

**EBOOK**

# 7 important reasons to start consolidating your instances and how it's done



Platinum  
Solution Partner  
ENTERPRISE



Nathan

Edouard

## About the authors

Nathan has been enjoying Atlassian products for more than 10 years, with all possible roles: user, administrator, developer, consultant and delivery project manager.

He has helped hundreds of companies over this period making the most out of their Atlassian products, whether in-person or through the consultants he managed.

As Valiantys Chief Technical Officer, Nathan is now responsible for our delivery excellence and our service offerings development. Outside of the office, Nathan is kept very busy by his 2 young children.

Edouard Dorcier is working as a senior consultant for Valiantys. In his 4 years he had time to focus on technical and business pain points during Jira and Confluence consolidations for a various set of customers. Outside of the office, Edouard is kept very busy by his 2 dogs.



# Foreword

As a key stakeholder in a large organization using Atlassian products, maybe any of these situations happened to you already.

**1. Your CFO**  
storms in your office

“Hey, did you know we have 12 Jira and 5 Confluence instances in the company, all on different servers, and the number of users keeps growing? I need to cut some costs on next years’ budget, but I want the teams to keep working, do you think you could help think of a plan to save some money without scaling down our use of Atlassian products. And I’m tired of getting tons of invoices from a single vendor. Any idea of how we could fix that? ”

**2. The Director of product development**  
sends you an email

“Hi, we got new teams on board for the development of product XYZ. I thought it was going to be a walk in the park as they are already using Jira but my managers tell me that the instances are configured differently and that they cannot give me a global reporting on how the work is moving on. I don’t like that. Can you help me?”

**3. Your CEO**  
gives a global presentation to all the IT managers of the company

“Dear colleagues, digital disruption will just increase and we have to be more agile and nimble. The keys to attaining those goals are clear, straightforward governance on all critical applications and planning to move those applications in the Cloud as fast as we reasonably can. I need you to prepare for that and build plans.”

**4. The Head of M&A**  
announces that your company just acquired a competitor and that all systems have to be integrated ASAP

“You know them, they also use Atlassian products – but their workflows and setup parameters are different than yours. And their versions are obsolete and no longer supported by Atlassian.”

This can look like a caricature but, believe us, we see this happening every day with our clients. And it’s not because people did not do their jobs properly – but because of the nature of Atlassian product growth in organizations.

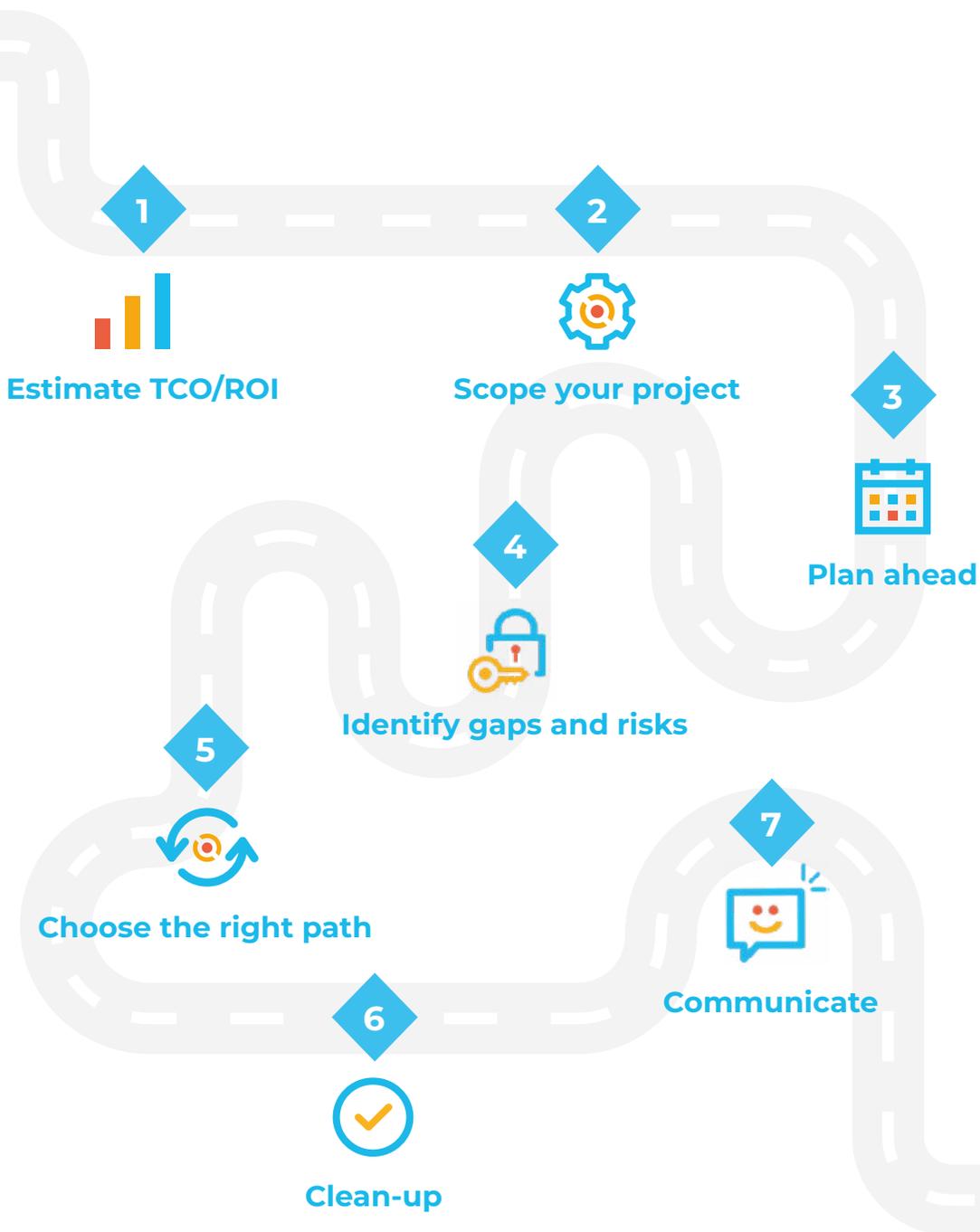
Several small teams start using the product for their needs, and the adoption goes viral due to the flexibility and ease of the tool. Months or years later, companies usually end up with multiple Jira and/or Confluence instances (including some very insecure shadow-IT instances) wondering how that happened and if there is anything they can do to get everyone back on track.

**So, OK. Houston, we have an issue. Is there any way to fix it? Yes, there is. The magic word is consolidation.**

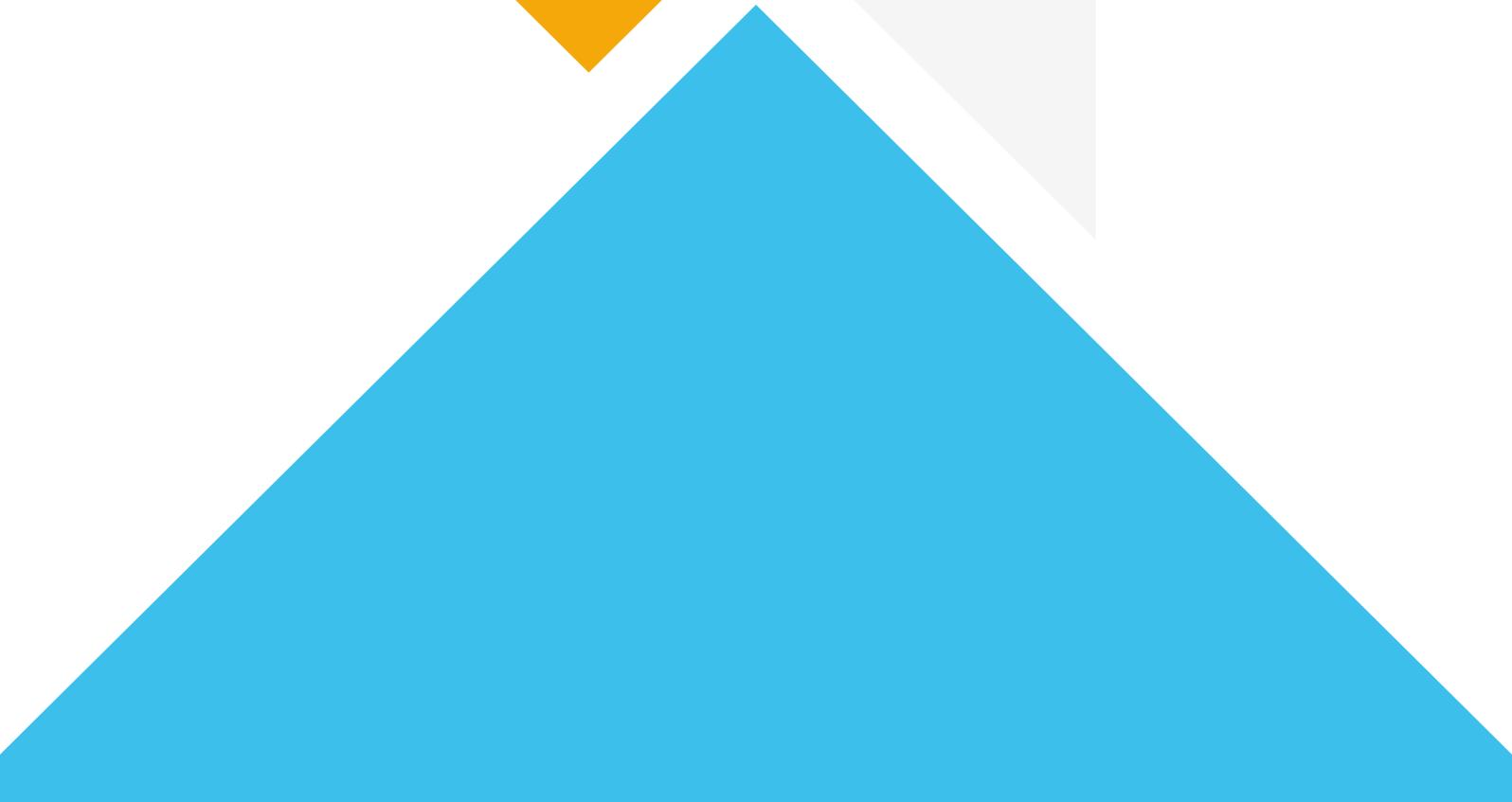


Continue reading this ebook now if you want to understand what it entails and how to proceed to reap the benefits of consolidation for your organization, with no further delay. To sum it up, the more you wait, the more you are wasting time, energy, and company money. Starting a Consolidation project can be scary as it feels like having to climb Mount Everest without any mountaineering experience, mandatory tools needed to get there safely and a friendly Sherpa guiding you and doing the heavy lifting. A consolidation project is usually not a single-step big bang thing happening overnight, it is usually a long process with multiple stops along the way.

**This ebook will help you prepare for this journey, in 7 steps:**



# 1. Getting started with your consolidation





First, let's go back to basics: What do we mean by consolidation exactly?

**Consolidation is a combination of one or more of the following:**

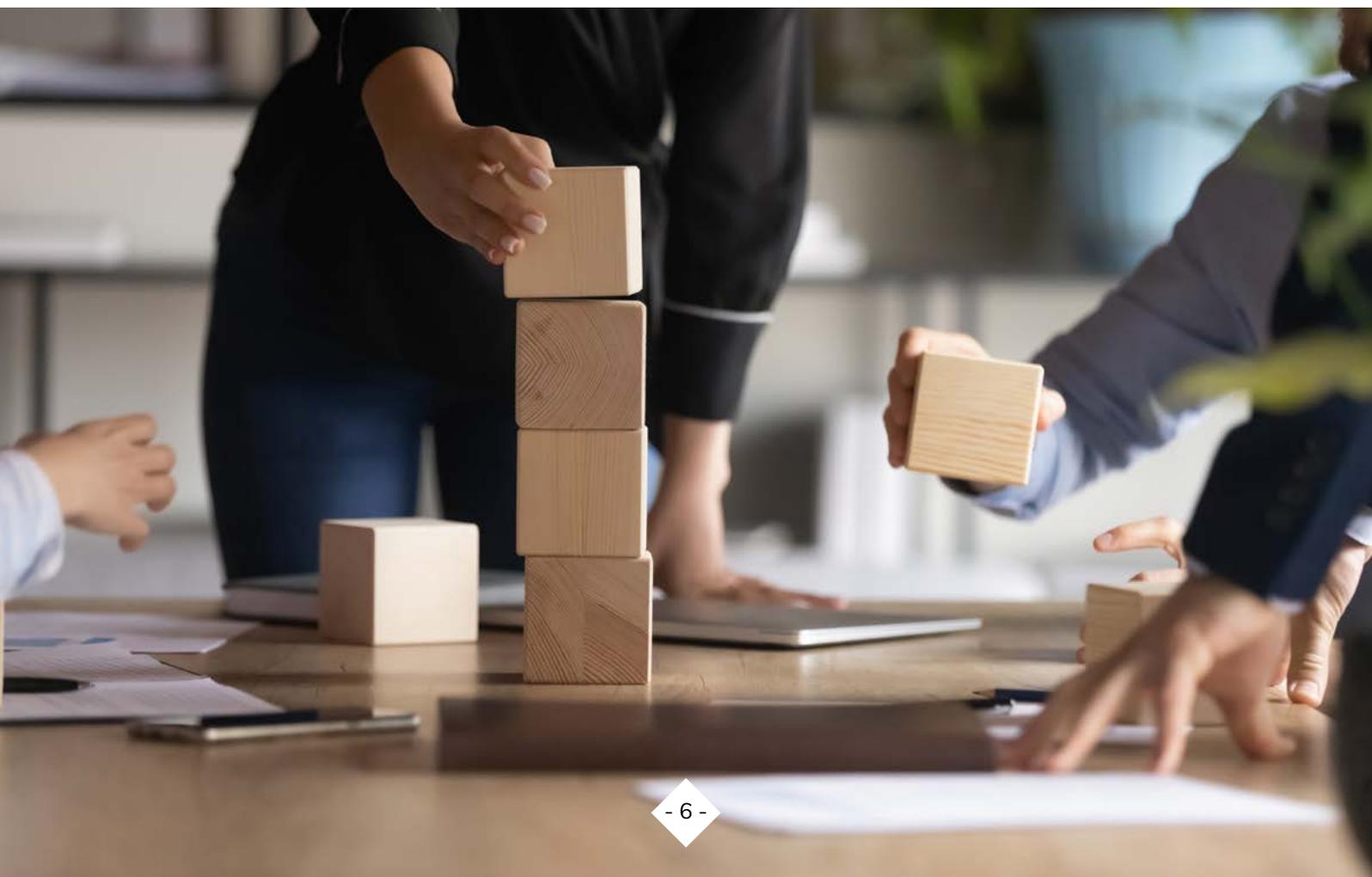
### **Migrating Atlassian tools data from one or more Source instances to one or more Destination instances**

- ◆ Server / Data Center to another Server / Data Center instance
- ◆ Atlassian Cloud instance to Server / Data Center instance
- ◆ Server / Data Center instance to Atlassian Cloud instance
- ◆ Atlassian Cloud instance to another Atlassian Cloud instance

### **Migrating data from a 3rd party application to an Atlassian instance**

The ultimate objective of a consolidation is to regroup applications with the same goal and thus reduce licences, infrastructures and maintenance costs and achieve economy of scale.

From a purely technical standpoint a consolidation is all about regrouping different instances of the same application(s) on one single infrastructure, which will yield cost reductions and economies of scale. But the technical piece is a means to an end, and does not give the full picture of the expected benefits of a consolidation: running multiple concurrent instances is counter-productive for a variety of reasons.





## 1.1 Do you really need to consolidate your instances?

- ◆ Misalignment in processes within the company, meaning that teams that do the same job do it differently.
- ◆ Inability to provide consolidated reporting as teams are working differently. This can become a real issue if considering an Agile at Scale transformation for example.
- ◆ The usage of resources is not optimized. Not only managing Atlassian tools may probably not be your main business, but one or several resources, whether part-time or full-time, are looking after each instance, instead of a single unified team, trained to do the job efficiently. Additionally, in that scenario, there is quite a high chance that one team spends time implementing features that have been implemented already on another instance by another team without their knowledge.
- ◆ Service to end-users is inconsistent, depending on which team is actually managing the platform. Some can provide great service while others may not.
- ◆ Governance is not aligned across all the instances. This can lead to massive problems in the long term with instances that are impossible to maintain due to ever-increasing complexity. It is also an issue that some teams get their change request approved while others don't, sometimes leading to productivity loss.
- ◆ License usage is not optimized.

Lastly, we are in the middle of an important wave of cloud transformation. More and more companies are starting cloud transformation projects to get rid of their infrastructure, become more Agile, and ultimately save money. In the process of your cloud transformation, there is a chance that you end up having to consolidate instances before or while you migrate to the Cloud. All the arguments for consolidating stay valid within the scope of a full-blown cloud migration initiative.

## 1.2 When you don't need to consolidate your instances

If you are working in a very secure environment, you may have legal constraints to run separate instances. Even if not legal, let's say you are running a Jira instance for your HR teams which contain very sensitive data. Merging that instance with a Jira Software instance used by your development team could be challenging as the application administrators will potentially have full visibility over the data (including the sensitive ones).

The way App licenses work for Atlassian products can sometimes be a problem for consolidating products. If you are using 15 apps on a Jira instance for 2000 users and 15 other apps on another Jira instance also for 2000 users, you will not only have to use a Jira 4000 user license but also acquire those 30 apps for 4000 users (even though half of them don't make use of them). This can feel very confusing at times.

Highly customized instances. If your instances have been heavily customized to fit uncommon needs with lots of scripts, custom apps, or even UI changes, consolidating may become a real challenge. Some configurations have a global impact on how the instance is behaving, making it impossible to run other types of projects in the same place. In that scenario, you either have to review that implementation or forget about that consolidation project altogether.



## **2. Step 1: Calculate the TCO, the ROI and the other benefits**





We have covered some items in the introduction already. The cost of having non-consolidated instances is high, and growing by the day. Management teams either lack full visibility in how the company is performing or spend lots of time and energy collecting and transforming data regularly to get consolidated reporting. The fact that teams work in a very different fashion also goes against productivity optimization which has become so important to stand out in an ever-increasingly Agile environment. All the time spent by your staff to maintain several instances adds up to a lot and will continue to add up quicker and quicker until the consolidation gets done. We will present this later in this document, consolidations are long term projects, so you better get started quickly if you want to be able to see your investment bear fruit.

Very often when thinking about consolidations, we think about the standard use case of consolidating multiple Atlassian tools, but you can easily take consolidations to the next level by looking at the bigger picture. Almost all companies have tools in place that serve the same needs. When a team requires a new tool, they very rarely go through the tools that exist already instead of choosing a new one.

### **This happens for two reasons:**

- ◆ They don't know that these other tools exist as this information is not shared across all teams/departments within the company.
- ◆ They want to have full control over the application selection process and administration because this looks like the easy road. This is true in most cases, but taking the easy road is not always the best option from the company's perspective.

### **To calculate your TCO or ROI, here are all the items you need to take into account:**

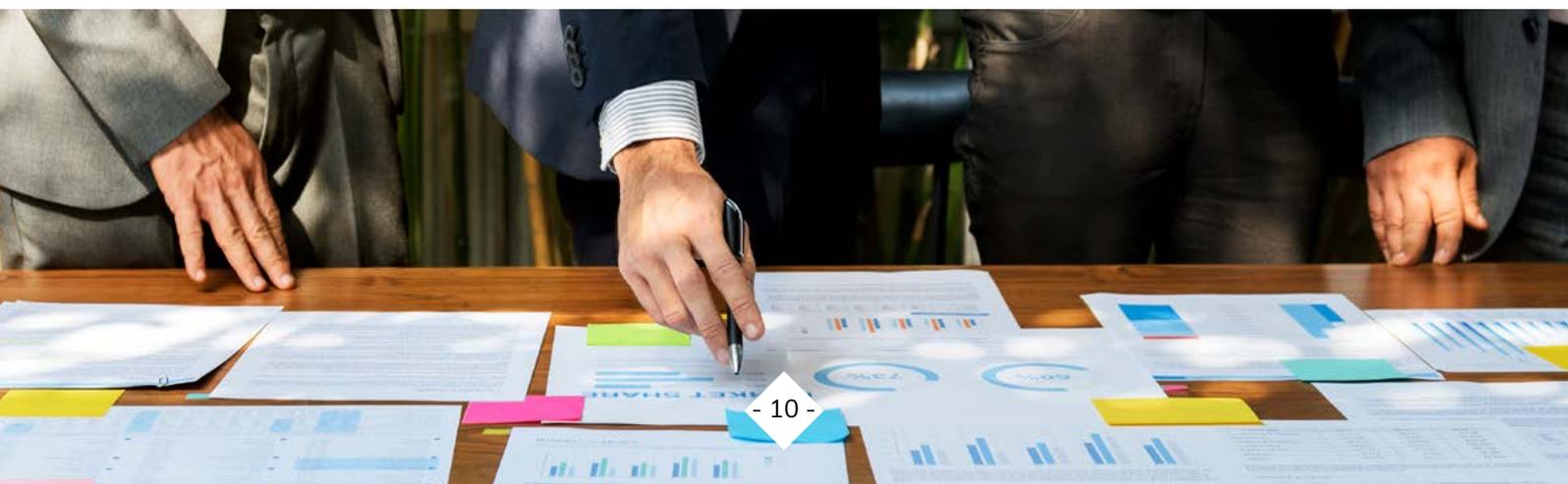
- ◆ The license cost of all the products you wish to consolidate, whether they are Atlassian products or not, and including Apps.
- ◆ Infrastructure costs (unless all your products are cloud-hosted)
- ◆ The total cost of resources maintaining the applications.
- ◆ Estimated cost for absence of consolidating reporting or estimated cost to generate consolidated reporting.
- ◆ Estimated cost for the misalignment of processes between teams.
- ◆ The estimated cost of poor level of service (response time, platform availability, ...)

You can then run the same calculation with your target environment and see where you land. There is an obvious gap between the « before » and « after » costs that we have not covered yet: migration cost. Consolidations are usually complex and costly projects, you need to know what you are putting your hands into. However, in the long run, these consolidations always pay off, because of the very high hidden costs that are inherently going to exponentially increase. When you do your TCO/ROI calculation, you have to do it for at least 3 years, the tipping point is usually within that range.

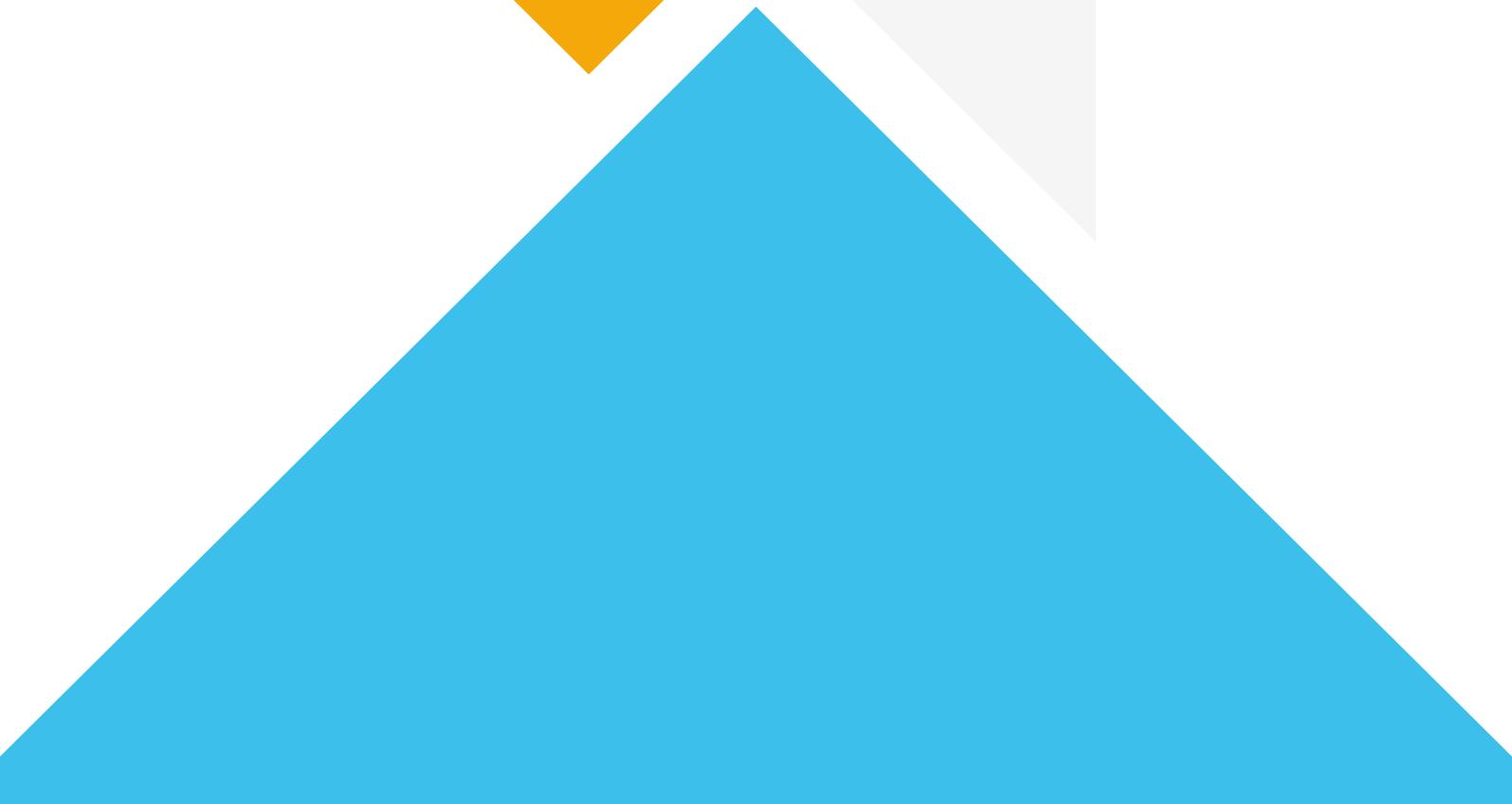
**There are some benefits and opportunities to a consolidation that can be difficult to measure in numbers as well but do help taking decisions:**

 <b>Benefits</b>	 <b>Opportunities</b>
<p>Having a single application helps with the onboarding process for any newcomer. There is a single training to do.</p>	<p>To review, simplify, or streamline your processes. You can migrate everything « as is ». But while you're at it, and you have all stakeholders available, it's usually the right time to address some pain points.</p>
<p>Employees changing team continue to work the same way they were before, making them operational more quickly.</p>	<p>To reduce your technical debt, by only migrating what needs to be migrated.</p>
<p>Consolidation is a good way to make that corporate process standardization initiative a reality.</p>	<p>To clarify your platform development roadmap, anticipating future business needs.</p>

By then, you should have a clear idea if a consolidation is something to consider in your environment or not. If yes, you can continue as we will drill down into how a consolidation project happens. If no, unless you are in the very specific cases described earlier in the introduction, you probably need to give this some more thoughts! Don't hesitate to read this document from the beginning again or contact us to better assess your situation.



# **3. Step 2: Define a clear scope for your consolidation project**



To define what you will consolidate, you need to have a clear view over what your instances pool look like, as well as other overlapping products you would like to get rid of as part of the process.

**Let's concentrate on the Atlassian products first, what you will have to gauge is how healthy your current instances are in the following areas, that you can score from 1 to 5:**

- ◆ How would you rate your instance manageability?
- ◆ How much technical debt do you have? By technical debt we mean both the technical side of things (version of the product, the apps, middleware, ...) as well as the functional side (workflows that are not up to date, a lot of unused projects and/or configuration elements)
- ◆ How would you rate the performance of your instance (response time, stability, ease of use)?
- ◆ How would you rate the security of your instance compared to your company's standards?
- ◆ How would you rate the upgradeability of your instance (how easy/difficult is it to upgrade)? (if you are running on Cloud this one is easy)
- ◆ How would you rate the user experience of your instance?

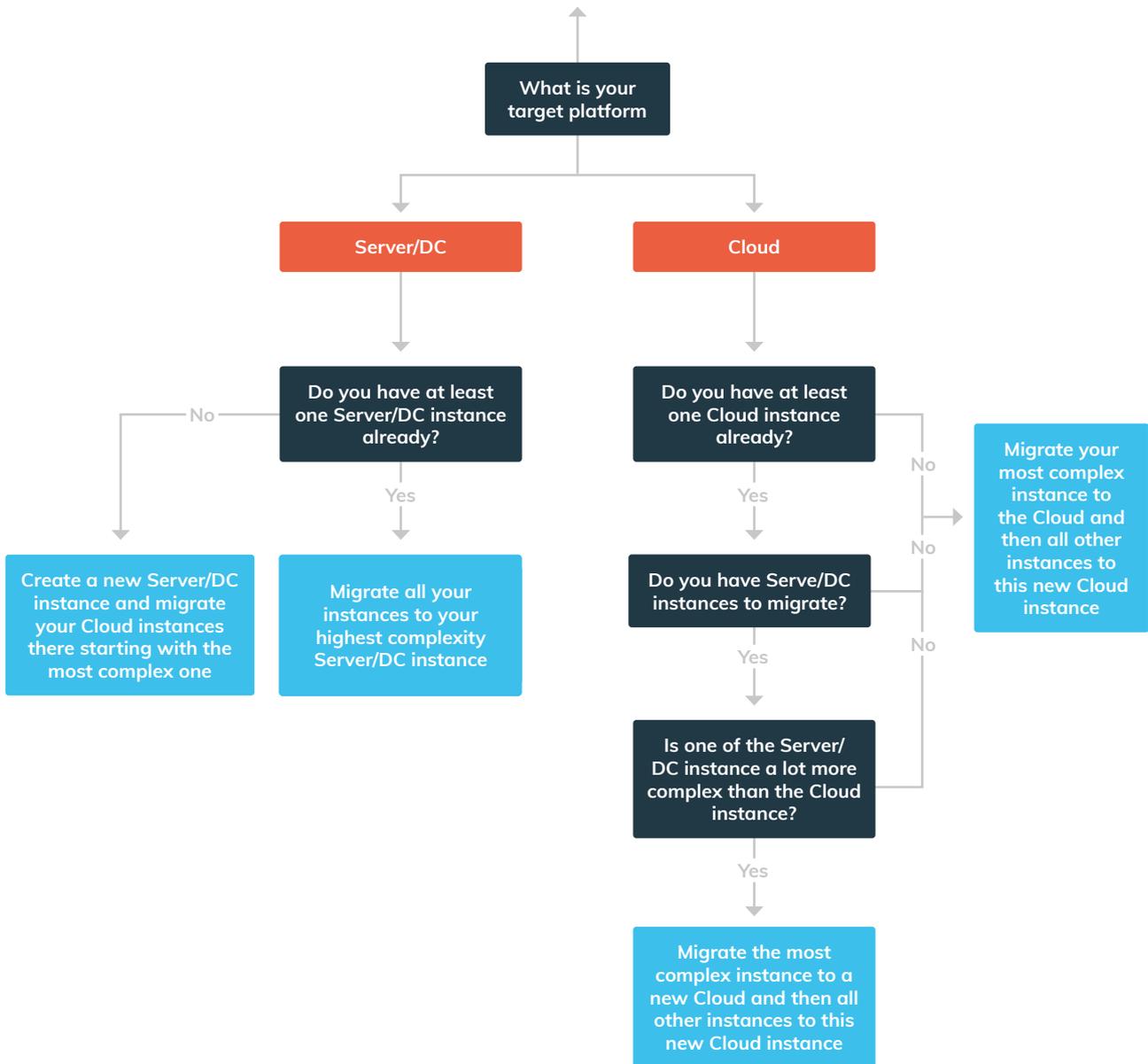
You will end up with your instance **complexity score**, which will help you easily compare your instances. You can of course add more weight to some criteria based on your context. Some companies prefer to emphasize user experience rather than manageability.

For products outside of Atlassian, what you ultimately need to define is what data you will want to migrate over, and compare that to the product export capabilities. If you are lucky, you will be able to easily export everything you need from that product quite easily. If you are not, you'll have to decide whether retaining that information is worth spending more time, or not. All modern products have advanced exporting capabilities, which now make these projects easier. However, that does not mean that all data can migrate that easily. Sometimes, a particular data is so expensive to migrate that it is just not worth it. Atlassian products offer lots of ways to import data, especially a REST API. Importing data will quite often require some development, so again, you must define what you are willing to spend on the migration.

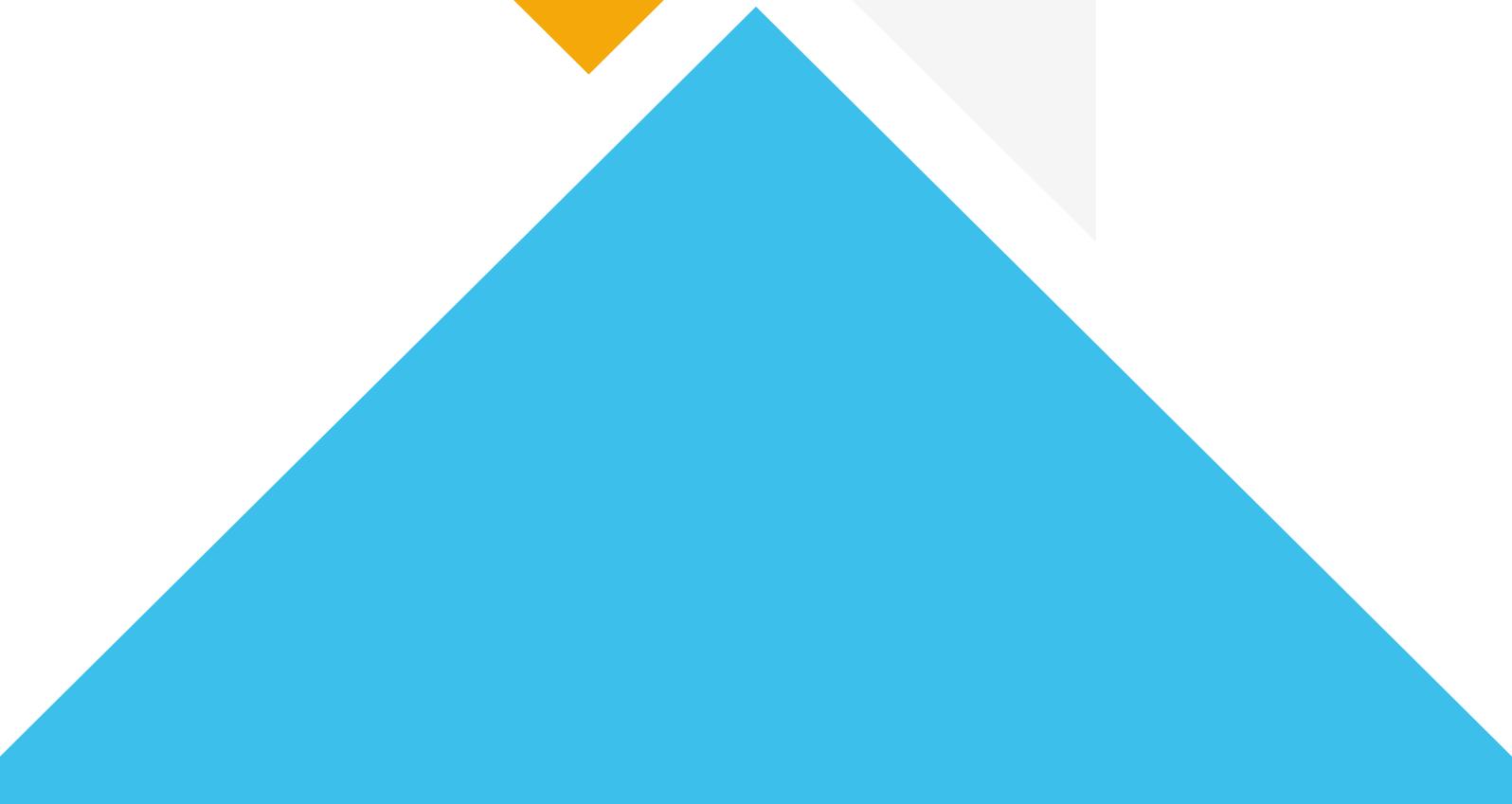


Now you have better visibility over your instances, it's time to define your target platform as well as your master instance – the instance that will receive the other instances' data.

### The process usually goes like this:



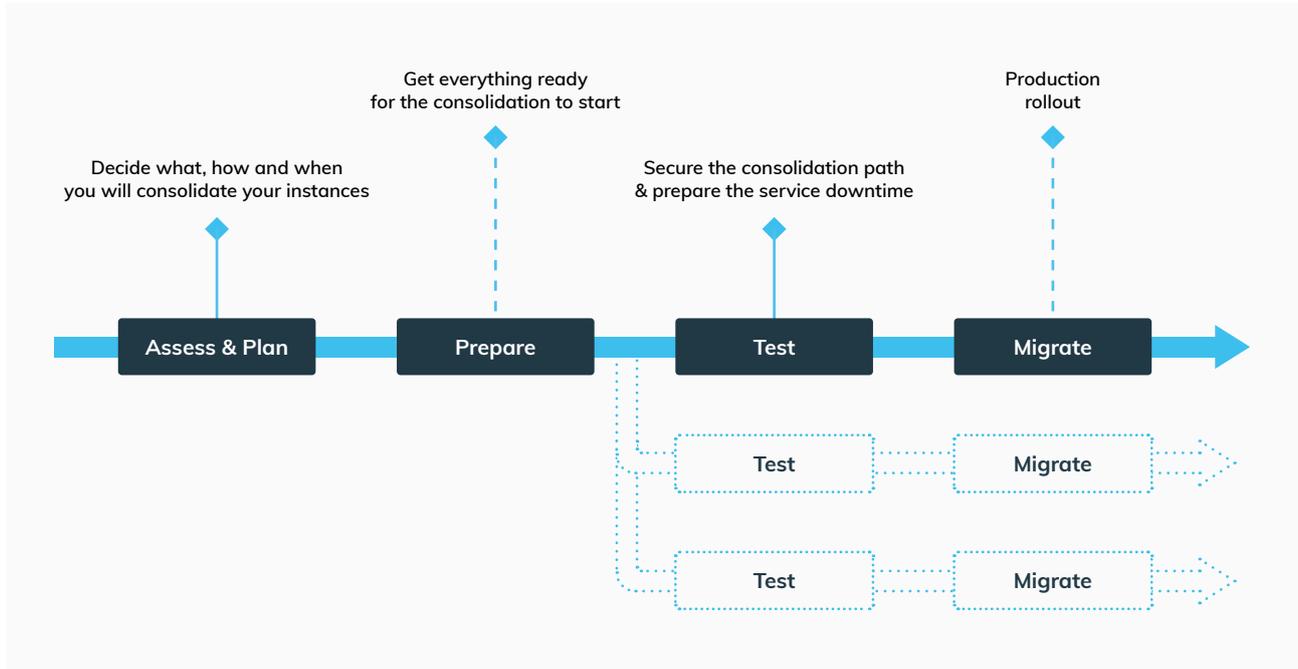
## **4. Step 3: Plan your consolidation**





Once you have chosen the platform and the master instance, you still have to define the exact order in which instances are going to migrate, what data inside those instances are going to migrate, and finally, when all of this is going to happen! This will happen at the Planning phase.

**A consolidation is composed of several phases, each of critical importance to the success of the project.**



Unlike a standard migration where you plan, prepare and execute sequentially, a consolidation project usually involves more data/instances and therefore parallel activities once planning has been done.

**The usual timeline for a consolidation project in each of these phases is:**

1. For assessing and planning

2 - 3 months for assessing and planning

2. For preparing

1 - 2 months for preparing

3. For each instance to consolidate

- ◆ 2 weeks to 6 months of testing depending on the instance complexity
- ◆ 1 day to a 6 weeks for migration depending on the data migration process you want to use (« big bang » : all data at once, or project per project)



Overall, a consolidation can take from 3 months to 1 year to complete. Some very complex projects with a very high number of instances or very complex customization can take even more than that. If that scares you, remember what we described in the early chapters of this ebook: most of the time, the cost of not consolidating heavily outweighs the cost of consolidating. Consolidating will bring all the problems to the surface at once to deal with them instead of having them lingering and waiting to cause massive issues. If planned patiently and carefully, a consolidation project becomes a doable project.

In case you don't feel like handling that on your own, Valiantys can help you undertaking that tasks. We have done hundreds of consolidation of migrations on all types of platforms and/or environments. Just give us the keys and we'll drive you safely to your destination, or do we?

Of course relying on a partner that knows the drill is a wise choice, but that does not remove the responsibilities that you as the client have during the project. Indeed, these are your instances, with your end-users, your governance, your problems.

We can help you take decisions by providing you options, pros & cons, but it's up to you to take those decisions ultimately, and that requires time & involvement in the project.

## **Here is an overview of the irreducible tasks we require help from the clients:**

### 1. **Get us access to** the environment

This can seem silly & simple for some of you, but in critical environments and in a remote work environment when security is at stake, it is sometimes a very complex task to tackle, as lots of client internal teams are involved in the process.

### 2. **Helping us** **understand** your environment

Thanks to our experience, there are a lot of things we can guess from your instances configuration, but it's impossible to fully grasp the importance or confidentiality or a specific project only by glancing at its configuration. We need informed stakeholders to run us through the instance and explain us what they have in there from a business standpoint. Any documentation providing that kind of information is a plus.

### 3. **Take difficult** **decisions**

In the course of the consolidation projects, there will be tough decisions to make that we can't make for you, such as abandoning some data along the road because it can't be migrated, or it is just too expensive to migrate. Aligning your internal teams on these decisions is time consuming, and we just can't replace you in that role.

### 4. **Change** management & communication

Consolidation projects can introduce massive changes to the organization. Users need to be informed of every step of the project and rallied behind the common cause. We can help you with your communication plan (see the below chapter), but change management goes way beyond this, and it should not be underestimated without putting the project at risk.

## **5. Step 4: Identify all gaps and risks**





Before we dig in more details into how the consolidation project is going to happen, let's take some more time to discuss gaps and risks. We have told it before, consolidation project involve potentially losing data. Also, consolidation projects are complex and require lots of decisions, technical tasks... and therefore involve risks.

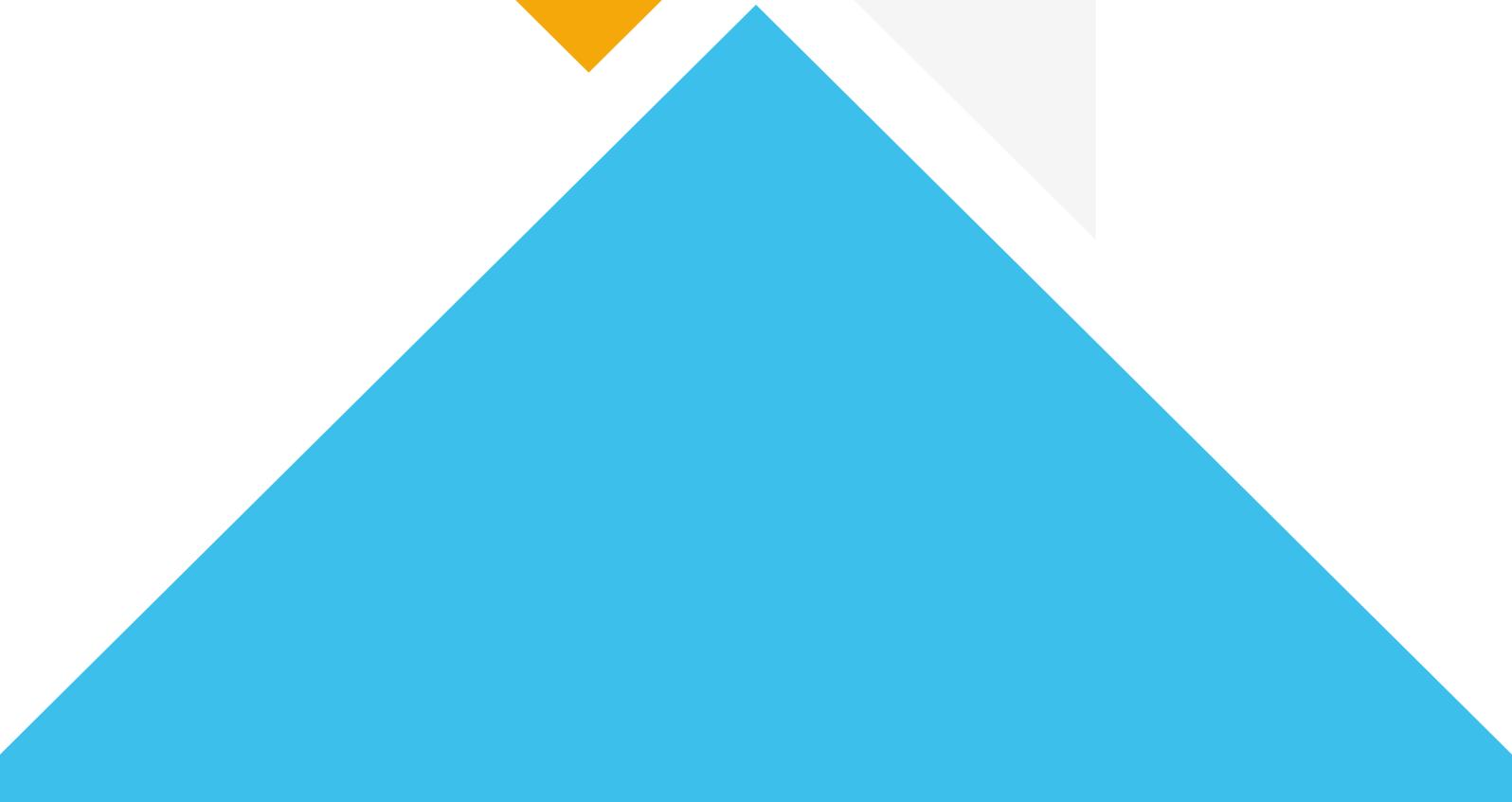
We encourage you to try and identify as many functional and non-functional requirements as well as risks during the assessment phase. Once you identified the requirements, you need to see if these are covered or not. As for the risks, your job is to find mitigations and have action plans ready for when the time comes.

Below are some examples we regularly face in consolidation projects. Functional and non-functional requirements can be particularly important if you change platform in the process (Cloud to behind the firewall or the other way around).

Requirements	Examples
<b>Functional requirements</b>	<ul style="list-style-type: none"><li>◆ Ability to write scripts using the Java API</li><li>◆ Ability to write scripts using the REST API</li><li>◆ Ability to customize the user interface</li><li>◆ Ability to integrate the product with a third party product hosted in a closed network</li><li>◆ Ability to integrate the product with a third party product hosted in the cloud</li></ul>
<b>Non-functional requirements</b>	<ul style="list-style-type: none"><li>◆ 99% availability rate SLA</li><li>◆ 24/7 support</li><li>◆ Unlimited storage</li><li>◆ Single Sign On</li><li>◆ Data locality</li><li>◆ Custom URL</li><li>◆ Compliance</li><li>◆ Access to the database</li></ul>
<b>Risks</b>	<ul style="list-style-type: none"><li>◆ Data gets lost or altered in the migration process</li><li>◆ Data is too expensive to migrate</li><li>◆ Additional time is required to validate the scope of the migration</li><li>◆ Additional time is required to execute the migration (application downtime is exceeding expectations and Recovery Time Objective)</li><li>◆ Apps are unavailable in the target platform or with a different features set</li></ul>

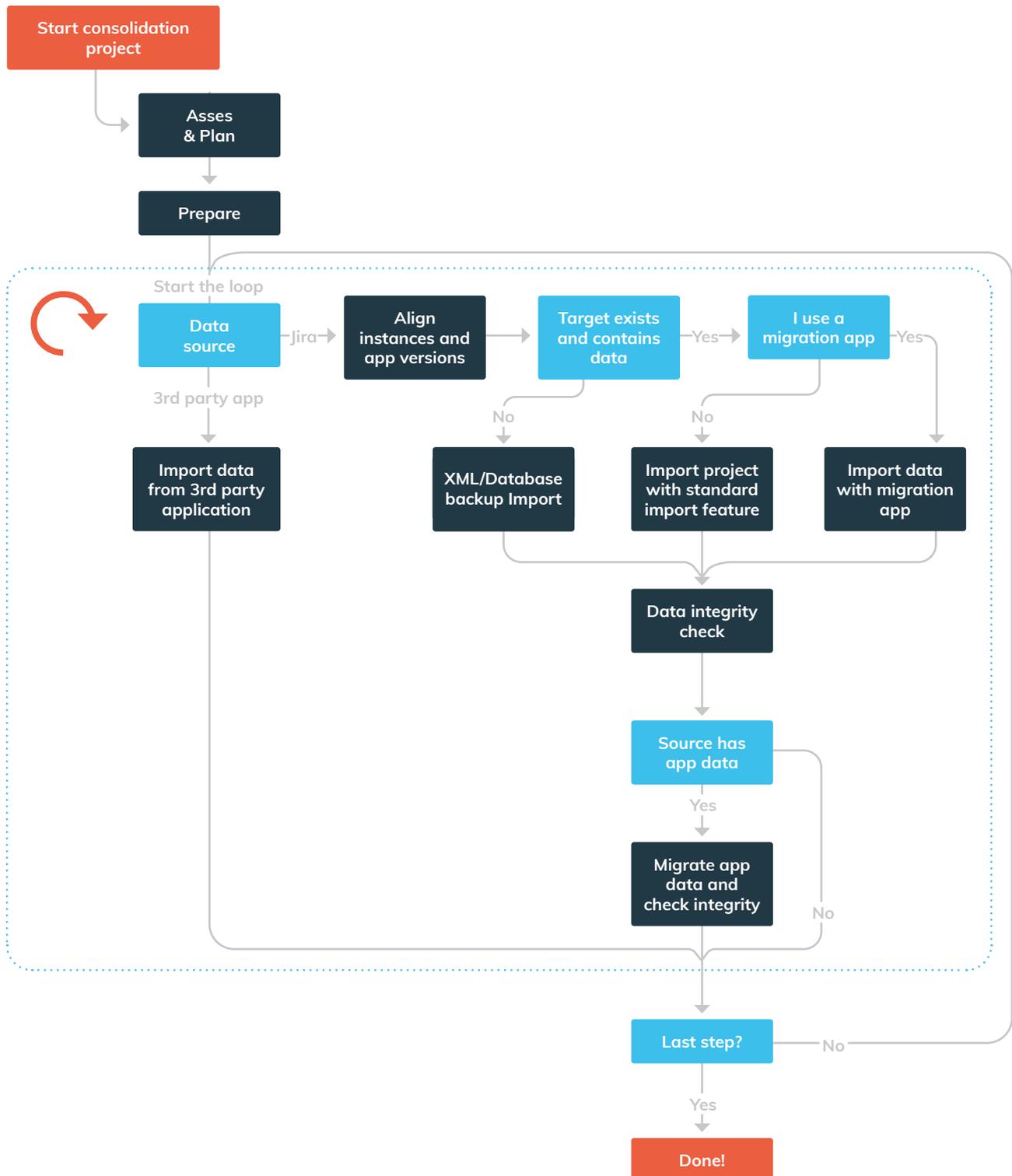
Another thing you have to bear in mind is how your current organization is going to be affected by that consolidation project. You may have to move resources around, reduce or increase some people's responsibilities. Having a before/after organization diagram could help everyone understand where you are coming from and where you are headed.

## **6. Step 5: Decide which path to take**



You have defined what you will migrate, the target platform, and you know what to expect from that consolidation project as well as the risks it entails. Now, let's see how you can technically get there.

**We will take Jira as an example because this could be the most common and the most complex case you will undertake:**





One important thing you need to know right away is that there is no simple way to merge two Jira instances. Why is that? Jira is composed of issues, stored in projects. Projects have configuration items that can be shared with other projects. When you mix all of this, it can be very hard to isolate a project configuration from another. It becomes impossible when you add on top of that a marketplace of 2000 add-ons that can bring additional data into the database.

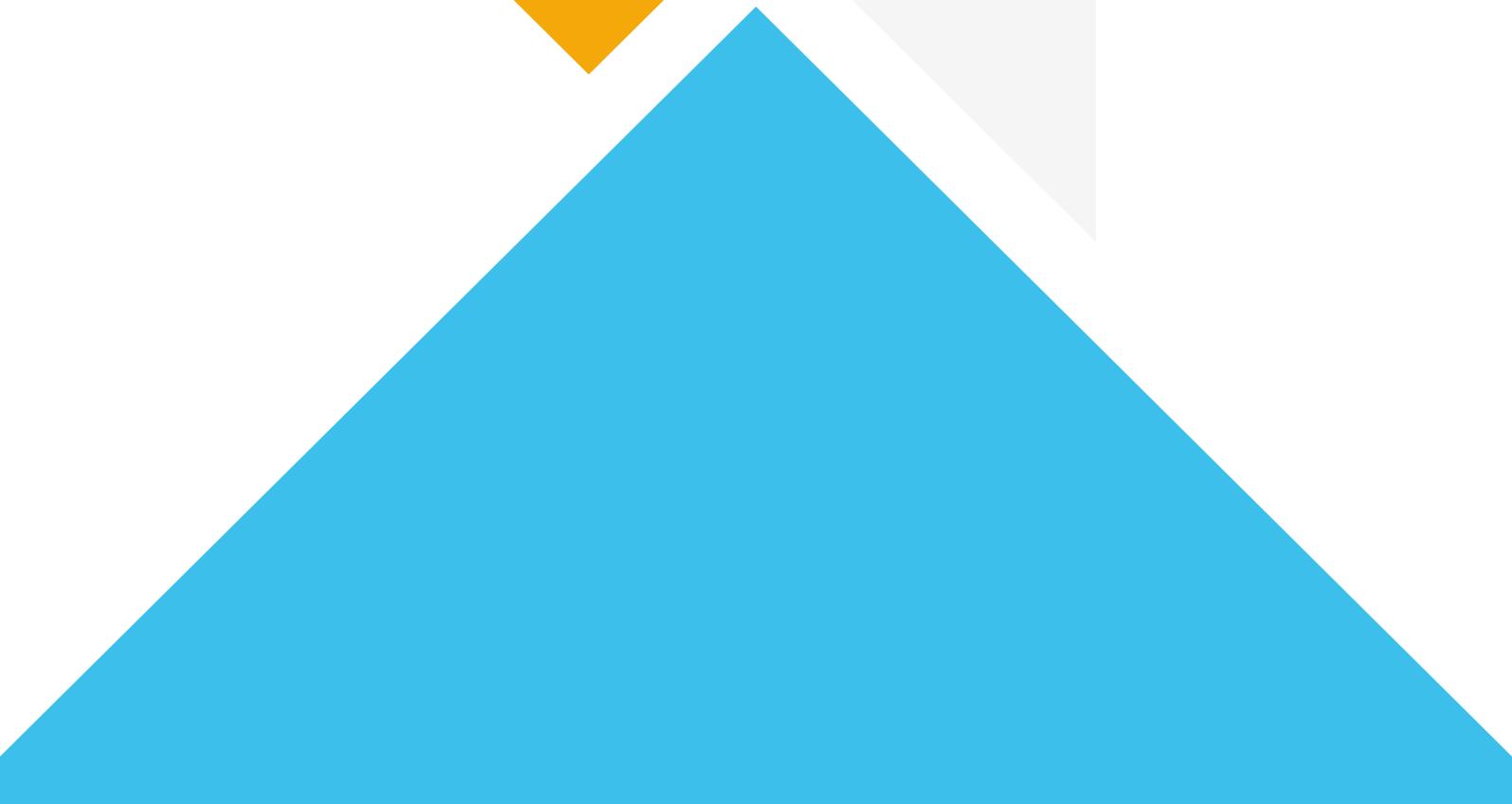
**Jira, by default, contains a standard mechanism for importing projects from one instance to another, but it differs if your target is on Cloud or Server/DC**

Server / Data Center	Cloud
<p>The <b>Jira Project Import</b> feature enables you to import a project from one instance to another, but without its configuration (workflows, fields, ...), that has to be manually created beforehand. If you have lots of projects to migrate or a complex configuration, this method can quickly become unbearable. Luckily, some paid apps exist to save the day which can export/import configuration along the way : Configuration Manager for Jira and Project Configurator for Jira. These apps do not support all apps data migration but their scope is getting larger and larger as we write these lines.</p> <p>(Note. it's worth remembering the major Atlassian announcement that Server will be phased out. For more information, please <a href="#">read here</a>).</p>	<p>The <b>Jira Cloud Migration Assistant</b> feature enables you to import Server / Data Center projects directly in the Cloud, along with its configuration. This is an improvement over the previously presented feature, however there are some known limitations for now. Jira Service Desk projects cannot be migrated and a lot of app data is not migrated along the way.</p>

For all the rest, you have to rely on the existing REST API to migrate the data. Luckily, Atlassian tools have very good API coverage, as well as most of the most popular apps from the marketplace.

**Yes, this requires development. If you think you can't handle it, we're here to help!**

# **7. Step 6: A big clean-up will help you tenfold**





This usually goes without saying, but it's always better to say it (or write it): **the less data you have to migrate, the easiest your consolidation project will become.**

Lots of instances have become very complex over the years due to configuration added on top of other configuration, with low standardization. In addition to that, very little cleanup has been done for unused configuration, and even more often unused projects. You can run a request on your Jira database to know when was the last update done on any issue in a project. If there has not been any update for years on a project, it usually means it can be archived (or deleted). Some organizations have records policies in place preventing them from deleting the data, then fine, but that does not mean they have to carry over all the data to the LIVE instance. The data can be exported and archived somewhere to be used in case of audit purpose.

**To sum it up, here is why you need to clean up your instance:**



**To Standardize your configuration**



**To improve performance, usability and maintainability**



**To simplify and speed up the consolidation project**





**8. Step 7: Communication  
is the key to success**

You now know almost everything on how a consolidation project gets done. There is one tiny little thing that you should never forget: communication. Communication is often overlooked but it may be the most important piece of the whole puzzle. If your communication plan does not work, your users will undeniably face issues at some point. If users face issues that could have easily been anticipated, then your project can be considered a failure, even though technically speaking the migration went smoothly.

## Let's see what are the most important elements of a good communication plan:

### 1. Communicate early and often

Early because you want to make sure people know what is going to happen a long time in advance, so that they have to prepare for the change. Often because communication does not always reach everyone. Employees receive too many emails, that's a fact. When you are in a rush and receive a global communication, you are likely to skip it, but also to not retain it. Communication regularly will help you reach more people and help people retain the information.

### 2. Prepare a clear cutover and legacy decommissioning plan

That plan should clearly state who is impacted by the consolidation, they need to know what instance they are supposed to be using, and when, and if they lost some data in the process or if they have some manual tasks to do once the migration is over (like a password reset for example).

### 3. Communicate about where the client data will be and for how long

As described before, you might lose some data in the migration process, you may also be migrating only a part of the available data. You need to let clients know where and for how long they can access their data.



Don't hesitate to use the Jira or Confluence announcement banner to update end-users about the progress of your consolidation project. Don't make that message too long though, as it will appear all the time for everyone, even if they have read it already. It is recommended to put the message in a colored banner. Whenever you change the message, change the background color of the banner, otherwise people may not notice the message has changed at all.

**How Valiantys  
can help you?**





The consolidation of your Atlassian infrastructure may look like such an overwhelming project that organizations keep postponing it for later. Our goal with this ebook was to show you the tremendous value that a consolidation can bring, why you should not wait, and share our knowledge about the best way to outline and manage such a project and avoid the pitfalls.

**In any case, since each Atlassian platform usage is different, so will the consolidation requirements be.**

Therefore, we encourage you to take only the most relevant advice from this document and adapt it to your context. We hope it will help you rationalize the use of your Atlassian tools to leverage all you can get from your present and future Atlassian investments.

**If you think you need guidance or specific services, Valiantys can help you.**

We offer a comprehensive range of professional services, from purely technical (instance audits, migrations, consolidations, training) to high-level organizational support and governance. We even conduct business transformation solutions consulting and implementation with Jira Align and Jira Service Desk.

We also provide application managed services, supported at all levels (including end-users) for everything Atlassian - 24x7. Additionally, there is the option of hosting on AWS servers for clients who have requirements too specific to fit on the current Atlassian Cloud. Our Managed Services are ISO certified and all our support and cloud engineers are certified Atlassian specialists, operating in the US, EMEA, and Australia.



# valiantys

Valiantys is the leading global consulting and services firm dedicated to Atlassian. We accelerate business transformation by digitizing processes and modernizing teamwork, using the best Agile methods and tools.

Our Atlassian technical expertise is unparalleled and we support our customers across the entire spectrum of their projects on those platforms.

Because teamwork requires more than just tools, we help them bridge the gap between their applications and strategic practices such as SAFe and ITIL.

Over the last 15 years, we have helped in excess of 5,000 customers to achieve their desired business outcomes at a reduced time to value, through improved team collaboration.

Find out how we can help you get the results you need at [www.valiantys.com](http://www.valiantys.com)

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