❝ The synergies of having everyone on one platform has been a blessing for everyone. It's so much easier!

FIONA GALLAGHER
Global Head of Product Support

iress

20%
lower ticket volume
using Jira Service
Management vs. email

46%
tickets resolved in
one day or less

500k
customers serviced
through the portal

Iress improves service with Jira Service Management Cloud

By migrating to Jira Service Management Cloud Enterprise, Iress has reduced ticket volume, resolution time, and maintenance to focus more on service.

▲ ATLASSIAN

THE CHALLENGE

After implementing server-based deployments of Jira Software for product management, Confluence as a knowledge base, and Jira Service Management for ITSM and enterprise service management, Iress' rapid scaling created new complexities. With 7,000 tickets per month and over 70 administrators who could set up their own projects and custom fields, it was becoming harder to maintain performance and updates for Jira Service Management on premise.

THE SOLUTION

Product Support took the initiative to migrate to Jira Service Management Cloud Enterprise to improve performance, stability, and satisfaction for both external customers and internal employees.

THE IMPACT

Since migrating to Jira Service Management Cloud Enterprise and offloading maintenance to Atlassian, Iress has reduced ticket volume by 20% and now resolves over half of tickets in one day or less. Customers love the fast, easy support they're receiving (including the option for self-service), reinforcing Iress' mission of helping people perform better, every day.

Helping people perform better, every day

Iress, a financial services software provider, has built a culture that's lean, autonomous, and entrepreneurial – just like their 500,000 customers across the Asia Pacific, Europe, North America, and Africa. But like many fast-scaling companies, Iress needed to strike the right balance between fueling creativity and maintaining control. Migrating to Jira Service Management Cloud has helped the company find this sweet spot.

Iress had originally chosen on-premise deployments of Jira Software for product management, Confluence for their knowledge base, and Jira Service Management for ITSM and enterprise service management. However, scaling had increased complexity. For example, there were exponentially more customers submitting 7,000 tickets per month via email, as well as exponentially more employees – including over 70 administrators who had the autonomy to set up their own projects and custom fields. With so many users, projects, and configurations, administration grew more complex, and system performance started to waver.

For Iress' Product Support Team, the answer to these challenges was clear: If their mission is to "make software that helps people perform better, every day," they needed the same thing internally – and that software was Jira Service Management Cloud.

By migrating their solution to the cloud, Iress improved performance, stability, and satisfaction for both customers and colleagues. Internal support and engineering teams have saved resources by offloading maintenance to Atlassian and reducing ticket volume from around 6,500 per month to 4,000. With access to faster, easier support, external customers are also happier and getting back to work faster – reinforcing Iress' mission day in and day out.

> 66 We'd been seeing a lot of the enhancements and new things that you get in Jira Service Management Cloud, so we were keen to jump off Server and move across quickly.

HERCULES DU PREEZ
Head of Support Operations and Systems

An off-the-shelf cloud solution brings hope for greater speed, stability, and service

Whenever Iress' on-premise deployment of Jira Service Management was slow or down, many teams at Iress would start raising incidents with Product Support and escalating issues all the way to the CTO. Global Head of Workplace Technology Manqing Zhao reinforced the need for a new way to improve performance, stop internal escalations, and even more importantly, enable paying external customers to raise issues more quickly and easily.

Hearing Manqing's concerns (and feeling them firsthand), Global Head of Product Support Fiona Gallagher and her team advocated for migrating Jira Service Management to an Enterprise Cloud plan to solve their performance challenges without requiring costly internal administration and configuration. "We think minimizing integrations and customizations is really important. We don't want to be best of breed at running a support system. We want to be best at supporting our clients," says Hercules du Preez, head of the Support Operations and Systems Team. "So we really wanted to keep our new solution standard. However, we'd also been seeing a lot of the enhancements and new things that you get in Jira Service Management Cloud, so we were keen to jump off Server and move across quickly."

Product Support saw that Jira Service Management Cloud would help them work faster, collaborate with Atlassian's Advisory Services team for extra support, and access new features and functionality that weren't available on Server, such as automation and webhooks back into Jira Software. Upgrading to the Enterprise Cloud plan would also enable them to manage service for Engineering, Support, and external customers.

"One of the things we really like about Jira Service Management is the integration with our projects on Jira Software because we do a lot with the engineers," Fiona says. "We have quite an open policy, and we want the business to be able to access support data so they can be part of making solutions and fixing things. For those reasons, Jira Service Management Cloud was better for us."

"This cloud migration was beyond my expectations."

Working within a culture that encourages learning by doing, Fiona and Hercules started using Jira Service Management themselves to better understand how it could work for Iress. Once they felt familiar enough to present a plan to stakeholders, they used a push-and-pull approach to get buy-in, piquing interest by showing people how their challenges would be solved on the cloud, while also assertively telling them when it was time to make the switch. "It was a very democratic process," Hercules says. "Everyone had a say, which took longer but made go-live so much simpler because everyone was on board."

Fiona and Hercules closely collaborated throughout the planning process as they cleaned up user lists, married user data with Iress' CRM system, imported that data into Jira Service Management Cloud, and set up a fresh instance. Along the way, they partnered with Bryan Musgrave from Atlassian's Advisory Services Team and the **Atlassian Community** to streamline the process, overcome challenges, and optimize their solution. For example, Bryan discovered Iress was using eight apps to replicate functionality that was already native in Jira Service Management Cloud. Eliminating these apps helped simplify setup, maintenance, and security reviews.

❝ One of the things we really like about Jira Service Management is the integration with our projects on Jira Software because we do a lot with the engineers…we want the business to be able to access support data so they can be part of making solutions and fixing things. For those reasons, Jira Service Management Cloud was better for us.

FIONA GALLAGHER
Global Head of Product Support

Once preparation, implementation, and extensive testing were complete, Fiona and Hercules were ready for rollout. Thanks to their hard work and collaboration with Bryan, launch was seamless. "This cloud migration was beyond my expectations. The day of the migration was a non-event," Bryan says.

## A new process and platform deliver quick wins and lasting impact

Today, Product Support is proud of the solution they've built – and the results they've seen from it.

Customers now must submit tickets via a Jira Service Management portal (called Iress Connect) instead of via email. The portal helps customers choose the question or issue they're having and collects the information agents will need to resolve it. Gathering this data up front enables Product Support to bucket requests into queues and answer queries faster. Customers can also look up answers to their own questions using Iress' 4,000-article Confluence knowledge base, which they created using the **Comala app** from the Atlassian Marketplace.

When tickets are received, agents complete a new triage process in the first few hours to confirm if they have everything needed to resolve the issue. Jira Service Management also pulls in fields from its native asset management tool so agents can filter down all the possible products the customer might have.

Iress Connect / Service Desk - Issues

Service Desk - Issues

Something not working? Raise a request for Iress to help you here

What can we help you with?

I need to reset my Iress password

I have a trading and market data issue

ORDER REMOVE ONLY - I have a trading & market data issue
Request for order to be removed that cannot be deleted by the user

I have an Xplan issue

I have an Xplan datafeed issue

I have a portfolio issue
including IPS Iress and Pulse

I have a mortgage issue
including Xplan Mortgage, Trigold and Websites for our UK clients

I have an integration issue
including Web Services and API

Once triaged, tickets are usually handled by the first line of support. Product Support can also escalate issues if needed using native automations to route tickets to a specialist or technical teams, who use Jira Software. Having Engineering, IT, People Operations, and Finance on the same platform helps teams collaborate to resolve issues, reply to tickets directly, and stay close to their customers – an important tenet of Iress' culture.
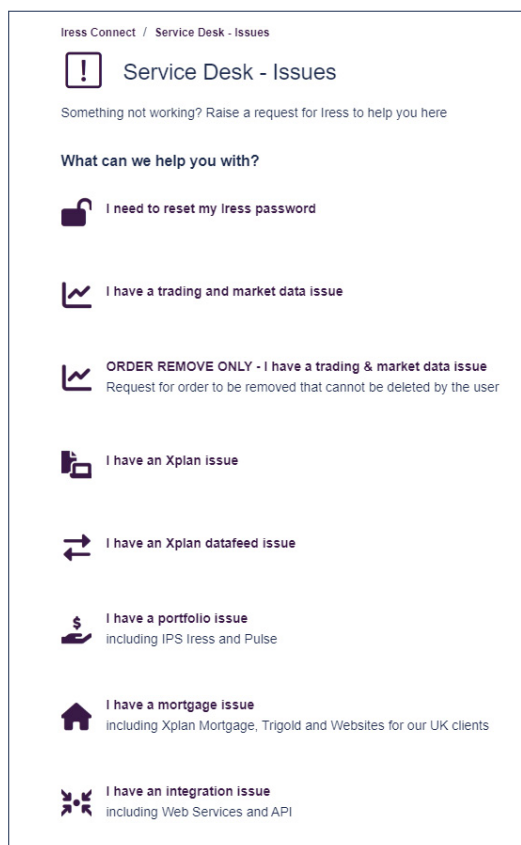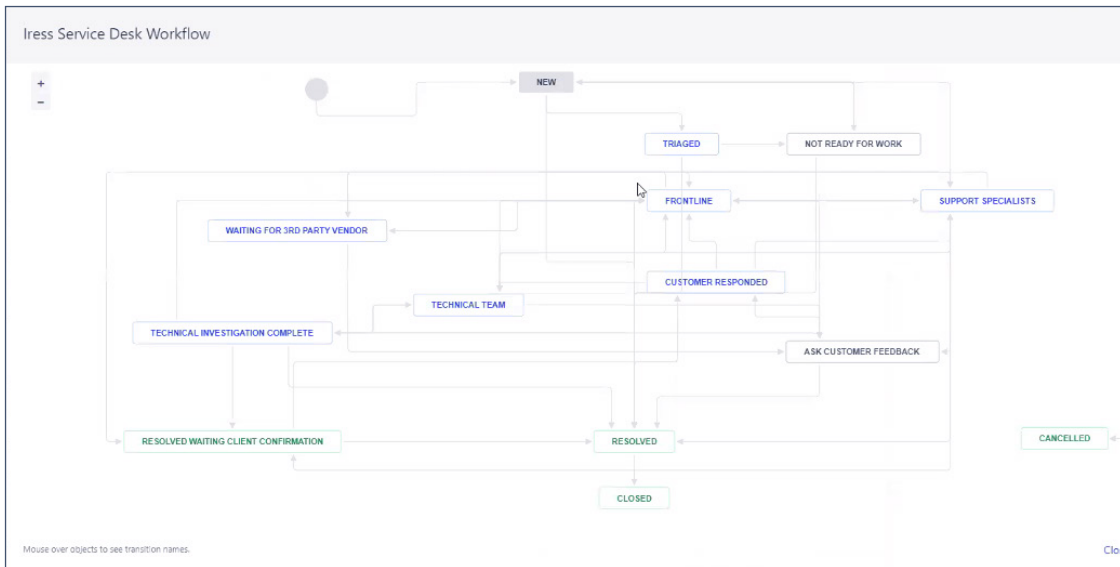
Along the way, Product Support and leaders use a Jira Service Management dashboard with rich filters and custom fields to view analytics, which is helping drive better decisions. The team is also onboarding new clients using Atlassian Access, which accelerates the process while minimizing the number of admins needed.
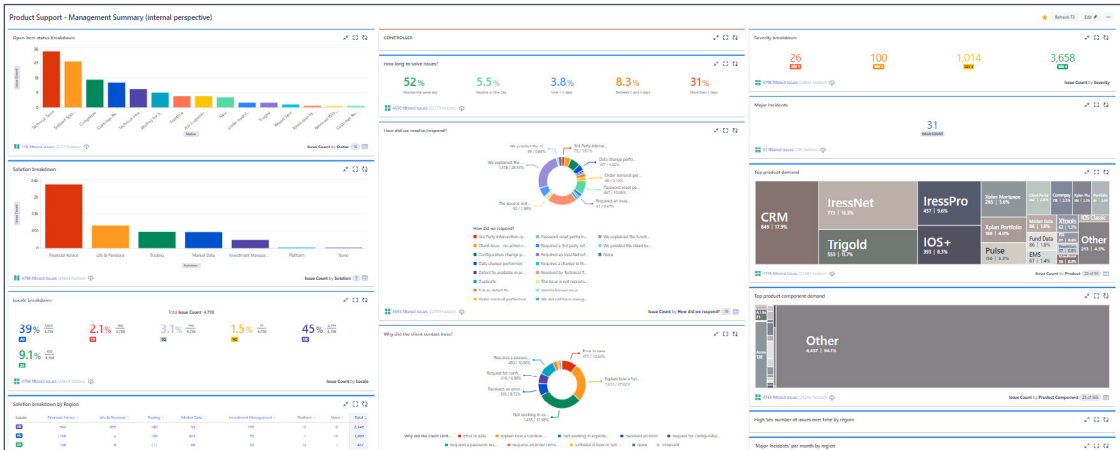
With so many quick wins already, Iress is excited about what's to come. By adding more automation, expanding their platform to include new processes like problem management and incident management, plus bringing more business teams over to the Atlassian cloud, they look forward to extending short-term improvements into long-term impact.

"The synergies of having everyone on one platform has been a blessing."

Less than six months after launching, Iress had reduced ticket volume by 20% with their thoughtful processes and intuitive, cloud-based solution. Customers can self-serve with the knowledge base, and when they do need extra support, using the portal instead of email creates "good friction" that helps agents by minimizing half-baked requests and gathering information needed for fast resolution. In fact, 46% of tickets are now resolved the same day, with more than half resolved in one day or less.

By bringing engineering, operations and support departments together with Jira Service Management Cloud, Iress has created the perfect balance between creativity and control, and transitioned from firefighting to delivering a more delightful customer service experience. "The synergies of having everyone on one platform has been a blessing," Fiona says. "It's so much easier!"

Explore what makes Jira Service Management Cloud different.
Learn more **here.**

ATLASSIAN