



# Transforming project management with the right tools and ways of working



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Best practices, exercises, and resources to build a strong foundation for every project you manage.

As a project manager, your average workday might include a sprawling suite of tools, siloed teams working independently, and tons of meetings, status updates, and deadlines. Things are even trickier if you're dealing with async work that spans several time zones.

It's an overwhelming – and occasionally daunting – work environment.

In 2021, Zapier [surveyed office workers](#) and found that 73% of respondents said they spend an average of one to three hours just trying to find information and documents every single day.

A separate survey [from Microsoft](#) found that 72% of employees wish their favorite tools were compatible with each other versus being fragmented.

When project managers and teams all work with different tools, it's hard to collaborate, problem-solve, and track progress. If documents are stored across Confluence, Google Drive, and SharePoint, people inevitably end up spending countless hours hunting for information.

When tools and platforms are siloed, project managers are stuck toggling back and forth between an assortment of tools like Jira, Asana, Monday, Google Docs, Figma, Slack and email. It can be exhausting tracking down where work lives. They also tend to get stuck doing manual, repetitive work transferring or duplicating information across tools.

That's time better spent on other priorities, like making strategic decisions that drive the project forward, communicating with stakeholders, or collaborating with your team.

# The connection between project management and work management

The best way to solve problems caused by siloed tools is a holistic, **integrated work management** system that connects tools and teams.

**Work Management** encompasses an ongoing scope of work activities that teams use to organize processes that ladder up to larger business objectives.

**Project Management** is a subset of work management that focuses on coordinating processes, tools, team members, and skills to deliver projects that meet goals within specific timeframes.

Work management tools, like the Atlassian Work Management suite, are designed to integrate flawlessly within a connected ecosystem that provide process driven approaches to work, and project tracking so that everyone can focus on doing their best work.

When employees have access to a streamlined work management system, all their documentation is easily accessible, all their projects are connected, and information is visible to everyone in the organization.

## ECONOMIC VALIDATION REPORT

In an Economic Validation report performed by TechTarget's Enterprise Strategy Group, customers interviewed reported:

- a 25% reduction in the length of projects and improved the number of overall projects by 10%
- improved customer satisfaction and reduced employee turnover by 10%
- a reduction in irrelevant interruptions by 35% and spent 50% less time searching for information

Learn more about the impact Atlassian's work management tools have on worker efficiency, project quality, and financial outcomes for organizations.

[Download the full report.](#)

# Using Atlassian Work Management tools to simplify project management

As a project manager, you shouldn't have to waste time and resources manually repeating work across tools.

In this ebook, we'll show you how to use [Atlassian Work Management](#) tools to manage projects within a single unified platform. We'll not only cover how you can use the products to get certain jobs done but also guide you on adopting practices that improve the way you work across teams.

 <b>Confluence</b>	 <b>Jira Work Management</b>	 <b>Atlas</b>
Document, collaborate, and create in a shared workspace to keep everyone aligned.	Project operations support to help teams plan, collaborate, deliver, and report on work.	Teamwork directory to connect the dots across asynchronous teams, apps, and work.

The Atlassian Work Management suite includes several interconnected tools that help project managers, individual contributors, and stakeholders break down information silos, manage tasks, and communicate more effectively.

These tools make it easy to share information across business teams, all on one unified platform. However, note that the benefits are even greater when these tools are used across the business in tandem with teams using [Jira Software](#) and other [Atlassian products](#).

# Phase 1: Set your project up for success

Every successful project starts with a solid foundation.

Before you start breaking down deliverables and assigning tasks, make sure to build systems that will help everyone stay aligned on the project. It takes some time to set things up, but because you have everything saved in Atlassian Work Management tools, future project setups will go much faster.

## Create a knowledge management system

**Knowledge management** refers to the process of creating, curating, sharing, using, and managing information.

Information silos are a common frustration for teams, especially teams that spend countless hours switching between tools.

If you don't already have an internal knowledge management system that contains everything people need to complete their work, take the time to create one in Confluence before work kicks off. This is where you'll organize and store important documents, files, and other information.

Use this step-by-step guide to learn how to create a knowledge management system inside of Confluence: [Set Up Your Confluence Site and Spaces](#).

**i** **Roblox** uses an Atlassian-powered collaboration system that includes Confluence for documentation, Jira Work Management and Trello for non-technical project management, and Jira Software for product development.

Joe Cotant, a senior technical program manager at Roblox, appreciates that his team has “been able to eliminate other duplicative or repetitive tooling, which has been awesome.” Now, Roblox sees “the entire tool kit together as an ecosystem, not individual tools,” which has been pivotal for collaboration, productivity, and discoverability.

## Establish roles and responsibilities

If your team has never worked together before, it would be beneficial to get clear on the specific roles and responsibilities team members will have on the project.

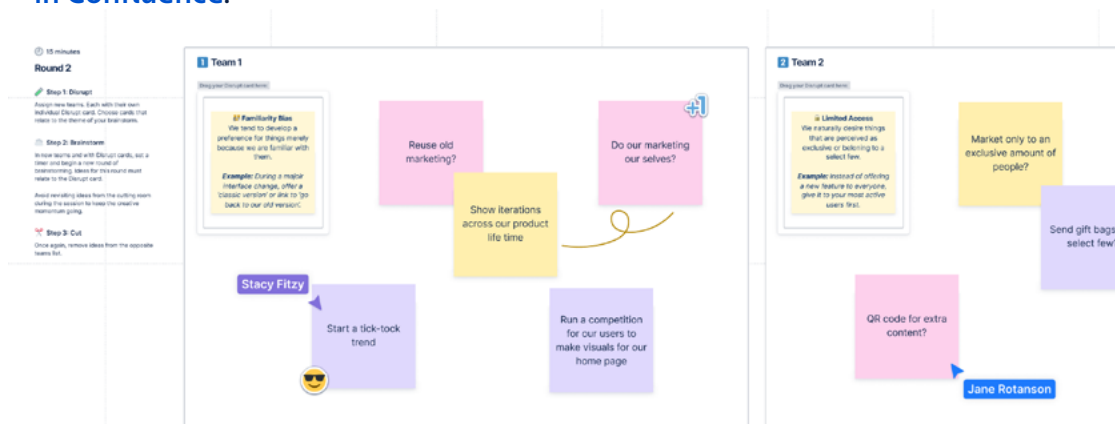
With the **Roles and Responsibilities Play**, you can clarify individual responsibilities and identify any resource gaps. In just 60 minutes, you'll get your team on the same page on project goals, how you'll measure success, and other key details.

## Set the project's scope, start planning, and brainstorming

Next, create a project plan to guide the logistics of everyone's work. This **Project Plan Template** in Confluence helps project managers organize important information, such as:

- The **overall scope**
- Key objectives
- Roles and responsibilities for contributors
- Resources and reference materials
- Deadlines and milestones
- Outcome and success metrics to measure performance
- The project's status

Create your project in Confluence so you start from an organized foundation, then hold an initial brainstorming session using the **whiteboards feature in Confluence**.



A brainstorming session using whiteboards in Confluence

Whiteboards offer a visual interface for ideating and organizing, making it easy to crowdsource ideas, no matter where your team is located. You can also make ideas actionable (and reduce tool silos) by turning cards into Jira tickets that sync with your Jira Work Management projects.

## Make your project visible to stakeholders and other interested parties

Sharing progress with your wider organization is a great way to collaborate and engage stakeholders, but that doesn't mean everyone needs to know everything. Senior leaders and people who aren't directly involved in the project benefit from curated updates, not a bird's-eye view of the tiny details of your Jira workspaces.

A tool like [Atlas](#) enables transparent communication without requiring stakeholders to sort through extensive documentation.

“ Atlas is a HUGE win for my global team. Any stakeholder can follow projects. No more, ‘Hey, what’s happening with Project X?’

KIM HANSON, VP OF PRODUCT ENGINEERING AT TURNITIN

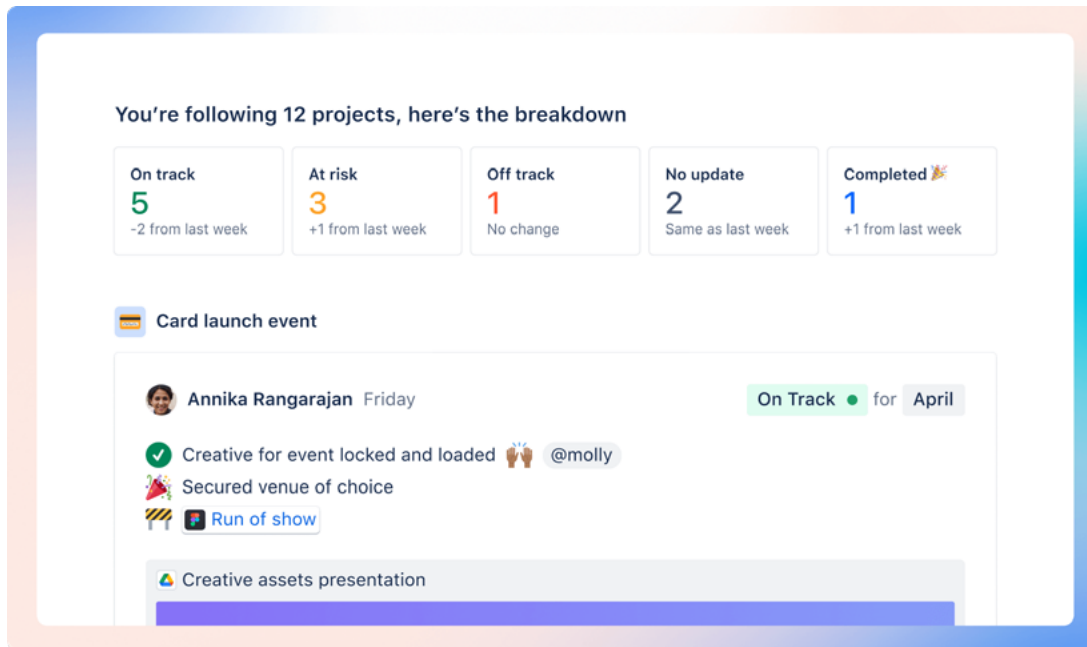
When creating projects and tickets in Atlas, you'll see fields that prompt you to answer questions like:

- What are we doing?
- Why are we doing it?
- What will success look like?

Answering these questions will give interested parties visibility into your project and its goals. Each ticket can also be linked to larger company goals, tags, and projects in Jira Work Management.



Once you have projects set up in Atlas, add your main stakeholders to the ticket so they'll receive weekly updates every Monday morning in their Atlas roundup.

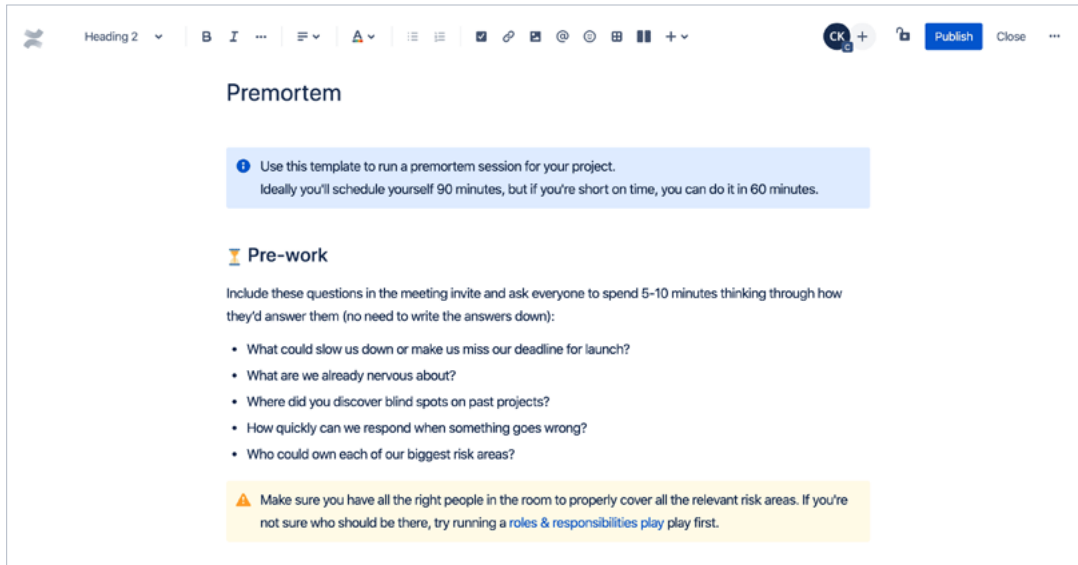


An example of a curated project status view in Atlas

## Run a pre-mortem and map dependencies

As you put the puzzle pieces of your project together, don't just think about what needs to be done... consider what could potentially derail progress, too. A proactive approach to risk assessment will help you navigate setbacks with ease. If something goes wrong, everyone will know how to proceed.

One useful project management Play for this step is [How to Run Pre-Mortems](#). This exercise helps teams identify potential risks, assess their likelihood, and make a plan on how to handle them.



The [pre-mortem template](#) in Confluence

Another helpful exercise is dependency mapping, which helps teams better understand potential roadblocks that could impede their success. Here's a quick exercise you can use to identify and proactively plan for dependencies: [How to Win at Dependency Mapping](#).

**CUSTOMER SUCCESS STORY**

Atlassian customer [Kiva](#) likes to use Jira as their [command center for project workspaces](#). It's powerful, easy to use, and connects with other work management tools, like their Confluence knowledge hub.

Matthew Flaming, Kiva's head of engineering, [explains that](#) "Both Jira and Confluence are among the core tools that we use to coordinate work, keep track of ideas, and understand the status of projects."

## Phase 2: Plan your team's work

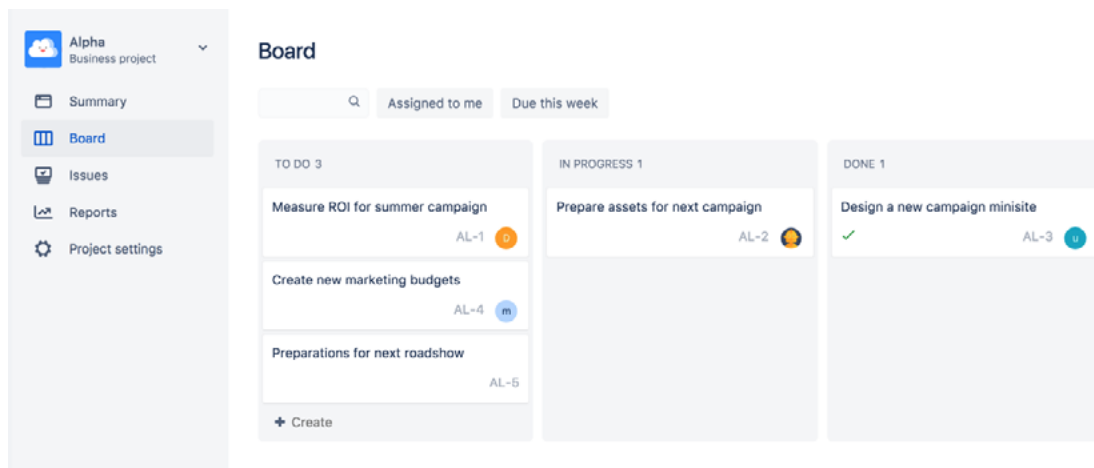
Now that you have a strong foundation and a shared sense of direction, it's time to dig into the weeds of your project!

During this phase, you'll finalize plans, prioritize milestones, and manage individual tasks. It's a delicate balancing act, especially since you need to make sure work is appropriately managed, regardless of the project's complexity.

### Set up your project board

A project board ensures that there's a single "source of truth" for project tasks, who will be working on them, and their due dates.

Jira Work Management also includes dozens of pre-configured templates, like the [project management project template](#) for tracking to-do's, tasks currently in progress, and completed tasks.

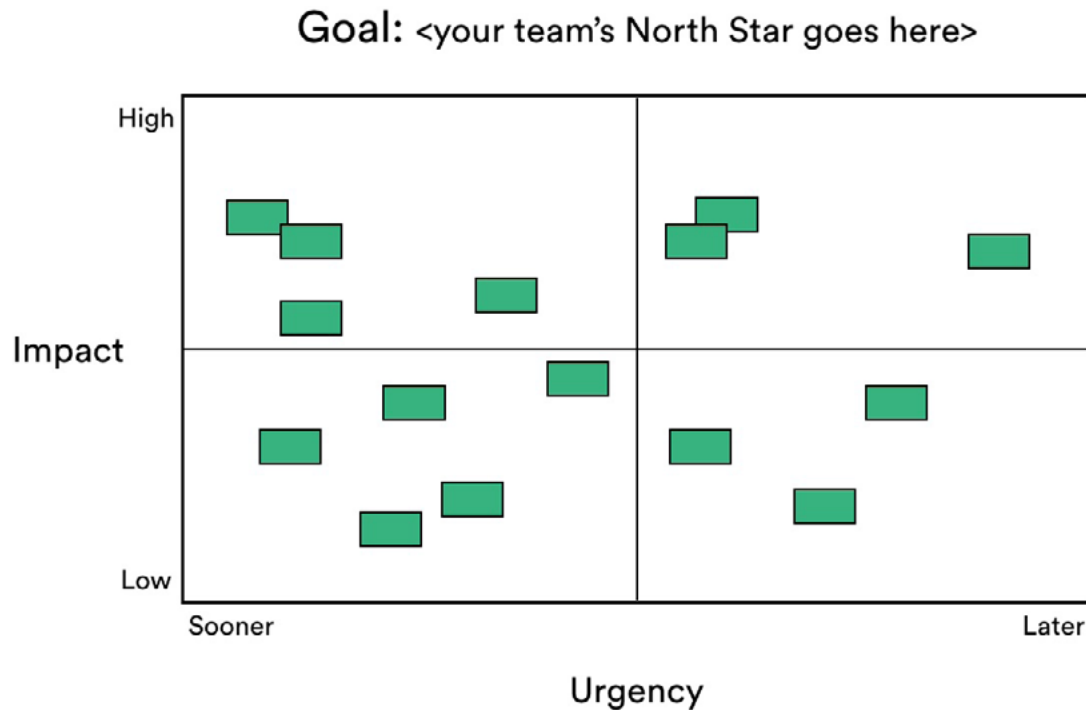


Jira Work Management boards help contributors get a quick view of tasks and progress.

## Work with your team to prioritize tasks

Prioritization helps teams eliminate bottlenecks and keep things moving. There's no need to determine priorities on your own, either. Gather your team for our favorite priority-setting Play: [Prioritization matrix](#).

This exercise gives teams a visual comparison between the relative priority of their own projects versus work requested by other teams.

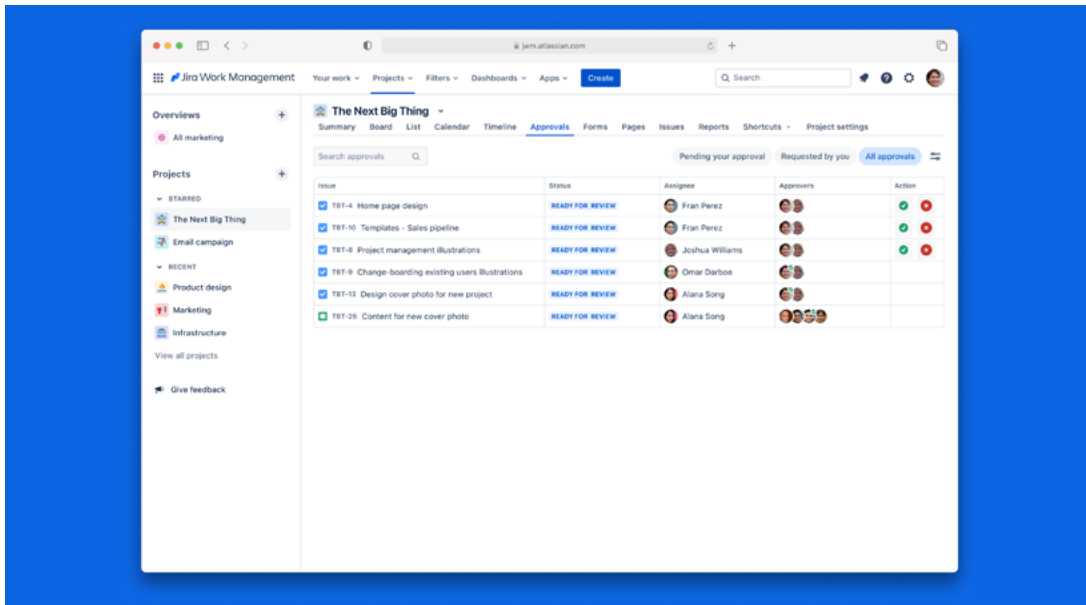


An example board that shows a distribution of tasks based on urgency and impact.

If you previously did the brainstorming in [Confluence whiteboards](#), you can easily reconfigure your sticky notes into a priority matrix and convert them into Jira issues.

## Set up workflows

Every team has slightly different needs when it comes to the flow of work which is why Workflows can be set up and customized to fit your team's specific needs. Plus, if you are on a team that needs approvals on a task before it can be moved to done, you can easily add this by setting up an approval into your workflow. [Approvals](#) are easy to set up and notify the approver once a task has reached this step. Rest assured that decisions are being tracked and you no longer need to track people down to get a task signed off.



Another way to improve your workflows is by setting up **automations in Jira Work Management**. Automations can save you time from completing repetitive processes like closing duplicative tasks or closing old issues. These automations can take just a few minutes to set up and can save you countless hours in the future.

“ Having all of our tools integrated into one seamless workspace means we can focus on our mission and product goals instead of thinking about how to organize workflows or what to do next.

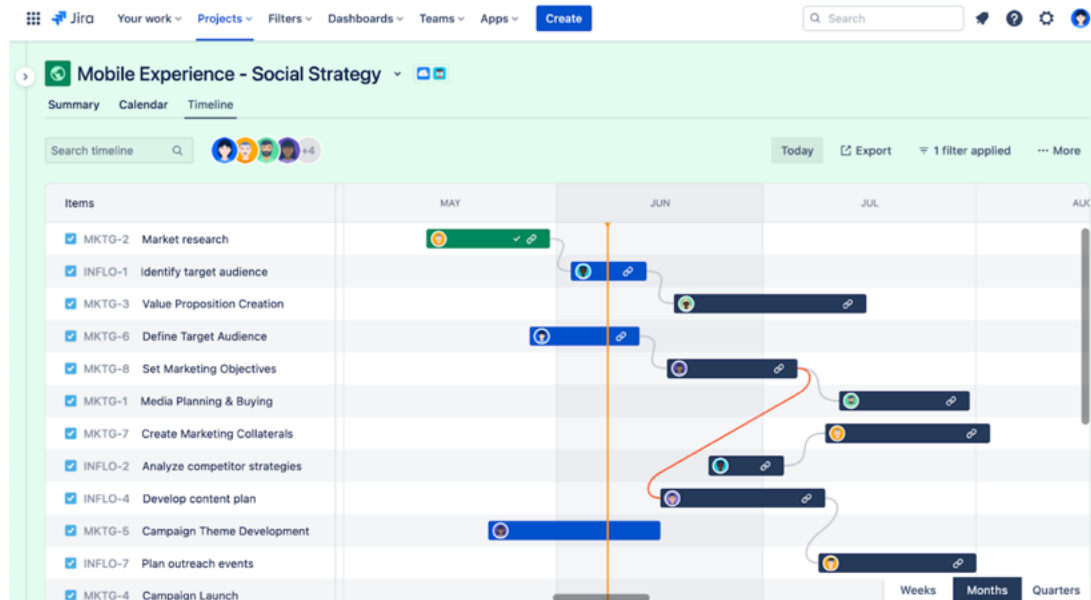
ROMAN BUGAEV, CTO, FLO

## See the big picture

If you're working on complex projects that span multiple teams, you need to look at the bigger picture and account for dependencies.

Dependencies in project management occur within a team and between different teams. Within a team, individual tasks often depend on other tasks within the project. Dependencies that arise between different teams are more complicated.

With Jira Work Management, project managers can use the Timeline view to get an aggregated, high-level view of work spanning separate projects and departments in one central location. Timelines visually highlight both intra- and inter-team dependencies, making it easier to plan and prioritize tasks and milestones.



An example Timeline view inside Jira Work Management showing timelines across different projects and teams.

Jira Work Management has several other ways to get a view of your work including:

- Overview – pull multiple projects together to see an overlay of project information
- Board view – a kanban view used for workflow visualization
- Calendar view – for keeping track of key dates
- List view – a spreadsheet like view that allows you to see all tasks in one place to quickly scan, sort or filter

## Phase 3: Manage the team's ongoing work

You've got your project plan, everyone knows what it'll take to cross the finish line, and stakeholders have visibility into your team's work. Now, it's time to settle into the rhythm of managing ongoing work.

### Use these project management tips to maintain velocity and maximize productivity

Now that the tasks have been brainstormed, added to Jira Work Management, prioritized, and ranked, it's time for the team to get to work!

Your aim with this backlog of work is to get from "To-Do" to "Done" as quickly and efficiently as possible, all while eliminating bottlenecks along the way. As people work, encourage them to:

- Limit work in progress by focusing on "getting work to done."
- Manage and organize small daily tasks in whatever way works best, like in a simple personal Trello board.
- Minimize multitasking to increase efficiency and reduce the chance of errors that might occur when attention is divided among multiple tasks.
- Prioritize time effectively to avoid constantly switching between tasks without making significant progress.
- Collaborate with others in the context of working using comments and mentions.
- Track decisions, blockers, and updates in their work tickets.

On your end, be mindful of making sure everyone has enough time and capacity to incorporate these tips into their daily workflows. Creating documentation, thoughtfully managing daily workloads, and communicating with fellow team members all take time.

Salesforce needed a reliable way to empower knowledge sharing and collaboration at scale. Deepa Aswani, [Director of Content at Salesforce](#), explains,

“ To be successful from anywhere, you need reliable information. You want reliable collaboration tools. And that’s what Atlassian is.

[Salesforce’s employee count is] at 80,000+ people now. To be able to grow at that scale, knowledge needs to be passed on, conserved, and consolidated. With Confluence acting as a single source of truth, employees have more time for innovation and problem-solving, not just wasting time “figuring out problems that are easy to solve.”

## **Manage operational requests from other departments**

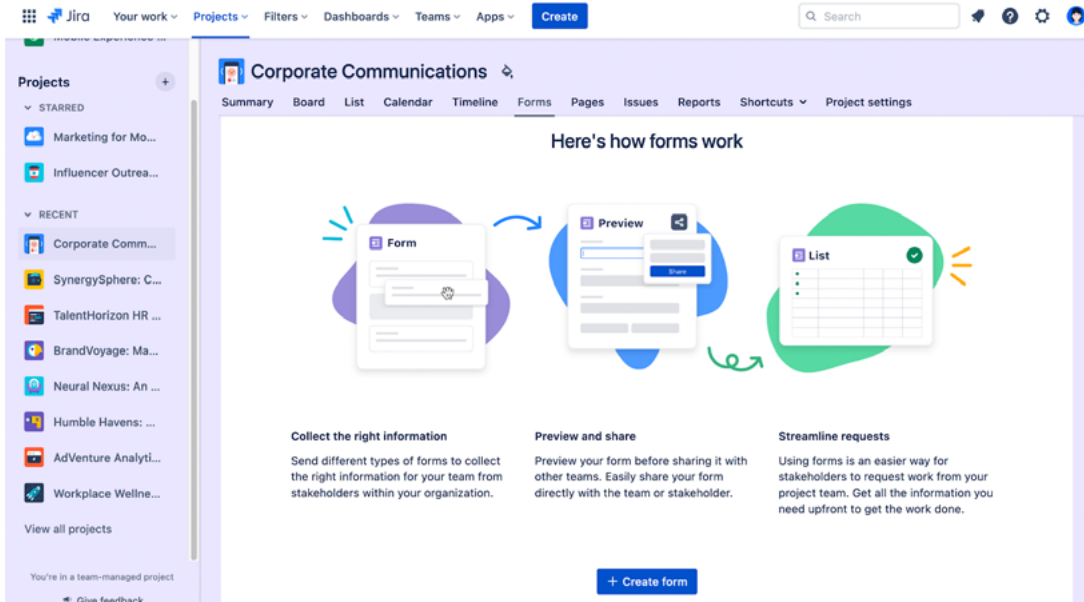
We've all heard the phrase, “Can your team...?” These sneaky operational requests often show up in emails, Slack or Teams messages, or random conversations. Oftentimes, there’s no official record of these requests, and it’s difficult to gauge their true impact on the schedule.

While a small number of operational requests won’t necessarily have major impacts on your timelines, too many can derail your plans.

If more than 15% of a team’s work comes in the form of operational requests, consider building an official intake process in Jira Work Management. This makes it easy for project managers and team members to prioritize ad-hoc operational requests alongside regular project work.

Start by creating a new project that’s solely for operational requests. Then, create a form inside of the project. Colleagues from other departments can use the form to submit requests, and then your team can prioritize based on other needs.



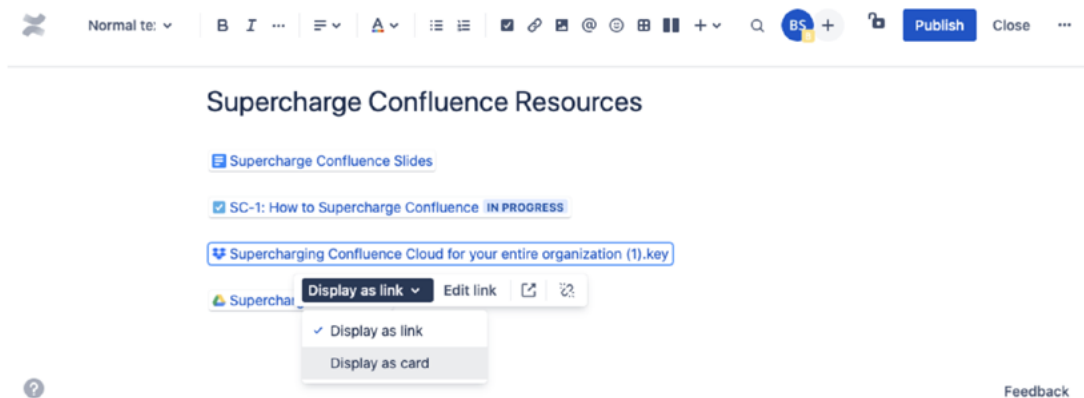


The form creation view inside of a project in Jira Work Management.

## Integrate with your teams “must-have” tools

Gone are the days on toggling between tools. If your team relies on work done on other platforms, check the [Atlassian Marketplace](#) for an existing integration to sync work between your tools.

Atlassian tools also benefit from a Smart Links feature that allows you to surface key information on a task, goal, or page without leaving your current page. Try out Smart Links by simply copying and pasting a url where you want the link to appear. Smart Links work across many tools including Google sheets, GDrive, Box among others.



Choose how you want to display smart links inside a page

With these features, it’s easier to collaborate and find everything needed for teams to do their best work.

## Make team meetings count

By this point in the project management process, the project team is proceeding full steam ahead with work. Weekly team meetings are important events that promote collaboration, communication, and productivity within your team, especially if everyone typically works asynchronously.

It's easy for weekly meetings to go off the rails, which is why meeting management is a critical part of project management. This guide is a great resource for improving your meeting facilitation skills: [How to Run Effective Meetings](#). It's a comprehensive course on how to:

- Lead efficient, focused, and effective meetings.
- Create clear meeting goals and helpful agendas.
- Keep attendees actively involved and engaged.
- Use the Atlassian Playbook to improve meeting success.

## Track status updates in Atlas

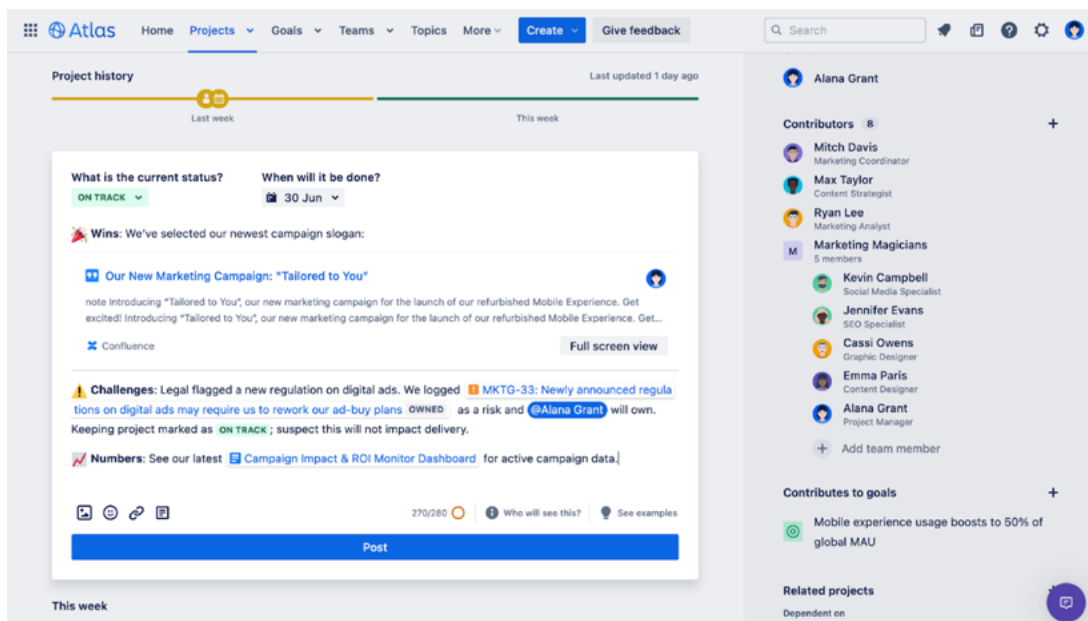
Nailing your project is about clear communication punctuated by regular status updates. Atlas tickets enhance transparency and trust among stakeholders. Additionally, they foster a healthier team environment where everyone knows the collective direction the group is heading.

Writing weekly updates may seem like extra work, but proactively sharing progress creates less work for everyone in the long run. Invest time into writing descriptive weekly status updates and you'll reduce the chances of last-minute surprises that introduce unplanned work.

Plus, you'll eliminate the need to repeat yourself in various meetings and messages. When an inquisitive stakeholder has a question, point them to your Atlas ticket for the latest project status. If they aren't already subscribed to project updates, ask if they'd like to be added as a follower.

When creating a project update, it's best to:

- Keep it high level and provide a broad overview of the current status.
- Use @ mentions to draw attention to individuals who need to provide input.
- Use simple language and skip the acronyms and code words.
- Use [Smart Links](#) to directly reference pages in Confluence or Jira.
- Keep updates interesting and engaging with videos, images, and emojis.



The project history view inside Atlas.

## Simplify decision-making throughout the project

At some point, you may face difficult decisions. While some decisions can be made autonomously, others are complex and require input from multiple people (or specific people).

If you get stuck on a decision, try using the [DACI \(Driver, Approver, Contributors, Informed\) Decision Documentation](#) template in Confluence. During the exercise, you'll assess the pros and cons of a decision, the relative impact of various choices, and other critical factors. The framework also helps teams avoid analysis paralysis by putting someone in charge and assigning a single approver who ultimately makes the final call.

Normal text | B I U ... | Publish Close ...

## DACI: Decision documentation

**i** Add your comments directly to the page. Include links to any relevant research, data, or feedback.

Summarize this decision in the table below. Type */date* to quickly add the due date and @mention the driver, approver, contributors, and informed to keep everyone on the same page.

Status	UNDECIDED
Impact	HIGH / MEDIUM / LOW
Driver	
Approver	
Contributors	
Informed	
Due date	31 Oct 2019
Outcome	

### Background

Provide context on the decision the team needs to make. Include links to relevant research, pages, and related decisions, as well as information on constraints or challenges that may impact the outcome.

### Relevant data

Add any data or feedback the team should consider when making this decision

### Options considered

	Option 1:	Option 2:	Option 3:
Description			
Pros and cons	+ -	+ -	+ -
Estimated cost	HIGH	MEDIUM	LOW

### Action Items

Add action items to close the loop on open questions or concerns

### Outcome

Summarize the outcome below (type */decision* to add another one)

*/*

The DACI: Decision Documentation template in Confluence.

## Phase 4: Assess your project's performance

Eventually, your project will come to an end. Before jumping into the next big initiative, take some time to wrap things up and review how the project went. You can then use those takeaways in future projects.

### Hold a retrospective

A retrospective is a dedicated time for everyone on the team to reflect on what worked, what didn't, and why.

Retrospectives are simple in theory but a bit more difficult to pull off in practice. You don't want to bore your team to death, for starters (here are [nine techniques](#) that will ensure that doesn't happen).

Learn more about [How to Run an Agile Retrospective Meeting](#) in this Play, which includes real-world examples from other teams. The [4Ls retrospective](#), which focuses on what everyone loved, loathed, learned, and longed for in a project, is another Atlassian team favorite.

### Close out all tasks and tickets

To get a clear picture of all project deliverables and accomplishments, go back through your project management tools of choice and complete or close out any outstanding tasks and tickets.

If you've given stakeholders insight into the project using a tool like Atlas, be sure to formally complete the project:

- Post an update as usual, but this time, choose Completed in the status dropdown.
- Write your final project update.
- Click Update.

We also recommend creating a more detailed wrap-up page inside your knowledge management system. If you use Confluence, create a page that includes key project assets, like:

- Atlas project links
- Project poster
- Jira Work Management boards
- Project Retrospectives

Include any lessons learned, project context, and anything else that would be helpful for someone who may have to reference this work in the future. Share it with your team and the larger organization. This gives your team more visibility and helps engage stakeholders.

## Celebrate with your team

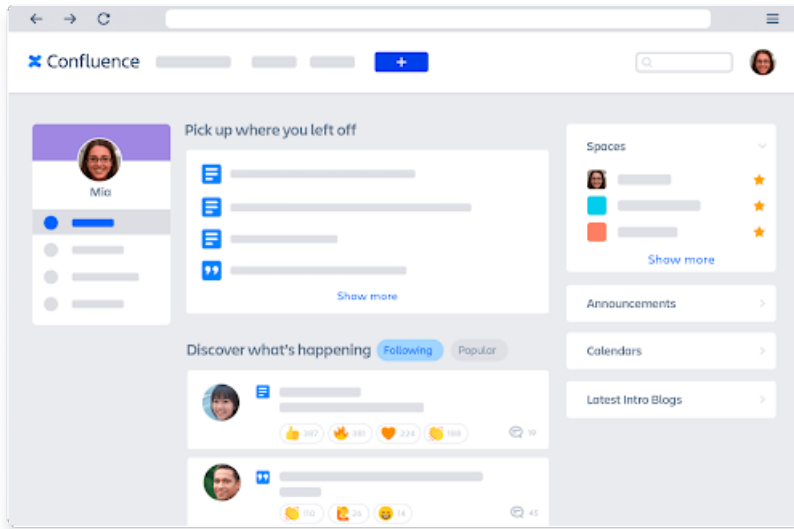
As you celebrate, don't forget about the power of making your progress visible to the rest of your company. **HubSpot's** Chief People Officer Katie Burke understands the power of visibility because

“ A transparent work environment leads to greater trust and alignment and for a global organization, that's paramount to our success.

HubSpot uses Confluence to increase transparency. The platform has given “anyone in the company [an] equal opportunity to participate, ask questions, and use their voice towards building a company our employees' grandkids can be proud of.

You've all worked hard, so take a moment to celebrate the end of a successful project. There are countless ways to celebrate, but here's one of our favorites: at Atlassian, we regularly **write blogs in Confluence** to announce important victories, changes, and news across the organization.

Writing a “Project Completion” blog is an excellent way to share your team's success within the organization. Clearly communicate your project's impact on the company or its customers, and be sure to include a few things you learned along the way. Other users in Confluence can react to the news with likes and emojis, showing their support for particular ideas, victories, and takeaways.



An example of an internal company feed in Confluence.

## Start planning your next project today

“ Other teams often come to us asking to upgrade [to Atlassian] because they see how it could improve their life and deliver a better experience for the end user.

JOEL TOMASOA, ARCHITECT AND IT TEAM LEAD, AIR FRANCE

Project management often includes its fair share of tool silos, manual work, and lack of discoverability. But it doesn't have to be that way. When everyone on your team works inside of a connected work management system that is unified with the tools software and IT teams use, things get a lot easier.

From setting up a knowledge hub inside of Confluence to collaborating and reporting on work in Jira Work Management to updating teams and stakeholders in Atlas, being on a single platform makes it much easier to find information and collaborate across distributed teams.

Combine these tools with the best practices and new ways of working you've learned throughout this guide, and you'll transform how you manage projects and teams.

**Learn more about how Atlassian Work Management tools simplify project management and help people work differently together [here](#).**



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Learn more at  
[atlassian.com/solutions/work-management](https://atlassian.com/solutions/work-management)

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