams. Since work is tracked in one place Jira provides program-level visibility and context.

The screenshot shows the Atlassian Goals interface. On the left, there's a sidebar with navigation links for Chloe's Home, Recent, Starred, Projects, Goals, Teams, Topics, Dashboards, Update feeds, and a link to Customize sidebar. The main area is titled 'Goals' and shows a list of 3,214 goals. The columns include 'Goal', 'Status', 'Progress' (represented by a bar chart), 'Target date', 'Owner', and 'Last update'. A 'Sort by follower count' dropdown is at the top right. A blue callout bubble with three short lines points to the 'Following' button for the last goal in the list.

Another improvement is making **Plans** available in Jira, providing a big-picture view of every project. Managers can use the summary view in Plans to get an overview of all goals associated with a program, and see what tracking and team capacity looks like.

A further way to improve alignment is to share news with the entire organization, using **Company Hub** in Confluence. Company Hub makes it easy to create a customizable, engaging single source of truth for what's happening across the organization.

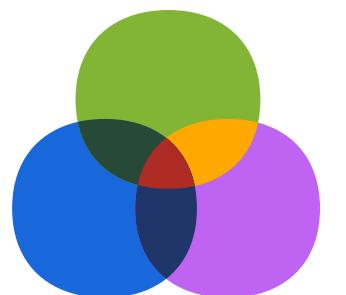
With Jira and Confluence, it's never been so easy to align the entire organization.

Taking collaboration to the next level

As the nature of work evolves, Atlassian recognizes the need to improve the tools and technologies that organizations use to get work done.

That's why all of Atlassian's new features and product enhancements – particularly the ambitious changes in Jira and Confluence – are driven by one clear, unifying goal: enhancing cross-functional teamwork by building collaboration directly into the workflow.

Great teams want and need to collaborate. Atlassian makes it easier than ever to bring teams together. No matter your team or its function, Jira and Confluence offer ways to ideate, plan and track, execute, and align. The ultimate result will be more successful projects and greater value for customers.





Atlassian's vision for a system of work is just getting started.

Atlassian's vision for a system of work is just getting started. When organizations like yours introduce work management solutions to breakdown silos and help great teams work together, the future of collaboration is bright - no matter where you are.