



# Say Goodbye to Spreadsheets and Meetings

Work asynchronously to plan your company's strategy with Jira Software and  
Advanced Roadmaps

Joe Pursel  
Sr. IT Applications Engineer,  
Twitter



# 2019

It was a wonderful year

## SAY GOODBYE TO SPREADSHEETS AND MEETINGS

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Do you want to:  
get rid of your spreadsheets  
have fewer meetings  
all while working from home...?

**SAY GOODBYE TO SPREADSHEETS AND MEETINGS**

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**Who thinks this can be done?**

**Well, we did!**

**Let me show you how we did it**



# Agenda

# Plan **Twitter's** 2020 strategy with Jira Software and Advanced Roadmaps



We have a  
problem



We need a  
solution



We built it



Now train  
our teams

# Plan **Twitter's** strategy with Jira Software and Advanced Roadmaps

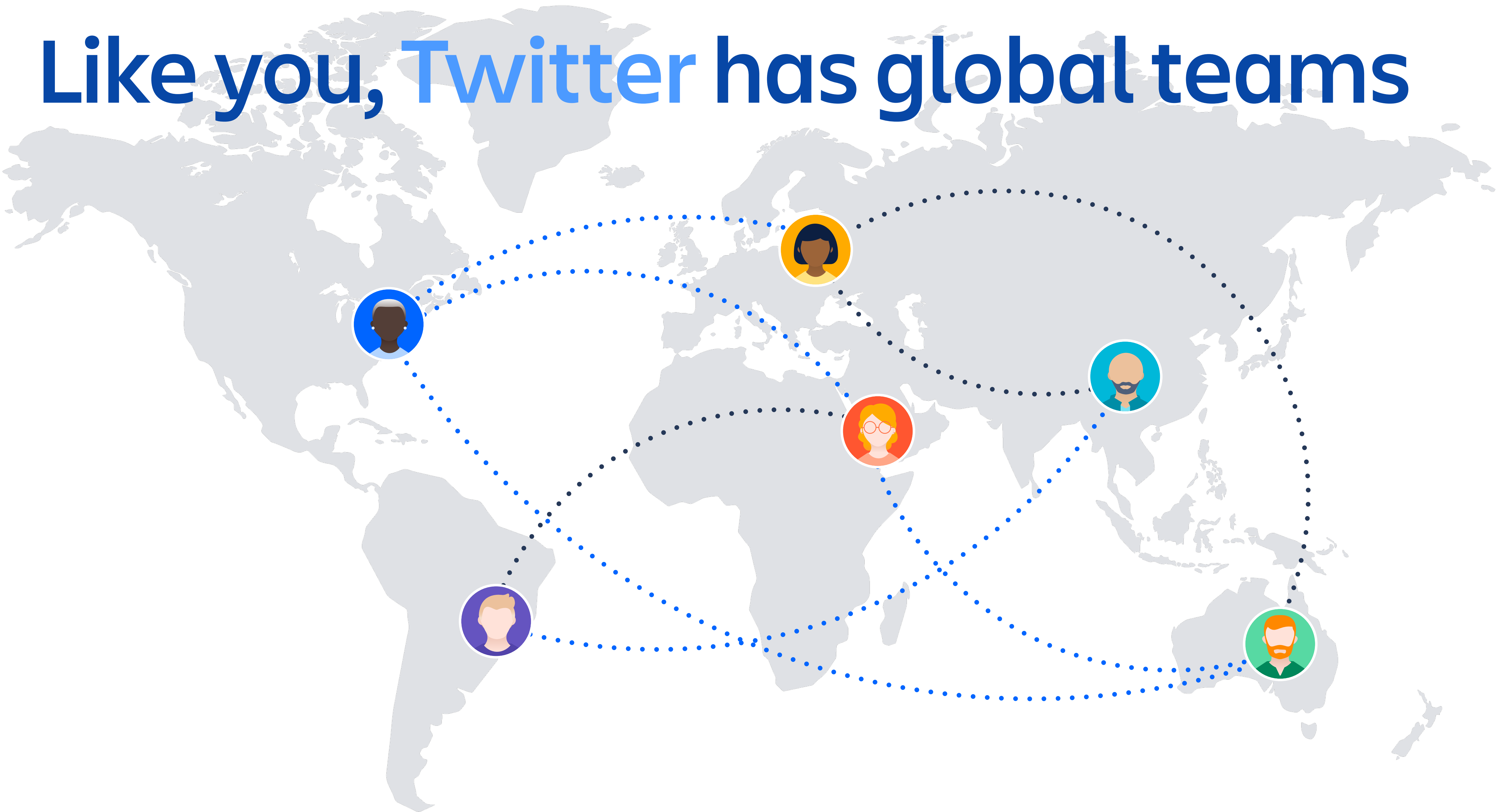


We have a  
problem

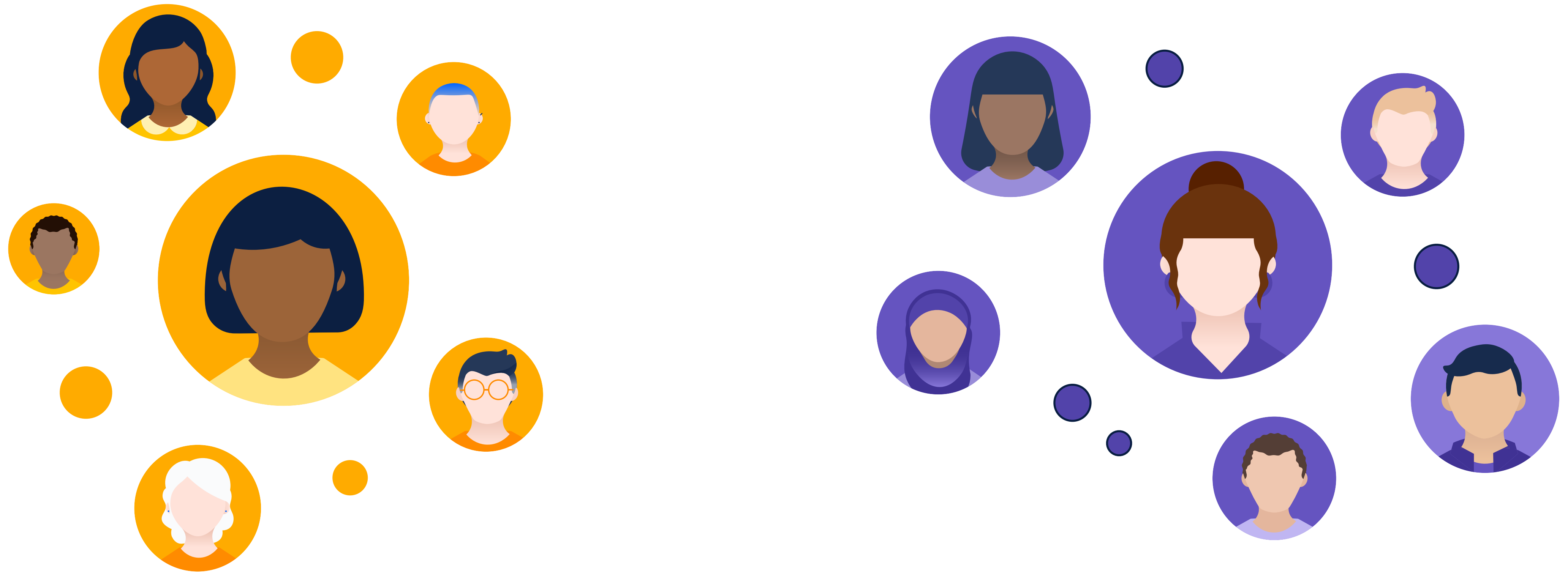
# Problem to solve

Planning a **years roadmaps**  
with **multiple** cross functional  
teams is **hard**.

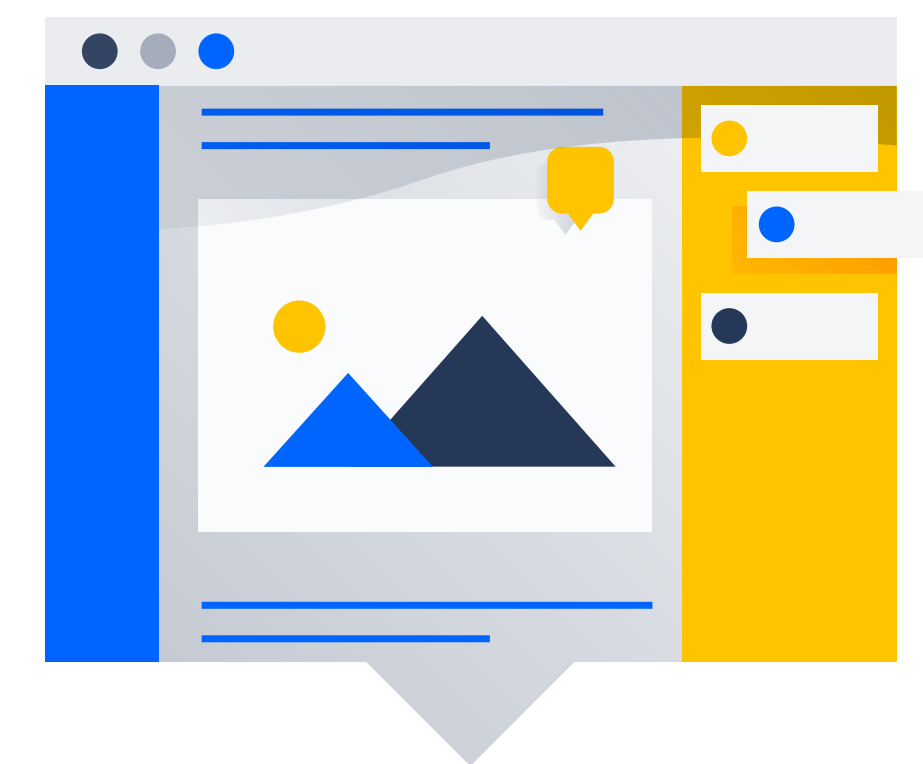
# Like you, Twitter has global teams



# Every team is unique – Every team has their own way of planning



# How do we get every team and Executives on the same page?

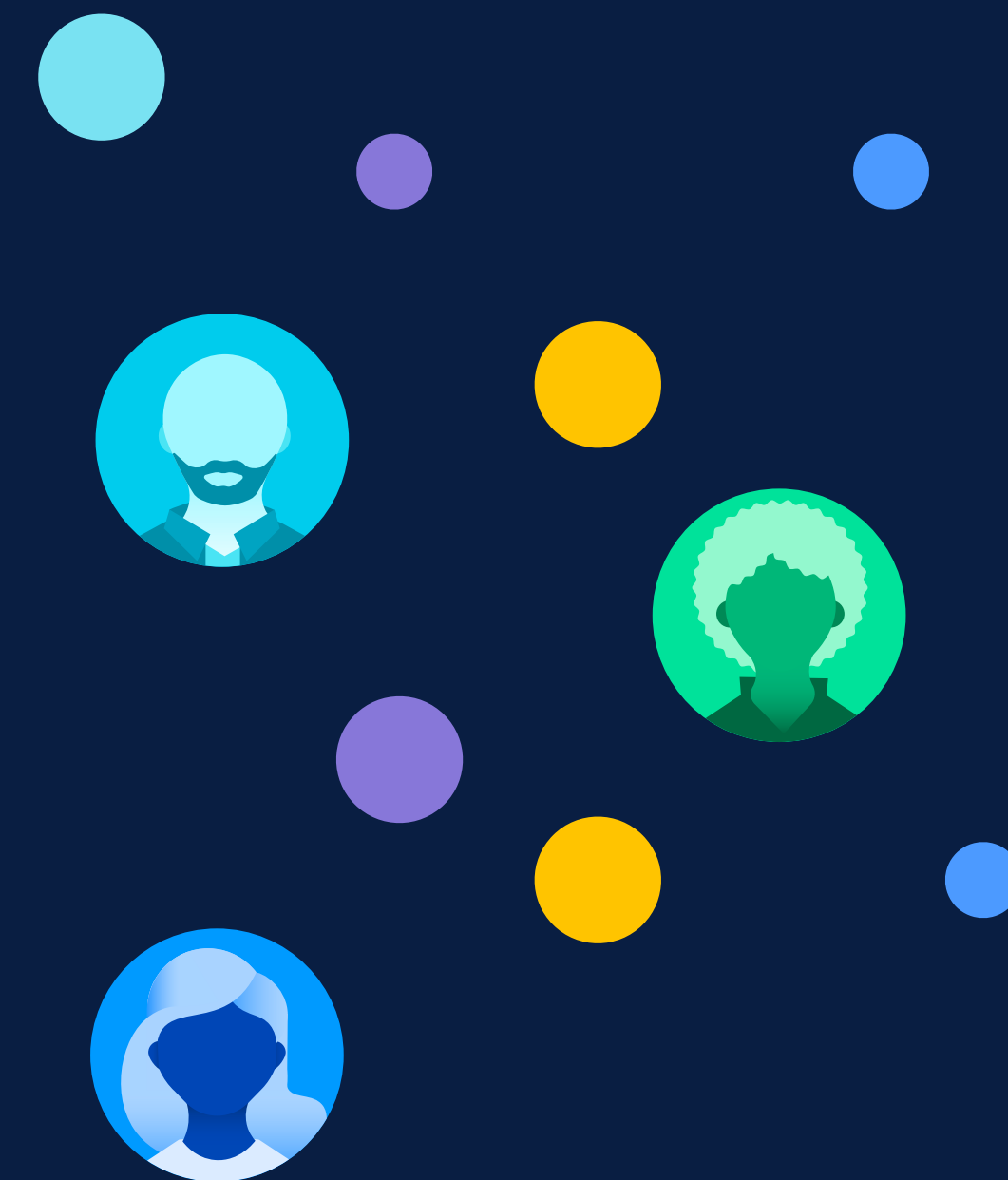
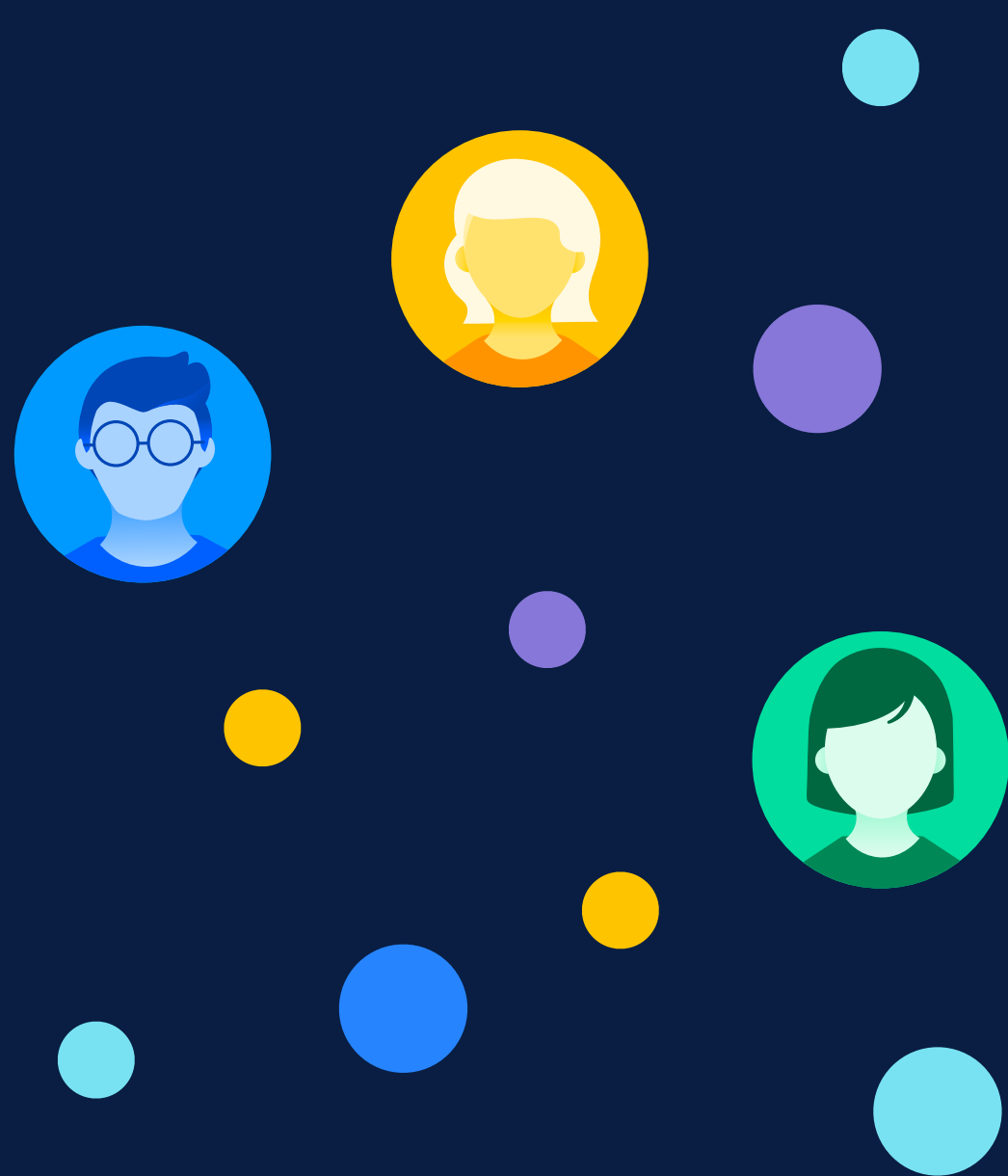


**SIMPLY PUT**

Twitter was **growing**, Teams were using **spreadsheets and slides** and **wasting too much time** without being able to plan **2020's** strategy



Does this sound  
familiar?



But, where do we start?

Start with what  
you have  
Hackweek

That's a great idea!



## OBJECTIVE

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Build a tool to plan **Twitter's 2020**  
**strategy without:**  
**spreadsheets and meetings**

# Plan **Twitter's** strategy with Jira Software and Advanced Roadmaps



We have a  
problem



We need a  
solution

Let's meet Brian



Technical Program Manager



Manages cross functional teams



Plans quarterly and annual  
strategy with other cross  
functional team managers

Let's meet Joe - Me



Jira Systems Admin



8 years of Atlassian experience



Many years of prior Program  
Management and software  
quality assurance experience

# Proposed Solution

We need a **goal setting** and **dependency mapping process** that allows teams to:

- Define a project
- Identify other teams dependencies
- Accept their dependency work
- Create a **Shared Objective Scorecard**
- Repeat the process quarterly and annually

# Benefits – The Scorecard will:

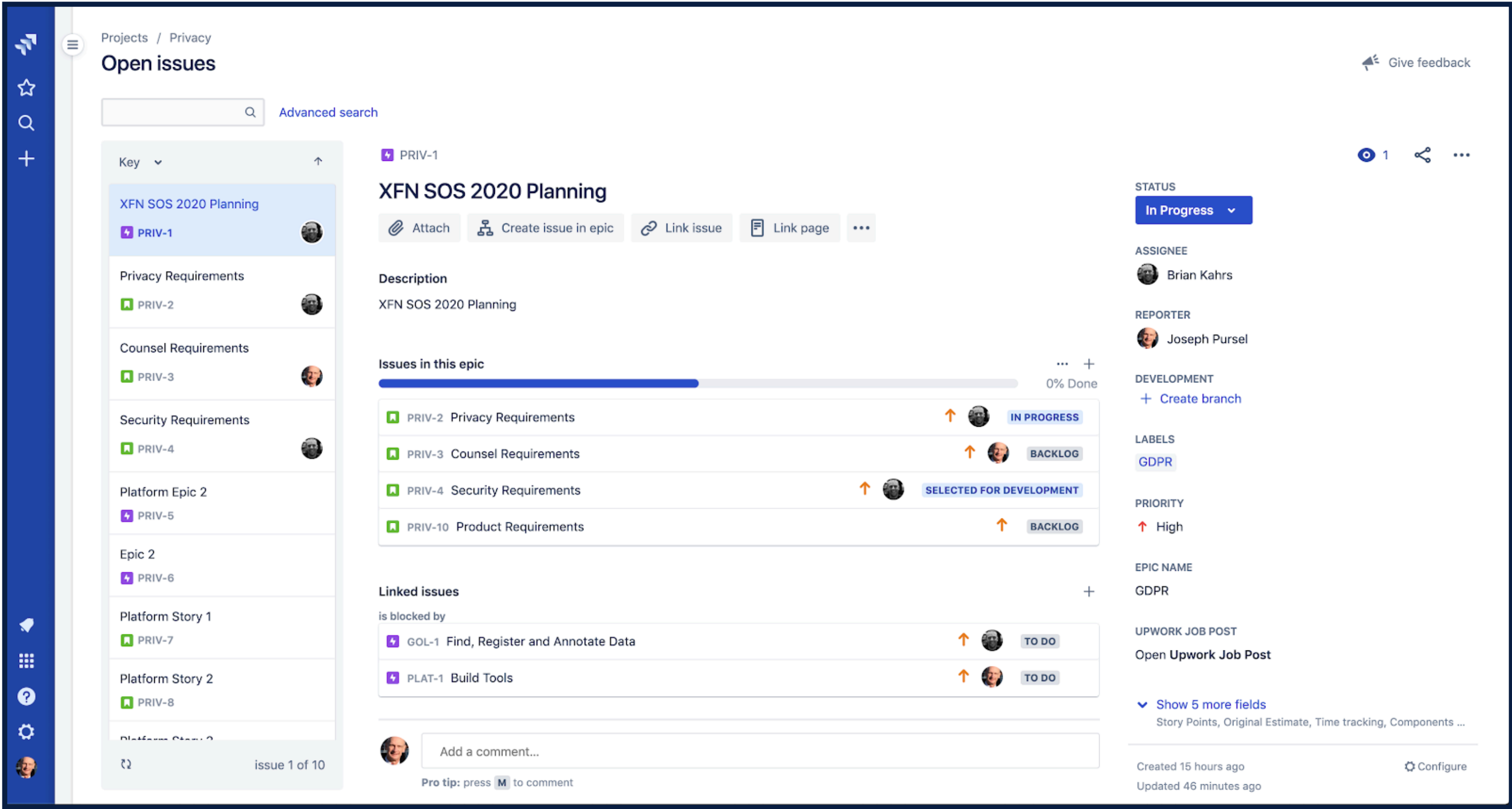
Compartmentalize risk and complexity in execution enabling accountable drivers and cost transparency, resulting in strong alignment, loose coupling and promoting healthy independent teams delivering against the company's top priorities



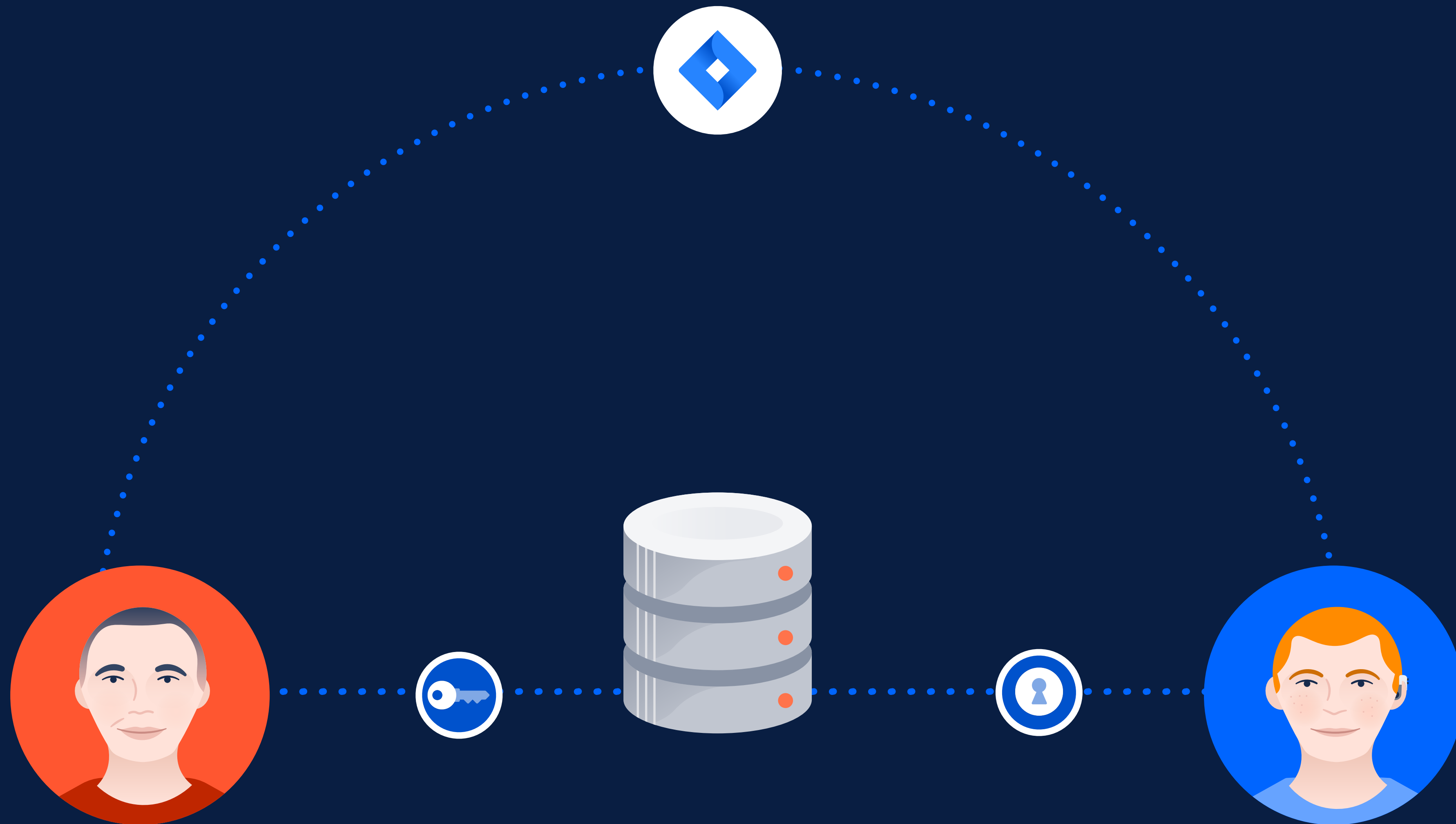
Finally

Background

# The Original Jira Prototype

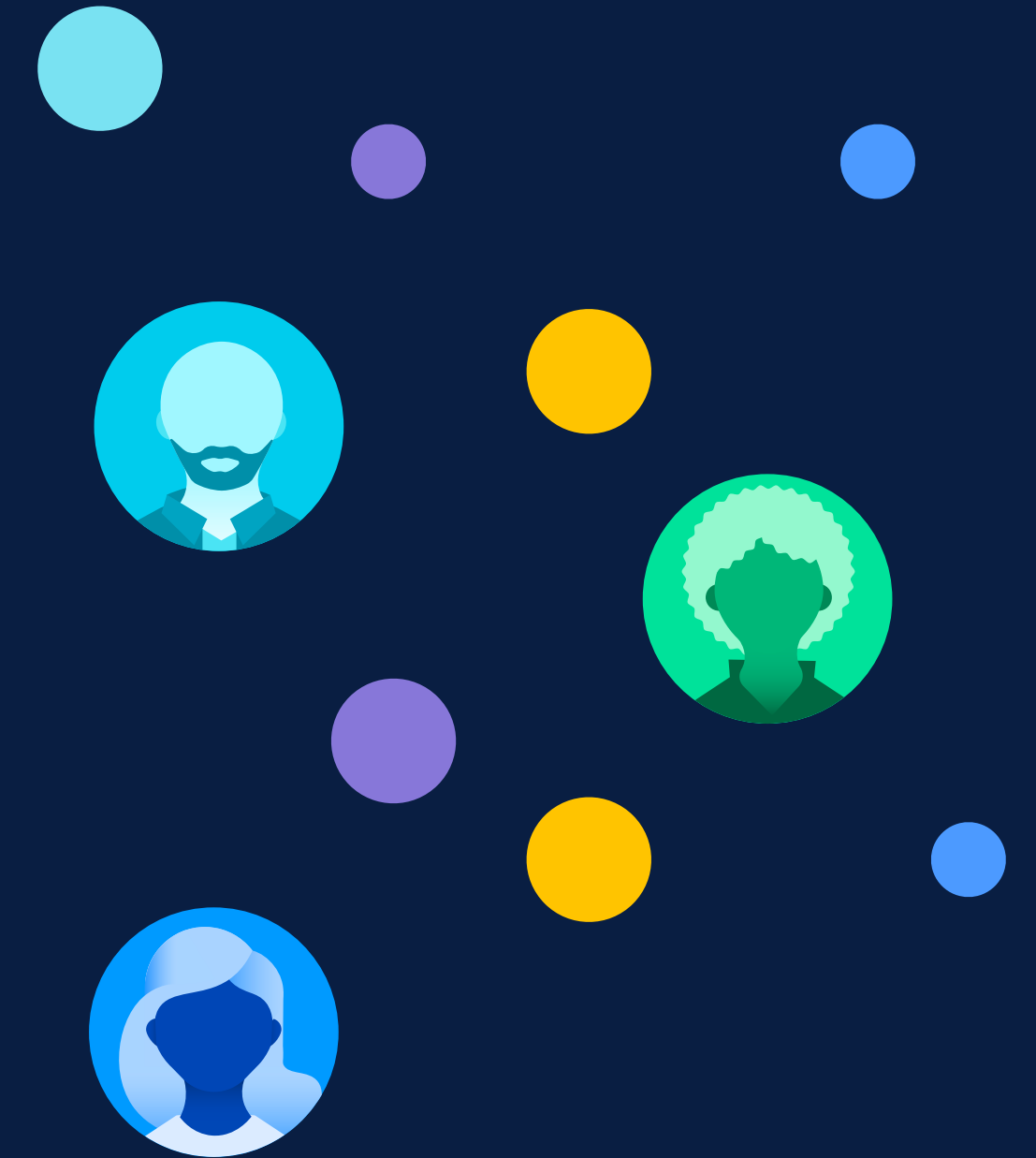
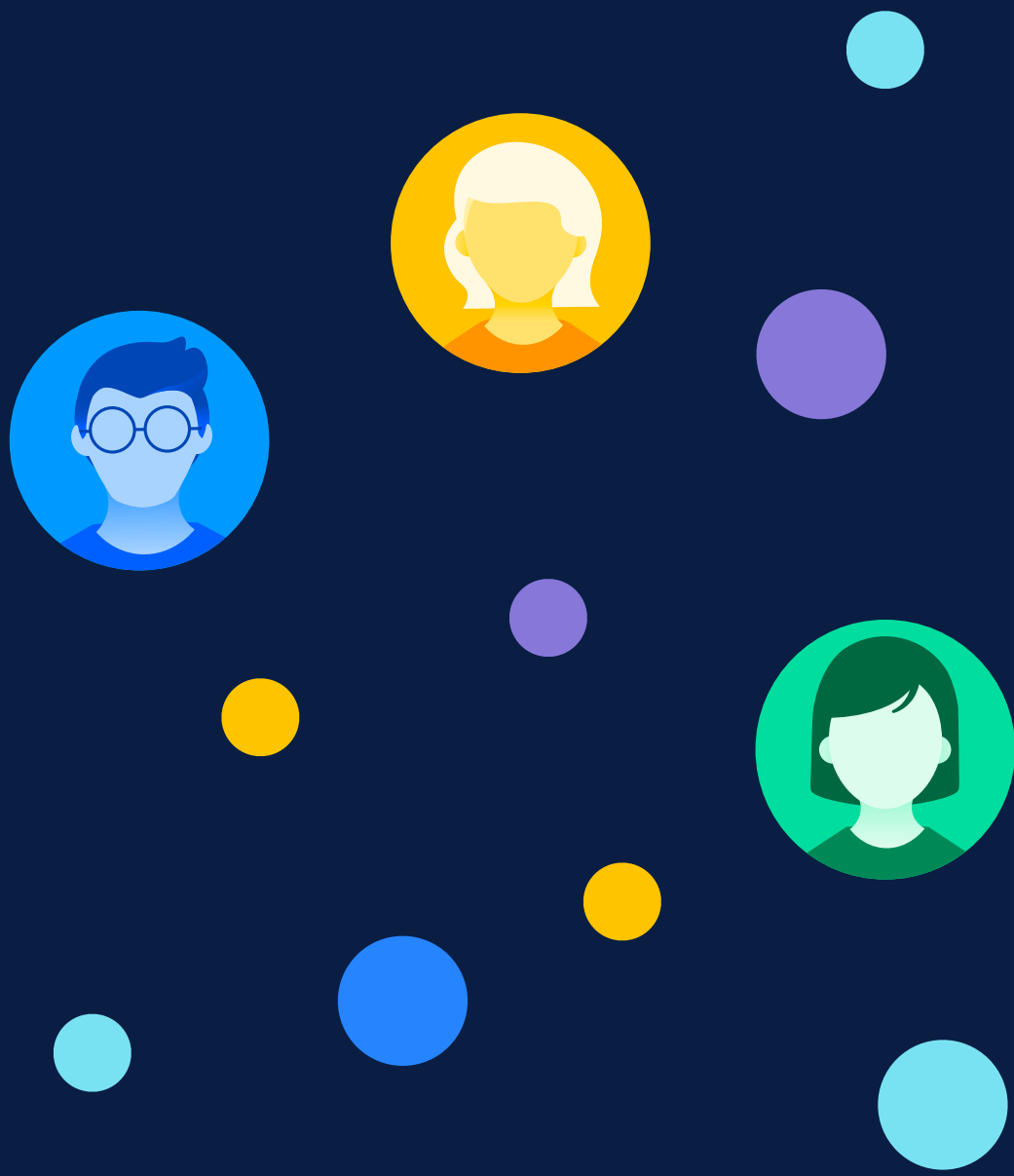


# Together with Jira, we made a great team



# Hackweek ended

**But... we  
didn't win  
...yet**



The year everyone wants to forget

2020

But, a year of tremendous challenges and growth

**MARCH 2020 - COMPANIES SENT EVERYONE HOME**

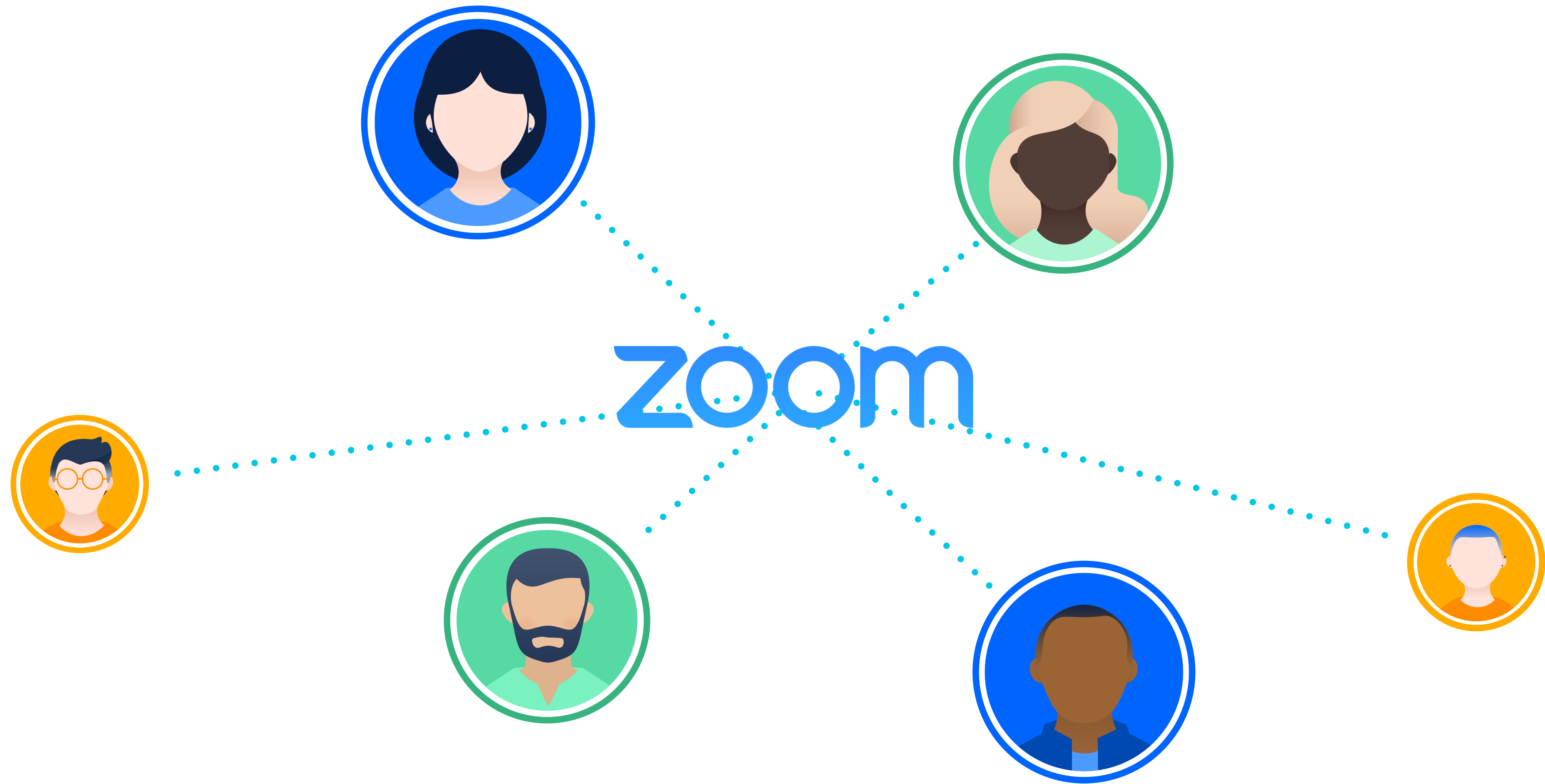
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# COVID-19 closed the world



Stephanie F. Scholz  
Source [economist.com](https://www.economist.com)

# Remote Work was Reality



# There are a world of options out there





# But, we had to Take care of business



**Before**

1 single Jira server



**After**

4 clustered Jira servers

Jira Data Center



# Let's look inside our Jira environment

 1 Data Center - 4 Servers

 Projects - 1,400+

 Issues - 6.7M+

 Comments - 21M+

 Users - 10K



# Why Jira?

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Background

Safety – Privacy

## Jira Software solved our needs

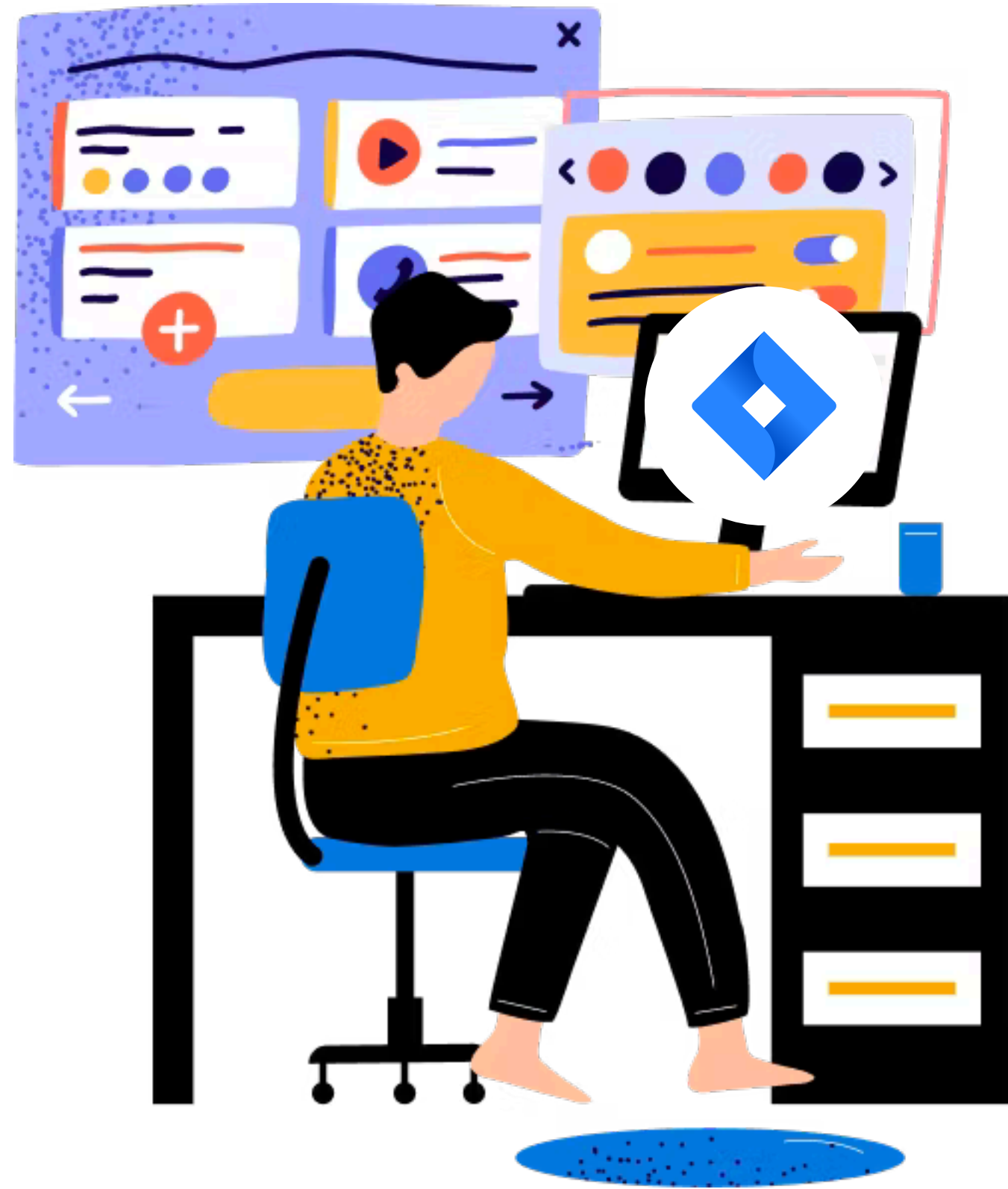
***Jira Software with Advanced Roadmaps*** enabled our teams to...

- ☑ Work asynchronously and independently
- ☑ Establish priorities based on goals and timelines
- ☑ Track progress and dependencies

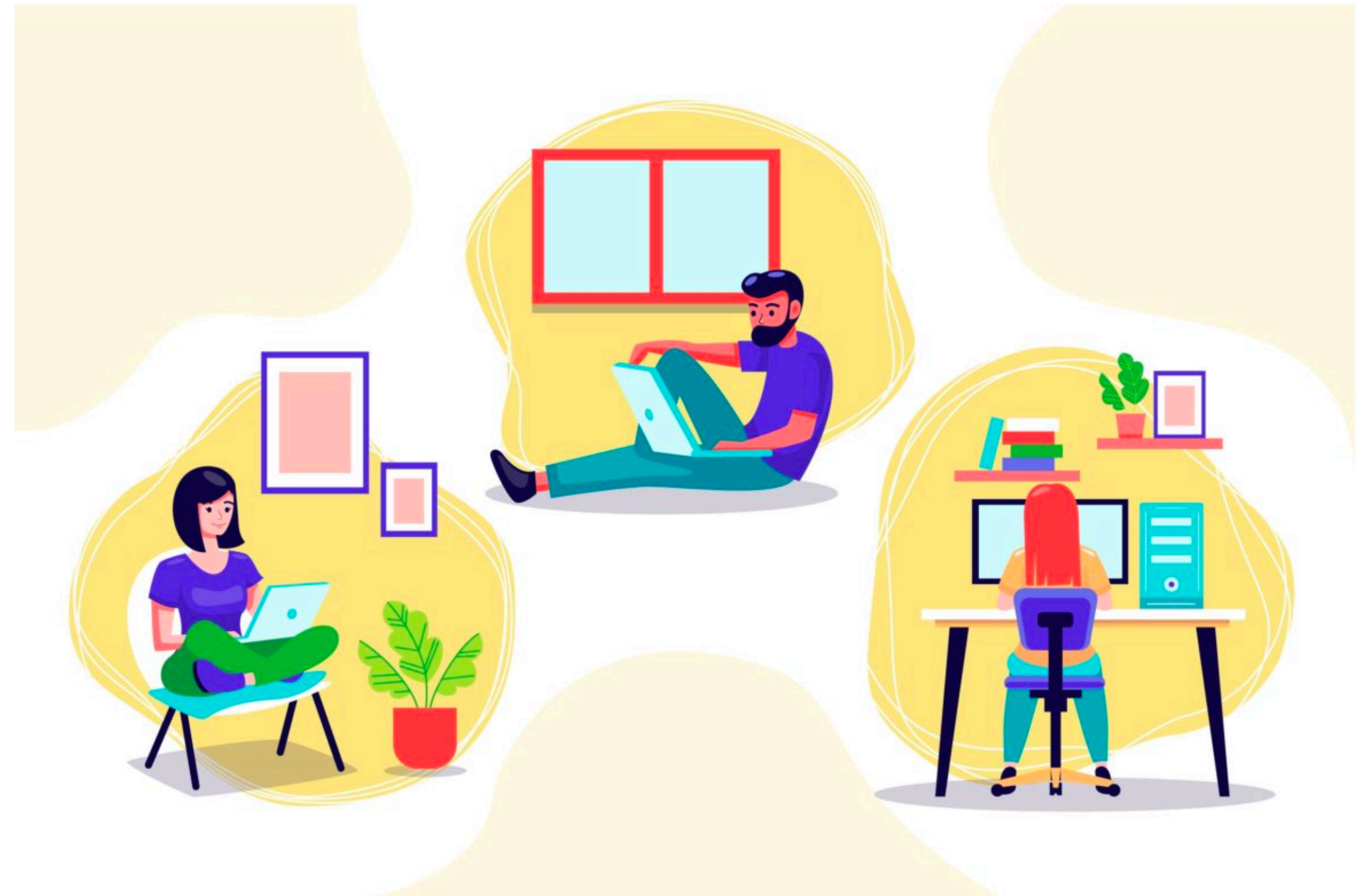
...while keeping tweets safe with ***Data Center***:

- ☑ Met security and privacy requirements including GDPR
- ☑ Gave us the performance gains necessary to meet internal demand for Jira

# Jira was built for Async work



<https://www.hatica.io/blog/async-work/>



<https://library.mailmanhq.com/asynchronous-work/>

# Hatching

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Background

Safety – Privacy

Scorecard

## *Hatching the solution*



<https://www.purelypoultry.com/>

- ☑ Built our model with Jira Software and Advanced Roadmaps
- ☑ Our model uses Agile which enables ***cross-functional teams*** to see each others roadmaps and plans
- ☑ This gave us a way to ***visualize*** our roadmaps
- ☑ Expanded Advanced Roadmaps - we added more levels and put multiple issues at the same level
- ☑ Adding levels and issue types to the same level in the Advanced Roadmaps hierarchy gave us company-wide visualization and added flexibility



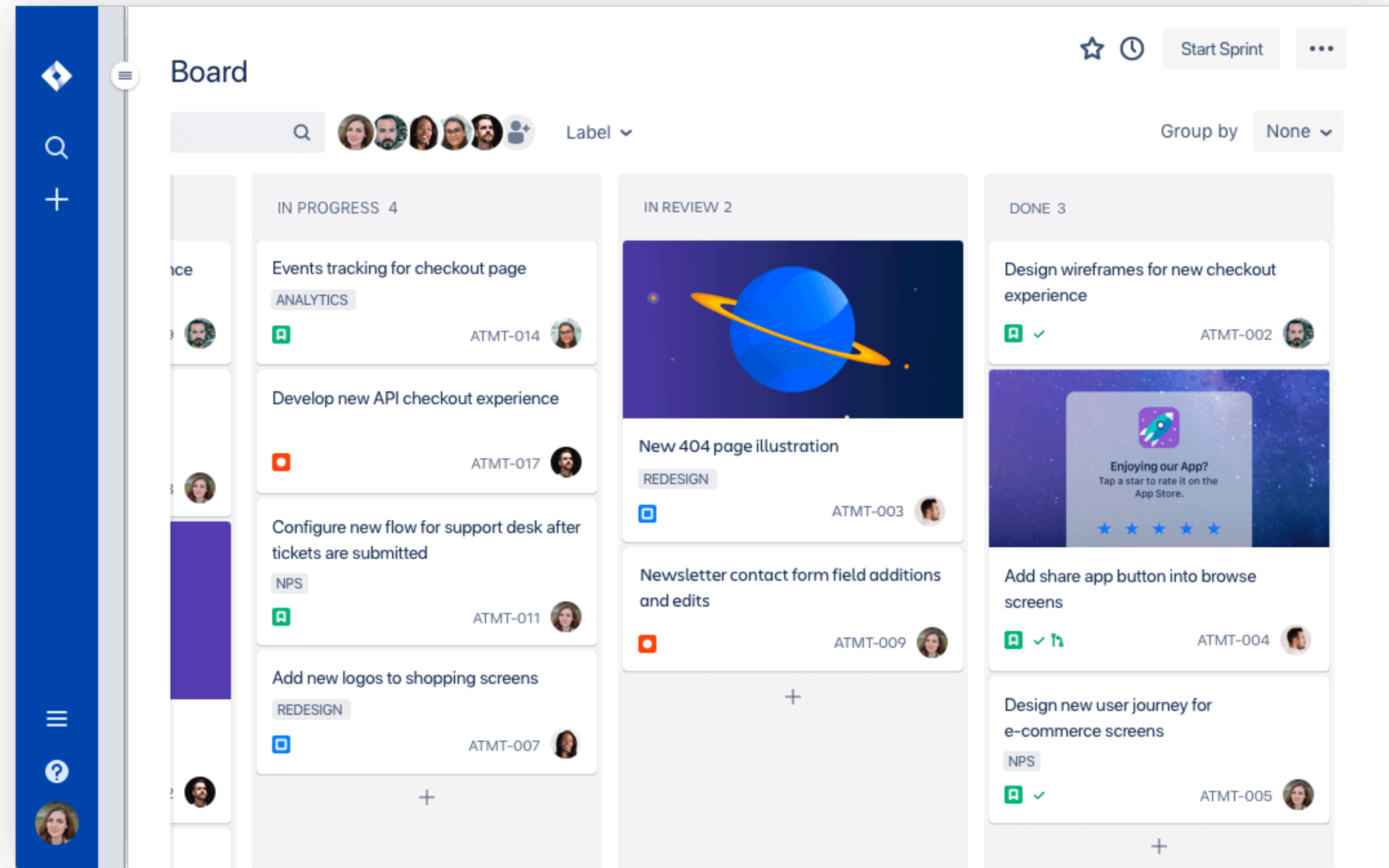
Hatching  
takes time

Background

Safety – Privacy

Scorecard

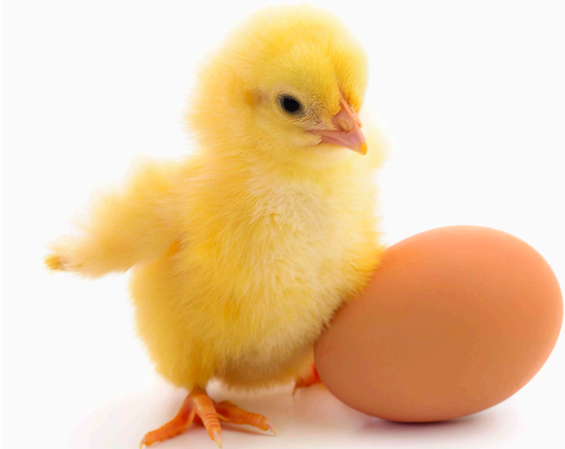
*We had our boards!*



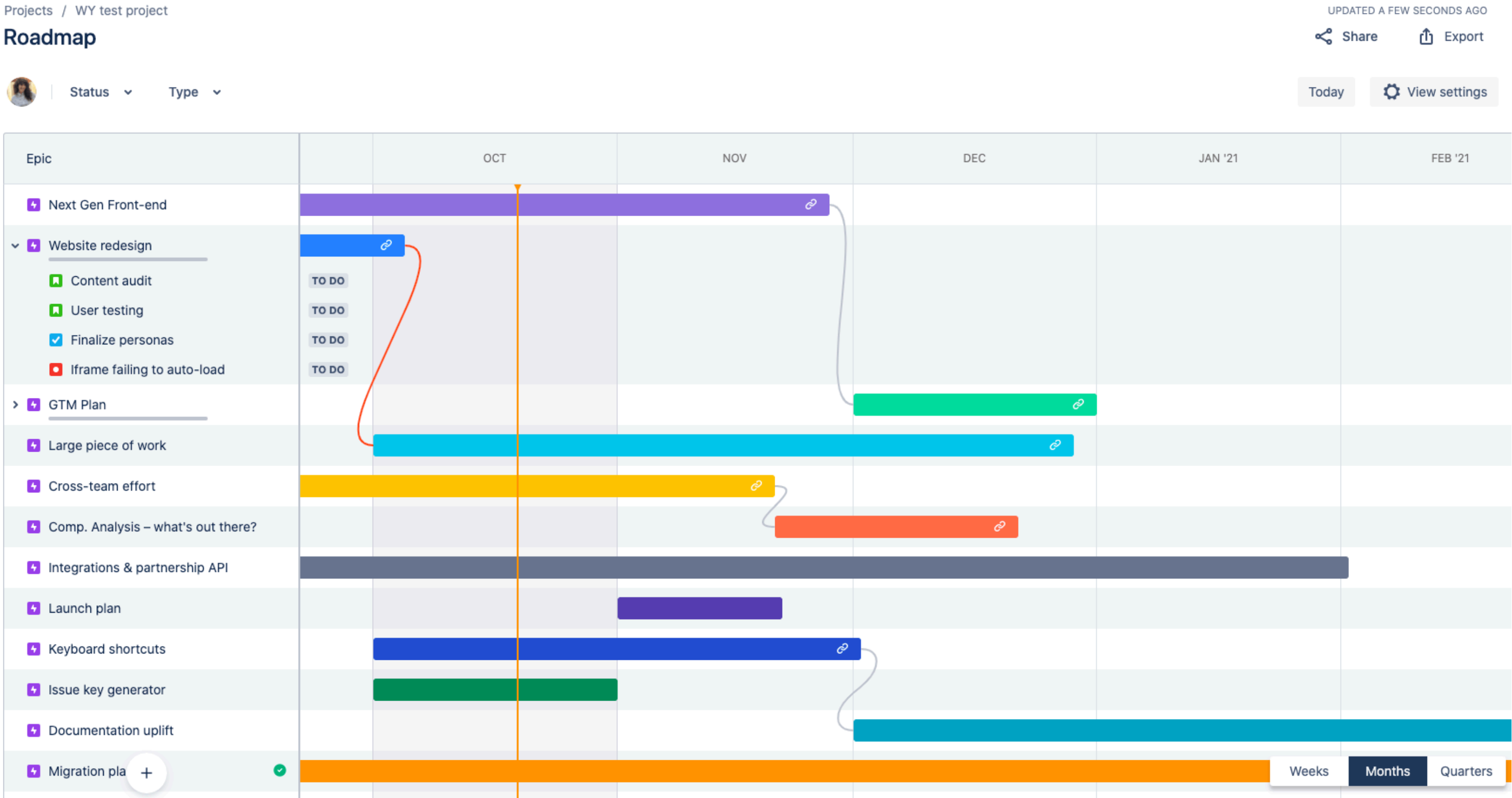
Hatching  
takes time

Background  
Safety – Privacy  
Scorecard

*We had our Scorecard!*



<https://www.ecofarmingdaily.com/>



# Plan **Twitter's** strategy with Jira Software and Advanced Roadmaps



We have a  
problem



We Need A  
Solution



We Built it!

# Solution -1

Jira Software

Advanced Roadmaps



Jira Software








Advanced Roadmaps  
(formerly Portfolio)



# Problem – Not Enough Issue Types

## The Twitter Way ITS

(IT-35510)

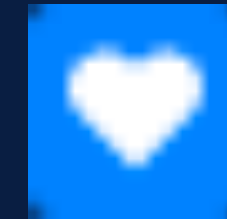
-  Task
-  Sub-task
-  Bug
-  Story
-  Epic

# Added Issue Types



## Strategic Initiative

Focused investments into specific opportunities which we believe can have an impact on our OKRs



## Roadmap Project

A series of work to be done with a clear purpose and timeline



## Workstream

A thematic grouping of 1 or more projects that ladder up to a specific strategic initiative

# Solution – Add Issue Types

## Strategic Objective Issue Type Scheme

Default	Twitter
Goal>>	Strategic Initiative
Strategy>>	Workstream
Initiative>>	Roadmap Project
Epic>>	Epic

- <> Objective
- + Strategic Initiative
- ⚡ Workstream
- ♥ Roadmap Project
- ⚡ Epic
- 📖 Story
- ✓ Task
- 🔗 Sub-task
- 📖 Milestone
- ! Risk

Wait, there's more

**We created too  
many issue types  
for Advanced  
Roadmaps**






# Solution - 2

## Expand Advanced Roadmaps Hierarchies



# Problem - Not Enough Levels



#	Level Name		Jira Issue Types	Actions
1	Theme	←	 Theme	Remove
2	Initiative	←	 Initiative	Remove
	Epic	←	 Epic	
	Story	←	All other standard issue types	
	Sub-Task	←	All sub-task issue types	
	+ Create Level			

# Solution – Add Levels and Expand

#	Level Name		Jira Issue Types
1	Purpose	←	
2	Vision/Objective	←	☰ <>
3	Goal/Strategic Initiative	←	✓ +
4	Strategy/Workstream	←	\$ 📈
5	Initiative/Roadmap Project	←	🕒 ❤️ \$
	Epic/Milestone/Risk	←	⚡ 📖 !
	Story	←	All other standard issue types
	Sub-task	←	All sub-task issue types
	+ Create Level		



# Solution - 3

## Standardize project configurations



# Solution – Standardize Configs










## Issue types

These issue types are available in your project. Each issue type can be configured differently.

Scheme:

### EPT - The Twitter Way ITS

-  Bug
-  Epic
-  Roadmap Project
-  Service Request
-  Story
-  Sub-task **SUB-TASK**
-  Task











## Workflows

A workflow defines which statuses and transitions an issue type can use within a project.

Scheme:

### AT: Workflow Scheme

-  The Twitter Way - Simple 
-  Atlassian Tools Team Workflow 
-  EPT Epics Workflow - 1.1 - (Comment on Parent) 
-  EPT Roadmap Project WKFW - 1.2 - Standard 

# Solution – Standardize Configs




## Screens

A screen defines how fields are displayed for an issue. Different screens can be used when an issue is created, viewed, edited, or transitioned through a workflow.

Scheme:

### **EPT - Corporate**

-  The Twitter Way - Corporate Issue SS **DEFAULT**
-  EPT Roadmap Project (Team) SS
-  The Twitter Way - Epic SS



## Fields

Fields hold the information about an issue, and each issue type can have different fields. How these fields behave is defined by a field configuration.

Scheme:

### **EPT - Corporate - Component Required (Not Subtasks)**

-  The Twitter Way - Corporate - Component Required **DEFAULT**
-  EPT Team - Roadmap Project FC
-  The Twitter Way - Corporate
-  The Twitter Way - Corporate Epic FC

# Solution - Standardize Issues



▼ Details

Type:

♥

Roadmap Project

Priority:

? Unprioritized

Affects Version/s:None

Component/s:None

Labels:None

Status:

PROPOSAL IN REVI... (View Workflow)

Resolution:Unresolved

Fix Version/s:None

Basics

Details

Which Flyway?:Lite

Days Past Target:14

▼ Description

Click to add description

▼ Smart Checklist

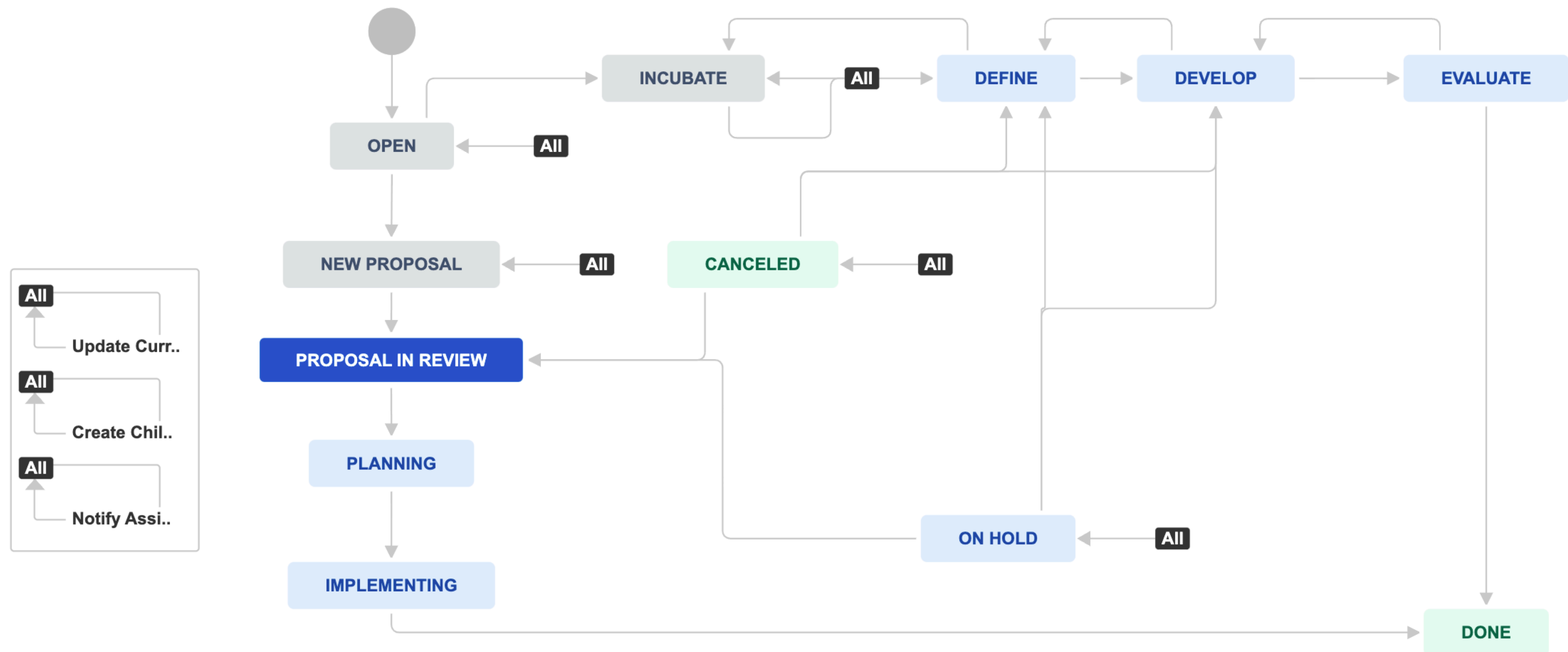
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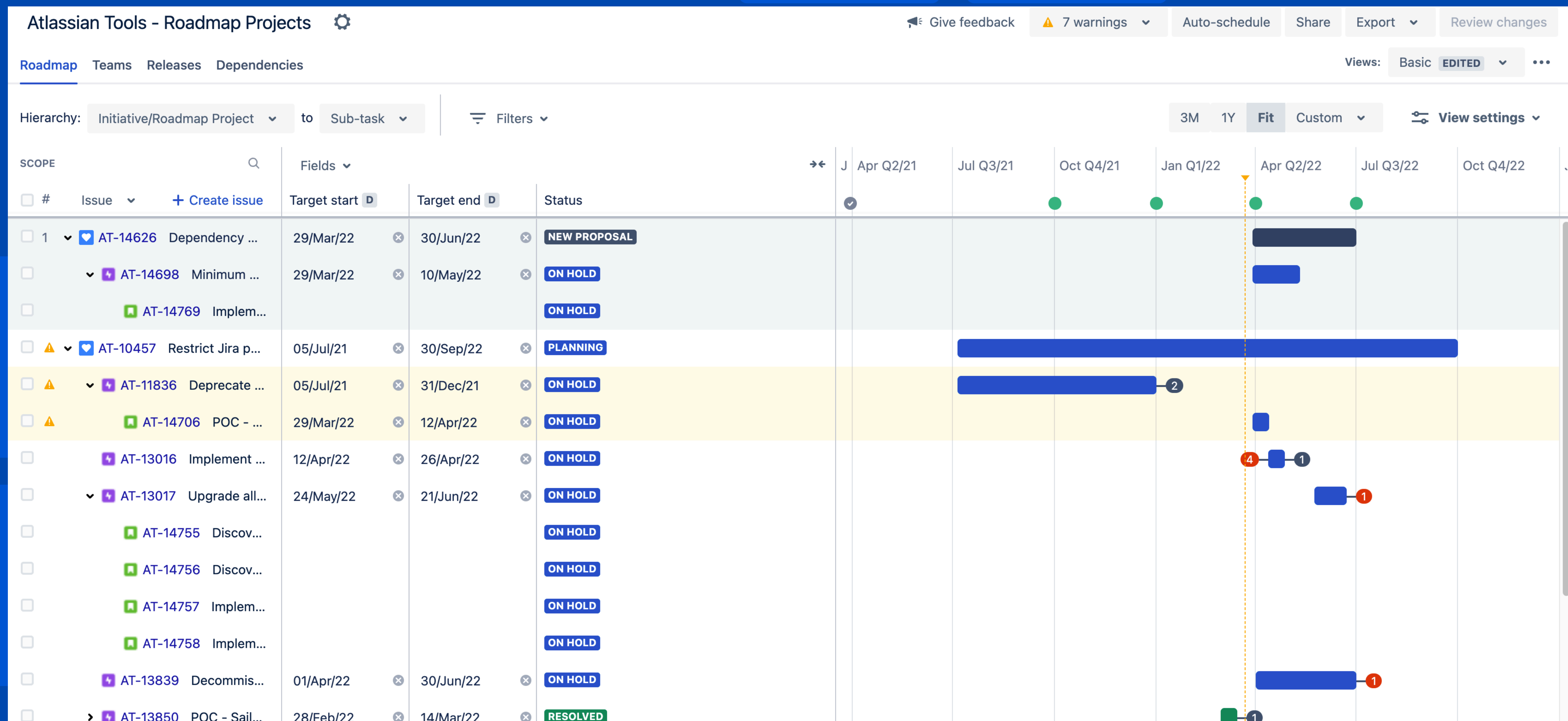
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⋮

# Solution - Standardize Workflow



# Solution – Standardize Plans



Sample Plan



# Solution - 4

Automate changes for  
project configurations





# Scriptrunner and Automation for Jira

## Scriptrunner for Jira



## Automation for Jira



Events ProjectUpdatedEvent × ProjectCreatedEvent × ProjectDeletedEvent ×

Which events to fire on .

Inline script

```
1 import com.atlassian.jira.event.ProjectUpdatedEvent
2 import com.atlassian.jira.event.ProjectCreatedEvent
3 import com.atlassian.jira.event.ProjectDeletedEvent
4
5 if (event instanceof ProjectCreatedEvent) {
6     // project created
7 }
8 else if (event instanceof ProjectDeletedEvent) {
9     // project deleted
10 }
11 else if (event instanceof ProjectUpdatedEvent) {
12     // project updated
13 }
```

Enter your script here

Automation Global administration Create rule

	Name*	Owner	Project
All rules	Auto assign on transition	John McKiernan	Global
Project rules	Close duplicate issues	John McKiernan	Global
Global rules	Close epic when all stories have been completed	John McKiernan	Jen's Team (JT)
	Close parent when all sub-tasks have been completed	John McKiernan	Global
	Close stories when epic is completed	John McKiernan	Jen's Team (JT)
	Close sub-tasks when parent is completed	John McKiernan	Global
	Comment on related issues on resolve	John McKiernan	Global
	Link mentioned issue	John McKiernan	Global
	SDCT: Transition: Progress status when catalog tasks are all completed.	John McKiernan	Global
	start date edit	John McKiernan	Global
	sync parent and subtask	John McKiernan	Global
	testing scheduled rule	John McKiernan	Global

Ok, we got this, now deploy

Changed over  
1,000 project  
configs in 1  
weekend



# Make a schedule - run it regularly



Weekly  
configuration  
updates

# Solution - 5

## Create content in Confluence



# Confluence Documentation



## Creating an Advanced Roadmap Plan

Created by Chris Shim, last modified on Mar 09, 2021 1 views since 21 Mar 2022

As a TPM, Initiative Driver, or EM an advanced roadmap plan (formally known as a portfolio plan) will help you visualize and track project work across multiple levels (e.g. Strategic Initiative down to Epic). Portfolio plans provide a hierarchy representation as well as a gantt chart view for project timelines.

- [Step-by-step guide](#)
- [Related articles](#)

### Step-by-step guide

To get started you can follow the below steps:

1. First create a filter to capture the scope of issues you want displayed in your portfolio plan
  - a. Navigate to the [Issue Navigator](#) to start a new search
  - b. Depending on your role you may only be concerned with a certain subset of issues
  - c. As a TPM or Initiative Driver, you might only be concerned with the Strategic Initiative level through team Epics that Roadmap projects are dependent on, in which case you might use:

```
project=<PROJECT_KEY> or issueFunction in portfolioChildrenOf("project=<PROJECT_KEY>") and type in ("Roadmap Project","Epic")
//e.g. project=Durability or issueFunction in portfolioChildrenOf("project=Durability") and type in ("Roadmap Project", Epic)
//'issuefunction in portfolioChildrenOf("")' returns all Child issues in the ("")
```

- As an EM you may be only concerned with a Team Level project and the Roadmap Projects depend on them, in which case you might use:

```
issueFunction in portfolioParentsOf("project=<PROJECT_KEY> and type=Epic") and type="Roadmap Project" or project=<PROJECT_KEY>
//e.g. issueFunction in portfolioParentsOf("project=NTAB and type=Epic") and type="Roadmap Project" or project=NTAB
//'issuefunction in portfolioParentsOf("")' returns all Parent issues returned from ("")
```

Create an Advanced Roadmap Plan



# Confluence Documentation



## EPT - Sample JQL Filters for Different Roles

Created by Chris Shim, last modified on Jan 12, 2021 1 views since 21 Mar 2022

JQL (Jira Query Language) filters are essential components in setting up Jira Dashboards, Portfolio Plans, and Agile Boards.

For more details please see - <https://www.atlassian.com/blog/jira-software/jql-the-most-flexible-way-to-search-jira-14>

We have provided a few sample filters that might help you filter down the scope of issues that are relevant for you.

Objective Owner - Everything Across an Objective (DUR/PAR/VEL/FUN) -

```
Project=PAR or issuefunction in PortfolioChildrenOf("project=PAR") and type not in (bug, story, task)
```

- Returns all issues in the 'PAR' project OR any child issues (Epics) of PAR issues except for bugs, stories, and tasks.

Functional Owner - Vertical (Consumer) - see all the work across all objectives

```
(type=Epic and "Eng Lead Staff"=ncaldwell) or issuefunction in portfolioParentsOf("type=Epic and 'Eng Lead Staff'=ncaldwell")
```

Initiative/Workstream Owner - Strategic Initiative > Task/Story/Bug/Experiment

```
key=<strategic Initiative/workstream ticket> or issuekey in childIssuesOf("<initiative/workstream ticket>")  
e.g. key=VEL-429 or issuekey in childIssuesOf("VEL-429")
```

# 2021

Coming thru COVID-19 and scaling Jira and Advanced Roadmaps with Scriptrunner and Automation for Jira



# Unified Project Tracking

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## *Unified Project Tracking Launched*

- ☑ **Accessible (and equitable):** Anyone at Twitter will have access to see who owns a project at Twitter and can ask a question in Jira no matter their level or their org.
- ☑ **Asynchronous:** Status updates or comments can happen at any time and in any location as long as teams leverage Jira. We won't need status meetings to generate these notes.
- ☑ **Purpose Driven:** We now know what we're working on in service of our strategy (thus our vision) and how it is progressing. Project Drivers will be accountable for updates and progress on these projects in service of our Objectives.



# Plan **Twitter's** strategy with Jira Software and Advanced Roadmaps



We have a  
problem



We Need A  
Solution



Build it!



Train our  
teams

Train our  
teams

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Background

Safety – Privacy

Scorecard

Get Buy-In

# *Get teams to buy-in with training*

✓ Our Atlassian Team created training for users and managers to buy-in to our Jira Roadmaps Solution

✓ Got Jira? – Jira 101 for all users – what is Jira? How do I use it?

✓ Advanced JQL – for users to learn how to use JQL to build filters for:

✓ Searching and reporting

✓ Dashboards

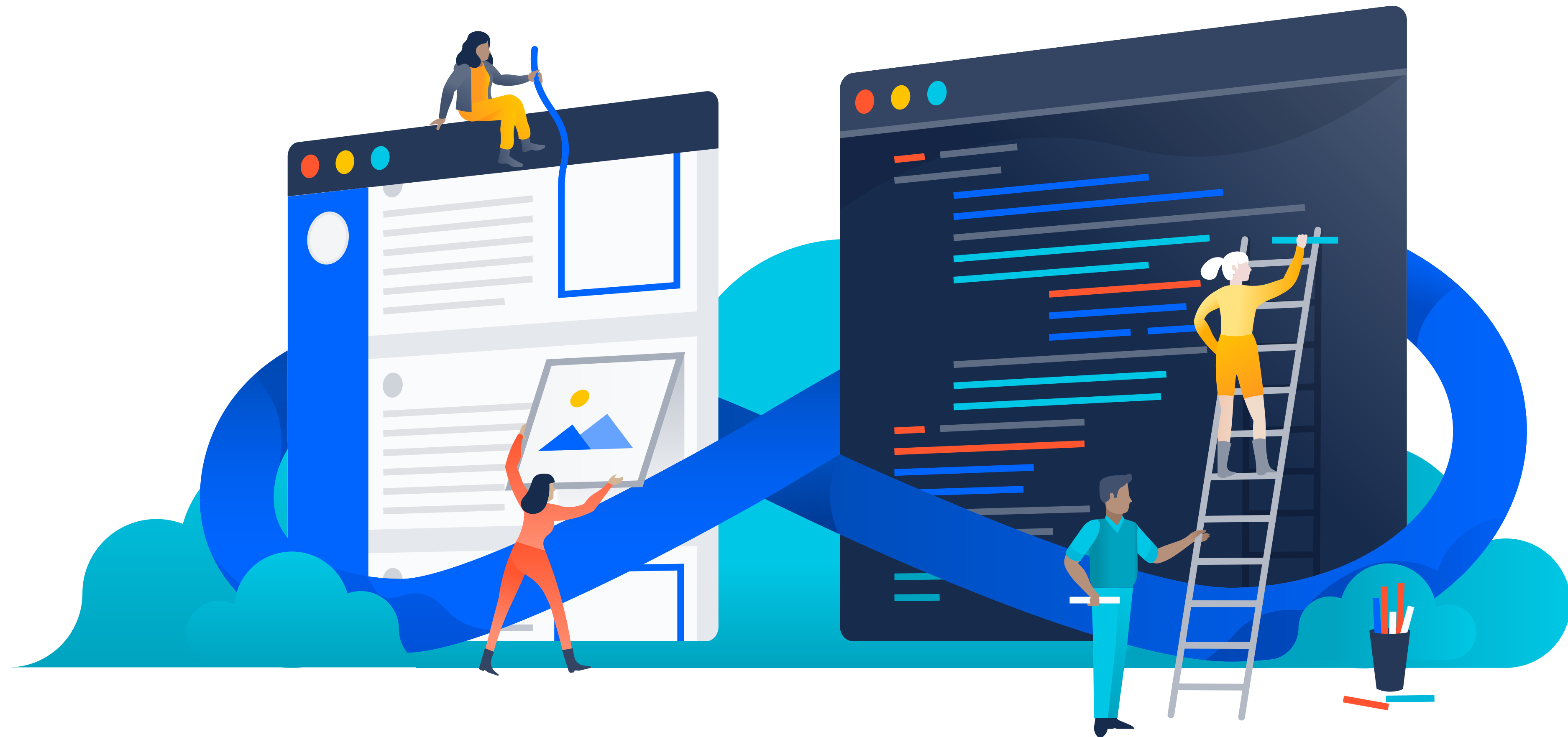
✓ Roadmap plans

✓ Scrum and Kanban boards

✓ How to search for issues in Roadmap Projects

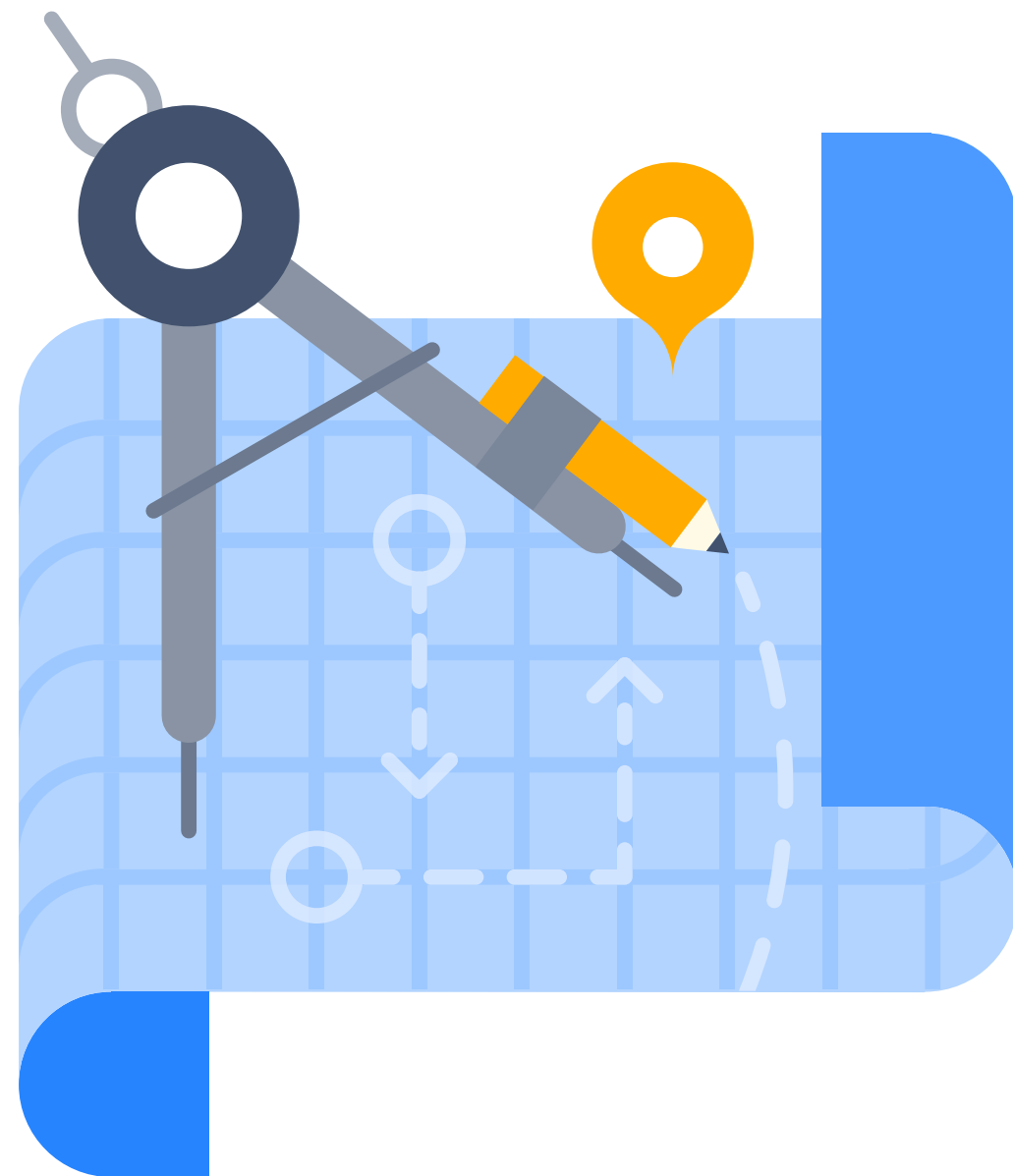


*At **Twitter**, Teams plan a years strategy with Jira and Advanced Roadmaps - without spreadsheets and meetings*



# SAY GOODBYE TO SPREADSHEETS AND MEETINGS

## Benefits



### Planning made easy

Team planning is easier with our standard project configurations and Jira Roadmap hierarchy levels!

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### Removes planning confusion

Every team can see what every other team is building

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### Number of meetings reduced

With fewer meetings, everyone is happy that we can work asynchronously with Jira

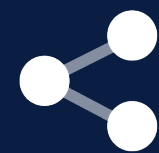
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# Twitter's 5 Solutions



## Solution - 1

Jira Software and Advanced Roadmaps



## Solution - 2

Expand Advanced Roadmaps Hierarchy's



## Solution - 3

Standardize Project Configurations



## Solution - 4

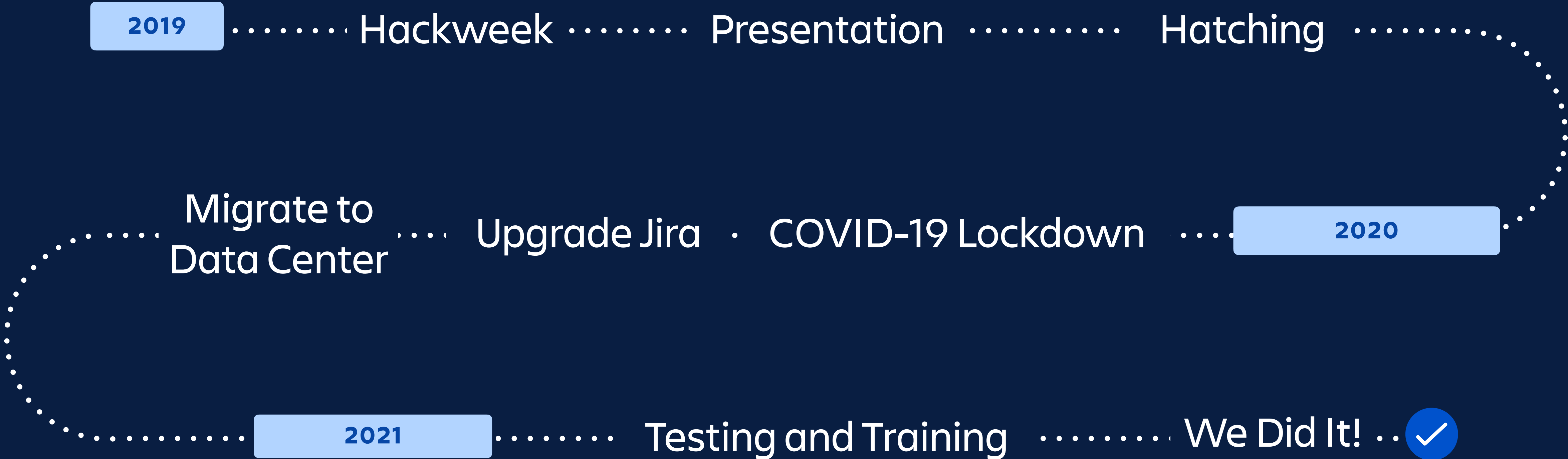
Automate Changes for Project Configurations



## Solution - 5

Create content in Confluence

# HOW DID ALL OF THIS HAPPEN? LETS REVIEW



And



# Twitter Teams Win!

**Finally  
Twitter Won**



Atlassian Awarded *Twitter* the 2021 Team Award



*Best in Class Technical*



▲ ATLASSIAN  
***team***  
*awards*

**2021 WINNER**

Best in Class Technical



Thank you Atlassian!

From all of us  
Twitter Atlassian Avengers




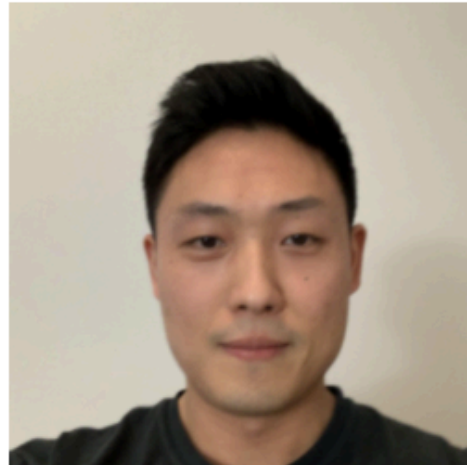

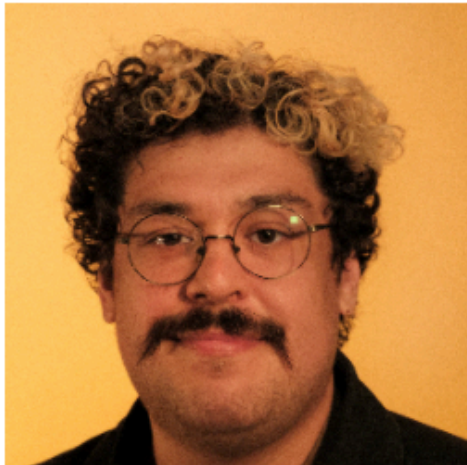






# 2021 Atlassian Team Award Winner

## Best in Class Technical - *Twitter*



### Meet the Team!

				
@Rei Song	@ Aswin Achuthan	@ Joe Pursel	@ Chris Shim	@ Dee Chhabra
				
@ Brian Cruz	@ Ruben Segura	@ Iris Pei	@ Robert Louie	@ Jessica Nguyen

### Atlassian Best in Class - Technical 2021



### The Twitter Atlassian Avengers



Marvel Entertainment



## SAY GOODBYE TO SPREADSHEETS AND MEETINGS

# Takeaways



### Jira Software & Roadmaps

Plan a years deliverables with multiple dependencies across cross functional teams is easy!

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### Standardize configurations

Using standardized Jira project configurations saves time and reduces technical debt

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### Get buy-in with user training

We developed our own, now all users can get up to speed quickly with Jira Software Roadmaps

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**SAY GOODBYE TO SPREADSHEETS AND MEETINGS**

# Looking to do this with your Team ?



**ATLASSIAN** Agile Coach

Agile / [Agile Teams](#) / How Twitter uses Jira

## How Twitter unified projects and teamwork with Jira

Twitter's innovative use of Jira to transform teamwork earned the company the Best in Class (Technical) award from Atlassian's Team Awards

 BY CHANDLER HARRIS

**BROWSE TOPICS**

- Agile manifesto
- > Scrum
- > Kanban
- > Agile project management
- > Product Management
- > Agile at scale

Twitter is an iconic social media platform that hosts more than 186 million users -- and growing. Behind the scenes, Twitter is a company with thousands of employees and hundreds of different teams, who use numerous tools to conduct internal work. Since 2007, Twitter's development teams have relied on [Jira Software](#) to manage their work. By 2019, the adoption of Jira expanded rapidly to almost every team at Twitter, as teams found that Jira helps them better manage and track their work.

**RELATED TUTORIALS**

- [Learn about Roadmap Software](#)
- [Learn more](#)

SUBSCRIBE

<https://www.atlassian.com/agile/teams/jira-twitter-unified-projects-teamwork>

**SAY GOODBYE TO SPREADSHEETS AND MEETINGS**



**QUESTIONS**





# Thank you!

Joe Pursel

Twitter

@joepursel / @idojira



