Technical and Business Alignment Workshop for Confluence and Jira

Understand your Jobs to be Done to drive adoption and utilization

Service ROCKET

ATLASSIAN

Platinum Solution Partner

Introduction

As every technical stakeholder knows, successful software adoption depends on proper alignment between the tool and task at hand, and clarity about the jobs that need to be done.

While that sounds simple enough, many business stakeholders often fall short of success. They lack the needed guidance to get the most from tools and technologies they use such as Confluence and Jira. Our adoption/utilization workshop was specifically created to address that gap.

This **step-by-step guide** will empower your team to exceed expectations and get the most out of Confluence or Jira while reducing adoption risk, by aligning four key actions:

- Agree on the use case, its participants and their responsibilities
- Capture the Jobs to be Done for the use case to succeed
- Map those Jobs to be Done to the capabilities of the apps
- Identify gaps and determine needed additional capabilities/add-ons

Do this and you'll come away with a clearer picture of what success means for your end users. You'll also gain greater clarity in how Confluence and Jira can support your product's success.

If questions arise along the way, remember the ServiceRocket team is here to help. After all, it's our mission to enable millions of heroes, just like you.

Let's get started!

GUIDEBOOK

STEP 1: Getting Started

Define your Use Case

Before you gather people together for your workshop, you'll want to identify a specific use case that could benefit from some analysis, and ultimately, from better app usage. What is it that you want to improve?

For example, your use case might be to maintain:

- The workflow of customer enhancement requests between Sales and Engineering
- A customer directory with contact info and service preferences
- A product catalog with descriptions and authorized partner discounts

For our example in this document, we'll use a product catalog for Confluence use case.

Once you've captured your workflow, create a brief description that captures what the business will gain from this use case. These are your outcomes.

Identify your Participants

Once you know your use case, turn your focus to who to invite. Which of your colleagues should you attend the workshop? Select people who represent important personas/roles in your use case and who play a significant part in the use case workflow.

Sharing your use case summary in the invite and any assumptions you have about their role in its workflow is a great way to kick things off and get them thinking about the task at hand. Of course, you can also reiterate it at the start of the session to help focus your time together.

ServiceROCKET

Workshop Supplies and Preparation

Here's what you'll need:

- Large index cards
- Sticky notes
- Sticky dots
- Persona stickers
- Plenty of markers and pens
- Tape (have more than one on hand)
- A white board or other surface to organize your cards and sticky notes
- Pizza and soda (optional)

Time Check: Optimally you'll want to allocate a minimum of one hour for your workshop. Alternatively, you can divide the workshop into two sessions. Groups that have worked together before can make a great deal of progress in 90 minutes. If possible, we recommend scheduling a two-hour block of time for this Job to be Done.

STEP 2: Workshop People First

In this part of the workshop, you want to focus on your participants. They are the source of its success.

In your introduction, confirm the use case that you are focused on and its broad goals. Get everyone's buy-in, as it will provide a consensus as you work through the workshop.

Hint: Many opportunities for improvement will be uncovered in your discussions. Not all of them will involve your use case. To keep things focused, let everyone know you're taking notes so their ideas won't be lost, as you steer the conversation back to the core use case.

Personas

The first interactive activity to have participants fill out is a persona index card. It should include their name and role. If possible, provide them with persona stickers to add to their card and ask them to add a fun fact about themselves.

Hint: You can ask them to do this as they arrive while you're waiting to start the meeting. Alternately, you can create a persona form in advance that lets people self-select their personas.

In our sample below, the persona cards are based on maintaining a product catalog with product descriptions, pricing and discounts.

Name

Michael

Role

Product Manager

Fun Fact

Owns 200 different pairs of sneakers

Name

Gillian

Role

Sales Ops Manager

Fun Fact

Has traveled to six continents

Name

James

Role

Partner Manager

Fun Fact

Has done intermittent fasting for two years

Ask your participants to place their completed persona cards on the whiteboard.

Responsibilities and Key Tasks

Once the cards are assembled on your whiteboard, ask everyone to write down their primary responsibility and related key tasks on sticky notes.

For example, our sample use case participants may say:

Michael, our Product Manager:

- Responsibility: That salespeople and partners have access to accurate product descriptions
- Key Task: Regular updates of product and new product descriptions

For Gillian, our Growth Manager:

- Responsibility: That salespeople and partners have access to accurate product pricing
- Key Task: Updating of product pricing

For James, the Partner Manager:

- Responsibility: That salespeople and partners have access to their partner discounts
- Key Task: Ensuring that partners are seeing/getting the correct discounts

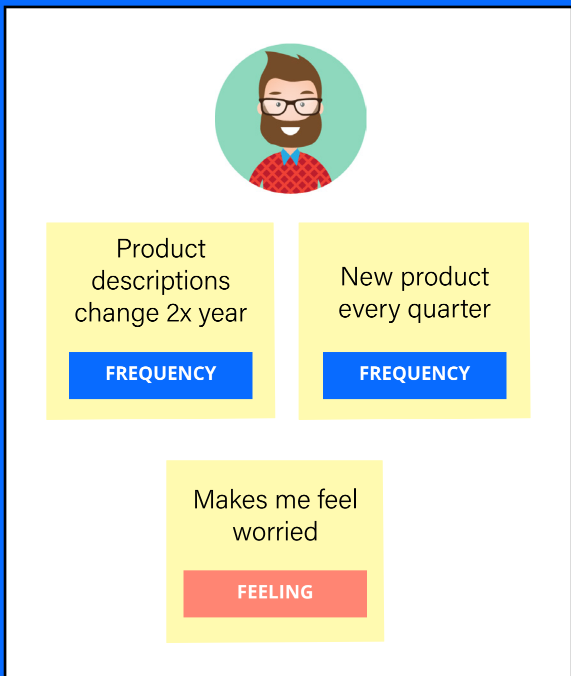
Your participants will then place their sticky notes below their persona card.

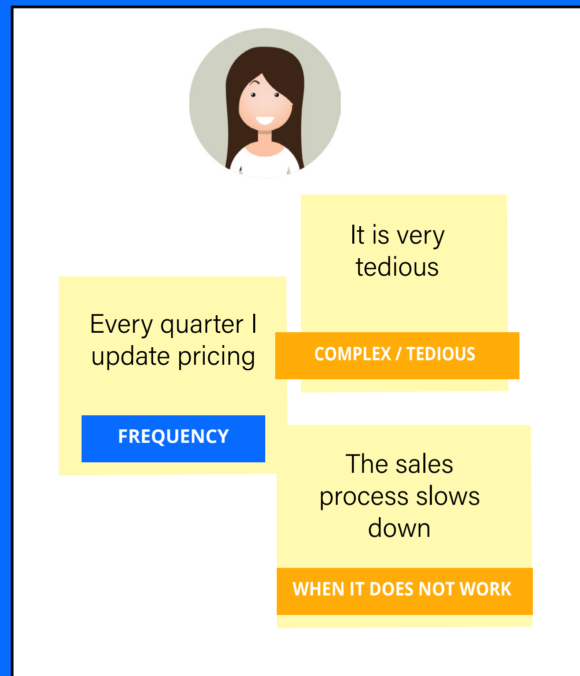
Now, using additional sticky notes, ask them for more detail on the tasks. For example:

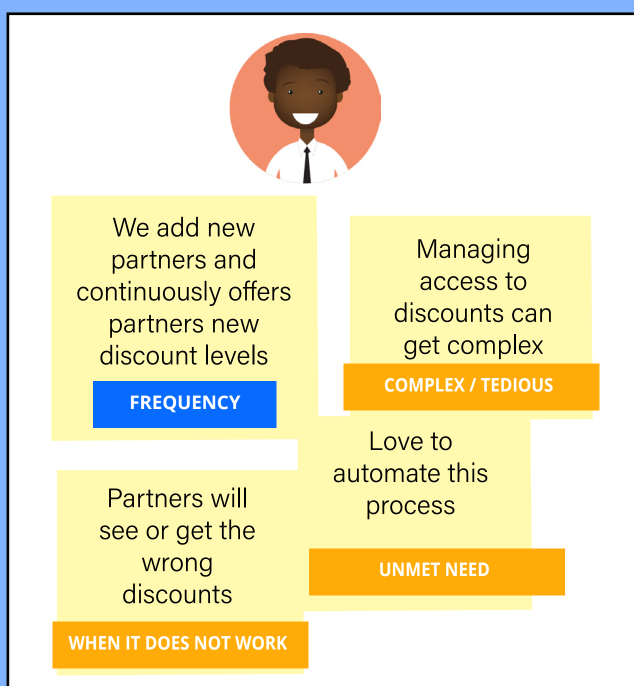
- Are there secondary tasks that support these tasks?
- How does the work make you feel?
- How often do you perform this function?
- Is it complex or tedious?
- What's working well?
- What happens if this doesn't work well?
- What unmet needs do you have?
- What gaps or issues do you see?
- Are there opportunities for improvement?

Have them add their notes below their persona card.

Hint: During preparation, print sticky labels that can be added to the sticky notes for the question types: Frequency, Complex/Tedious, Feelings, Unmet Needs, When it goes wrong, etc.

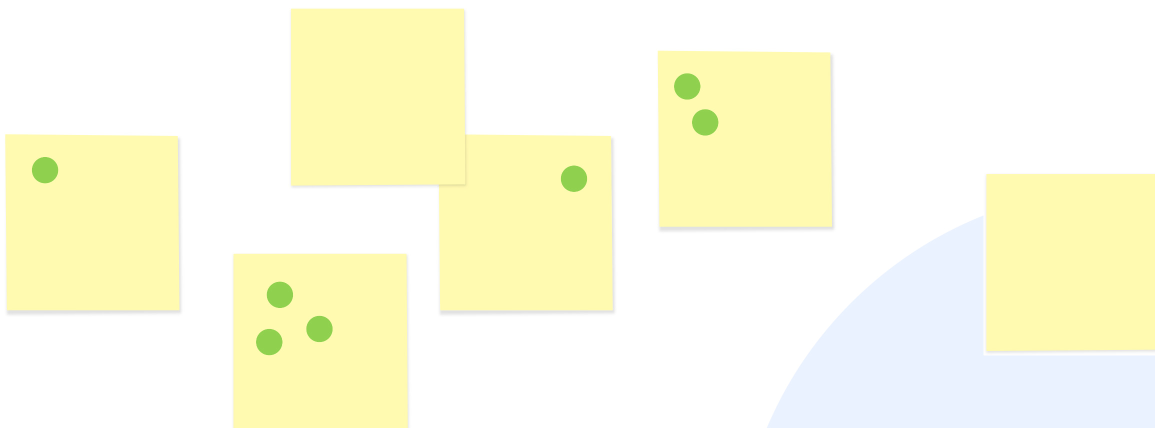

Product descriptions change 2x year
FREQUENCY
New product every quarter
FREQUENCY
Makes me feel worried
FEELING


It is very tedious
COMPLEX / TEDIOUS
Every quarter I update pricing
FREQUENCY
The sales process slows down
WHEN IT DOES NOT WORK


We add new partners and continuously offers partners new discount levels
FREQUENCY
Managing access to discounts can get complex
COMPLEX / TEDIOUS
Love to automate this process
UNMET NEED
Partners will see or get the wrong discounts
WHEN IT DOES NOT WORK

Identify What is most Important

Next, you'll want to prioritize and order these notes with a round of voting. Using sticky dots, ask participants to rank their tasks using one, two or three dots, with three being top priority.



Once they've completed this task, take a few minutes for discussion. Ask them to briefly explain their rankings.

As the moderator, make a mental note of the key ideas you're hearing. For instance, what's working and what isn't working so well? What values are emerging from the discussion? What areas generate the greatest complexity -- and what is their level of complexity? These will be important considerations as you start to identify how Confluence and/or Jira can improve the process.

STEP 3: Workshop the Jobs To Be Done

Now that you've prioritized the use case tasks, let's take a deeper look at the use case's workflow and requirements—the steps that are required to get these things done. This information will help target problem areas and align them with the capabilities of apps such as Confluence and Jira.

We'll do this by asking participants to dive deeper into their prioritized tasks using the following form. This form vertically breaks out this information by category starting with the tasks. It horizontally breaks out the process as a beginning/middle/end sequence.

Beginning	Middle	End
Tasks		
Actions		
Requirements		
Risks		
Feeling/Thinking		
Opportunities/Expectations		
Tools		
People		

Ask your participants to map out their steps horizontally. What are the high-level steps or sub-tasks required to complete the job, from start to finish? How long does it usually take? How often do you do it?

Ask them to go through all the steps identified. Define what is happening in each of them, discuss the emotions that people have along their journey. Are they happy or frustrated? Note also who is involved in the process and the tools they use. What are the opportunities to improve the experience and make it more efficient?

Be sure to take time to define the business requirements for each task. This information will be critical as you map the technical requirements to the tools. These types of business requirements are critical to understanding how your team can get the most out of your Atlassian products.

Hint: In our example, James, the Partner Manager, needs to control who can see the partner discounts, since this catalog is shared between internal sales people and external partners. This suggested we'll need an add-on to secure and encrypt some of the information on the Confluence page.

Share the Knowledge and Wrap-up

When participants are done adding sticky notes to the board or completing the worksheet, ask them to present their results to the entire group. This will organically lead to clarifications as other participants make comments and ask questions. This is one of the most rewarding parts of the workshop.

Your participants have just provided you with a clear outline of what they need to accomplish. Now you know their Jobs to be Done. Take a few minutes to summarize what you have learned and the process you will follow next to put this information to work. (See the conclusion for more details).

STEP 4: Identify the Gaps and Needed Functionality

Now it's time to organize and consolidate the information you've gathered. This process will allow you to align Confluence and Jira with the requirements and characteristics of your business stakeholders' Jobs to be Done.

So what should you know after this workshop? Let's use a modified story model to capture your top line:

As the technical stakeholder,

- responsible for the successful adoption and utilization of Confluence/Jira,
- my success depends on [name of key personas]
- accomplishing his/her specific Jobs to be Done

Now that you have that story, let's create a story for each of your key personas. Here is an example:

As the Partner Manager,

- responsible for our low-friction partner sales process,
- my success depends on our partners
- accessing product information and their distinct discounts quickly and securely

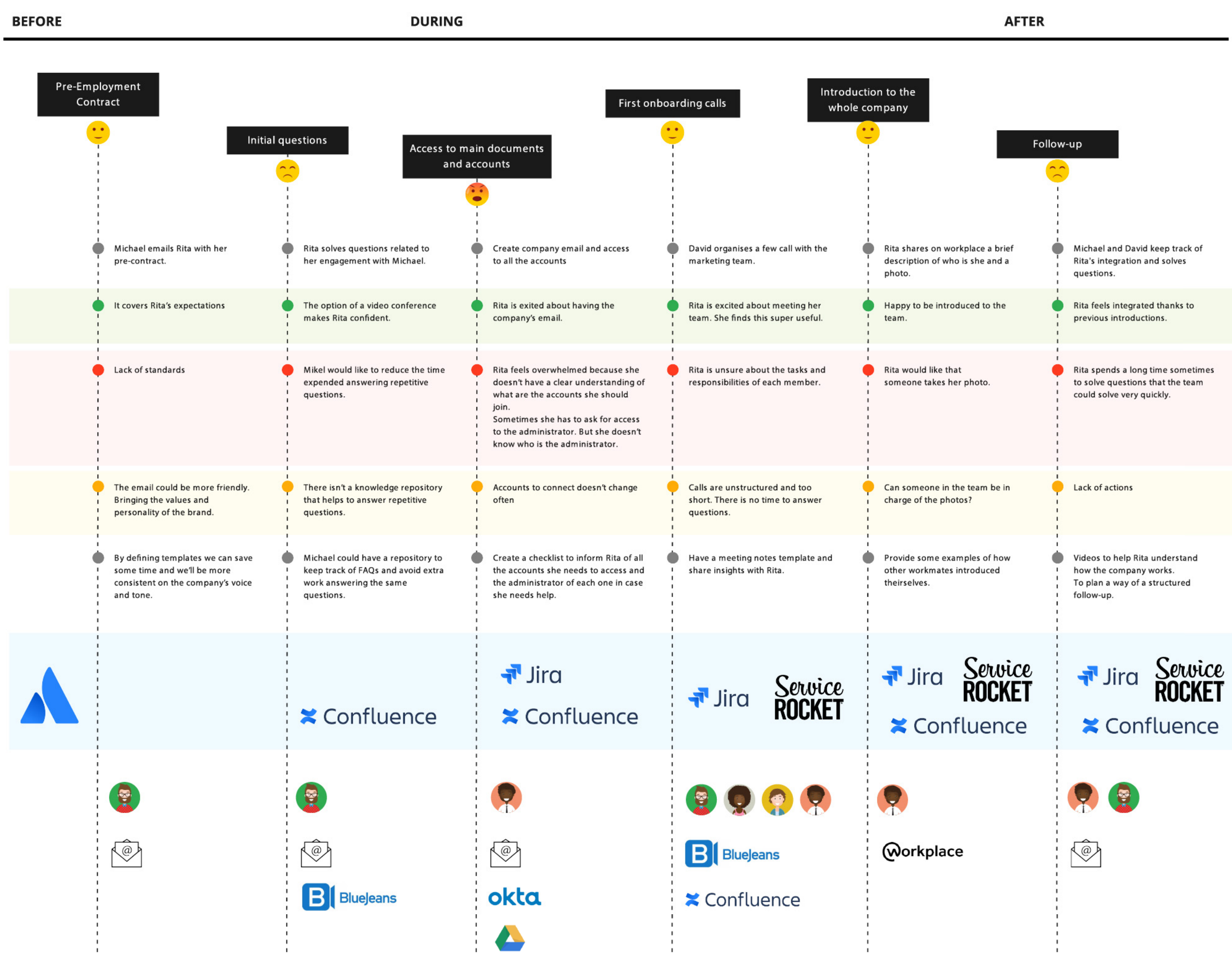
The last line of the story, which is the action line, should capture the key requirements, concerns and opportunities for that persona.

With this information you (and your team) can quickly verify what your business stakeholders need to accomplish and why. Additionally, this will help you frame how to design their use of Confluence or Jira.

Now that you have the story and action line, we want to line up and compare this information in a chart format. It should include:

- Jobs to be Done
- The emotion
- The story
- Key tasks
- Specific requirements
- Atlassian tools and add-ons
- Other technologies that are needed

HR Onboarding Workflow Example



Most of these items have been generated during the workshop and are easy to paste into the form. The challenge here is to evaluate all of these data points to determine how Confluence or Jira can be best used to fulfill your participant's needs.

In some cases, you will find gaps in capability, or determine that the solution using Confluence or Jira natively could be made less cumbersome with an add-on.

As we mentioned, James, the partner manager, has different discounts available for various partners. Using Confluence, it is possible to create a secure page for each partner, but that might become hard to manage. In this case, the technical stakeholder responsible for James' success might recommend an add-on, such as ServiceRocket's Security and Encryption for Confluence, to create password protected discounts.

The story-based analysis above will allow you to quickly understand your business stakeholders' goals and align the capabilities you provide to their Jobs to be Done.

Hint: If you're ambitious, we recommend doing a Problem Solution Fit model to clearly identify your value proposition for each persona. This is the kind of work we typically do in our ServiceRocket workshops. We've included an example of this with our templates. Contact us if you are interested in some guidance from our expert consultants.

Conclusion

We live in a very connected world. Fortunately, there are amazing modern tools for communication and collaboration—Confluence and Jira from Atlassian are two great examples. But more importantly, we live in a world where each individuals' success is connected more and more closely to the success of others.

If your success depends on how well your Confluence/Jira users do at their jobs, it's well worth it to organize a workshop to understand what they need to accomplish. Doing so will help you reference their Jobs to be Done and consider their perspective, as you implement Confluence and Jira. Alignment is key.

There are thousands of Confluence and Jira add-ons. There are even more critical decisions that organizations like yours need to make to get the most out of their investments and achieve their business objectives. We'd like to help.

Whether you are a customer or not, ServiceRocket is a partner in your business success. We see our mission as creating millions of heroes like you -- individuals who exceed expectations and support a web of success in their organizations. Reach out to us, and let's explore your Jobs to be Done and how we can help.

CONTACT US TODAY

Platinum
Solution Partner

About ServiceRocket

ServiceRocket, the world's premiere Atlassian Platinum Solutions Partner, provides the services, training, and support to deliver superior value for every on-premise and cloud-based Atlassian system. ServiceRocket's global operations boast a team of experienced certified consultants and engineers, available 24/7 worldwide customer support, and a robust ecosystem of purpose-built applications designed to enhance the value and utility of Atlassian solutions. Atlassian administrators, users, and power users from thousands of leading worldwide organizations depend on ServiceRocket's experienced team of professionals to plan, design, implement, and support business-accelerating solutions. **Never Atlassian alone**.

Learn more at **atlassian.servicerocket.com**.

Palo Alto, California, USA
ServiceRocket Inc
2741 Middlefield Road, Suite 200
Palo Alto, CA, 94306
(888) 707-0088

Sydney, Australia
ServiceRocket Pty Ltd, Level 3
17-19 Alberta Street
Sydney, NSW, 2000
Australia
+61 2 9900 5700

Kuala Lumpur, Malaysia
ServiceRocket Sdn Bhd
Suite 3B-3A-3, Plaza Sentral,
Jalan Stesen Sentral 5,
Kuala Lumpur Sentral, 50470
+603 2726 2300

Santiago, Chile
ServiceRocket SpA
Mariano Sanchez Fontecilla 310,
Office 4148
Las Condes, Santiago

London, England
ServiceRocket Limited
1st floor West Davidson House,
Forbury Square, Reading
Berkshire,
+447848282125

Singapore, Singapore
ServiceRocket
80 Robinson Road, #02-00
Singapore 068898

Service ROCKET™

The right partner can make all the difference.
You've got Atlassian. We've got your back.