

ATLASSIAN + SUN LIFE

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PAUL MCNALLY
Jira Cloud Technical Product Owner



> \$250k

Time savings captured in the first 10 months

97%

Atlassian Cloud user satisfaction scores

80%

Increase in efficiency with Confluence Cloud



How Sun Life unlocked a brighter future by migrating to Atlassian Cloud

Turns out, old firms can learn new tricks. Learn how Sun Life migrated to Atlassian Cloud products to digitally transform and increase speed, security, and collaboration.



INDUSTRY

Financial Services

LOCATION

Toronto, Canada

NUMBER OF USERS

1,300

SOLUTION PARTNER

Adaptavist

ATLASSIAN PRODUCTS & APPS**Confluence**
Document collaboration**Jira Software**
Project and issue tracking**Aura**
Content formatting macros**Draw.io**
Diagrams and whiteboards

When you envision a company that's been around for over 150 years, the words "forward-thinking" and "digital innovator" probably aren't the first to come to mind. But Canadian financial services firm Sun Life is proving that a historic company can be a modern leader.

Sun Life strives to maintain its position not only as a top financial planning and benefits provider, but also as a top place to work. Many employees have been with the company for decades and have adapted to new ways of working together and serving their customers.

Recently, Sun Life began a digital transformation initiative to stay competitive and provide a superior customer experience. The initiative included adopting agile methodologies and cloud-based tools to increase efficiency, encourage collaboration, and deliver even better products.

Like many teams in a similar position, employees were skeptical about changing their processes and platforms, especially given the strict security and compliance requirements they were beholden to. But just as they always do, Sun Life embraced the challenge, mitigated risks, and reaped the rewards.

Since migrating to Atlassian Cloud with the help of their Solution Partner, Adaptavist, and the Atlassian Migration Program, Sun Life has captured hundreds of thousands of dollars in time savings in less than a year, achieved 97% user satisfaction scores, and created a more agile, collaborative working environment that will help ensure their next 150-plus years are just as successful as their first.

Centralizing and modernizing with Atlassian Cloud products

When Cynthia Brind'Amour joined Sun Life in 1999 (as a second-generation employee following in her mother's footsteps), the most sophisticated piece of technology she used at work was a microfiche reader. There was no email, let alone collaboration or ticketing software.

As Cynthia worked her way up from a call center representative, to a trainer, to a process specialist, she became known for her deep company knowledge and relationships. This reputation made her the perfect fit for helping Sun Life through its digital transformation.

After implementing on-premise deployments of Confluence and Jira Software in 2008, employees saw how much faster, easier, and better their work could be. Cynthia helped the team upgrade to Atlassian Data Center on AWS to offload maintenance, but over time, they realized they needed even more flexibility and agility to stay ahead in their industry.

In 2020, IT began an agile transformation to modernize their practices and achieve these goals. "Before, we had a traditional IT model for financial services that was more focused on cost control than delivering value. We had a system with a lot of capabilities, but it was very controlled and difficult to change," says Paul McNally, Jira Cloud Technical Product Owner at Sun Life. "We wanted to be agile, move quickly, provide a better experience for our teams, and deliver value – not just control costs."

At the same time, Cynthia was hearing feedback that the number of disparate tools at Sun Life was making it hard for employees to find the information they needed. Although Confluence and Jira Software were popular products among IT and Operations, some team members were still using Lotus Notes, Sharepoint, Microsoft Excel, Microsoft Project, and other software to do their work. "People were complaining that everything was everywhere. There wasn't one place where they could do their job," Cynthia says.

As the pain points accumulated, it became clear to the team that Sun Life's platform needed to be transformed along with their processes. "At a certain point, you can only do so much on Server and Data Center," Cynthia says.



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SUN LIFE EMPLOYEE

However, there was hesitance from users and leadership around change management and cloud security. Cynthia and Paul’s teams overcame these concerns by explaining how sensitive data would be protected, sharing the benefits of cloud security, and introducing them to cloud capabilities such as advanced permissions.

Once leadership realized that the rewards far outweighed the risks, they wanted to make the change as soon as possible. They set a target timeline of three months, but after working so closely with the tools for years, Cynthia knew it would take more time to do it right. She set up a sandbox to demonstrate cloud functionality, discussed costs, and walked them through the process.

Cynthia says this approach helped set leadership’s expectations and develop a more strategic plan for migration, and the team benefitted from working together from the start. “Never assume. Just because you are migrating from the same platform does not mean this will be seamless,” she explains. “Sandboxes are your friend. They immensely helped the project team and the business visualize what the space would look like once in the cloud. This also helped us determine which spaces were not a good fit for the cloud and which macros will work.”

Confluence makes the first move

Sun Life began their cloud migration with Confluence, one of their most widely used Atlassian tools. During the planning process with leadership, Cynthia suggested using an “optimize and shift” approach so that they could move as quickly as possible, while also setting up their new platform for sustainable success. With this approach, the team focused on identifying which sites, apps,

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CYNTHIA BRIND'AMOUR
Confluence Cloud Technical
Product Owner

and workflows were most needed. “I’ll never migrate a site just because. I meet with the team members, understand their desired user experience, and see if it makes sense and is worth the time and resources for migration and ongoing management,” Cynthia explains.

During these meetings, Cynthia demoed Confluence Cloud for each team and discussed their specific needs. For some sites, it made perfect sense to move to the cloud. For others, Cynthia offered three options: migrate to the cloud, move to another legacy tool within Sun Life, or archive their content. Through these conversations, the team identified 25 sites out of 350 for cloud migration.

From there, Sun Life worked with their Solution Partner, Adaptavist, to devise a migration plan. They created a phased timeline to migrate groups of sites in five waves, lasting two weeks each. During each wave, Adaptavist built new instances in their sandbox and transferred them to Sun Life’s sandbox for demo to users, remediation, testing, and final migration.

Her team also trained users so that they were aware of any functionality that would be different and new features they could use. For example, based on user feedback, the migration team introduced several new cloud-based Marketplace apps, including Aura to elevate page design, Table Filter and Charts for Confluence to enhance business analysis, and Draw.io for diagram creation (soon to be implemented). “There’s a lot you can do in Confluence Cloud that you can’t do with on-premise or Data Center deployments,” Cynthia notes. Users are starting to see this, too. “Once we’re finished converting, I see many instances where the new Confluence Cloud will provide efficiencies not available in the on-prem version,” one employee shared.

The optimize-and-shift approach worked remarkably well. “Everyone said what a smooth migration it was,” Cynthia recalls. “I’ve done four migrations at Sun Life. This one was the most successful. It was nice to hear people who had been through the others say, ‘This one was seamless.’”



Testing and support make the Jira Software migration “the best I’ve seen”

As Cynthia wound down the Confluence migration with Adaptavist, Paul and his team started working with them to ramp up with Jira Software Cloud. They collaborated with Sun Life’s Agile Transformation Office to gain approval from leadership, then assembled an architecture team to shepherd the project through planning and implementation.

Similar to Cynthia’s approach, Paul and his team organized the migration into waves, then surveyed users to understand how to best set up Jira Software Cloud to meet their needs and support an agile approach. Throughout the architecture process, the migration team strived to standardize workflows and keep the system as open as possible while maintaining security. “Instead of being strictly locked down, we’re striving for moderation,” Paul says. “And if someone wants a workflow for their business area, we talk about standardizing and facilitating that process. That’s been a big win.”

As the team began the migration, they used the Jira Cloud Migration Assistant (JCMA) to make the process easier. When challenges arose, they leaned on their Atlassian Cloud Migrations Manager (CMM) for help. For example, the group hit a snag with duplicate email addresses in Active Directory, so they collaborated with

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the CMM to resolve the issue. “We could not have been successful without the help of Atlassian. JCMA and the CMM’s support were crucial. I’ve done migrations with other companies, but Atlassian actually helps and cares,” Paul says.

Paul admits he was a bit hesitant to take advantage of the CMM and do testing, but eventually he saw the value they both added. “In hindsight, I would have listened more to the Migration Manager. They suggested testing and remediation, which I now realize are key. If you check the data in the originating system, do as much cleanup of the source system as possible, and test early and often to resolve any data issues, the migration should be pretty straightforward.”

Sure enough, preparation and testing are paying off. Paul and Cynthia’s teams surveyed users after the migration, and the feedback was resoundingly positive, with consistent praise for how smooth the transition has been. Paul says, “When the teams came in after their migration was complete, they didn’t see that much difference other than a new link, which has been a big win. People have been happy that their whole history was there and the keys were the same. I’ve done dozens of migrations in the past, and our Atlassian Cloud migration at Sun Life is the best I’ve seen.”

“You can do it all with Atlassian”

Sun Life’s Confluence migration was just recently completed and their Jira Software migration is still in its final phases, but the company is already seeing undeniable improvements in collaboration, efficiency, and security.


Sun Life’s Jira Software Cloud platform is much more open than their Data Center system, while maintaining rock-solid security. The team has customized the tool to reflect their internal processes, enabling people to find the information they need, work together more, and be more strategic. “Jira Cloud has made my tasks very organized and easy to understand. All the necessary information and files relevant to an issue are easily accessible,” one employee says. Paul adds, “I see a lot more collaboration across the team and a lot more attention toward portfolio management. We’re even looking into adding Jira Align to see the big picture and be able to track organizational OKRs.”

IT and Operations are loving cloud apps like qTest and Tableau Connector Pro, as well as native features like Advanced Roadmaps and automations, such as the creation of an onboarding request triggering the creation of stories and subtasks. “Automations save a few minutes each time, which adds up over a year with over 3,300 users,” Paul explains.

The feedback has been equally positive with Confluence Cloud, which Cynthia says “blows on-prem out of the water.” Employees have been especially enjoying templates, in-line commenting, analytics, search (which she calls “out of this world”), and cloud-only features and apps that reduce the need for email. She also notes, “The fact that you can create a Jira Software ticket through a Confluence page is money!”

From IT to the Call Center, employees across departments agree that centralizing from multiple tools to one cloud-based platform has made a monumental impact. In a recent survey, users reported an 80% increase in efficiency using Confluence Cloud, enough time savings in Jira Cloud to cover 94% of license costs, as well as 97% satisfaction with the new platform as a whole. One employee said, “Jira Cloud and Confluence Cloud are a big step in the right direction from the previous tools we were using. All the new functionality really improved my day to day.”

These are exactly the types of improvements that will sustain Sun Life’s reputation as a top financial services provider and employer. No matter what the market forecast is, they’ll continue to shine brighter in the cloud.

 If you’d like to learn more about migrating to cloud, visit the [Cloud Migration Center](#).