ATLASSIAN

A Guide to Work Management

for Business Leaders in 2024

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INTRODUCTION

A smooth work management system is like a well-conducted orchestra where each instrument's contribution is vital; one out-of-tune instrument and the whole performance can feel… off. If you want your organization to be successful, you need to implement a cohesive work management system where tools are well-integrated and connected so that processes are streamlined across the entire company. No more information siloes, unnecessary dependencies to unblock work, or redundant work between teams that don't talk to each other. A work management orchestra where every instrument is in tune will not only increase productivity within teams, but also increase innovation across departments with a system that brings everyone together for tighter collaboration.

We've taken an evidence-based perspective to determine best practices when it comes to work management. And because we're in the business of empowering teamwork, we're committed to sharing what we learn.

Here is a step-by-step work management guide to set your org up for success in 2024.

But first, let's review:
What is work management?

Work management is an organization-wide system for keeping work across the company organized, on track, and visible at all times so teams are able to collaborate and move company initiatives forward.

It's similar to project management but broader in scope. Rather than just focusing on one project or team, work management involves managing multiple projects, all teams within the organization, and external stakeholders (when necessary).

Moreover, all decisions are made through the lens of what's strategically best for the business as a whole— rather than just considering the needs of one team or department.

Woof! That's a lot of moving parts and elements to keep in mind. So, let's dive into how to do work management right so that you have a smoother, easier time reaching your business goals.

6 steps to successful work management

Successful work management is built on a foundation of clear strategies and effective practices. These six steps provide a comprehensive roadmap for enhancing productivity, fostering collaboration, and ensuring smooth operations in any professional setting.

Scope out projects that need to be completed

You can set your workflows up for success by scoping out projects – including objectives, expected outcomes, team member roles and responsibilities, deliverables, and timelines.

Create a project plan to document this key information. The **project plan** template in Confluence gives you a convenient starting point to map out the work that needs to be done and how it will be completed.

Use this template to create a standardized, single source of truth for each project to share with teammates and stakeholders so nothing falls through the cracks. That way, you're set up for success from the very beginning.

A good exercise to run during this planning phase is the **project kickoff play**. You'll find that this play helps you seamlessly create your project plan from start to finish.

The Confluence project plan template functions as a hub for all of your project scoping needs.

Plan out deliverables and assign tasks

Once you scope out projects, it's time to plan out and assign the tasks to complete for each deliverable.

First, break up your project into the tasks needed for completion using a project management tool like **Jira Work Management**, where you can easily add, manage, and track project tasks on one board.

Then, determine which teams are able and available to provide the resources and skills necessary to complete a project.

As you plan out tasks, match them with the people who have the skill sets. This will help you determine if you have the talent in-house or need to upskill or hire someone new.

Also, be sure to keep capacity planning in mind to figure out availability based on team members' schedules and existing assignments. This is especially important with a distributed workforce with varying time zones. **This capacity planning template** can help guide that process.

Once you're sure you have all of the resources to get project tasks done within the designated timeline, you can start assigning them accordingly. If you use Jira Work Management, you can assign these tasks out right from their corresponding cards.
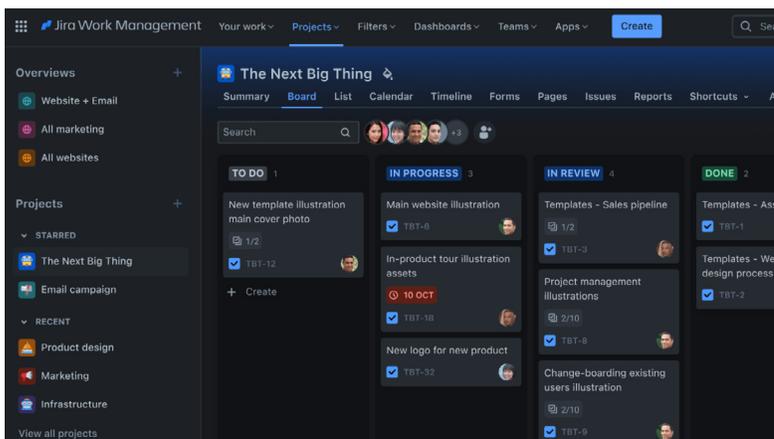
Map out tasks and assign them using a Jira Work Management board like this one.

Maintain visibility for stakeholders

An effective work management system offers real-time visibility into the work that needs to be done, how it will be done, and when it will be done.

Stakeholders, especially project or program managers, should always have easy visibility into in-progress work to make sure projects are on track. That way, they know steps are being taken to meet expected company outcomes within the timeline that was set or make modifications if things are running behind schedule.

The Confluence project plan created in Step 2 offers a single source of truth for all key dates and important details about the project, and can be linked as a resource directly from your Jira Work Management board that gives real-time insights into the project's progress. Both are valuable resources for stakeholders to stay in the loop at all times.

Collaborate strategically in asynchronous vs. synchronous work

Once the actual work begins, it's important to use synchronous and asynchronous time wisely. Help team members manage and structure their time to increase productivity when the team is together and protect their own energy by encouraging timeboxing and intentional progress tracking. In a survey Atlassian conducted with executives in 2023, we found that allowing employees to timebox calendars and tracking individual progress each day led to 16% more goal clarity, a 30% larger boost in workload sustainability, and 31% more progress on top priorities than in a typical week.

In addition to timeboxing, give guidance on the difference between synchronous and asynchronous collaboration. This is especially important for distributed teams that may work remotely, across time zones, or on different schedules.

Synchronous work

Use synchronous work time for meetings that inspire creativity, navigate complexity, and drive momentum and bonding. This might mean leaving time for casual chit-chat, participating in team-bonding activities, or getting together in person for an event. **Our research** shows that team gatherings lead to an average 27% increase in feelings of connection, and this boost lasts four to five months. In contrast, sporadic office attendance has no impact on team connection.

What makes a sync meeting successful is setting intentions and planning ahead. Here are some tips to make sync meetings successful:

- **Have a stated purpose for every meeting.** The less ambiguous it is, the more likely you'll have a productive meeting. Everyone knows what the goal is and can focus and contribute more effectively.

- **Share a meeting agenda beforehand** so everyone knows what to expect and comes ready to discuss. Follow-up action items can be documented here as well for easy access after the meeting.

- **Don't default to 30 minutes.** Some meetings require more time, some less. When you plan ahead, you have a better estimate of the appropriate amount of time it will take.

- **Block off "open collaboration" time.** Part of that time estimate could include a non-structured portion of the meeting where team members can brainstorm, ask questions, or get advice. This can be really helpful for sparking innovative solutions.

- **Be inclusive.** Some meetings can get hijacked by the loudest people in the room. Make sure everyone who wants to participate has the opportunity to express their opinions or ideas.

Asynchronous work

Leave async time for focused work, such as creating a crisp new project proposal, writing a campaign recap blog, or **documenting a decision path** to share with project stakeholders.

According to our **research**, an unexpected benefit of sharing information async was increased participation, not less. **Workers say that half of the meetings** they attend are costly and unproductive, and 77% reported that they're frequently in meetings that end in a decision to schedule a follow-up meeting; turns out, meetings are usually not as effective as we expect, and shouldn't be our go-to for attempting to get work done. Within Atlassian's walls, we've seen over 90% of Atlassians engage with our "Founder Top of Mind" Confluence blog posts, which feature a Loom video and the corresponding transcript of our leaders sharing an announcement, whereas only about 60-65% of Atlassians would attend live, in-office informational sessions.

Here's how to help your org make the most of async work time:

- **Prioritize focus time.** Encourage team members to block off time in their calendars for heads-down work. Create a norm where people don't schedule over those blocks.

- **Agree on async collaboration norms.** Use a tool like **Atlas** for teammates to post status updates asynchronously that visibly ladder up to the larger goals their work contributes to, keeping teams aligned and leaders in the loop.

- **Share announcements through video.** Whenever you're considering scheduling a meeting where just one or a few people are sharing information, ask, "Could this information be shared over a recording?" Use **Loom** to record and share that information with your team more efficiently and solicit any follow-up questions in the comments section.

For example, say you have weekly synchronous status meetings where project leads share updates and next steps with their team. Oftentimes, don't require much discussion – not to mention repetitive. They also interrupt workflows and take away time and energy that could be better spent doing other work.

If instead, you record a Loom for async viewing, team members can watch at 1.5x speed at a time that works with their schedule. As a result, Loom customers reported 28% fewer meetings in 2023.

Measure productivity with outcomes

Measuring productivity with outcomes rather than tasks completed gives you a better idea of how productive and effective your team is.

When we **surveyed** enterprise executives, they rated low productivity as their #1 challenge — followed by tracking goals against progress.

Have a system in place to keep track of and analyze outcomes. You'll find that when you monitor progress on tasks, brainstorm about challenges, and communicate delays, productivity improves. Here are a couple of ways you can do that:

- Set company **objectives and key results (OKRs)** that you can track progress on consistently.

- Conduct monthly scoring meetings on your OKRs where team members collectively come up with a score for how much progress they've made toward the objective. Track the progress of those OKRs using **Atlas** to keep goals visible for stakeholders and connect projects to those OKRs for organization-wide alignment.

OKR updates and monthly scoring are done in Atlas, and Atlassians can follow any OKR to receive regular summaries that contain this information. All OKRs are linked, so it's easy to see how each one ladders up to the single, big company goal.

Use Atlas to track and score OKR progress across your org.

Weave your values into how you learn and reflect

Whether you succeeded in completing the project or missed a launch, it's important to communicate through the lens of your company values as you collectively learn from the experience. Implementing this type of leadership communication helps teams feel connected to one another and to your organization's mission. This allows teammates to learn and culture to grow.

For instance, if transparency is one of your company values, your leadership team should be sharing both wins and mistakes with everyone in the organization. This might mean recording internal leadership meetings and sharing them with the rest of the organization to observe and learn from. Or it could be creating a detailed summary explaining the thought process behind decisions or strategic changes.

A retrospective is an effective way to collect and analyze work insights and figure out why something was or was not successful. This **retrospective** template is a good starting point for reflection on what to start, stop, and keep doing. Just make sure the discussions and conclusions align with your company values.

At Atlassian, we incorporate **our core values** into how we write project recaps, speak to customers, give peer feedback, and perform biannual performance reviews, ensuring these remain embedded into the fabric of the company, both within and beyond our walls.

Don't default to the status quo

Neglecting to establish an effective work management system isn't just a missed opportunity but also a detriment to an organization's ability to harness its full business potential. It's not rocket science: when teams work smarter, they can achieve more, faster. And with better results.

Learn more about achieving a smooth work management system for your team.

Find out how
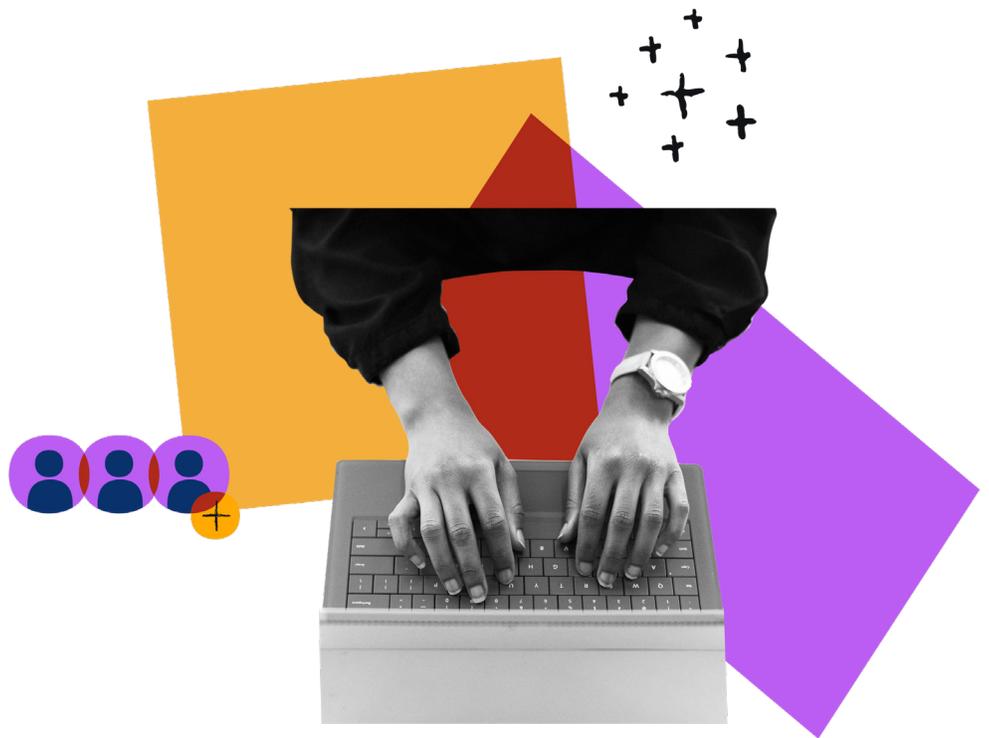
Learn more at
atlassian.com/solutions/work-management

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