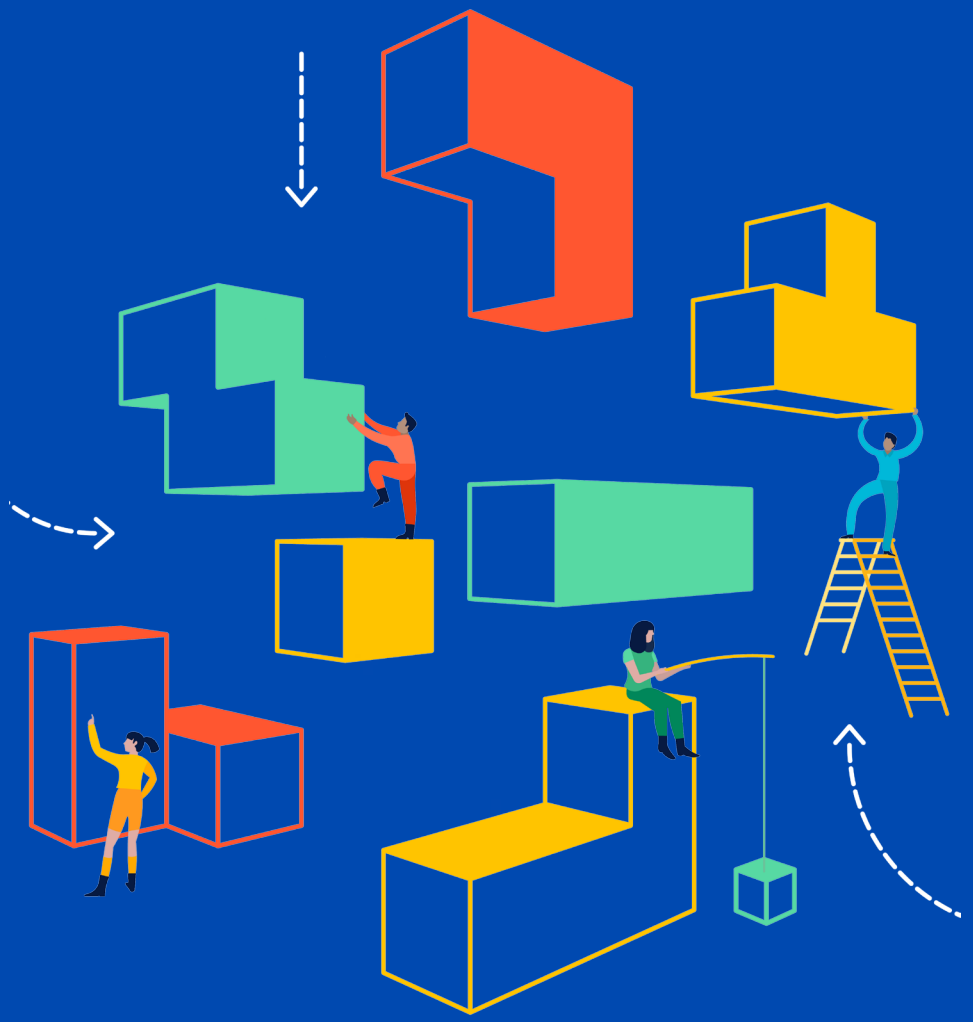
ATLASSIAN CPRIME



Tips to make a lean, mean ITSM machine

Learn how you can get all the muscle, without the fat

Paul Buffington & Swati Jain

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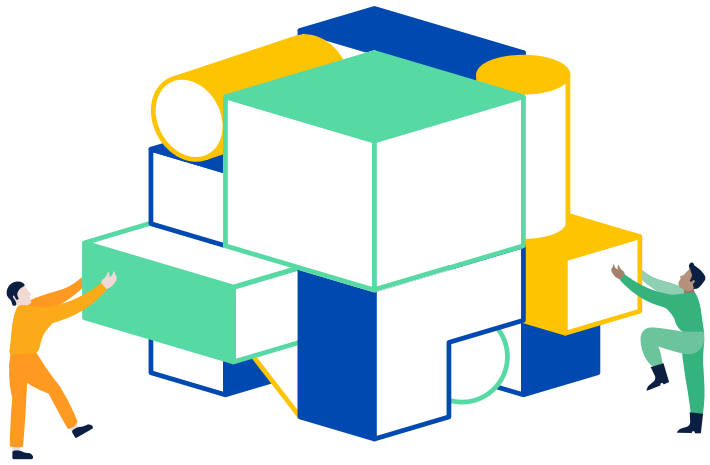


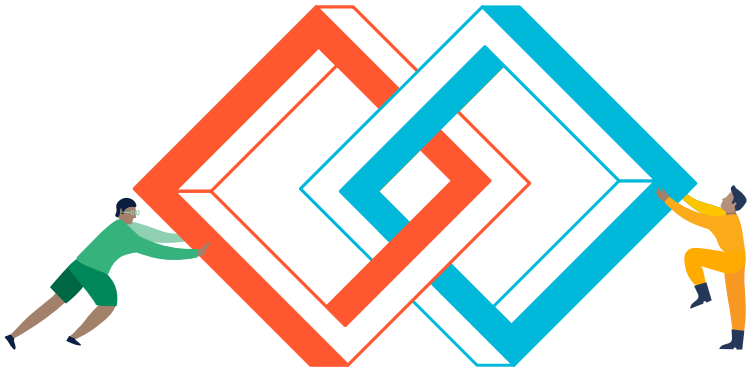
Introduction

Every software company is fundamentally becoming a service company. We live in a services first world and IT sits right at the center of this transformation. Today's customers want fast, flawless service and IT teams are under pressure to efficiently deliver that service, while cutting costs and demonstrating value. This is also intensified by the rise of the DevOps and Agile movements which are putting increasing pressure on the traditional approaches to ITSM. As product teams continue to reduce their time to market, other business teams are expected to bring more agility in their ability to respond and support.

In response, IT teams are switching to leaner, more agile approaches that value ease of use, collaboration, and knowledge sharing over complex, inflexible workflows. Applying lean and agile principles to ITSM can help IT teams gain efficiencies, stay nimble, and focus on services that deliver business value. If you feel bogged down by heavy, old-school tools, it may be time to switch. Like many companies, you may have grown tired of paying for ITSM workflows you never use, or employing an army of developers to maintain heavy customizations that add big bucks to your administration costs.

Agile IT teams are more adaptable to changing needs, increase velocity when delivering new technology, and improvise when faced with obstacles. These teams also align with the business needs and strategy as opposed to just completing tickets and delivering on SLAs. When IT teams are aligned with the business strategy, they can streamline their day-to-day work and focus on driving technological improvements across the company, from sales and marketing to new digital services that ensure customer success.

Convergence of Agile and ITSM

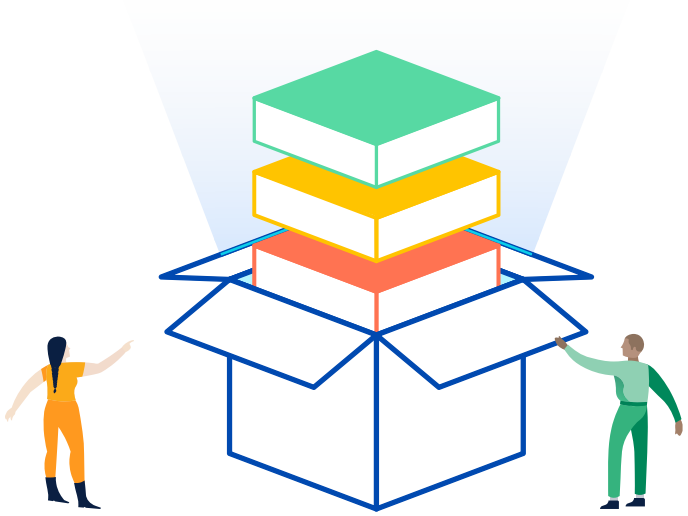


ITSM is simply how you manage the delivery of end-to-end IT services to your customers based on best practices, and ITIL is one of the most commonly adopted best practice frameworks for ITSM. Agile is a set of best practices that offers an industry standard for an iterative approach to delivering business value. Agile aligns teams with customer needs and company goals to hone in on the importance of delivering value.

When IT teams are looking to increase velocity, improve efficiencies and minimize waste, applying a combination of ITIL and Agile–keeping the muscle and removing unnecessary fat–brings a much more pragmatic approach to ITSM.

ITIL is an immensely valuable framework–yet many legacy service desks took it too far, charging a fortune for overly complex ITIL workflows that either slowed you down or were too unwieldy to implement. Many IT teams simply don't need full ITIL coverage, but they're paying for it anyway. IT teams should be following the spirit of ITIL's processes and best practices rather than treating them as strict rules and guidelines that aren't flexible to evolving needs. Applying lean and agile principles to ITSM leads to collaborative service delivery and iterative service improvement. By harnessing the core principles as guidelines from both ITIL and Agile, your IT Service Management will transform from "doing things right" to "doing the right things".

Atlassian ITSM Solution



Atlassian was founded in 2002 with a mission to unleash the potential in every team. Atlassian's team collaboration software–including Jira Service Desk, Jira Software, Confluence, Hipchat, Bitbucket and Trello–removes the friction inherent in teamwork, making it easier for teams to organize, discuss, and complete work.

Today, Atlassian's products serve teams of all shapes and sizes, in virtually every industry–from IT and service teams to software and technical teams; from sales and marketing teams to HR, finance and legal teams. The engineering investments Atlassian has made in ensuring these products support so many different teams reflects the continued commitment to R&D.

Atlassian's Jira Service Desk, Jira Software, Confluence, Hipchat, Statuspage and Trello are the foundational products required to support a well-rounded ITSM solution. Riada's marketplace add-ons, Insight and Insight Discovery, serve as a good backbone for asset library. Each product plays a specific role in providing the context and functionality required to support a collaborative, communicative, and efficient service operation.

Jira Service Desk

Jira Service Desk has everything your IT teams need for service request, incident, problem, and change management out-of-the-box, and is PinkVERIFY™ certified. Customers can submit requests via a simple self-service portal, and machine learning will intelligently recommend the right service and learns from every interaction, so the answers are easy to find. Agents can easily setup automations so they can focus on solving the important stuff and help lighten the workload. And if your software teams already 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.

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.

Statuspage

Whether it's a full blown network outage, VPN connection issue, or third party service disruption, the simple truth is that downtime happens. Statuspage lets IT teams report on the status of all IT services, giving the whole company one dedicated dashboard 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.

Confluence

Confluence is content collaboration software that changes how modern teams work. Confluence gives teams the power to create anything and everything, from meeting notes and project plans, to product requirements, with multimedia and dynamic content to make work come to life. Create a space for every team, department, or major project to share knowledge, information and keep work organized. Use a structured hierarchy and a powerful search engine to find work quickly and easily, and leave feedback on the work itself with inline, page and file commenting on any Confluence page. For ITSM, Confluence is the place where service teams create customer-facing FAQs, internal runbooks, and troubleshooting guides.

Hipchat Data Center

Hipchat Data Center is the self-hosted communication tool for enterprise technical teams. Easily communicate with teammates using group chat, video, or screen sharing in 1:1 conversations or private and public rooms– from any device. Amplify feedback to catch failures before they make it downstream– accelerating your time to resolution and improving the alignment of your teams. All while making sure it meets your regulatory and compliance needs. The integration with Jira empowers teams with centralized alerts and notifications as well as contextual discussions and troubleshooting.

Trello

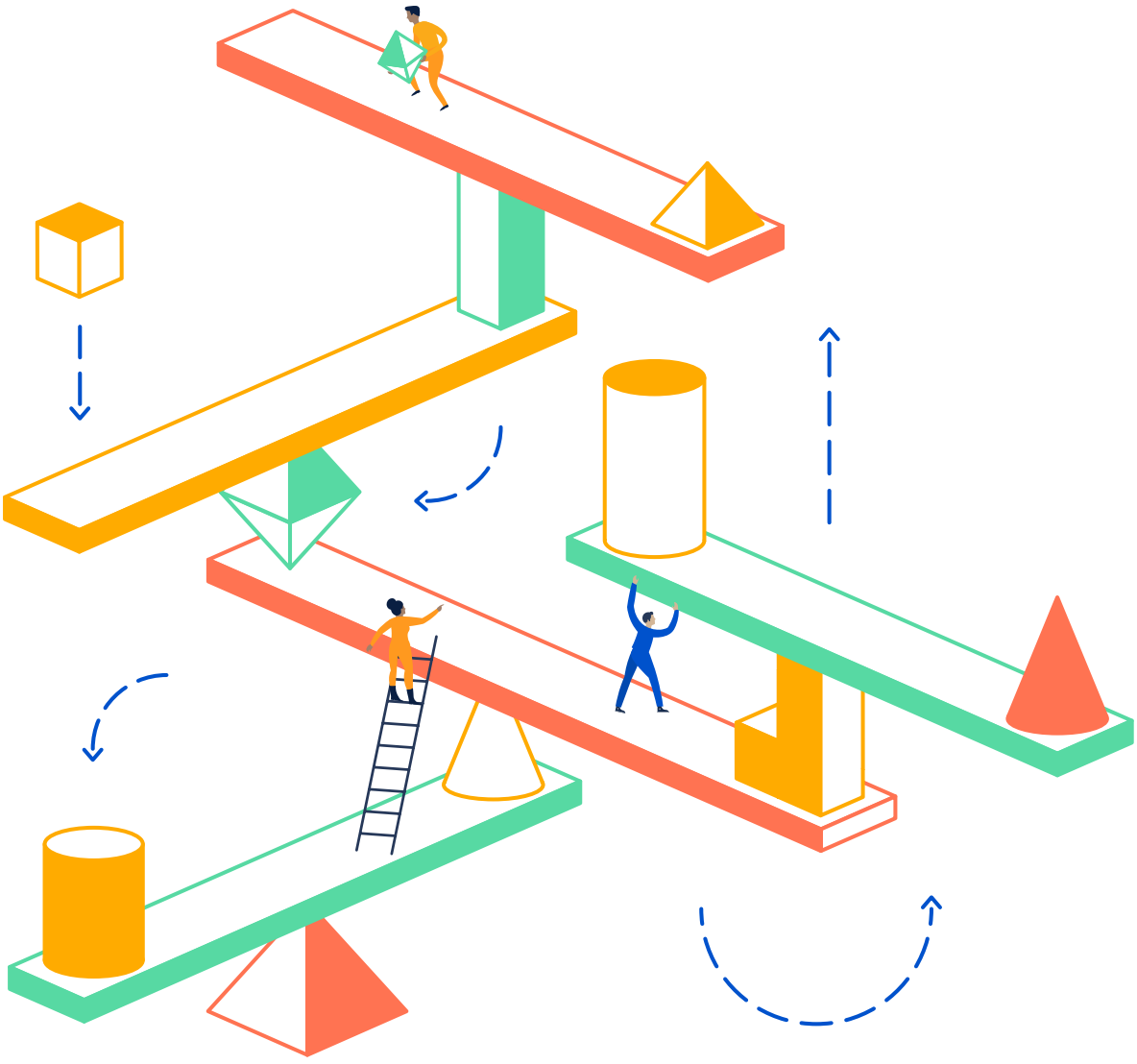
Managing IT projects across teams can be challenging. The ability to collaborate and share information shouldn't be a barrier. Trello improves cross team collaboration and breaks down barriers, offering a visual way for teams to collaborate on any project. And this is especially important when business and IT teams are working together on a common goal. 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. It allows them to organize the essential info from all their apps with Power-Ups.

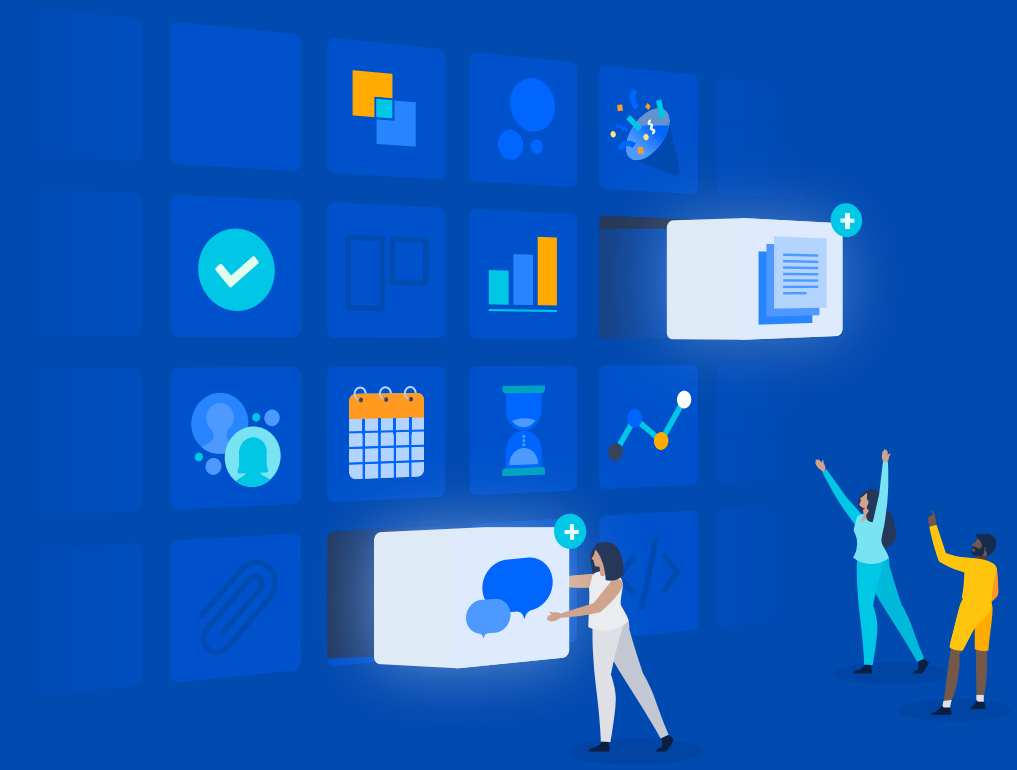
Insight

Insight (a marketplace app by Riada) unleashes the power of Enterprise Asset Management with the Atlassian platform. It provides a modern configuration management database (CMDB) for ITSM with dependency mapping and impact analysis, custom fields so you can associate assets to Jira issues and an integration with Jira Service Desk to enable asset selection in the customer portal.

Insight Discovery

Insight Discovery (a marketplace app by Riada) provides agentless enterprise network scanning with automated asset discovery and dependency mapping. The collected data is automatically imported into the Insight CMDB and available in Jira. Patterns determine what can be discovered and what data is collected. Discover assets like Linux & Unix servers, Windows servers, computers, routers and printers out-of-the-box.



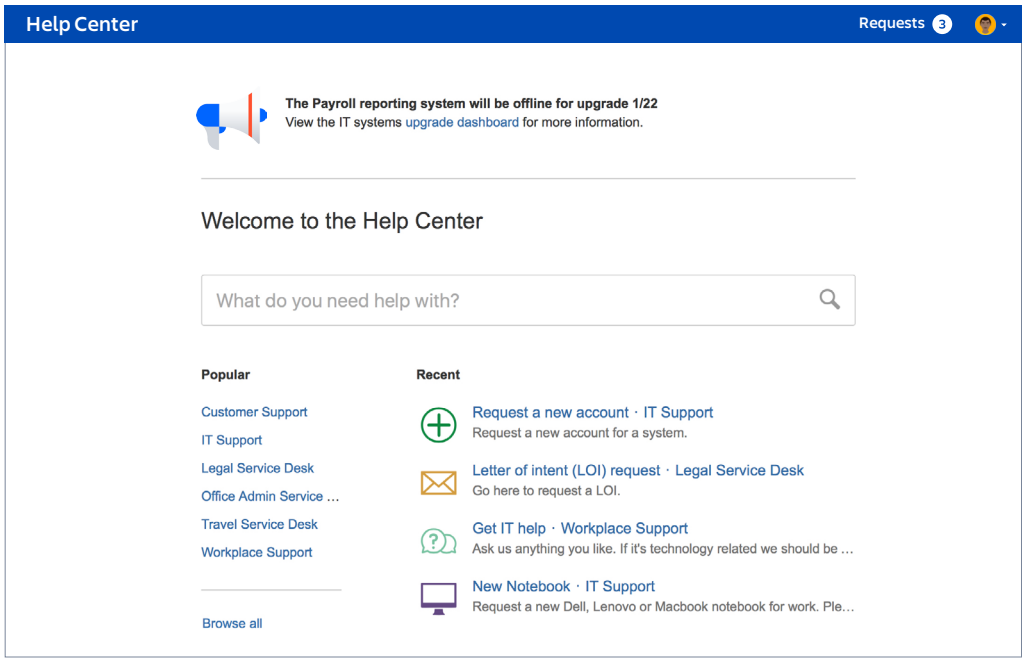


‘Shift Left’ with self-service

Consumerization of technology has transformed the way we use products and services. We’ve all come to depend on self-service applications that help us find answers or ask for help. End users like to be self-sufficient and have come to expect the same from the self-service that the IT team provides. These expectations are now being applied to IT organizations and the self-service that they deliver. And as your organization grows, self-service keeps driving costs down. It not only benefits your team, but customers prefer it. The ability to ‘shift-left’ and deliver quality self-service is a top priority for many IT organizations today. The question remains, what is the best pathway for achieving this goal?

Self-service isn’t a new concept, either. We see it in our everyday lives, from buying airline flights to using an ATM. And now, finding answers is easier than ever with the power of search engines. At Atlassian, we believe that there has never been a better time to start building a self-service culture in your organization. Self-service is the face of IT to an organization and if it’s lacking or nonexistent, it can leave IT with a bad reputation.

Jira Service Desk makes it super simple to provide users with easy access to self-service. From a single portal, users have access to every service desk project from a single global Help Center. And when something important occurs, IT teams can post general notifications or outage announcements on the Help Center as a way to keep everyone informed.



Users also have easy access to their requests from the portal where they can follow updates and communicate with support teams. Based on a users profile and organizations mapping, users are able to view their requests as well as other requests associated with their organization.

The customer portal can also be used for request approvals. Jira Service Desk makes it very easy for IT and service teams to include approvals in their Jira workflow to enforce business rules. Approving requests from the Jira Service Desk portal is easy. The approver can view the request and ask for additional information. Selecting 'Approve' or 'Decline' moves the request forward to the appropriate Jira workflow step.

> **WHY SELF-SERVICE?**
>
> **According to Forrester Research, manned support can cost up to $12 per contact, while self-service solves problems at 10 cents or less. That's 120 times more cost-effective. A study by Coleman Parkes for Amdocs showed that 91% of customers say they prefer self-service if it were available and tailored to their needs.**

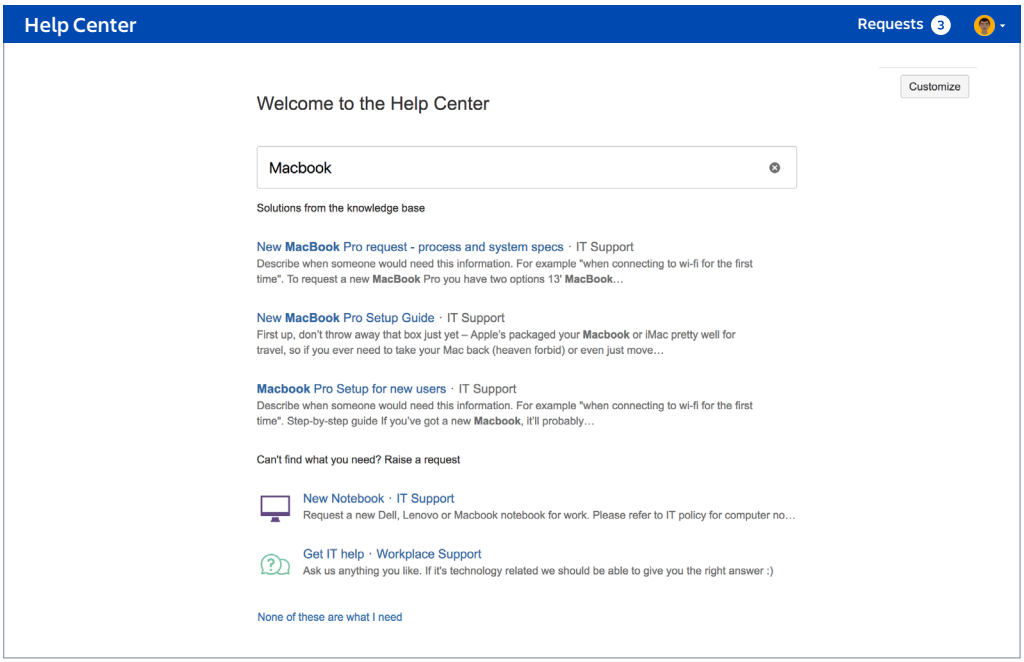
Build a knowledge-centric service desk

As the single point of contact for users, the service desk is the face of IT. With services becoming more complex, agents now have to keep up with the range of technologies and procedures needed to effectively support customers. This makes knowledge management more important than ever. Not only does knowledge improve service quality, but it lowers the overall cost of support by boosting productivity.

As technology evolves, knowledge will exist in more and more disparate places. Information gets stuck in email, social media interactions, forum discussions, comments, tickets, and even in the brains of individual service desk agents. If you don't already have one, aggregate your knowledge in a single repository or system as an easy solution. Centralizing all of that content accelerates learning and helps your team make better decisions. If one person holds knowledge about a particular system, have them document it. If customers are commenting about a service, update your documents with that feedback. If your team receives multiple common tickets, create an article about the topic.

We recommend to invest in ways that encourage and develop a knowledge-centric support culture. Most support teams love to help users solve issues and answer requests. IT teams are more than willing to share their knowledge, but in many organizations their current tools and process hold them back. Invest in tools that make it easy to author and share knowledge. Break down barriers and use streamlined knowledge sharing process that leverages peer reviews to ensure the proper knowledge base articles are published. Leverage reporting to understand which requests are deflected by knowledge bases and where the team can focus with future knowledge base articles. And finally, recognize and reward team members that go above and beyond to contributing to knowledge base.

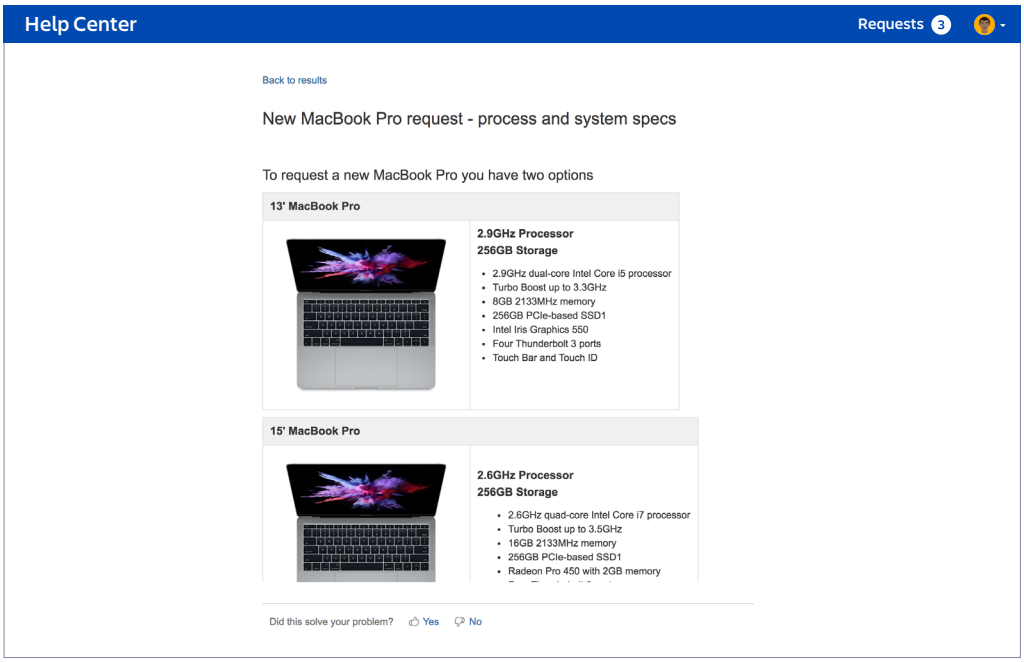
Confluence is the best way to capture, store, and organize your team's knowledge and Jira Service Desk puts that knowledge to work, providing knowledge base recommendations while the users fills out the request. These knowledge base articles may answer questions to help deflect requests or may help them complete the request to ensure the process flows smoothly. Jira Service Desk is designed around search using technology called Smart-Graph that leverages machine learning to remember what users are searching for and what they choose. The more users search in the portal, the better the results become.



Measure your knowledge base to improve business performance

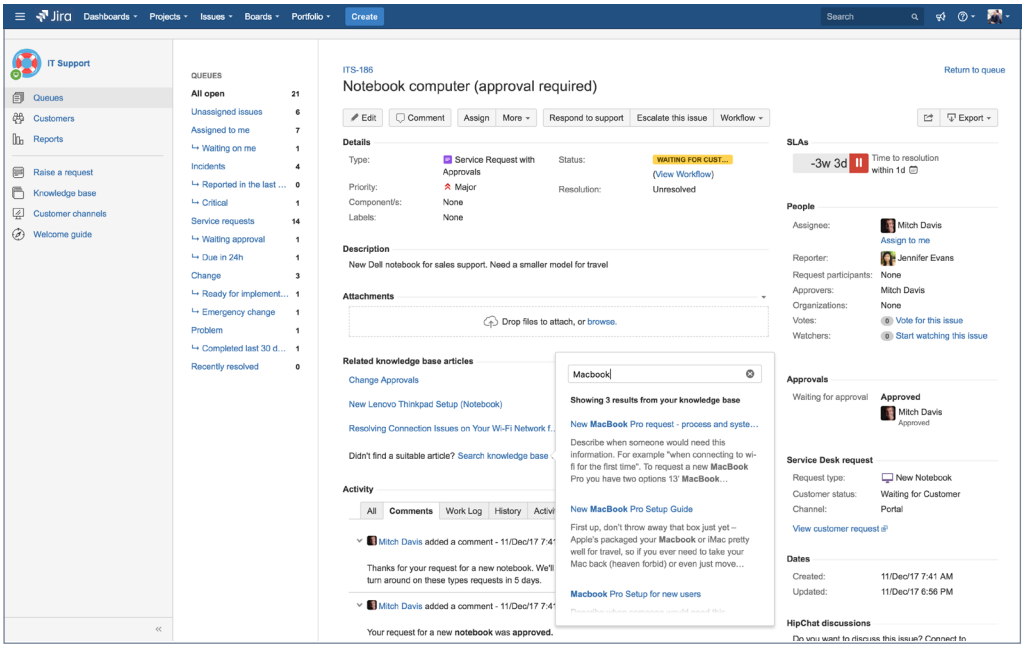
How does your knowledge add value to your organization? Which articles are being utilized the most? Measuring knowledge is the first step towards improving your team's performance. Metrics to consider include: the number of articles attributed to First Contact Resolution, the number of articles created and updated by the team, the number of articles utilized by the team, and the number of incidents with article links.

Not only is knowledge management critical for agents, but it's also important to customers. Enabling self-service both satisfies customers and frees up time for your team. With the self-serve customer portal, you can help customers help themselves by putting answers directly at their fingertips. With technical teams typically chasing large backlogs and time sensitive requests, questions such as "How can I configure my Google calendar" or "How can configure my wifi access" can easily be addressed through a knowledge base.



General questions, FAQ, or how-to articles are all great candidates of knowledge that can be readily made available to your customer. This continues to extend customers preference to self-serve and also reduces your service requests volume significantly, allowing IT teams to focus on requests that actually need their attention.

Jira Service Desk also provides IT teams with easy access to knowledge base articles from an issue or request. Based on the type of request, they will see various recommendations. They can choose from one of the recommended knowledge base records or simply search for what is needed to respond to the users request. Jira Service Desk also makes it very easy for IT teams to author new knowledge base articles, allowing the IT team to define a knowledge base library that best fits the needs of their users.



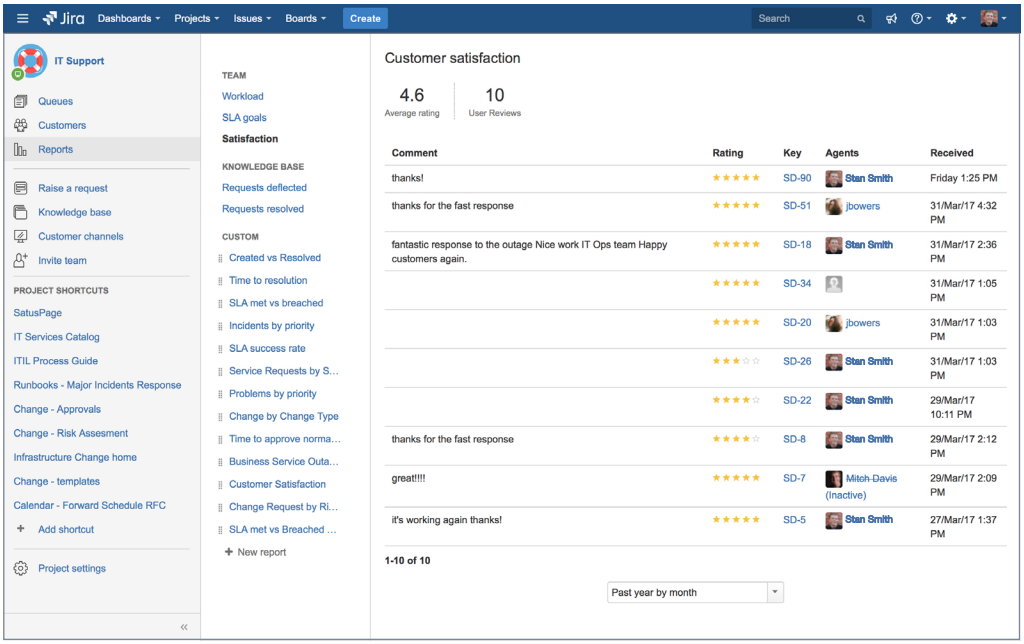
Measure your support service with KPIs

Measuring the quality of support is an important metric for service teams. Key Performance Indicators (KPIs) are the metrics chosen to gauge how well a team performed against agreed standards. An IT service desk, for example, typically agrees to provide technical support for a wide variety of services and devices within the business, and offers guarantees around things like uptime, first-call resolution, and time-to-recovery after service outages. KPIs are the specific metrics that are chosen to track whether the IT service desk fulfills these guarantees.

The following KPIs are useful for evaluating your request fulfillment processes. To visualize trend information, it is useful to graph KPI data periodically using a Jira dashboard. In addition to the data provided by service manager, you may need additional tools to report on all of your KPI requirements.

1. **Size of request backlog -** Current backlog of requests
2. **Created vs. Resolved -** Good baseline for throughput and capacity
3. **SLA Success Rate -** Rate and consistency at which SLAs are met
4. **Average Time to Resolution -** Mean elapsed resolution time for each type of service request
5. **Average cost -** Average cost per type of service request

When it comes to measuring users satisfaction with the quality of support, CSAT (customer satisfaction) is an important metric to measure. The level of user satisfaction with the handling of service requests as measured in some form of satisfaction survey should be simple for a user to complete. The fewer the questions, the more likely a user is to provide a response. Atlassian has found a 5 star rating with a comment field is the most effective way to track CSAT.

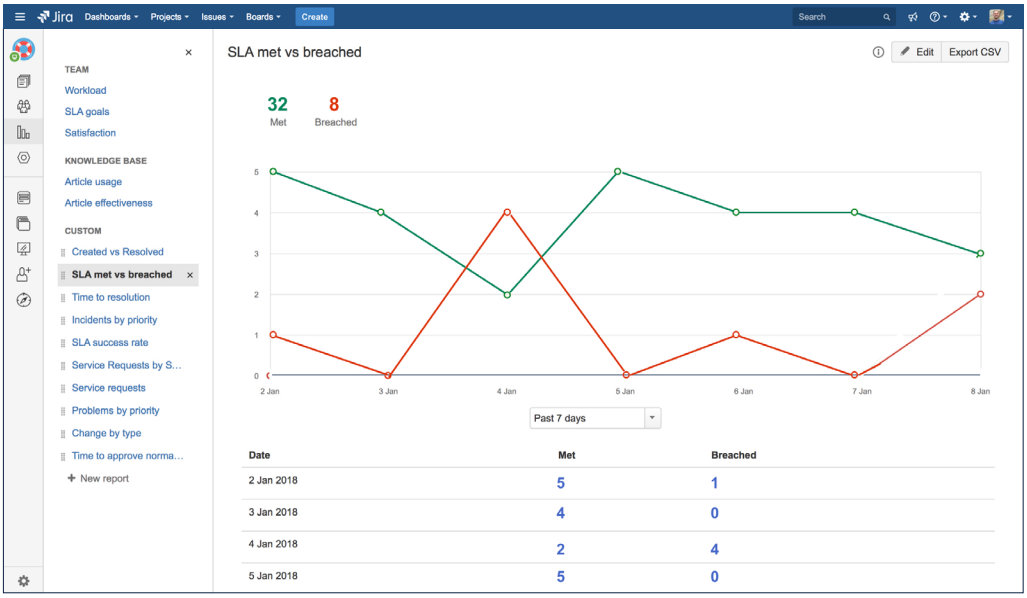


Jira Service Desk provides a simple, built-in mechanism to collect customer feedback to measure CSAT. Customer feedback data can be used to identify strengths and weaknesses in the service quality, engage and motivate the team to improve satisfaction scores, and provide mentoring and training where required. Managers can also leverage Jira Service Desk reports to view CSAT performance by agent.

Service Level Agreements (SLAs) provide the best means of tracking the day-to-day progress for a support team. An SLA is a plain-language agreement between you and your customer (whether internal or external) that defines the services you will deliver, the responsiveness they can expect, and how you will measure performance. When a major outage occurs, the clock is running as down time has a direct impact on the business. SLAs serve as an objective way to track if an outage or incident was resolved within acceptable time. The following are important KPIs related to the incident management process:

1. Incident volume (month and quarter)
2. Number of incidents created per agent
3. Average incident response time
4. % of incidents resolved within SLA target
5. % of outage due to incidents (unplanned unavailability)
6. % of incidents resolved on first assignment
7. Incident Mean Time to Repair (MTTR)

In Jira Service Desk, you can create SLA performance goals based on just about any combination of parameters you define. Configuring these SLAs is easy, can be done in-house, and requires absolutely zero customization or software development–i.e., you can change them as needed without spending a fortune. The pattern of SLAs met vs breached helps IT teams measure their efficiency and quality. This metric provides valuable insights into the phases of incident response and where an IT team should focus for improvements, whether through additional staffing, training, or other relevant means.



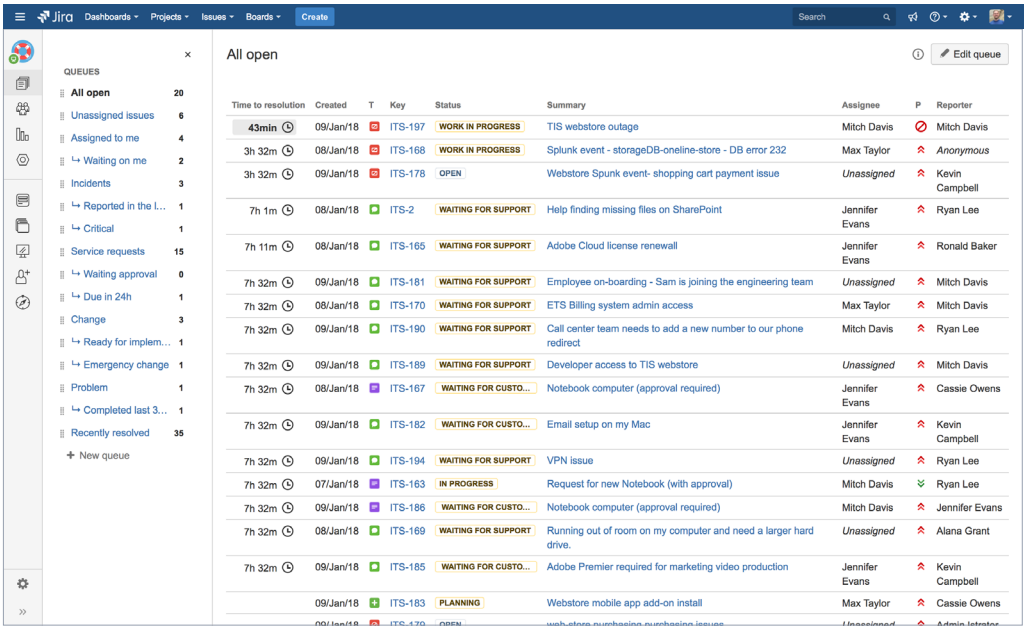
Jira Service Desk reporting provides valuable real-time tracking for IT support team performance. Each IT support project includes a good set of default reports as a starting point. This allows a team lead or manager the ability to understand the support team workload, where they are missing SLAs and opportunities for improvements. Real actionable insights that allow an IT team to learn, adjust and improve.

Many IT organization also leverage Jira Dashboards to increase visibility and share IT metrics with other teams, because they are very easy to create and share.

Use work queues, cards, or kanban boards for a visual backlog

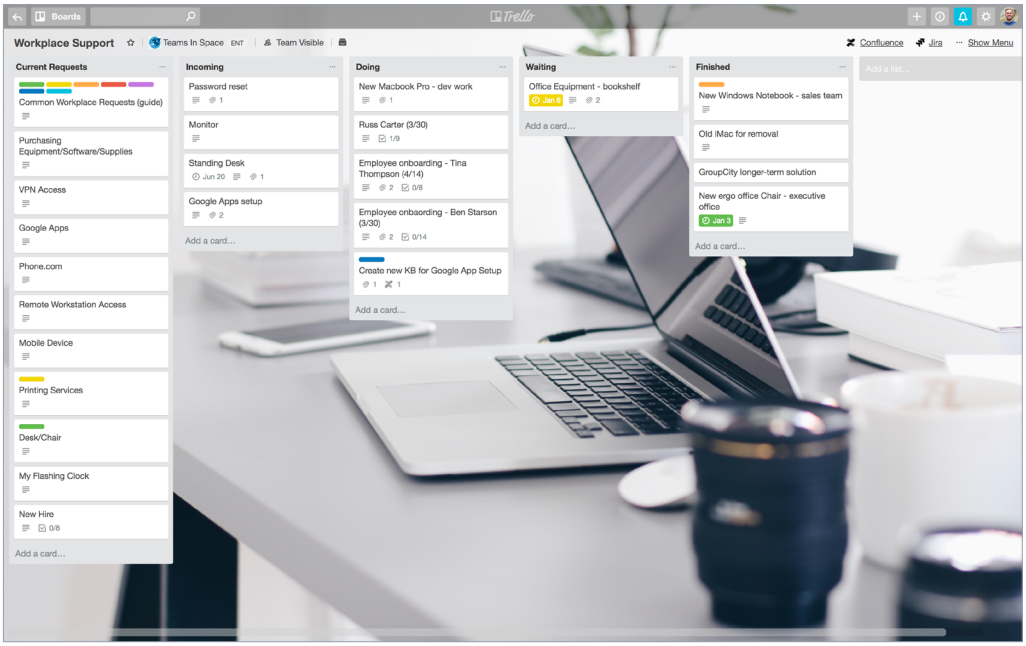
IT support teams have a constant follow of inbound work. They are always looking for efficient ways to stay on top of requests and the work that is most important. Queue based support is a popular approach that is adopted by many IT teams. A work queue is a list of issues that are displayed based on a set of criteria. They help filter and route work based on desired work classification, which reduces the noise for your agents and allows them to focus on their assigned responsibilities. They also help solve the challenge of triage and assignment for IT Supervisors.

Jira Service Desk comes with default work queues that your administrator can update to automatically triage issues for your team. Your agents can see how many issues are in each queue, and switch between queues to work on the right issues at the right time.



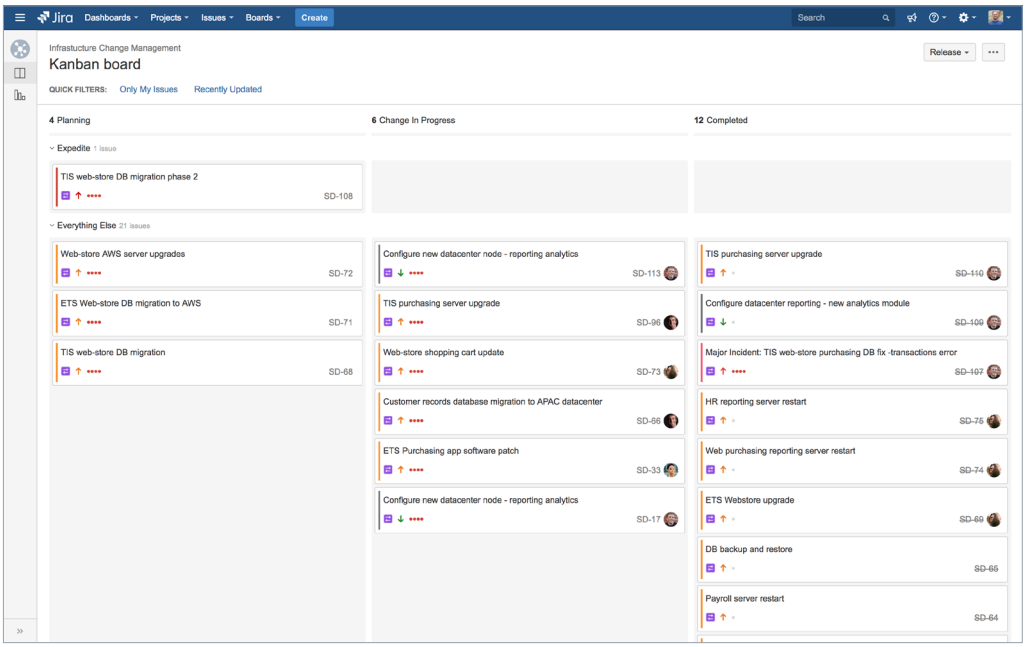
We also know that IT teams have additional tasks and work beyond the day to day queue work. For example, a workplace IT support team has tasks and activities related to standard operations within their team like daily standups and team meetings, authoring and reviewing knowledge base articles, and auditing and reviewing IT hardware inventory, just to name a few. Trello is a great fit for this type of work and provides an easy way to adapt the flow of work to the way the team works.

In this example we see a Trello board for a workplace support team. It includes Trello cards that are linked to active service requests from their Jira Service Desk project while also including tasks and activities that are important to their daily work. Trello is a great place to create a task for other team members to work on. IT teams love Trello because it allows them to bring together all of their support work in one place to make them more effective.



Kanban is a popular framework used to implement Agile software development. It requires real-time communication of capacity and full transparency of work. Work items are represented visually on a kanban board, allowing team members to see the state of every piece of work at any time.

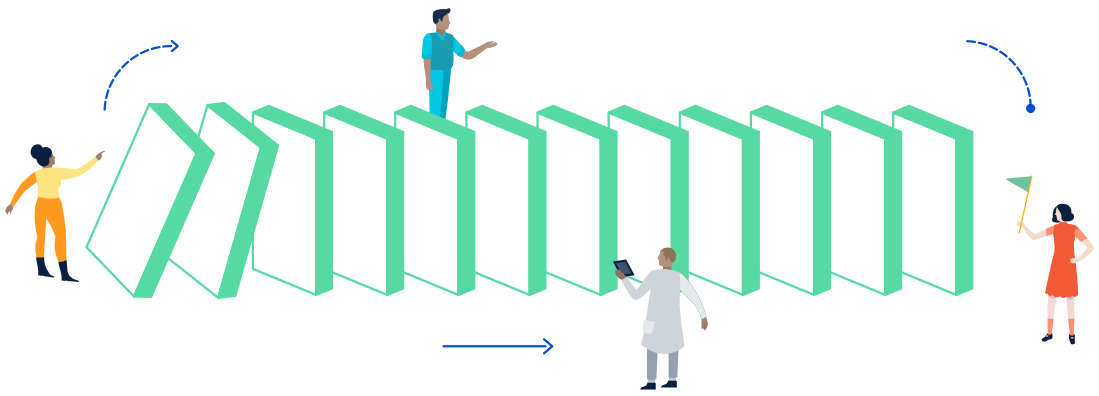
With its interactive drag and drop capabilities, Kanban boards in Jira Software offer a good visual approach to prioritize and to progress work through its life cycle. Each ticket, a card on the board, can be color coded to call attention to specific criteria (such as severity or SLAs). Cards can also be configured to display and highlight specific data points. Setting quick filters can allow agents to narrow down tickets on the board for specific use. Overall, Kanban boards can visualize work and optimize the flow of the work among the team. In this example we see how a Kanban board is used to manage the flow of production change requests an IT team is currently working.



Adopt a team-centric approach to incident management

One of the most critical capabilities for an IT team is their ability to effectively respond to major incidents and service outages. Incidents are unplanned interruptions of service that prevent customers from accessing critical services and have a direct impact on the business. While IT teams can't predict when these types of incidents will occur, they can take a proactive approach that improves the team's ability to respond and reduce downtime. Atlassian has found that highly effective IT teams adopt a team centric approach to incident management, with a focus on:

- Using automation to better classify incidents
- Understanding incident impact with a service-centric CMDB
- Open communication with customers and service stakeholders
- Easy access to service outage runbooks for improved troubleshooting
- The use of ChatOps to improve team collaboration and speedup resolution
- Strong cross functional team communication and collaboration, especially development
- Improving post incident learning and sharing with knowledge-centric Post Incident Reviews (PIR)



Incidents may be system detected or user reported. Effective monitoring tools are the eyes and ears for IT Operations teams when it comes to detecting issues and outages early. The Atlassian Marketplace offers an extensive list of common monitoring and analytics apps for Jira Service Desk. Additionally, you can integrate your existing monitoring tools into your incident process. The bottom line for IT teams when it comes to creating incidents is the ability to easily integrate and adapt the ITSM tool to their needs.

IDENTIFY + COMMUNICATE	INVESTIGATE + DIAGNOSE	RESOLVE + RECOVER	CLOSURE
· Classification	· Investigation	· Recover	· Learning
· Prioritization	· Troubleshooting	· Document	· Sharing
· Coordination	· Collaborations	· Verify	· Reporting
			· KPI

Mean Time to Resolution (MTTR)

A study of Incident MTTR found that 70% of the time is consumed by the 'investigate and diagnose' phase of incident response. Providing contextual help content and service information at the incident level can significantly reduce the time spent in troubleshooting and diagnosis. IT teams that follow this approach have realized a 30% response time improvement because the IT teams assigned to the incident have all of the relevant troubleshooting information in one centralized place.

Implement a service-centric source of truth with a CMDB

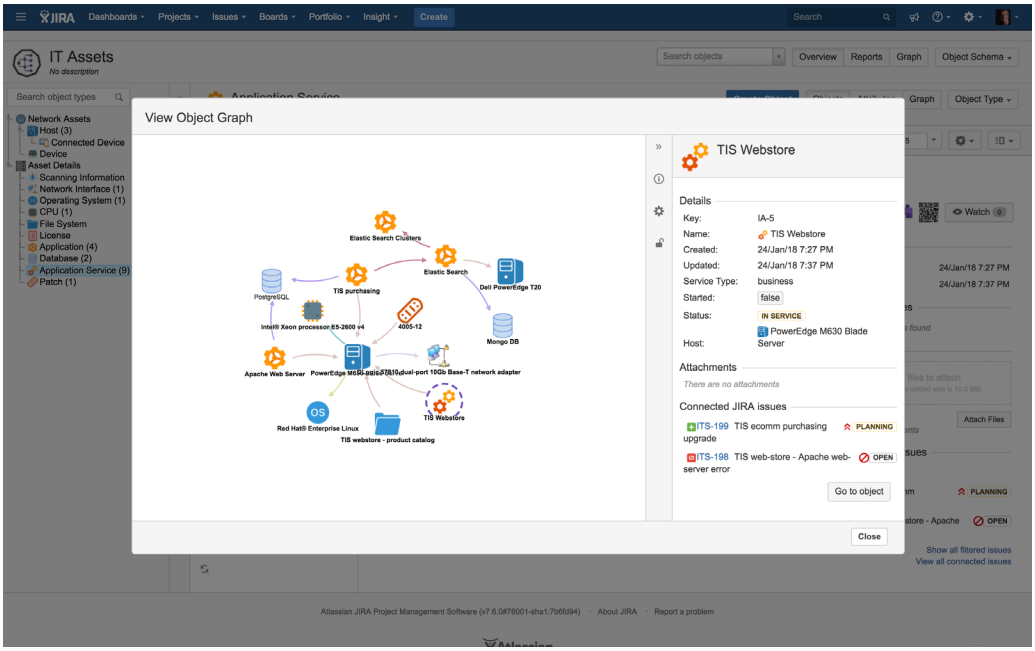
In the age of virtualization, cloud and containers, IT organizations still face the challenge of managing complex IT infrastructures. A study by HDI found that more than 60% of incidents were caused by a configuration problem, which is why the ITSM discipline of configuration management is very important for an IT organization. They need a central source of truth that allows them to maintain service levels and keep all hardware and software performing at peak levels.

At the heart of every comprehensive configuration management strategy is the creation of a centralized database–commonly referred to as a Configuration Management Database or CMDB. The CMDB is a centralized repository that stores information on all the important entities in the IT environment that is under the control of the IT organization. Configuration Items (CIs) in a CMDB can be hardware, the installed software applications, documents, business services and also the people that are part of your IT system.

A well defined CMDB provides a valuable resource for the an IT organization. The benefits include improved ability to understand the impact of an infrastructure change and better troubleshooting of a major incident. Implementing a CMDB should be based on the data needs of the IT process that will consume that data. A common failure for many CMDB projects is defining too broad of a data scope and over loading the CMDB with data that won't be used. A common best practice is to begin with the services the IT team manages and define the schema structure for those services. Think of this as a 'top down' approach that defines the data scope to ensure the CMDB includes the most valuable configuration information.

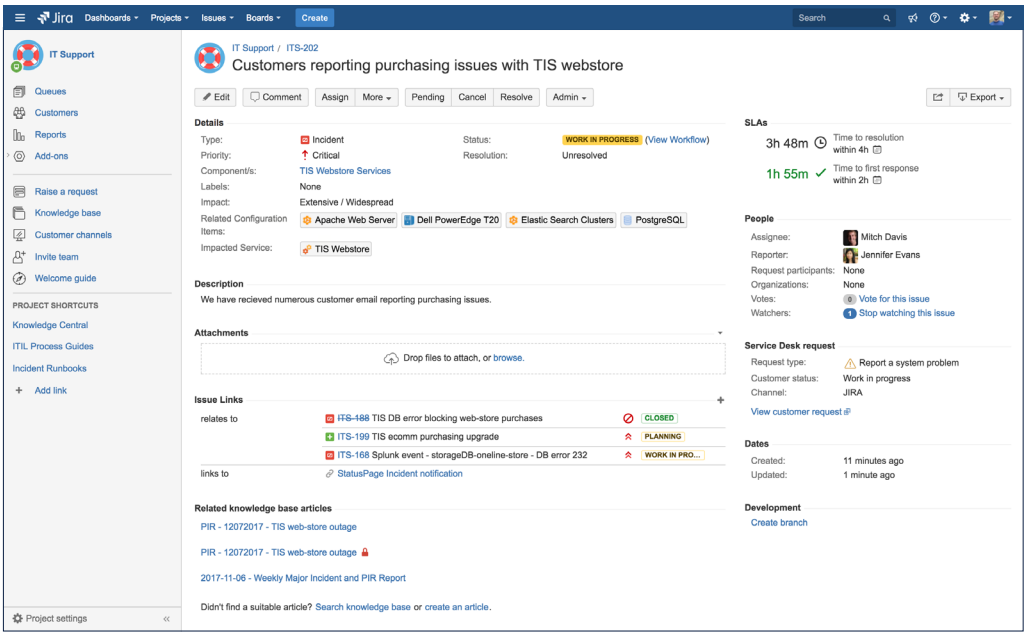
We realize every IT organization has varying asset and CMDB needs. Many customers look to the Atlassian Marketplace to find an asset and CMDB app that fits their needs. We can't cover all of them in this section but we'll share an example from one of the most popular apps.

Insight (a marketplace app by Riada) unleashes the power of asset and configuration management with the Atlassian platform. Insight provides a modern CMDB that allows an IT team to easily define asset application, and service structure that best fits their needs. It offers a greater level of flexibility when compared with other vendors. In addition to a flexible schema to match the business need, Insight provides dependency mapping and impact analysis, automation, and workflow integration in Jira Software and Jira Service Desk.



The Insight Platform extends Jira with a flexible CMDB solution. It allows any service team to track assets, as well as other contextual information related to the assets, to assist with the request and fulfillment process.

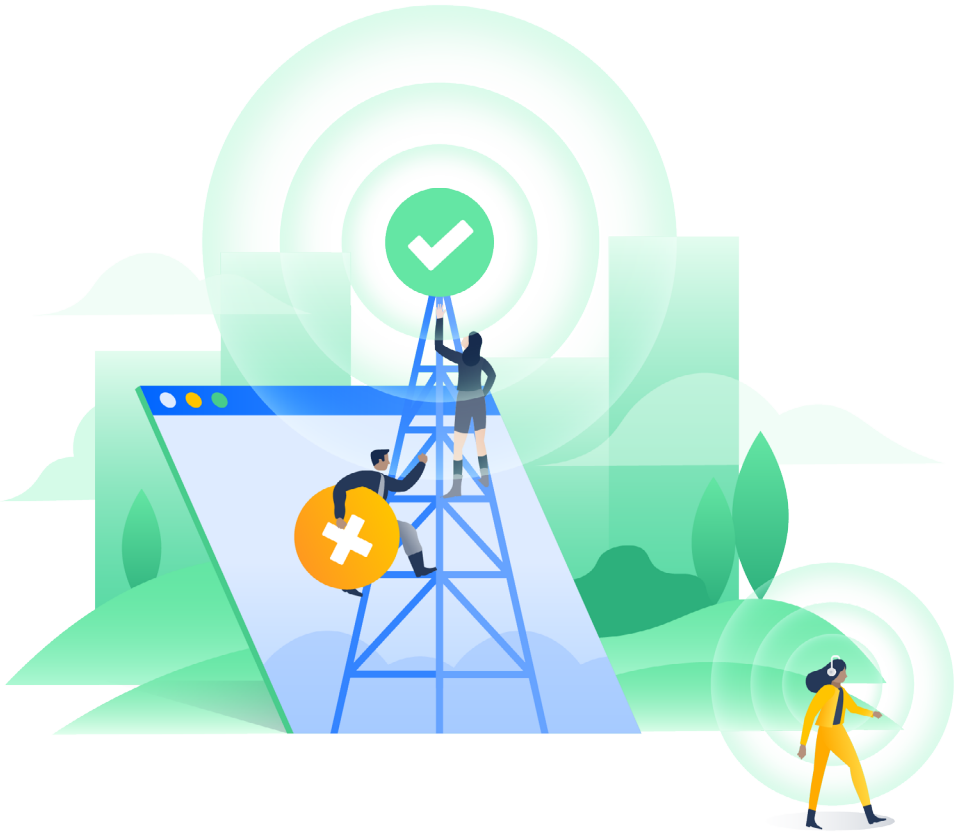
The real value of incident management is realized when IT teams have access to an accurate CMDB. When the outage clock is running, they need fast access to a central source that helps them understand the context of the outage. A CMDB can help them quickly find impacted CIs and services, pointing them to where they should troubleshoot. Relating CIs to incidents also improves visibility and helps aid with faster resolution times when similar incidents occur in the future. In this example we see a major incident where customers are impacted by a web-store outage. Asset Insight (from Riada) allows the IT team to explore the CIs related to the impacted service and they can browse the service topology to understand the CIs they need to investigate for the outage.



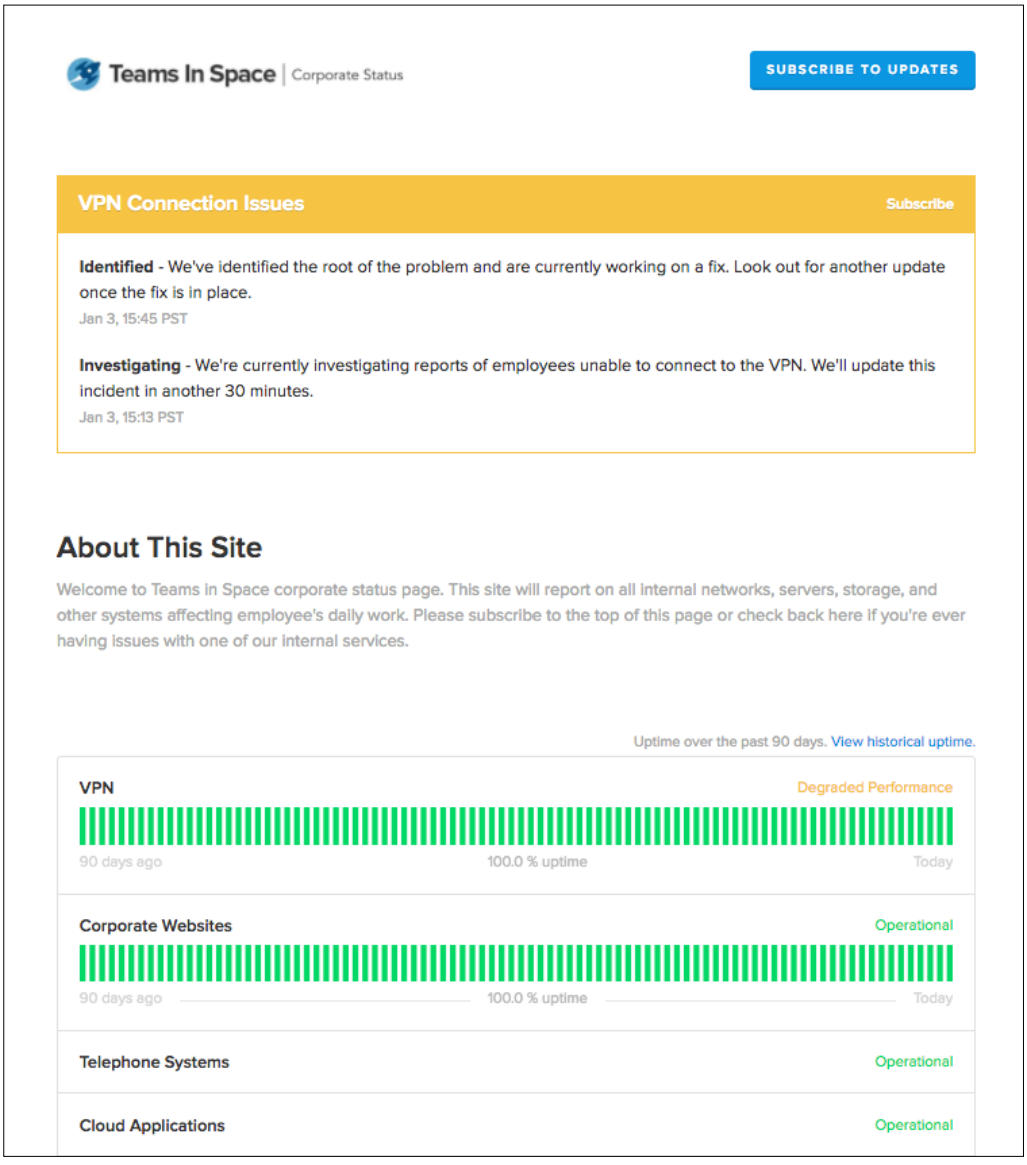
> **Every incident should be classified by impact, urgency, and severity. Using CMDB, your business application or service can be assigned with impact. User can enter urgency. Based on impact and urgency, system auto-assigns severity. Use of application/service context and automation provides the key to saving time and also escalating incidents in appropriate manner.**

Proactively communicate service disruptions

During an outage, communication is critical. Just as a company's support team keeps customers informed during downtime, IT teams should keep service stakeholders and employees in the loop. To accomplish this communication today, most IT teams use some form of mailing lists or simply respond to every incoming email from stakeholders asking, 'what's the status'? While these options have gotten the job done in the past, the amount of services that IT needs to support continues to increase year over year as companies adopt more third party SaaS products and as they build more microservices internally. Add on newer challenges like remote working and the problem of getting the right people the right information during downtime becomes a big pain for IT managers.

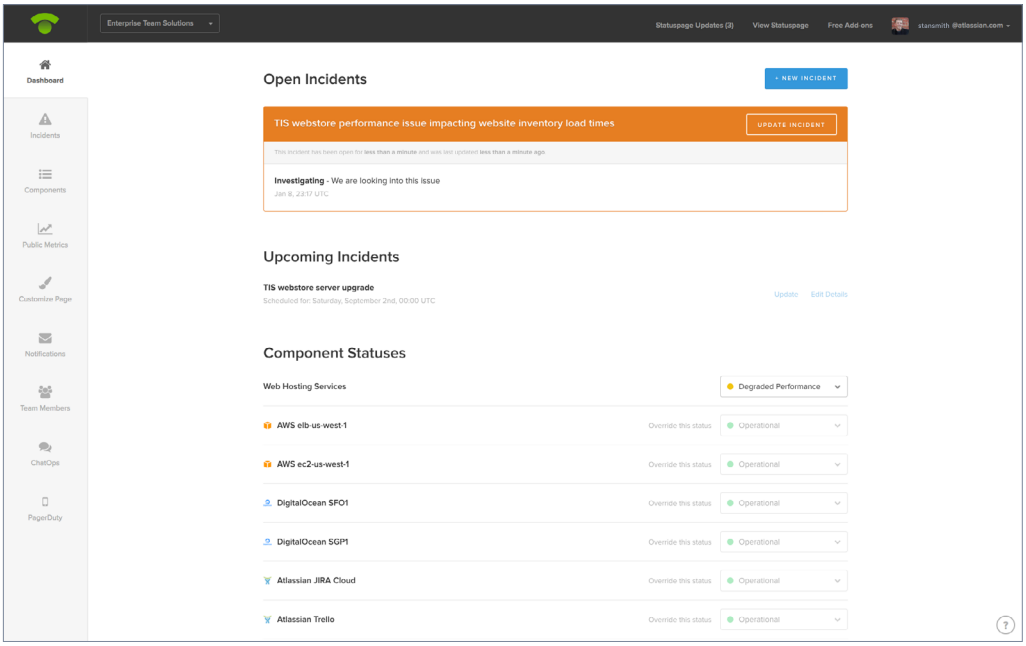


To get in front of the problem of inbound support surges, the best IT managers use a centralized dashboard to display the current status of services and provide clear, consistent, and proactive communication when services go down. At its core, Statuspage provides IT teams one place to report on the status of services that are critical to their companies. Employees have the ability to opt-in to the services relevant to them in order to receive both SMS and email notifications. These notifications are automatically sent when someone on the IT team creates, updates, or resolves an incident. By taking the burden off of IT teams to update mailing lists, figure out who needs to be kept in the loop during an incident, and respond to emails, they can instead focus on fixing the issue at hand. IT managers love the weight that Statuspage takes off their backs.



Another core tenant of a status page is that it needs to be hosted externally, outside of a company's server infrastructure. This way, if internal services go down, the status page will still be up and running, letting IT teams communicate effectively during outages. As a product, Statuspage has built-in redundancies across its own infrastructure and notification system, giving IT teams the assurance needed to depend on Statuspage when the inevitability of downtime happens.

While Statuspage works great for downtime, it also solves the problem of keeping employees informed of any upcoming scheduled maintenance. Most internal services need to be upgraded, updated, or changed at some point, which requires planned downtime. Stakeholders and customers can subscribe to updates, improving the way you communicate with them during outages.



Using Statuspage, IT teams can create the maintenance ahead of time for affected services and Statuspage will automatically notify relevant employees when the maintenance is created, when it starts, and when it ends - all without the IT team needing to manually update users.

> **Integrate Statuspage with Hipchat to pipe incident updates directly into your teams' chat rooms and cut down on the amount of internal 'what's the latest' chatter.**

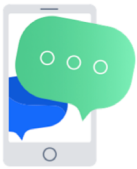
Use ChatOps for rapid response in real-time

Most IT teams have dealt with the dreaded 3 am phone bridge means for gathering IT teams to troubleshoot a major outage. This approach has gone the way of the rotary phone as IT teams have moved onto the use of other tools to improve collaboration.

ChatOps is a collaboration model that connects people, tools, process, and automation into a transparent workflow. This flow connects the work needed, the work happening, and the work done in a persistent location staffed by the people, bots, and related tools. The transparency tightens the feedback loop, improves information sharing, and enhances team collaboration.

Place tools in the middle of the conversation

Leverage team knowledge



Collaborate in real time

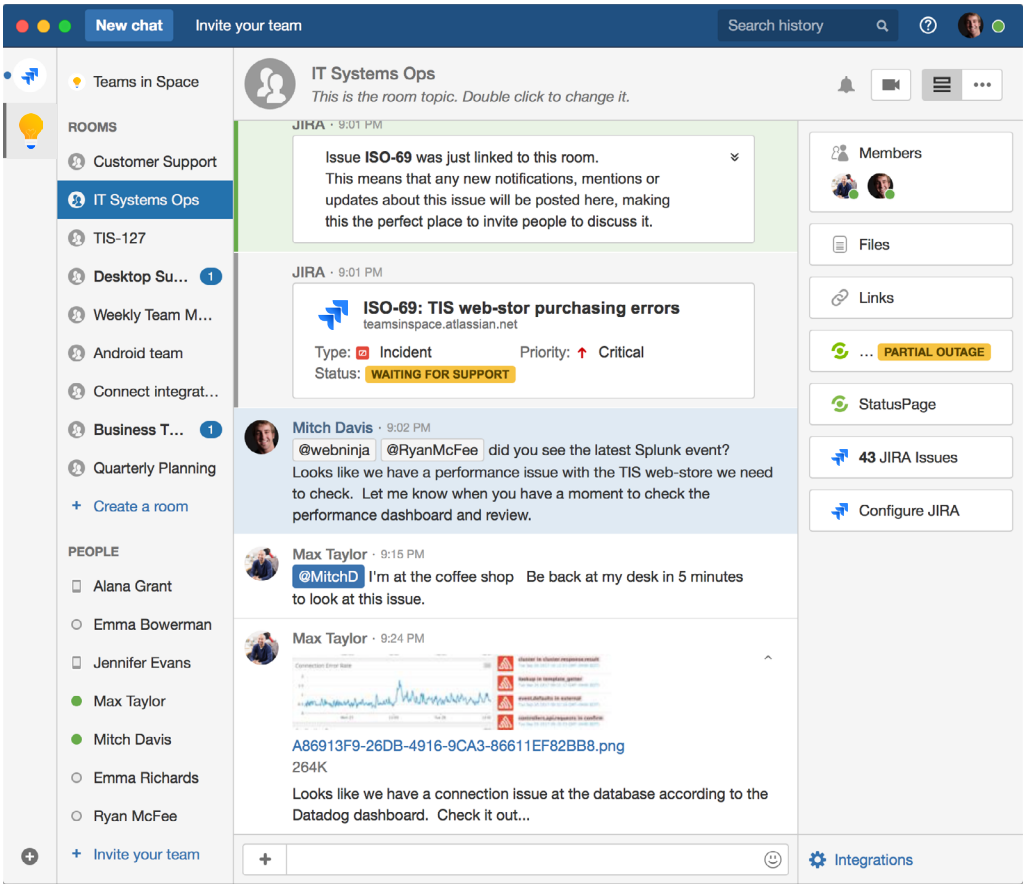
Lower incident MTTR

The use of modern-day integrated communication tools can be pivotal to shape team collaboration. Atlassian has found five ways support teams have adopted ChatOps to improve their overall support operations:

1. Kill your phone bridge and use ChatOps 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. Let the robots make you look good by adding bots that save time for common actions
5. Technical teams playing on the same field - improved IT and dev team collaboration

Hipchat offers a powerful integration with Jira Software, Jira Service Desk and Confluence that empowers teams with centralized alerts and notifications as well as contextual discussions and troubleshooting. When an incident occurs, your team needs a common space to huddle and share information in real-time. No one wants to navigate an incident through fragmented updates via one-on-one chat, or blindly scroll through conversation history to find the source of the incident.

The Jira integration for Hipchat lets you create a dedicated chat room directly from the Jira Service Desk issue and track the incident with a single click. From there you can invite others to join and configure exactly which corresponding issues get piped into that room. You can pull up a list of the chat rooms where that issue is being talked about, making it easier to gather info during an incident or redirect team members to the right rooms.



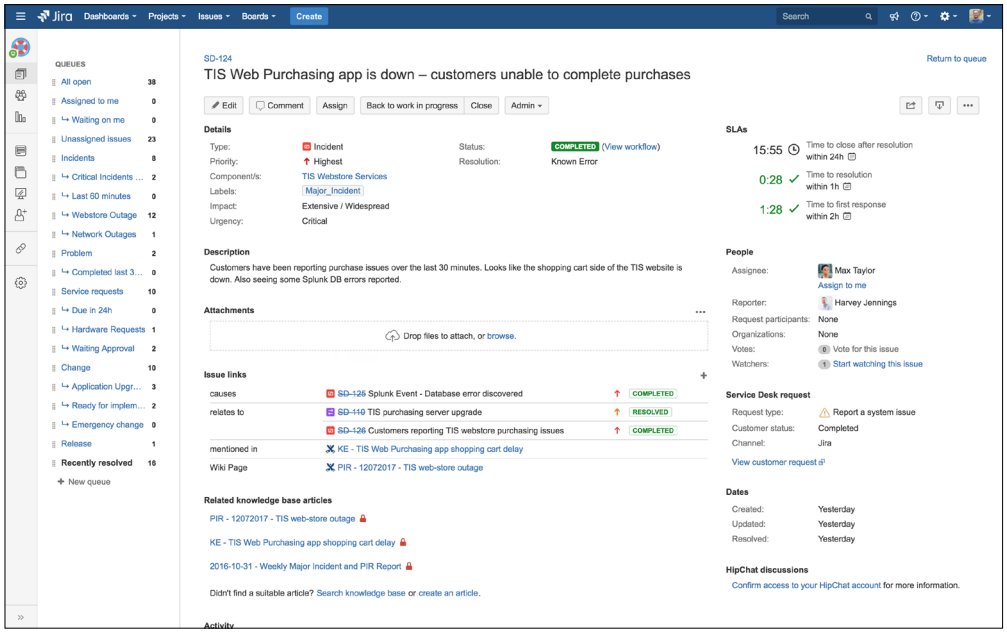
Adopt a formal Post Incident Review (PIR) process

Many IT teams consider their job complete once normal service is restored and the incident is marked resolved. This is oftentimes the fault of legacy ITSM tools because they have a few fields to capture resolution data but they fail to carry the learning forward. Valuable lessons are to be found in major incidents. Lessons that help IT deliver on the promise of continual service improvement.

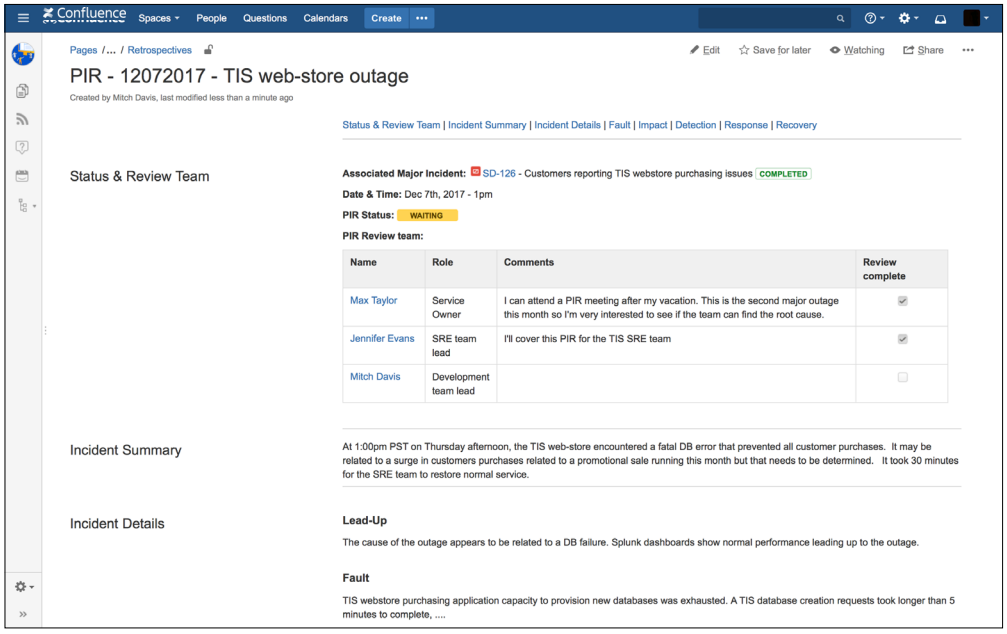
Atlassian has found that highly effective teams implement a formal Post Incident Review (PIR) process for major incidents. Here are the best practices many of these teams follow:

- Establish a culture where the goal isn't finding blame, but is focused on the team unlocking critical lessons and understanding all contributing root causes
- Provide a repeatable PIR process that is simple to follow and encourages collaboration
- Link all related items created from the PIR to the original incident to improve visibility
- Create/revise internal troubleshooting knowledge base documents and Runbooks for future reference
- Create preventative actions (changes, bugs, etc.) that help reduce the likelihood of incident recurrence and help improve service quality
- Post and share the PIR results and overall progress via reporting and dashboards with other teams

We've found IT teams appreciate the ability to use tools that fit their PIR process. They use the Incident record in Jira Service Desk as the parent record for linking all things relevant to a PIR. Jira Service Desk automation allows the IT team to keep linked issues updated relevant to a PIR.



Confluence provides an excellent environment for cross-functional teams to collaborate during a PIR. Many customers have standardized their process by creating a Confluence template that allows a team to quickly get started.



Documenting PIRs in Confluence also improves visibility for management. It allows the IT organization to publish reports and dashboards that show the progress for improving key services.

Find the root cause of problems faster

With incident management, IT teams are focused on restoring normal service as quickly as possible. They don't have time to slow down and search for the underlying root-cause. Problem management is a valuable ITSM discipline that focuses on in-depth investigation to find the real cause and to make sure the problem causing an incident is completely fixed so it won't happen again. The main focus of problem management is to increase long-term service stability and, consequently, customer satisfaction.

In theory, problem management is a worthwhile objective, but many IT teams struggle to achieve an effective capability. It's challenging to move past reactive problem management to realizing the true value found in a proactive approach. This type of problem management places the IT team, that's responsible for problem investigations, in the driver's seat. They are better connected to other teams; including the business. They take on problem investigations that are most important to the business and deliver on the goal of improving overall service quality. In addition to monitoring incidents and PIR results, they analyze data from across teams and services to identify where they should invest their time. They are focused on the areas that offer the greatest return for service improvement.

> **Problem management is reliant on the inputs and information from the incident management process. Therefore it's important to make sure you have a mature and established incident management process before you start on problem management.**

For example, a problem management team is closely aligned to the software releases the development team ships for critical business systems and services. They monitor IT changes, incident, bugs and overall performance trends to best understand where their next investigation should focus. Recent e-commerce system performance issues have caught their attention. While no major incidents have occurred from this issue they want to stay ahead of this potential for an outage. Since this is a critical business service they open a problem investigation to find the root-cause of the performance issues. The result of this investigation may result in them publishing a Known Error to help the IT Ops team restore an outage quickly or lead to a major change to fix a hardware issue. It also improves feedback to the software team, with valuable bug reports sent directly to their backlog.

The problem management teams strategy focuses on the greatest needs of the business. This may include improving the top business services by reducing outages and improving availability. This business oriented approach will help keep the IT team grounded in the real reasons for problem management.

Atlassian believes this is an important IT support process that IT teams should consider adopting. It offers a pathway toward not only reducing incidents but plays an important role with continual service improvement. We've found problem management is most effective when it offers a lean fit for the way IT teams work, while delivering a collaborative approach to proactive problem investigations that offer the greatest value to the organization. Problem investigation teams also benefit when everyone is working on a common shared platform, making it easier to find root-causes faster.

Problem Investigation

Jira Service Desk

Recent changes
Trending incidents
Major outages (sev 1 + 2)

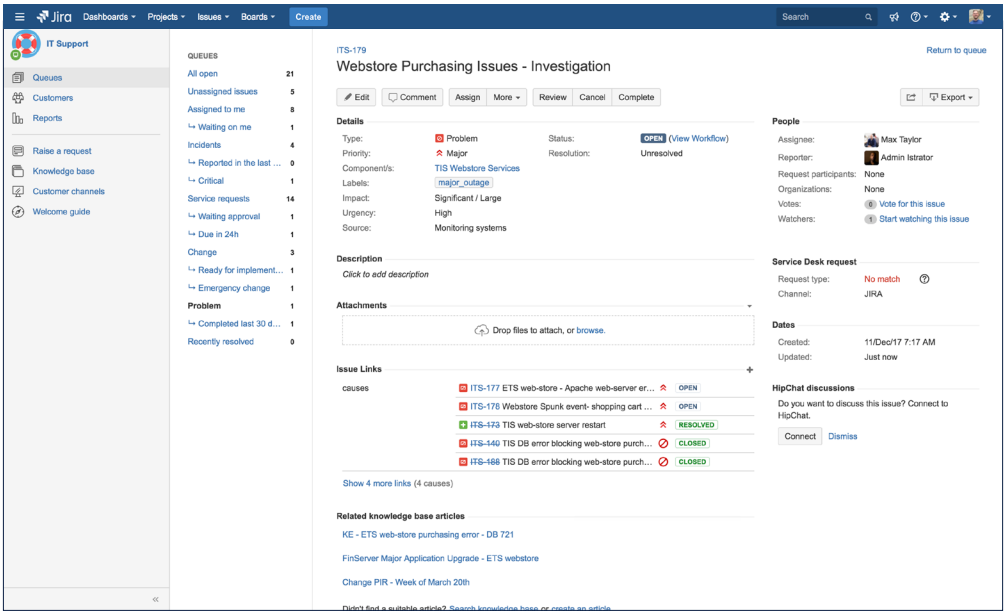
Confluence

PIR
Change implementation plans
Internal KBs

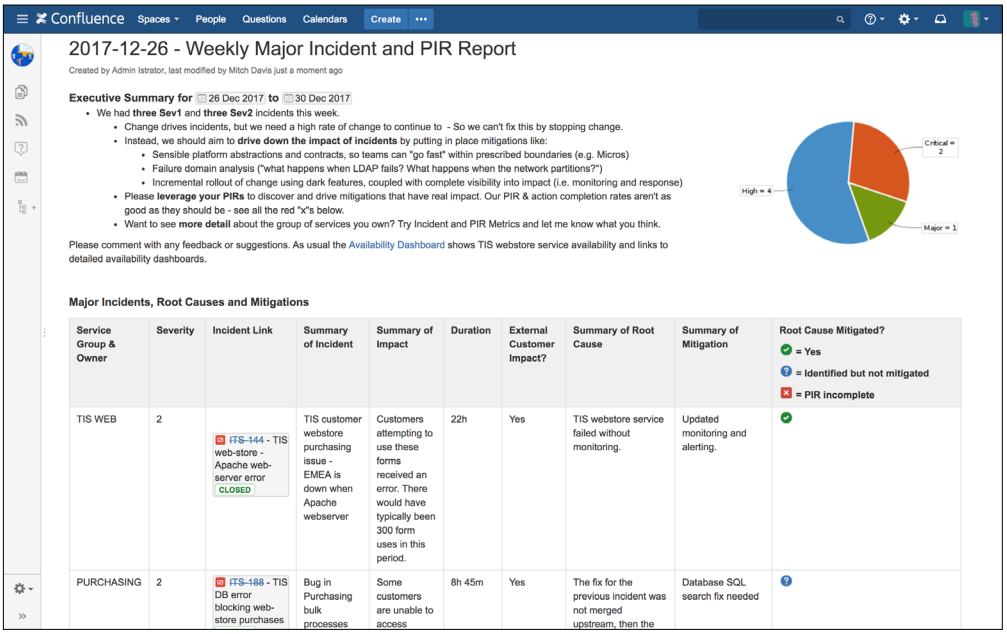
Jira Software

Recent releases
Open bugs

As the problem investigation team researches an issue, they need a way to easily link related incidents, software bugs, changes, and other information to the investigation. Jira Service Desk makes it easy for them to link this type of information to the problem record. This increases visibility and makes the problem team more effective.



Incident PIRs are a great place to start to understand the top business impact incidents the IT team should tackle first. This example shows a weekly PIR summary report published by the IT operations team. This provides a rich source of data for the problem team to reference in their planning and investigations.



While tools and technology are a great source of collaboration, the team's real predictor of success is how effectively and frequently they communicate. The needs for communication are higher as risk and complexity grows. It is highly recommended that you introduce agile ceremonies such as daily standups as part of your team's routine to share progress, highlight roadblocks, and sync up on the day's expectations. If any team members are working remotely, fire up a call using Hipchat video chat, and create a shared Trello board to improve communications.

Jira Service Desk also provides the flexibility to define reporting that matters most to a problem management team. Some of the common KPIs metrics they track in reports and dashboards include:

- Problems reported by (category, organizational unit, person, etc.)
- Trends associated with problem backlog
- Problems resolved within the SLA targets
- Percentage of problems exceeding SLA targets

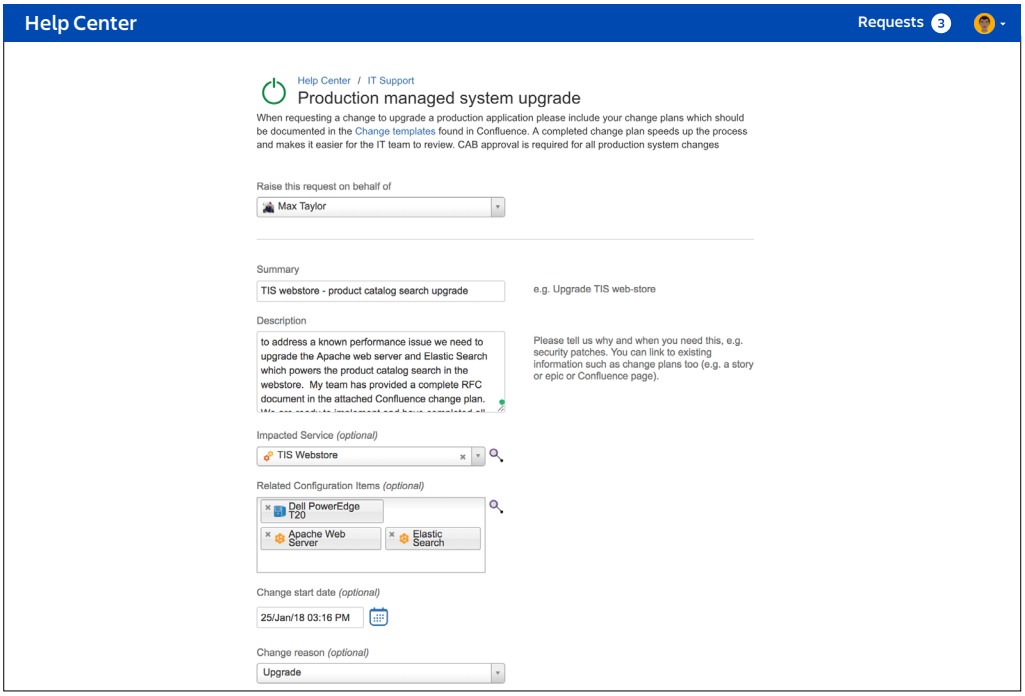
> **Automated spawning of tickets based on conditional or business logic is a great way to harness the power Jira's workflow engine and to drive process efficiencies.**

Streamline your approach to change management

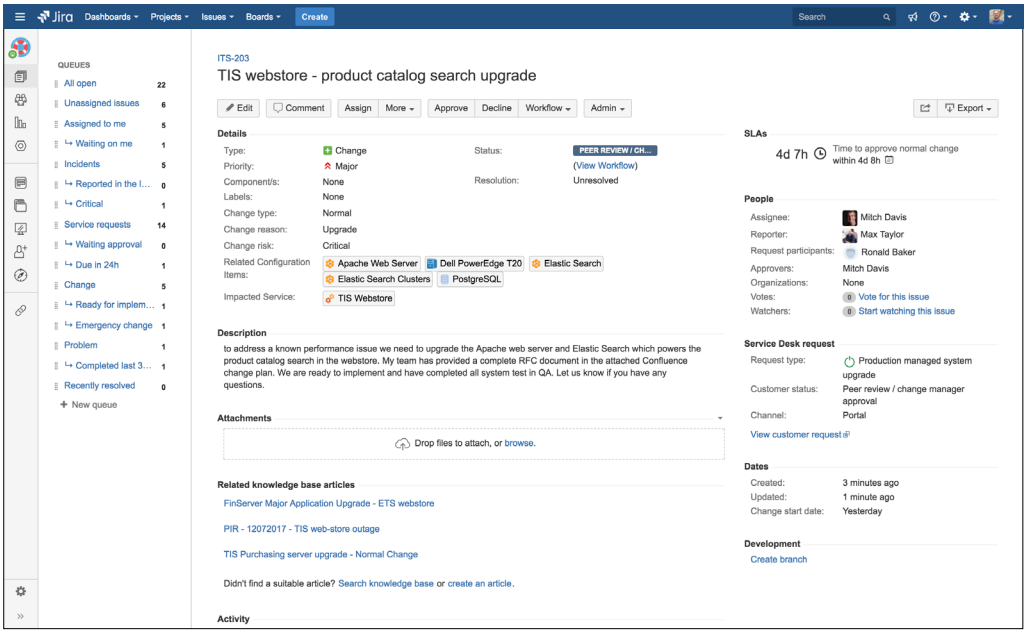
Every IT team faces the challenge of managing a constantly changing IT infrastructure, whether it's rolling out new technologies, managing existing ones, or keeping up with a never-ending churn of updates and upgrades. The rate of change is also increasing as we accelerate into a "services first" world, and on top of that, demanding regulations require IT teams to provide a detailed audit history of system changes. To manage change successfully, IT teams need a repeatable, streamlined process that captures the appropriate data and meets regulations. Change management is used to manage these changes and to help to improve the availability of IT services, especially the services that are critical to the business.

Change management is often a heavy process that requires days of lead time, is plagued by a lack of information sharing between IT and development (especially when it's difficult for the development team to capture changes) and the approval process is often complex, which slows down the process. The Atlassian approach to change management provides a path toward lean change management, which can meet the pace of your IT team while enforcing your change policy.

Having a streamlined approach is possible when an IT organization makes it easy for the process to get started, uses collaborative peer reviews to speed up the approval process, integrates IT and development teams to improve coordination on infrastructure and software development life cycle, and moves critical documents (aka change plans) into Confluence. Many IT teams find it frustrating to raise a change request with the IT team responsible for managing that process. With Jira Service Desk, you can streamline the request intake by using the customer portal to make it easy for IT teams to raise a change request.



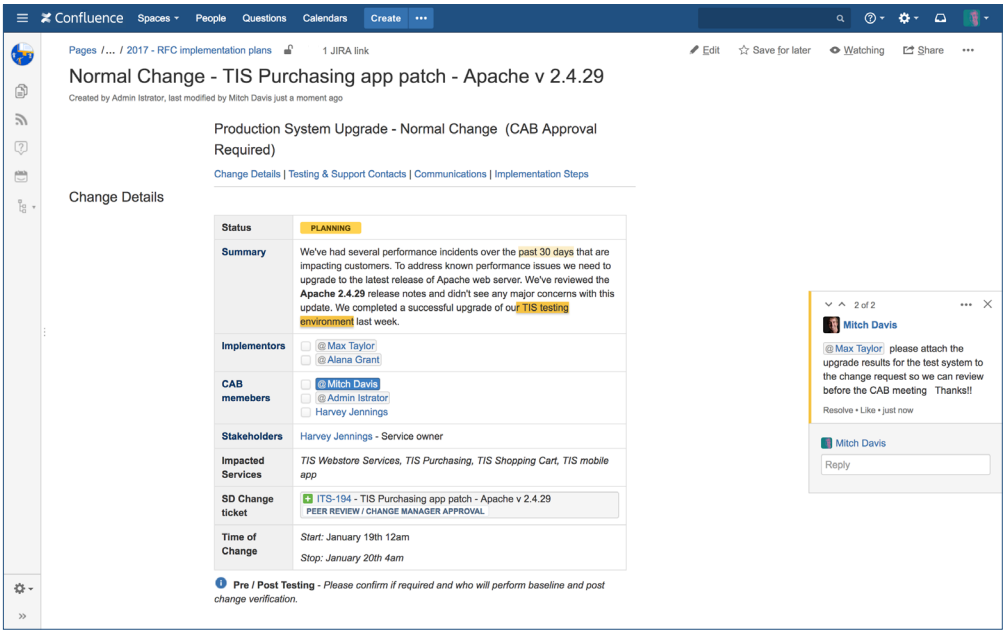
You can also power your Jira tickets with a CMDB integration to extend automatic mapping of all contextual information relevant to the fulfillment of the request. These data points may also account for the time sensitivity of a change request, ensuring that the minimum standards on due-diligence are met for a healthy balance between speed and risk. Jira Service Desk and Riada Insight offer a powerful solution to map complex data sets and business rules right in the context of your change requests.



Once your change requests are mapped with all relevant data points, Jira workflow automation can be used to enable your processes and standards. For instance, the Jira workflow can dynamically pivot to facilitate one or multiple approvals, as required. Jira workflows automation can route and assign the request to the next authorized person in charge per your business rules, and can validate that only the authorized person (or people) can provide approvals for a specific change request.

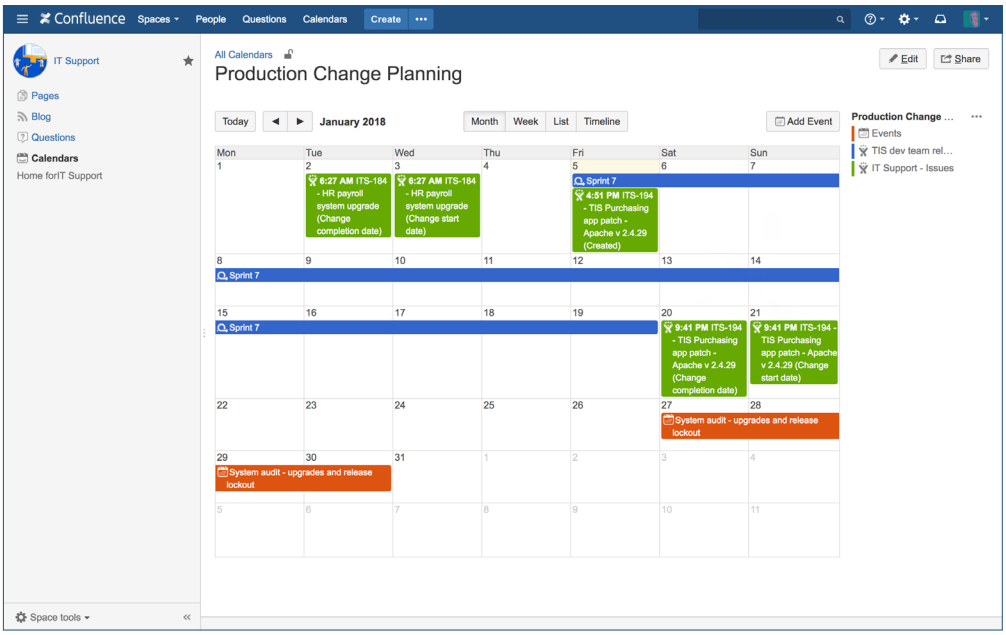
Centralize and visualize your change plans

One of the biggest hindrances for improving the change process is tracking all of the documentation outside the process. Atlassian believes IT teams collaborating on these types of critical requests need a place where they can centralize their change plans to improve the way they plan, implement and review the results. High performing teams work together to maximize productivity. Confluence combines the speed of creating on your own with the advantages of working together. This makes it easy to create change documents as a team, provide feedback in context and quickly iterate until the change is implemented. In this example we see how a Change Manager has asked a question on the Confluence page. These types of simple interactions improve the way the team communicates.



Visibility is also an important factor when planning a change request. Part of this is achieved with using a CMDB to help understand the risk and service impact when upgrading an application or database. The other part of visibility can be difficult to achieve because it's dependent on cross-functional teams sharing information.

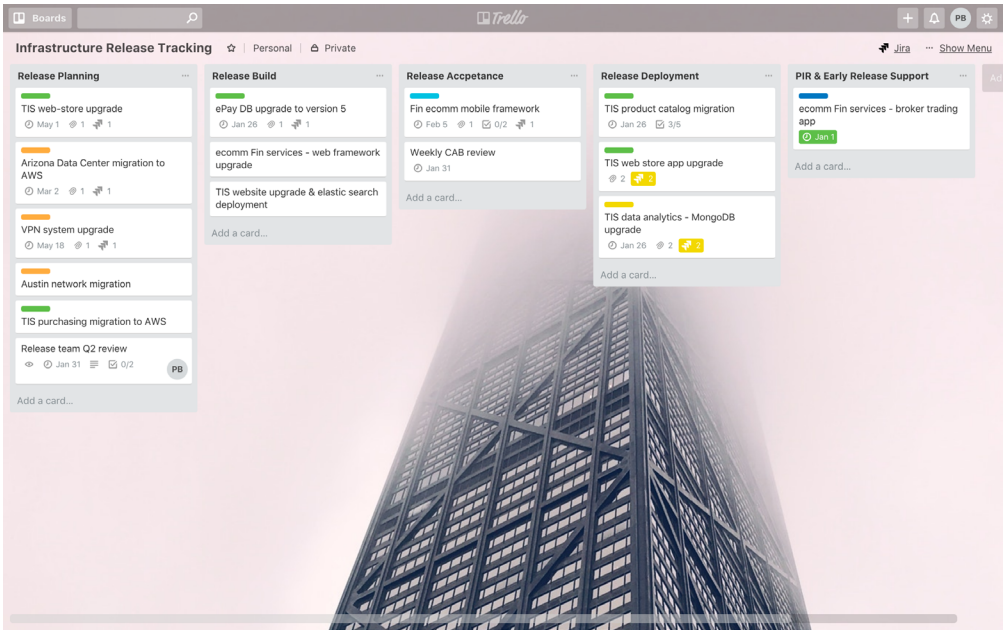
What major projects is the PMO team currently managing? Are there any upgrade blackouts in place? When will the software team ship the next release? These are all important data points that need to be communicated across teams. Atlassian has found IT teams responsible for change management use Team Calendars for Confluence (a marketplace app) as a single source of truth for managing all change requests.



Team Calendars for Confluence provides visibility across multiple sources of Jira and event data. This allows a change manager to see which time frames are best for implementing a change and it also allows them to see when the software team is in a sprint to avoid any conflicts that may cause an issue with an upcoming release. This comprehensive view means they can not only better coordinate change requests but they can also avoid collisions with software releases.

Atlassian has also found change management teams love to use Confluence for their PIRs. Some even use the change plan documented in Confluence as a starting point and include the PIR as a section in the document. The ability to collaborate and learn from major changes is an important factor for improving change success rate.

Customers also love using Trello to manage the flow of their change work. The use of a Trello board improves visibility across teams and allows them to link Trello cards to the change request in Jira Service Desk or the detailed change in Confluence. In this example we see how a Trello board tracks major releases of changes as they move toward release into the production environment.



Automate where you can, streamline where you can't

According to a 2017 study by McKinsey, 45% of work activities can be automated with currently demonstrated technologies. These time savings represent $2 trillion in annual wages. Imagine for a moment 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?

Gartner research also found that 75% of enterprise IT organizations have deployed some level of automation. That's a 20% increase when compared with 2016. In a short amount of time, automation has become a key cornerstone for ITSM success. Yet, many see the adoption of IT automation as a difficult and costly venture. How many developers do I need on my IT team? What does this add to my budget? Does the cost outweigh the gain?

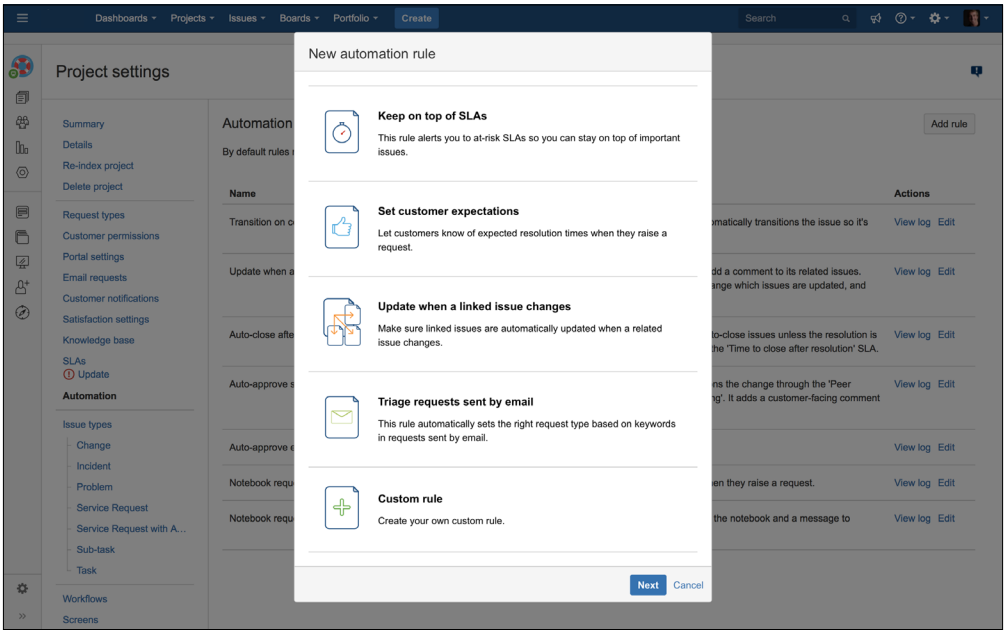
Atlassian realized the importance of automation for IT teams and included it as a key capability in Jira Service Desk. We also know that it needs to be super simple to implement. IT teams have a lot of work on their plate and they don't need another time consuming development task. Jira Service Desk provides a simple, intuitive UI where a project admin can easily define the rule that will replace a manual task. The automation engine performs actions based on specific events and conditions defined by the project admin. We've found the adoption of Jira Service Desk automation grows quickly within an IT support organization as they identify common repetitive tasks to automate.

- Email is received → Create a ticket
- System goes down → Change priority
- SLA due → Escalate ticket
- Jira issues resolved → Add comment to request
- Ticket status changes → Update incident
- Ticket is approved → Grant access and send reminder
- Request for new development VM → Webhook provision VM

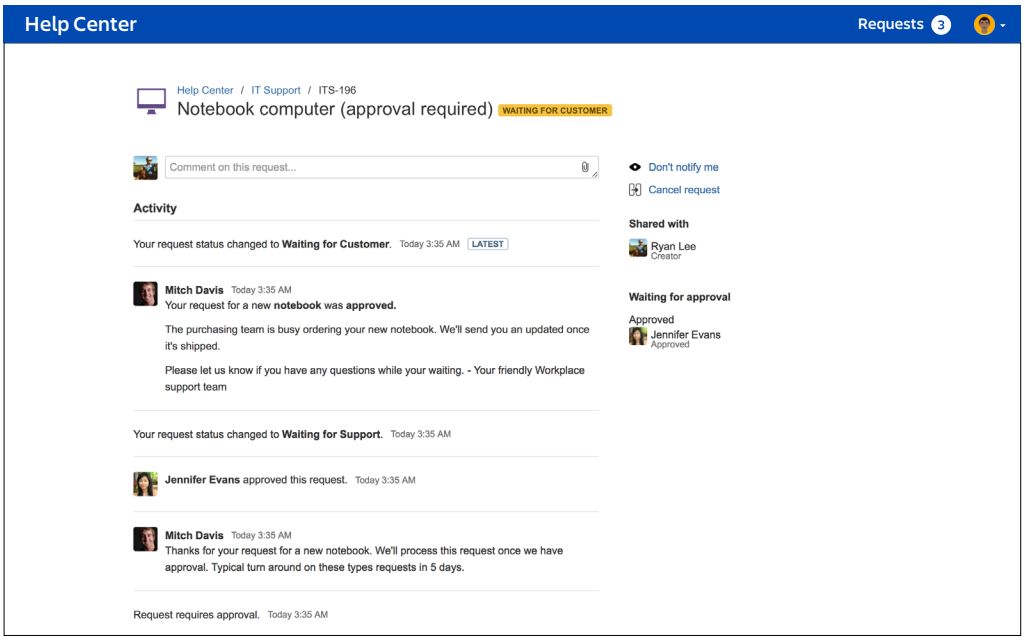
Atlassian also realizes that not every task is a candidate for automation. Here's a few automation tips to help you find the ones that will deliver the greatest value:

- Review common requests with your support teams to identify the ones with the greatest pain points
- Identify requests that need additional attention–automation is a great helper for proactive monitoring of requests
- Apply automation to common user self-service requests to improve your CSAT
- Streamline common incident management activity–improve your team's ability to respond to outages
- Automate standard change requests approvals to gain efficiency and the appreciation of IT teams
- Implement rules that keep linked issues updated–agents will love the time savings
- Start small, learn from the results and build on your success

Jira Service Desk automation rules perform actions based on specific events and conditions. Out of the box, we provide a handful of automation rules to help you boost productivity and burn down the queue (not literally, though). More importantly, we then give you the ability to write your own rules without needing to learn a new programming language or get expensive consulting.

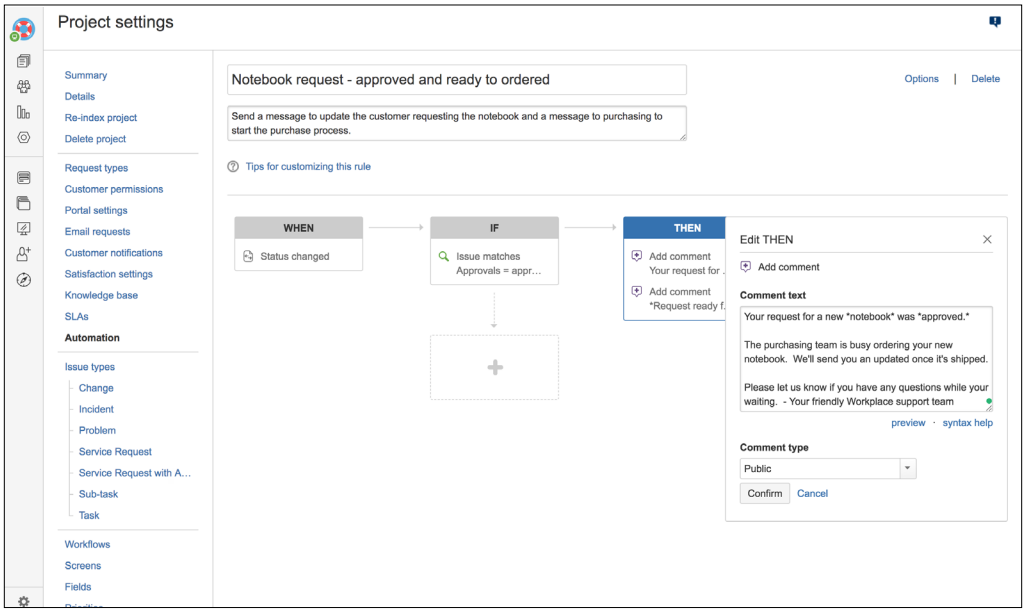


To illustrate the value of Jira Service Desk automation, let's consider a couple of common examples. Improving the way IT teams respond to common requests is a great place to start. In this example we see the results of several automation rules updating a request for a new Macbook.



It may appear that Mitch Davis wrote the friendly comments to update Ryan about his request for a new Macbook, but these were added by an automation rule. This type of update not only saves time for the IT team but it improves the level of communication with their customers, which results in overall satisfaction with support. Let's take a closer look at the automation rule use to create this update.

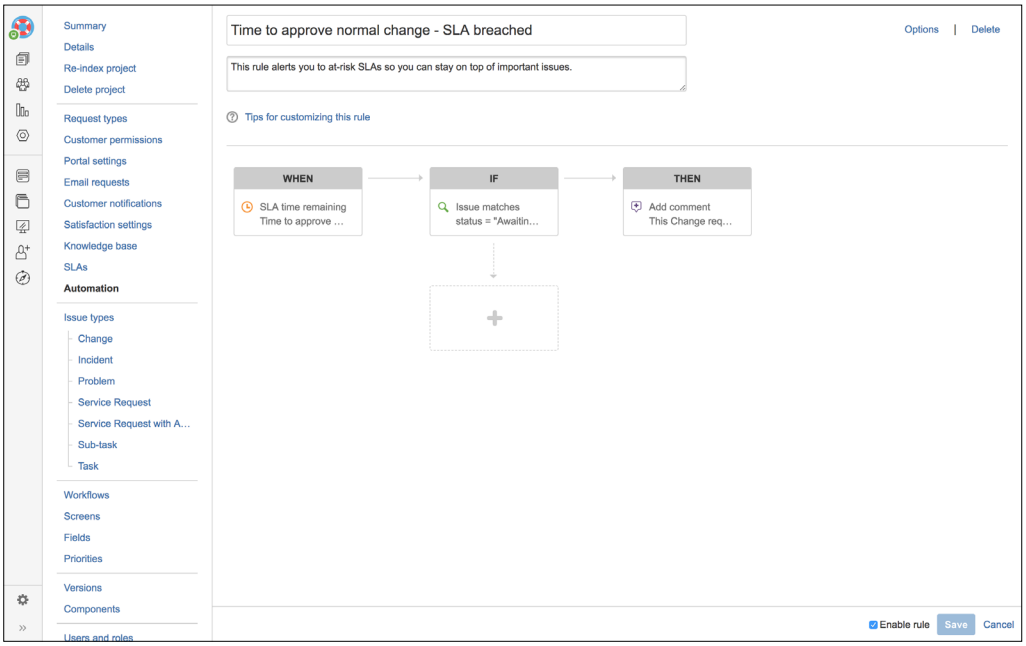
As you can see in this example, it's easy to configure an Automation rule. **When** the status of the service request changes and **if** it matches request a Macbook that is approved **then** it will add two comments to the request. The first comment is show in this example, which is the friendly update to the requester for the expected time for delivery of the new Mac. The second is an internal comment to inform the purchasing team the request is ready for them to fulfill.



What are some of the other ways an automation rule can interact with a request? You have quite a few options at your disposal. Adding a comment with the power of an @ mention is simply powerful one that is commonly used, but you can also transition the issue to a new status, send an email to notify someone, edit the issue to change values or you can contact external systems with web-hooks. These are just a few of the possibilities in your automation 'toolbox'.

With so many change requests in-flight, an IT team needs a way to automate common, repetitive tasks with automation. When we combine automation with SLAs we find the right combination to create a proactive approach to change management.

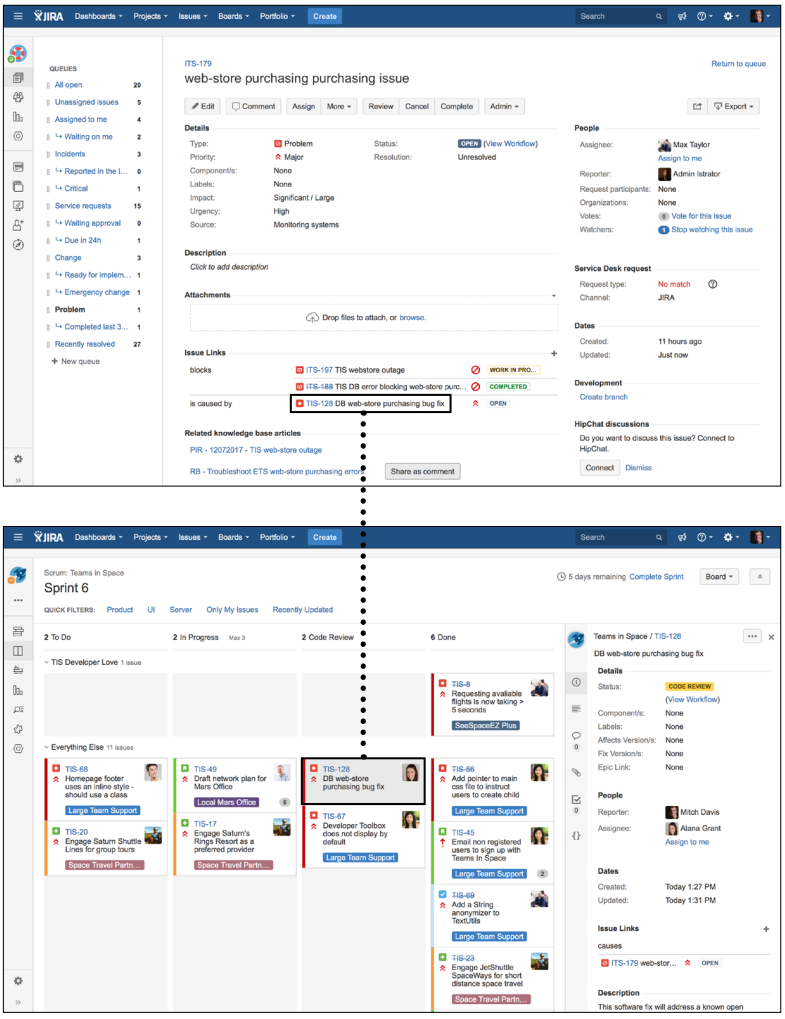
IT teams can use the power of Jira Service Desk automation to improve and streamline their change management process. In this example we see how automation sets an important process reminder for the change implementer based on an SLA. Automation can also be used to auto-approve a standard change to help further streamline the process and save time.



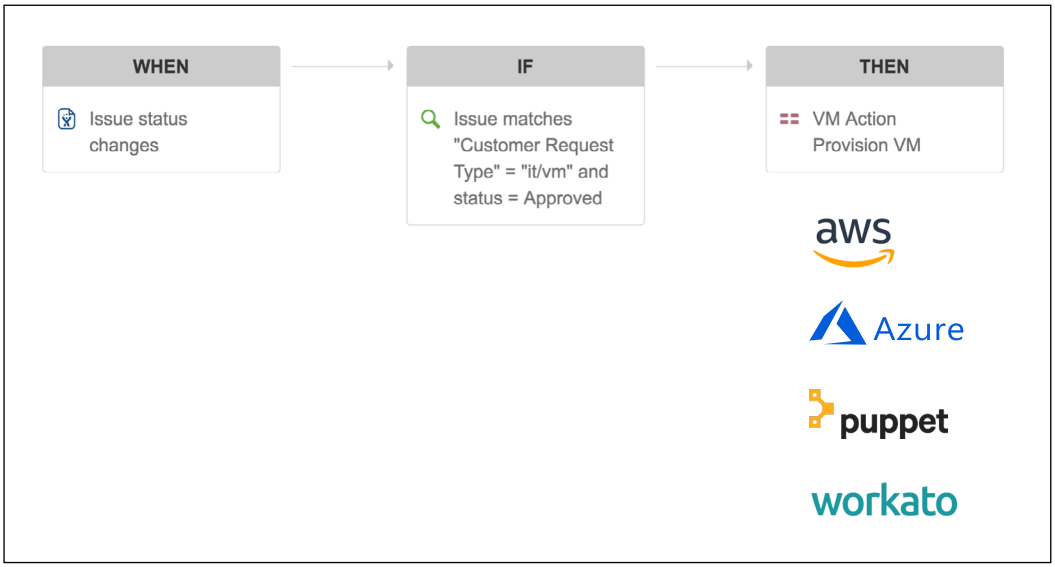
Here's the details of how it works:

- We've defined an SLA to count time between ready for review and finished
- In our workflow, a change is ready for review when it goes into the status of awaiting change review
- The review is finished when reviewer approves it
- This automation rule keeps the process on track and reminds change reviewers about a request when it slips past them

Automation also plays a key role in improving cross-functional work between teams. Let's say the IT team found a software bug during a problem investigation, they can leverage the power of Jira to create a linked issue. This increases the visibility between the two teams but it also means they need to stay up to date with the status of the bug fix. The IT team don't have time to camp-out and monitor the bug fix to know when the software team will ship it. That's where an automation rule can keep the linked issues synced and the teams updated. When the software team transitions the bug from their backlog to In Progress, then the automation rule updates the problem investigation ticket with a comment and notification to the IT team. IT and software teams on the same page, life is good.



Some customers have taken automation to the next level by using Atlassian Marketplace apps to automate common steps and tasks in their change management process. In this example we see an automation rule that uses automation webhooks to provision a new development VM once the change request is approved.



Save time and money with a simply affordable solution

Cost shouldn't be everything when choosing a service desk. In fact, it's far more important to choose a solution that delivers the value you need today, and the room to grow for tomorrow. At the same time, nobody likes to overpay for fancy features they don't use or need, and many legacy service desk providers are still charging legacy prices. Now, add complicated contracts, lengthy implementations, expensive consultants, maintenance and customizations which quickly compound your costs. If you're drowning in these extra expenses, it may be time to take a look at Jira Service Desk.

#1 Most Affordable ITSM Software

Jira Service Desk is the #1 Most Affordable ITSM software (and the #1 Most Popular ITSM software) based on Capterra's research, which compiles user reviews and ratings with product information such as pricing and number of users. To determine the most affordable software, Capterra looked at the available features of a system, the cost of those features, and what actual users said about those systems in customer reviews. For their analysis, they compiled a pricing scenario based on a typical ITSM software buyer. The standard, expected features they considered were:

- Incident/ticket management
- Change management
- Problem management
- Configuration management
- Contract/license management
- Self-service portal
- Knowledge base management

> **With an affordability score of 92, Jira Service Desk was the #1 Most Affordable ITSM system. Jira Service Desk offers a fully featured ITSM at the lowest monthly cost of all featured solutions.**
>
> -Rachel Wile, Capterra's Senior Product Research Analyst

No hidden renewal costs

Many legacy vendors are still play pricing games, holding you hostage with big price hikes or hidden fees at renewal time. They win your business with low introductory rates, then charge a huge premium once the term is up. Put kindly, we think that's silly – so we keep our prices totally transparent, affordable, and predictable.

Use cases for ITSM and beyond, at no extra charge

Rather than make users pay and configure additional modules for new functionality or use cases like many legacy vendors, Jira Service Desk includes customizable templates for ITSM, customer service, and business teams like HR and finance. The flexibility and simplicity of the product allows every team across the company to offer a basic service desk to take and fulfill requests, from marketing and creative teams to facilities and legal.

Easier implementation, configuration and administration

IT organizations have limited resources and budgets and are looking for an ITSM tool set that offers a fast path to implementation without busting the budget. Atlassian products makes this possible with implementation projects in weeks and not months.

Based on the G2Crowd Service Desk Implementation Index Report, the industry average implementation time is 3.3 months. The average ServiceNow implementation takes 4.5 months, while Jira Service Desk takes just 1.2. That's because Jira Service Desk is designed to be easier and more intuitive from the ground up – so you can implement it yourself, even at companies with 10,000 agents or more. In fact, one of the world's largest electronics corporations recently set up a lean ITIL operation (combining service request, incident, problem and change management) in just three weeks using Jira Service Desk.

And while Atlassian Solution Partners are available to help at every step of the way, you can easily maintain and even extend Jira Service Desk without paying for third party expertise or in-house developers.

Supercharge your ITSM solution with Marketplace apps

Like many companies in the DevOps era, you may be making the shift from closed-off, tough-to-integrate tools to more modern solutions that embrace openness and extensibility. It's a huge trend, as even some of the largest enterprises start to standardize around open-source frameworks like Node.js.

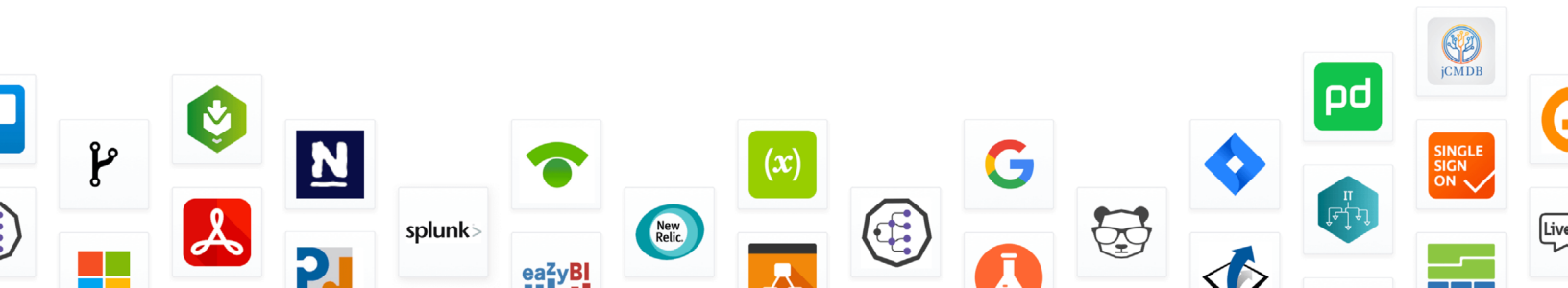
Yet, many legacy service desks aren't following suit, doubling down on their proprietary platforms that require costly consultants or extensive vendor-specific training. That makes it harder (and more expensive) to connect your systems, maintain critical customizations, and deliver top-tier service to your customers. With Atlassians approach to ITSM with Jira Service Desk, you get:

A more modern approach to development

As a Jira Service Desk customer, you can easily develop your own apps, integrate with other cloud products, and extend your out-of-the-box functionality using Node.js or other open, community-driven frameworks. Our APIs are open, and we offer extensive Jira Development Guides to make it even easier to build your own applications or connect Jira Service Desk with your other external systems.

Tons of ITSM apps to make integrations even easier

It would be impossible to list all 600+ Jira Service Desk apps here–but if you can imagine it, then the Atlassian Marketplace probably has an app for it. Many provide one-click integration to the tools you already use–like Splunk, BigPanda, and more. Just a few of our favorite ITSM apps include:



BigPanda for Jira
Enables IT Ops to create Jira issues from high-level, correlated incidents in BigPanda.

Comala Workflows for Confluence
Set customized workflows to create, review, approve, and publish your knowledge base content.

Real-time Splunk for Jira Service Desk
Automatically turn Splunk events into real-time Jira incidents, and make sure the right people know.

Refined Theme for Jira Service Desk
Customize and brand your Jira Service Desk theme and add rich content for an even better customer experience.

Riada Insight - Asset Management for Jira
Add the power of Enterprise Asset Management to the Atlassian platform, including a modern CMDB for ITSM.

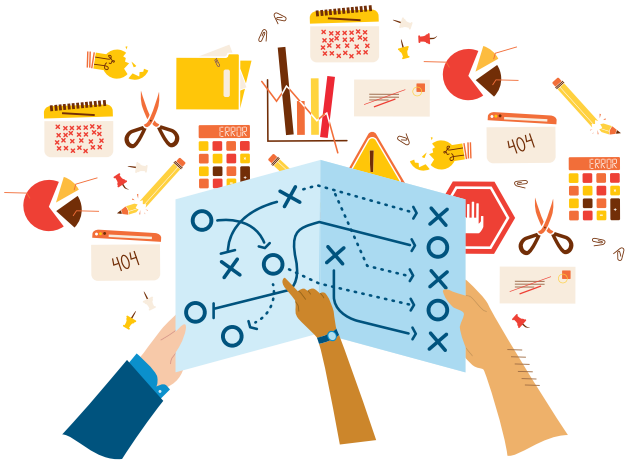
Riada Insight Discovery
Automatically scan your enterprise network, discover assets, and map dependencies in your Riada Insight CMDB–all on the Jira platform.

Service Advisor for Jira Service Desk
Investigate and resolve incidents up to 50% faster with an app-centric view of Jira Service Desk incidents, changes, problems, and components.

Workato integrations for Atlassian
Integrate Jira Service Desk, Confluence, and Jira Software with thousands of apps to automate your DevOps and ITOps–from Bitbucket and Splunk to Jenkins, Github, NewRelic and more.

xMatters Actionable IT Alerts for Jira
Automatically communicate with the correct on-call resources to resolve issues faster, integrating xMatters and Jira.

Unleash your team's potential with the Atlassian Team Playbook



Atlassian wants to unleash the potential in every team. But it takes more than giving the right tools to the right people–you need the right practices, too. That's why we opened up our Team Playbook. Here, you'll find tool-agnostic techniques Atlassian teams use every day to unleash their potential and do the best work of their lives. Step-by-step instructions for tracking your team's health, and new ways of working ("plays") that build your Get $#!t Done muscle. Use the plays on their own, or in concert with Atlassian tools.

We developed the Team Playbook to transform the way we work. And it has. This ain't your CEO's management book. It's by teams, for teams–any team. It's tactical, battle-tested, and bull$#!t-free. Anyone–from interns to executives–can use the Team Playbook.

How to use the Team Playbook

There's no prescribed method, but we do have three suggestions.

Step one, Health Monitor

You can opt to start with a Health Monitor workshop. This provides a baseline for your team's health, tracking your progress, and building trust amongst team members.

Filter plays by pain point

Already know points of frustration for your team? You can filter plays by pain points for a curated list of plays your team can complete to work better together.

Use a game plan

Or, you can start by checking out our collection of game plans. You'll find hand-picked plays that are tried-and-true for specific situations.

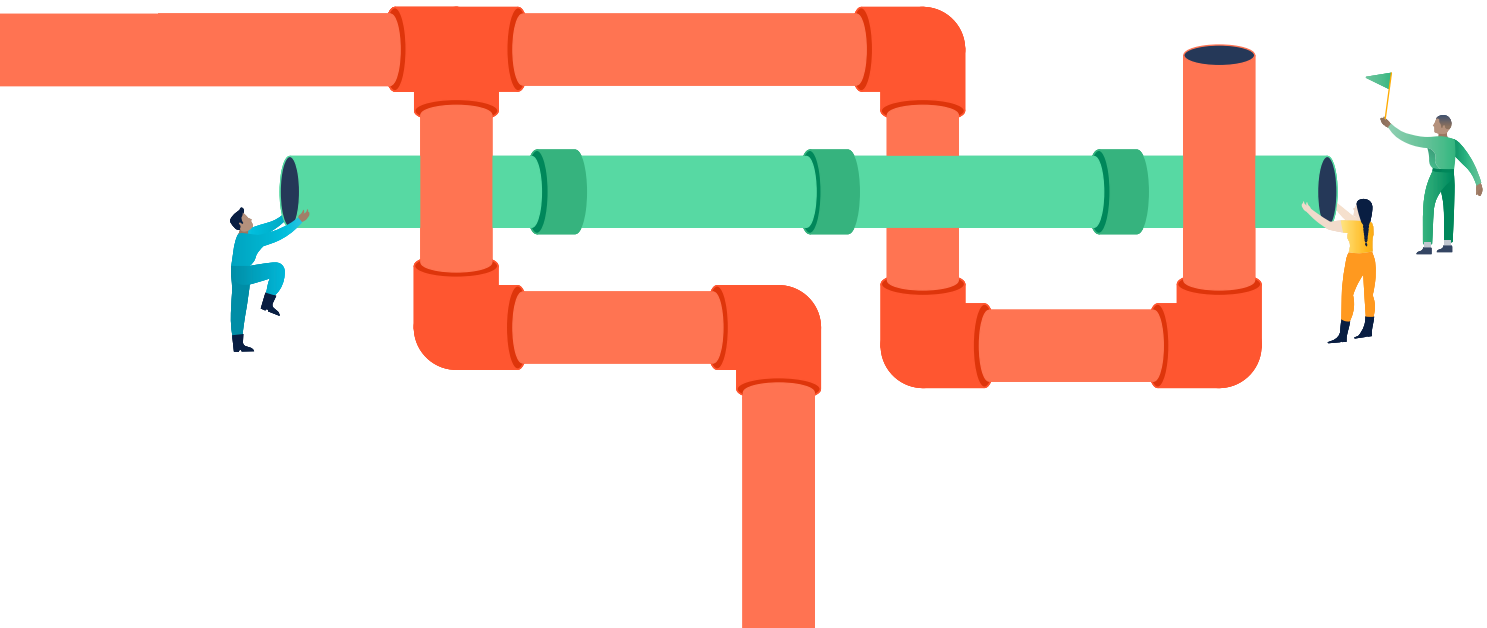
Conclusion

A lean approach to ITSM offers many benefits. We've found some of the most common to include:

- A 'shift-left' to knowledge centric support happens at a faster rate
- Improved request coordination across support teams
- Improved response time to major incidents with ChatOps
- Continuous service improvements with cross team knowledge sharing from collaborative PIRs
- Streamlined agile IT project management that's better aligned with the business and development teams

And you get it all without paying a premium for a few dozen other ITIL workflows you'll never use.

Many IT teams fear that tearing down the pillars and processes of traditional ITSM may introduce unnecessary risk. However, with the right approach, teams should be able to take on more risk as a trade-off to having a more lean and agile approach that supports and grows the business.



About the authors

Paul Buffington

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As a member of the Atlassian Enterprise team, Paul is responsible for helping customers redefine the shape of modern ITSM. His passion for all things IT is driven by 15+ years of consulting in the industry. His expertise spans the Atlassian products but also goes beyond the technology to helping teams improve the way they work. Paul enjoys spending time with family and their three golden retrievers on the Oregon coast. Hiking and photography are a perfect weekend for him.

Swati Jain

VP Professional Services, cPrime

Swati is responsible for successful development and delivery of Service Management Initiatives at cPrime.
Her team has spent over the last two years in building variety of Service Management solutions for their customers ranging from ITSM, HR ops, CRM, Asset Management, and Client Service operations. She believes in the exponential power of team-work and is passionate to help teams reach their potential each day. She loves music, wine, books, and a good thought-inspiring conversation.

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