IMPLEMENTING CUSTOM JIRA WORKFLOW FOR QUALITY ASSURANCE

OVERVIEW

A custom Jira workflow based on the Eight Disciplines (8D) methodology was successfully implemented for a new Quality Assurance (QA) team, replacing spreadsheets, improving efficiency, enabling real-time reporting, and saving costs.

PROBLEM STATEMENT

A newly formed QA team lacked a dedicated system to track and manage QA-related activities. The team, which had grown to over 30 members, was relying on Excel spreadsheets, making it difficult to maintain consistent processes, track progress, and generate reliable reports.

PROPOSED SOLUTION

Using my knowledge and prior experience with Jira, I proposed creating a custom workflow tailored to the team's needs using the 8D methodology of problem solving. The implementation process included:

1. **Collaborative Planning:** Partnered with the company's Jira Administrator and two QA engineers to gather requirements and identify how the team could leverage 8D with a Jira workflow.
2. **Workflow Design:** I sketched a developed a step-by-step custom workflow in Jira with statuses, transitions, and custom fields that aligned with 8D.
3. **Access Controls & Automation:** Established role-based permissions for transitions and built automations to notify assignees, enforce field completion, and support users with reminders.
4. **Testing and Feedback Loop:** Ran a pilot with QA engineers and the QA manager to test the workflow and incorporated iterative feedback for improvement.
5. **Documentation & Training:** Created end-user guides, technical documentation for administrators, and held training sessions for the QA team.
6. **Launch & Optimization:** After management approval, I pushed the project to production with appropriate permissions, published resources to the knowledge base, and introduced dashboards and automated reporting features.

RESULTS

The initiative was successfully developed and rolled out over a 3-6 month period. Outcomes included:

- **Cost Savings:** Eliminated the need for a paid TIPQA service.
- **Improved Efficiency:** Replaced spreadsheets with a dynamic, centralized Jira workflow that supports real-time collaboration.
- **Enhanced Visibility:** Created dashboards and ad-hoc reporting features that helped managers save time and simplified report requests.
- **Team Empowerment:** QA team members could now easily track progress, escalate issues, and contribute to continuous improvement using a structured, familiar system.
- **Recognition:** I received an internal Bravo Award for innovation, development, and impact.