



The content described herein is intended to outline our general product direction for informational purposes only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

The development, release, and timing of any features or functionality described herein remain at the sole discretion of Atlassian and is subject to change.



Optimize your Atlassian tools

Strategies to drive lasting adoption

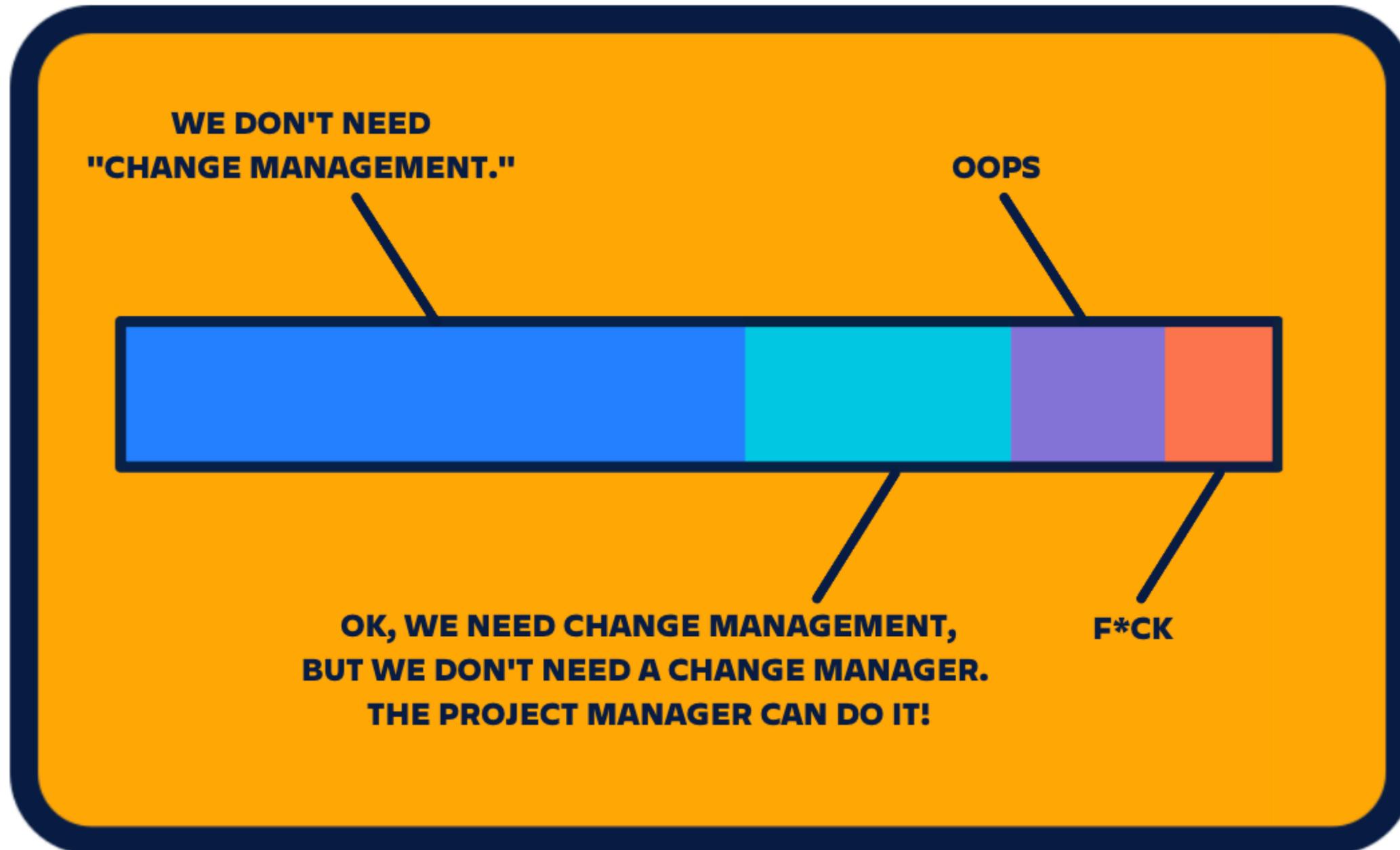


SARAH JOSHI | GROUP PRODUCT MANAGER - ENTERPRISE | ATLASSIAN

GERTIE RIZZO | HEAD OF CUSTOMER SUCCESS | ATLASSIAN

Why projects fail

A TIMELINE



Agenda

The people side of change

Your plan for a successful rollout

Driving lasting change

Supporting your adoption journey

Q&A

Adoption and change management (ACM)

A FRAMEWORK THAT EQUIPS THOSE INVOLVED IN A CHANGE WITH SOLUTIONS TO



Understand

why the change is happening.



Stay engaged

in the organization during a period of disruption.



Create

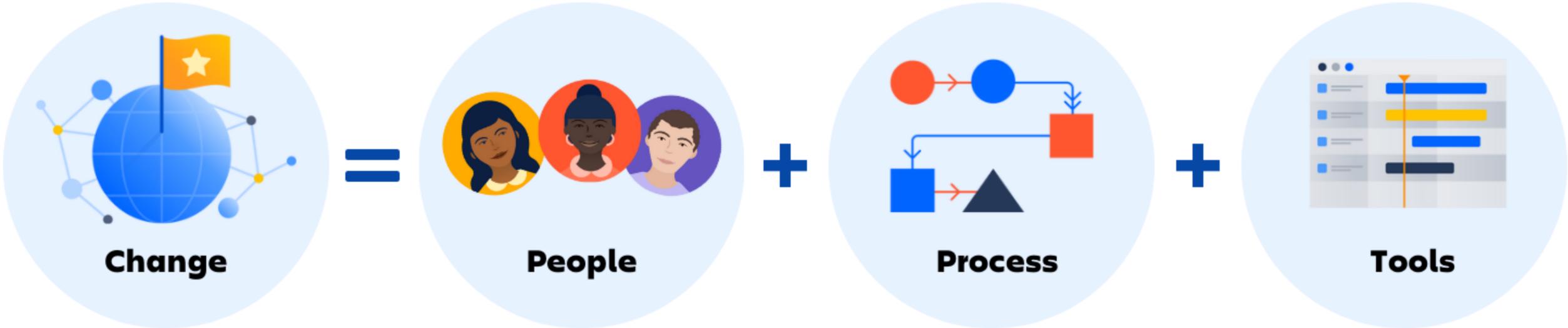
time and resources to get on board, feel heard, and stay supported.



Adopt changes

faster, more completely, and proficiently.

Why a **SUCCESSFUL ROLLOUT** matters



LASTING CHANGE takes work

A successful **organizational** move to a future state



Current



Transition



Future

requires **individuals** to move from their current to their future state.



Current

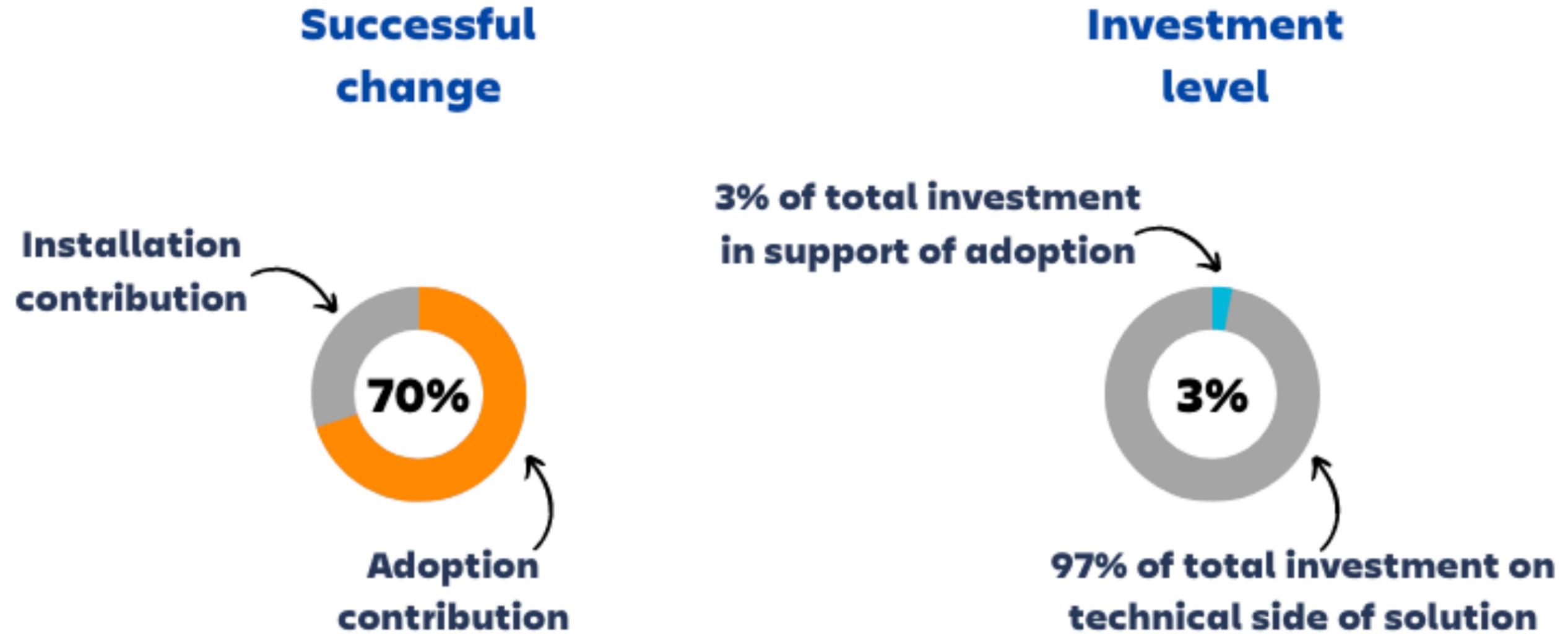


Transition



Future

Organizations aren't investing enough in adoption



Without change management

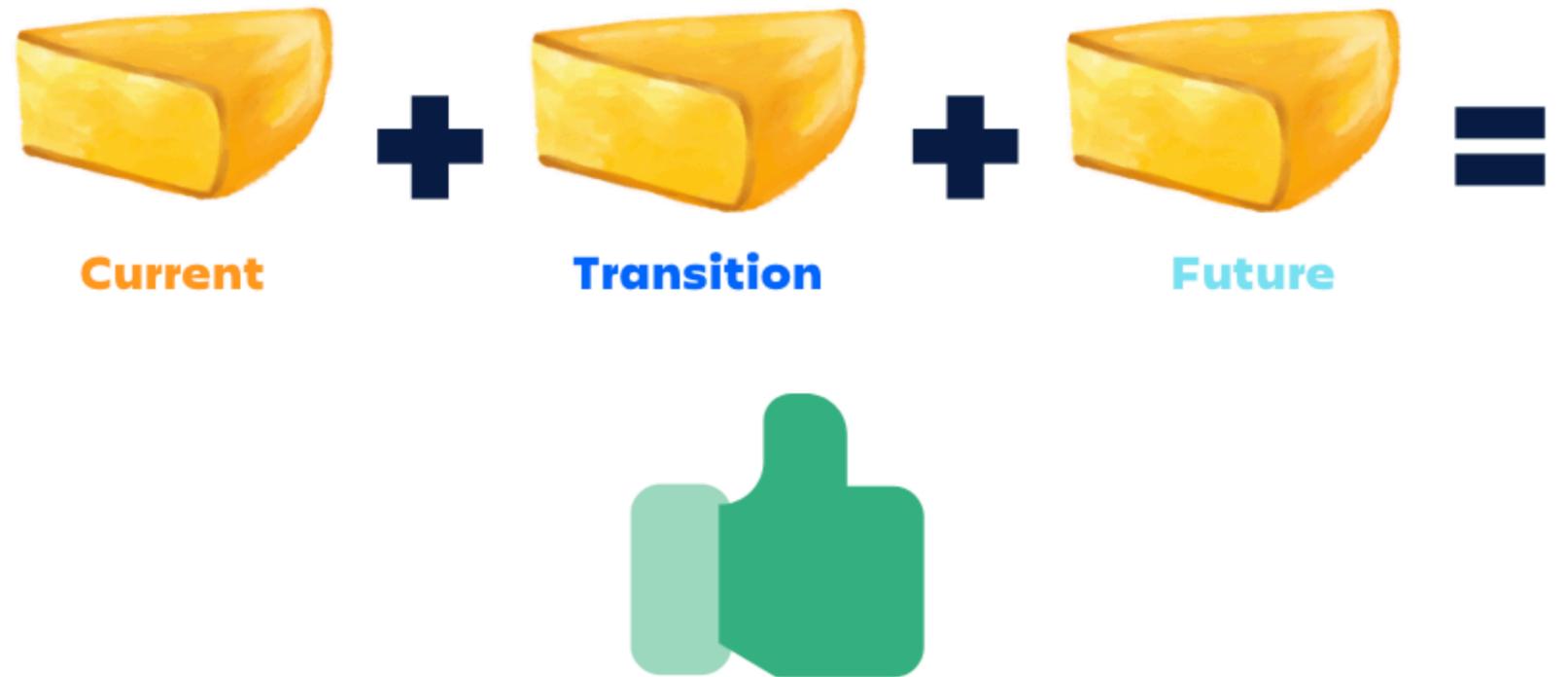
- Chaos and confusion
- Overwhelmed teams
- Low adoption rates
- Lost productivity
- Failed change project
- Costly re-rollout



With change management

“

We use Jira and Confluence across every department in our company; each team setup was slightly different. To be well prepared for the migration to cloud, we had a diverse group of UAT members. This allowed us to anticipate and plan for unique use cases and SMEs to help with post-migration questions.



Agenda

The people side of change

Your plan for a successful rollout

Driving lasting change

Supporting your adoption journey

Q&A

Change comes in all shapes and sizes

COMMON TRIGGERS OF CHANGE



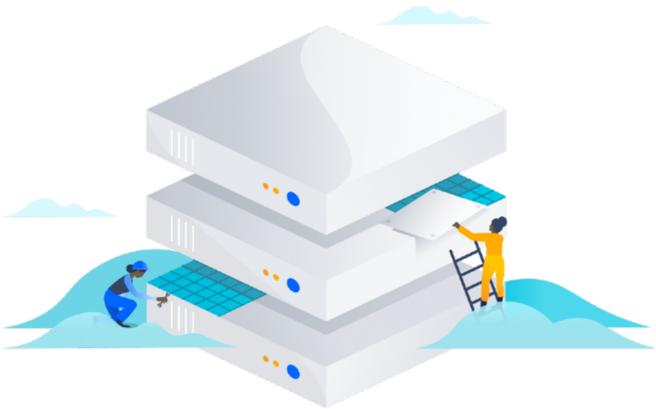
Cloud transformation



Geographical expansion



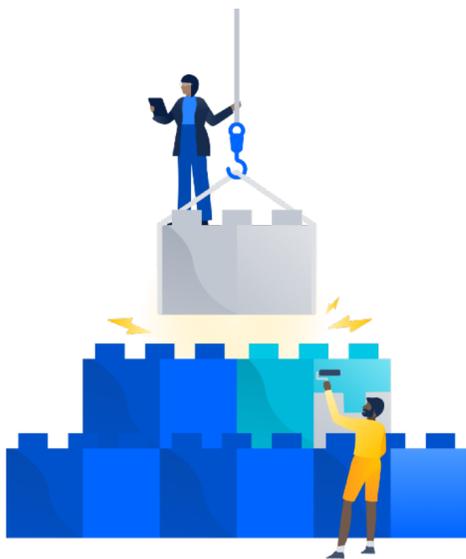
Rapid growth



Consolidation



New product launch



Acquisition/merger



How to build a strategic rollout plan

- 1 **Set your vision**
- 2 **Define success**
- 3 **Assemble your adoption team**
- 4 **Scope the rollout**
- 5 **Identify key use cases**
- 6 **Build your training and support plan**
- 7 **Build your communications plan**
- 8 **Identify Champions and build your network**
- 9 **Ship it!**
- 10 **Monitor & engage**

STEP 1

Set your vision

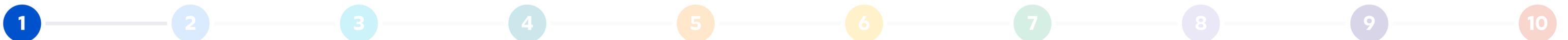
What are we trying to achieve?

Why are we doing this?

When are we doing this?

Who will be impacted?

How will they be impacted?



STEP 2

Define success



CSAT

Can you measure how happy your users are with the change?



Active usage

How many people are using the tools? How often?
By department? By region?



ROI

Have you seen any cost savings or time savings?

1

2

3

4

5

6

7

8

9

10

STEP 3

Assemble your adoption team



1

2

3

4

5

6

7

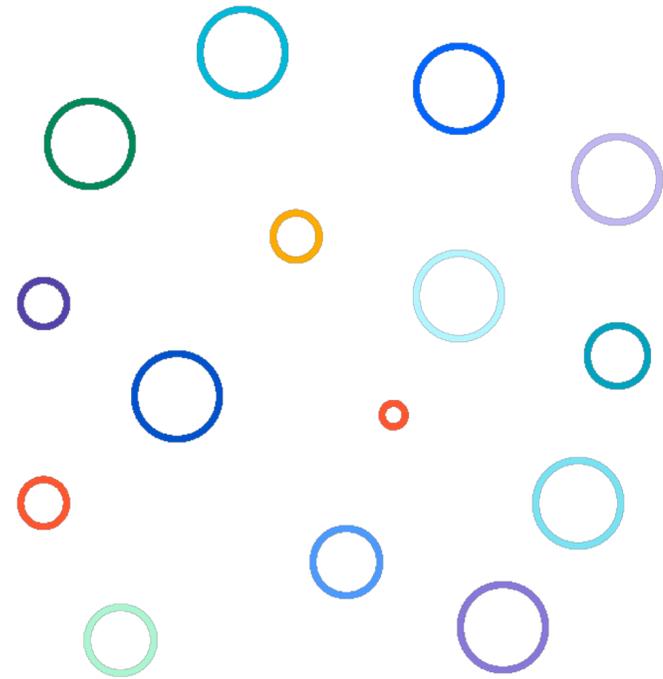
8

9

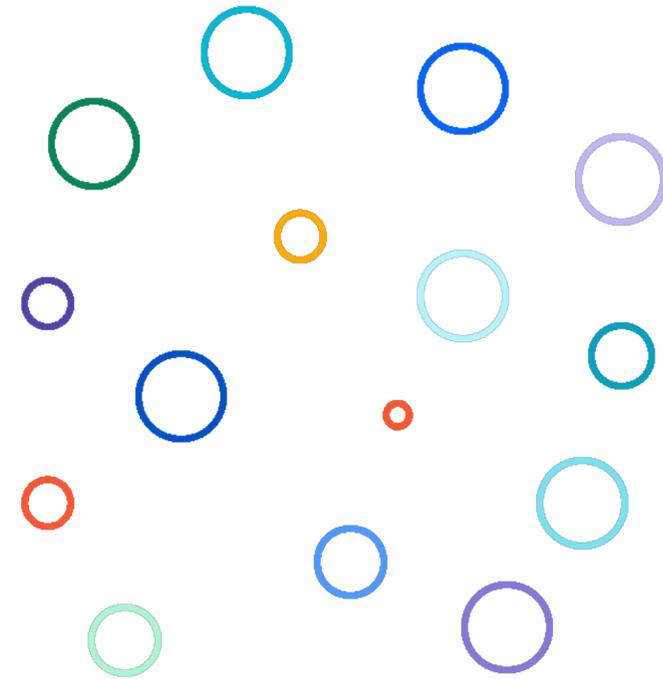
10

STEP 4

Scope the rollout



Phased rollout



Big bang rollout

1

2

3

4

5

6

7

8

9

10

STEP 5

Identify key use cases

	Current challenges	Potential use cases
Marketing	<ul style="list-style-type: none">[Redacted][Redacted]	<ul style="list-style-type: none">[Redacted][Redacted]
HR	<ul style="list-style-type: none">[Redacted][Redacted]	<ul style="list-style-type: none">[Redacted][Redacted]
Legal	<ul style="list-style-type: none">[Redacted][Redacted]	<ul style="list-style-type: none">[Redacted][Redacted]

STEP 6

Build your training and support plan



How will you train your teams to use new tools?

How will you train your IT department to support new tools?

1

2

3

4

5

6

7

8

9

10

STEP 6

Build your training and support plan



On-demand



In-person



Lunch & learns



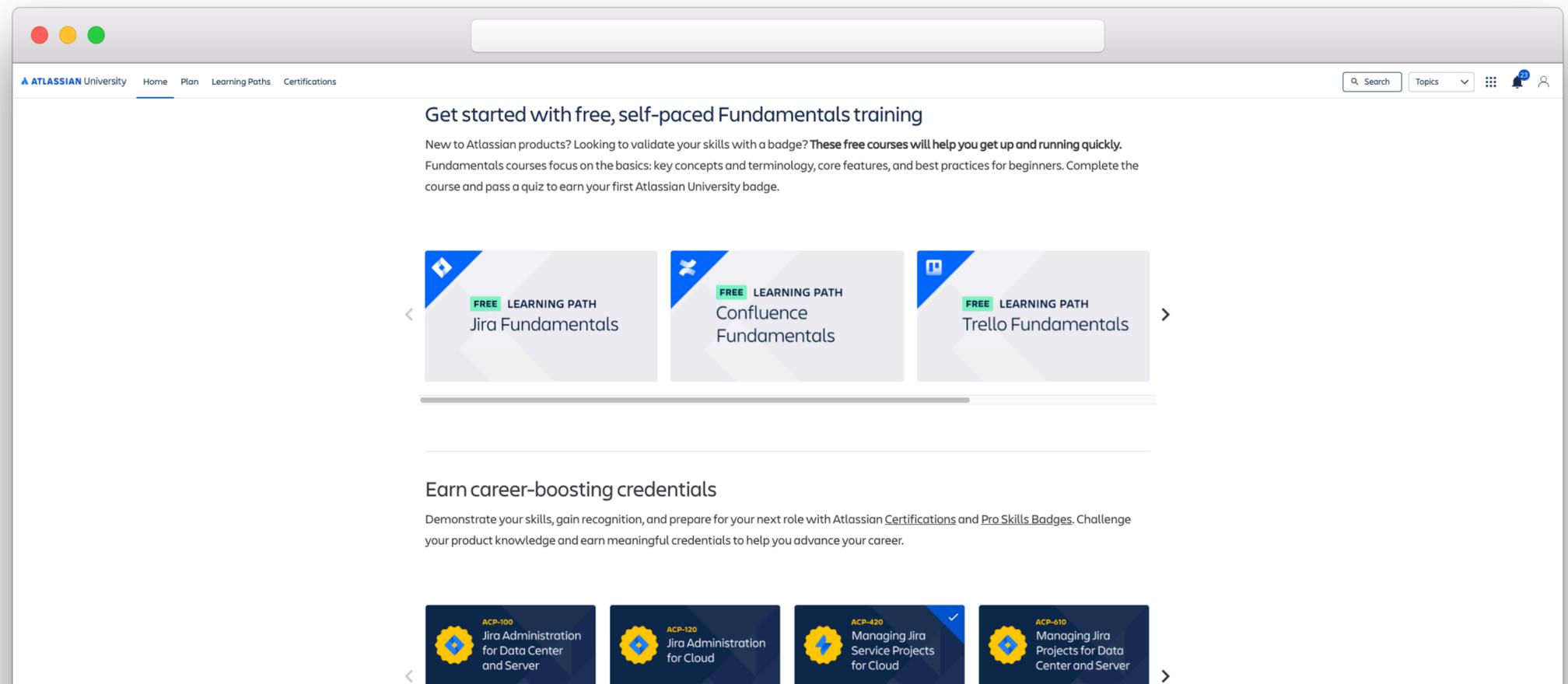
Office hours

Offer a variety of **formats** and **cadences** to increase engagement and improve the effectiveness of your rollout.

STEP 6

Build your training and support plan

Check out
ATLASSIAN University
for online training modules,
certifications, and more!



STEP 6

Build your training and support plan

Training for Jira
available in
ATLASSIAN Marketplace

The screenshot shows the 'Jira Service Essentials participation' page in Jira. It features a table with columns for Name, Assigned, Started, Completed, Progress, and Status. The table lists 10 learners with their respective completion dates and progress bars. A 'Download to CSV' button is visible in the top right corner.

Name	Assigned	Started	Completed	Progress	Status
Grace Harris	05/17/2022	05/17/2022	-	4 of 12 completed	IN PROGRESS
Fran Perez	05/17/2022	05/17/2022	-	4 of 12 completed	IN PROGRESS
Donald Stephens	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Eva Lien	-	05/17/2022	-	4 of 12 completed	IN PROGRESS
Omar Darboe	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Craig Calzoni	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Lindsey Baptista	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Terry Saris	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Kaylynn Gouse	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Martin Bator	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED

“*Atlassian University courses and Atlassian YouTube videos were critical in training both users and admins. We built training plans for Jira Software, Jira Work Management, Confluence, and Advanced Roadmaps using only these free resources provided and prebuilt by Atlassian. In addition to async training, we also held open office hours before and after migration to answer specific questions and host UI/UX walk-through sessions, all of which were vital to the success of our change management plan.*”

CLEARWATER
ANALYTICS

STEP 7

Build your communications plan

HOW ORGANIZATIONS OFTEN HANDLE CHANGE

Monday	Tuesday	Wednesday	Thursday
 Email on Monday	 Training on Tuesday	 "GO-LIVE" on Wednesday	 ...

1

2

3

4

5

6

7

8

9

10

STEP 7

Build your communications plan



Email from Executive Sponsor
(more likely to be noticed than one
from IT)



Corporate intranet or social platforms



Newsletter update



Showcase in org-wide or department-
wide town halls/team meetings



Desktop backgrounds/screensavers
or Zoom backgrounds



Physical signage or swag like posters,
laptop stickers, etc.

1

2

3

4

5

6

7

8

9

10

STEP 7

Build your communications plan

The screenshot shows a web application interface for a Migration Program. The top navigation bar includes "Migration Program", "Explore", "Plan", "Help", "Contact sales", and a "Claim free trial" button. Below the navigation, there are tabs for "Email 1", "Email 2", "Email 3", "Email 4", and "Email 5". The "Email 1" tab is selected, displaying the following content:

Table of contents

Using these templates

- Templates

Email 1: Rolling out Atlassian Cloud products

SUBJECT:

We're rolling out [Product Name (ie Jira Software, Confluence, Jira Service Management) Cloud]

CONTENT:

[add organization banner image if available]

Hi,

As you know, we have been working on migrating [Product Name] to cloud. This change will make it possible for you and your teams to work more efficiently, enjoy a modern user interface, and get access to new features sooner.

The migration is on track and your cloud products should go live on [date] at [time]. After the migration, you will see some changes, and we want to be sure you are prepared.

1. During the migration on [date] at [time] with expected duration of [hours], the following application(s) will be unavailable:
 - a. [list Server/Data Center URLs].

1

2

3

4

5

6

7

8

9

10

STEP 7

Build your communications plan

MANAGING RESISTANCE TO CHANGE



We can't avoid resistance entirely, but we can anticipate and plan for it to set the stage for successful adoption and change management.

STEP 8

Identify Champions and build your network

BUILD, TRAIN, AND NURTURE A CHAMPIONS COMMUNITY



Create

a Champions Slack/Teams channel to communicate.



Host

monthly office hours where Champions can network.



Reward

your Champions and recognize their hard work.

1

2

3

4

5

6

7

8

9

10

“ *A Company User Group is a great idea to get alignment and speed-up adoption...we started 2023 with "Refresher" workshops on our ways of working, and based on the feedback, we have already scheduled monthly mini-workshops on specific topics, such as estimation and reporting. The workshops combine brief concept presentations, tools (Jira, Confluence), best practices, and demos.*

KAPLAN

STEP 9

Ship it!



Agenda

The people side of change

Your plan for a successful rollout

Driving lasting change

Supporting your adoption journey

Q&A

STEP 10

Monitor & engage



Were we successful? What are our **success metrics** telling us?
Do we need to course-correct?



Are there successes in one department that can be highlighted and shared to **keep up the momentum**?



How are our teams feeling about the change? What other steps can we take to **support** them?



Are teams asking for **additional features**, add-ons, or products? Are there other helpful training resources?



Are we ready for teams to start using another Atlassian product to help **solve an ongoing challenge**?



How can we take this to the next level? Is there a **new use case** we want to land org-wide?

1

2

3

4

5

6

7

8

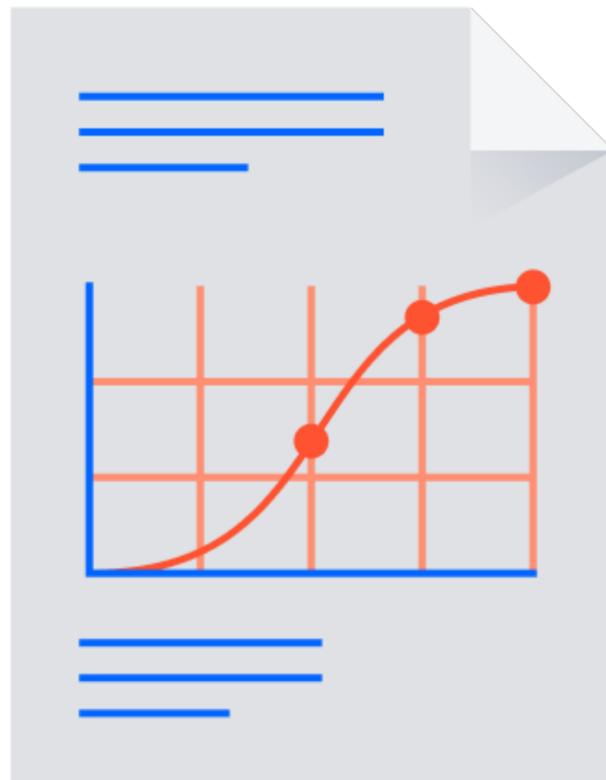
9

10

STEP 10

Monitor & engage

MEASURING ROI



Survey

Touch base with users via survey plugins available in Atlassian Marketplace.



Admin Hub

Access Atlassian's centralized user management portal at admin.atlassian.com.

1

2

3

4

5

6

7

8

9

10

STEP 10

Monitor & engage

SURVEY USERS TO GAUGE



Overall satisfaction

with the rollout, training, communications, and the new tools and processes.



New use cases

for products, including unexpected ways teams are using tools to get work done.



Future needs

such as opportunities for growth and innovation down the road.

1

2

3

4

5

6

7

8

9

10

Demo time

View organization insights

ATLASSIAN Administration acmteam ▾ Overview Directory Products **Security** Billing Settings

Admin / acmteam

Organization insights

View analytics for insights about the users of your organization's Atlassian products and your security practices. [Learn more about organization insights](#)

Select the time range and products:

Last 3 months ▾ All products ×

Active users

Compare up to 5 products

We consider users active when they visit a product. This chart shows the active users of the first five products you selected.

Product	Active users	User lists
Confluence	86/267	View
Jira Service Management	103/267	View
Jira Software	103/267	View

Understand user activity via CSV export

The screenshot shows the Atlassian Admin interface for the 'acmteam' organization. The 'Users' section is active, displaying a list of users with columns for Name, Status, and Actions. A modal dialog titled 'Export users to CSV' is open in the center, allowing users to select the data to include in their CSV file. The dialog includes instructions, selection options for users and user status, and checkboxes for additional data like group membership and product access.

Export users to CSV

Select the data to include in your CSV file. We'll send an email to [redacted] when your download link is ready. [Learn more about exporting users](#)

Users

- All users in the organization
- Users from selected groups only

User status

- All users
- Only active users

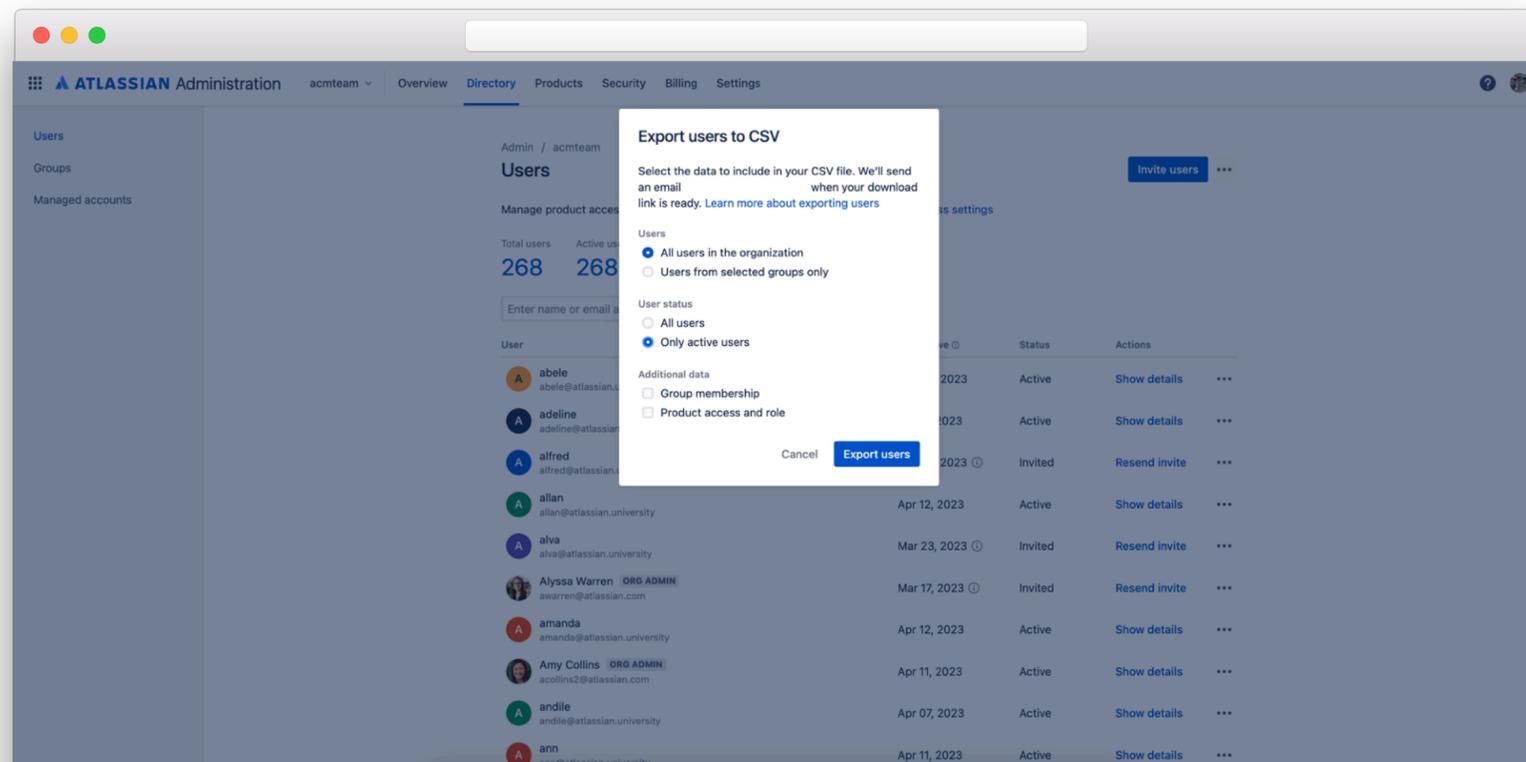
Additional data

- Group membership
- Product access and role

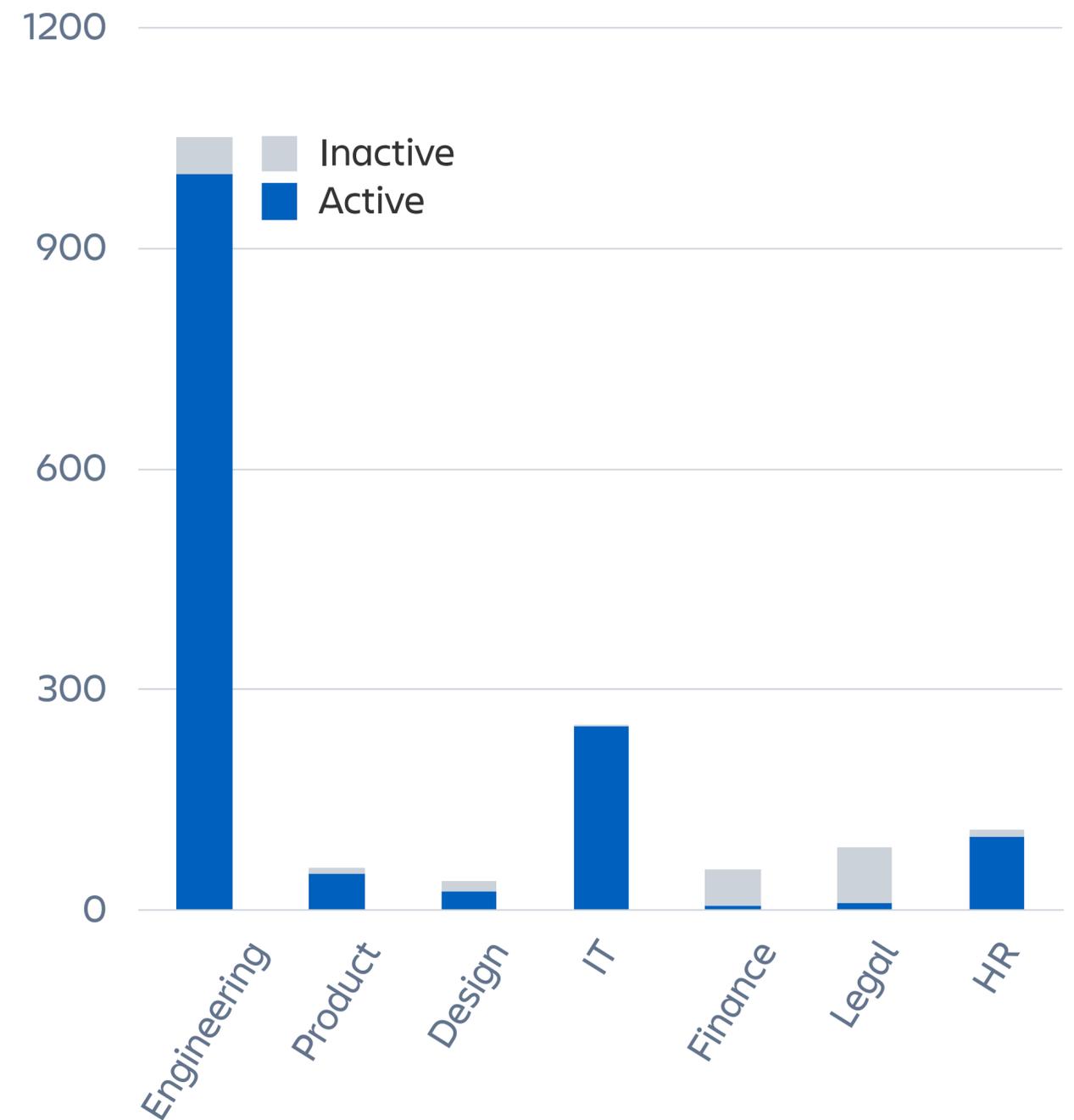
Cancel **Export users**

Name	Status	Actions
[redacted], 2023	Active	Show details ...
[redacted], 2023	Active	Show details ...
[redacted], 2023 ⓘ	Invited	Resend invite ...
[redacted], 2023 ⓘ	Invited	Resend invite ...
[redacted], 2023 ⓘ	Invited	Resend invite ...

Measure adoption by department



Adoption by Department



Identify Champions via audit log actions

The screenshot shows the Atlassian Admin interface for the 'acmteam' organization, specifically the 'Security' section's 'Audit log' page. The page title is 'Admin / acmteam Audit log'. A search bar is present with filters for 'Date' and 'Activities'. The 'Activities' dropdown is open, showing a list of JIRA user actions such as 'Added Jira issue security scheme', 'Deleted Jira issue security scheme', 'Created Jira issue', 'Removed member from Jira project role', 'Updated Jira issue security level', 'Added member to Jira project role', 'Removed permission from Jira project permission scheme', and 'Added Jira issue security level member'. The main content area displays a table of activities with columns for 'Date' and 'Location'. The table shows activities from April 10, 2023, back to March 30, 2023. An 'Export log' button is located in the top right corner.

Admin / acmteam

Audit log

Your organization's audit log tracks activities that occurred from your organization and across your sites within the past 180 days. For product-specific activity, visit the product's audit log. [Learn more about your organization's audit log](#)

To save activities before they pass 180 days, regularly export the log or use the organization REST API to store activities to another location. [Learn more about the organization REST API](#)

Search by name, group, Date Activities Apply

Showing 30 activities

Date	Location
Apr 10, 2023 15:45 PDT	[Redacted]
Mar 30, 2023 05:20 PDT	[Redacted]
Mar 30, 2023 05:20 PDT	[Redacted]
Mar 30, 2023 05:19 PDT	[Redacted]
Mar 30, 2023 05:19 PDT	[Redacted]
Mar 30, 2023 05:19 PDT	[Redacted]
Mar 30, 2023 05:18 PDT	[Redacted]
Mar 30, 2023	[Redacted]

JIRA USER ACTIONS

- Added Jira issue security scheme
- Deleted Jira issue security scheme
- Created Jira issue
- Removed member from Jira project role
- Updated Jira issue security level
- Added member to Jira project role
- Removed permission from Jira project permission scheme
- Added Jira issue security level member

26 of 26

@atlassian.com to organization

@atlassian.university to organization
am.atlassian.net

@atlassian.university to organization
https://acmteam.atlassian.net

Invited @atlassian.university to organization
https://acmteam.atlassian.net

Invited @atlassian.university to organization

Simplify invitations via user access settings

The screenshot shows the Atlassian Admin interface for the 'acmteam' organization. The navigation bar includes 'Overview', 'Directory', 'Products', 'Security', 'Billing', and 'Settings'. The 'Products' section is active, and the 'User access settings' page is displayed. The page title is 'Admin / acmteam User access settings'. A descriptive paragraph explains that these settings control user access to products and provides a link to 'reset your user access settings'. Below this, there are tabs for 'Approved domains', 'User invites', and 'Invitation links'. The 'User invites' tab is selected, and a sub-header reads 'Control how existing users can invite and request access for other people.' The main content area is a table with two columns: 'Product' and 'Existing user permissions'. The table lists five products: Confluence, Jira Work Management, Jira Service Management, Jira Software, and Jira Administration, all with the domain 'acmteam.atlassian.net'. The 'Existing user permissions' column shows a dropdown menu currently set to 'Require admin approval'. A tooltip is visible, showing three options: 'Invite anyone' (no org admin approval), 'Invite approved domains' (no org admin approval), and 'Require admin approval' (requires org admin approval).

Products

User access settings

Product URLs

RELEASE MANAGEMENT

Product updates

Release tracks

Sandbox

SITES AND PRODUCTS

acmteam Site

Admin / acmteam

User access settings

These settings control how users get access to your products. If you wish to transfer your products to another organization, you can [reset your user access settings](#). If you exceed the user limit on any product's Free plan, we'll upgrade that product to a trial of the Standard plan with unlocked user limits. Trials can be cancelled at any time. [Learn more about configuring user access settings](#).

Approved domains User invites Invitation links

Control how existing users can invite and request access for other people.

Product	Existing user permissions
Confluence acmteam.atlassian.net	Require admin approval
Jira Work Management acmteam.atlassian.net	Invite anyone Can invite anyone, from any domain (no org admin approval). Can request access for anyone from any domain (requires org admin approval).
Jira Service Management acmteam.atlassian.net	Invite approved domains Can invite people with approved domains only (no org admin approval). Can request access for anyone from any domain (requires org admin approval).
Jira Software acmteam.atlassian.net	Require admin approval Unable to invite anyone. Can request access for anyone from any domain (requires org admin approval).
Jira Administration acmteam.atlassian.net	

Customize user invitation emails

×

Invite people to acmteam

Invite teammates to collaborate and use products in your organization. We'll ask new users to enter their personal details when they sign up.

Email addresses *

Separate emails using a comma. Note, we can't send invitations to distribution lists.

Product	Product roles	Unselect all
 Jira Service Management acmteam	User (agent)	▼
 Jira Software acmteam	User	▼
 Jira Work Management acmteam	User	▼
 Confluence acmteam	User	▼
 Jira Administration acmteam	None	▼

Group membership

Customized groups give users access to specific projects or spaces. Avoid adding guests to groups that have regular product access, as this will give them full product access.

▼ Personalize invitation email

Send invitation

Customize invitation

Share updates via Jira announcement banner

Welcome to Jira Cloud! Please review our onboarding guide to learn about Jira Cloud, changes from the previous version, and take training courses to get started with Jira: bit.ly/traininglink. If you have any questions, please reach out to IT at [#help-jira-cloud](#)

Jira Your work ▾ Projects ▾ Filters ▾ Dashboards ▾ Teams ▾ Plans ▾ Assets Apps ▾ Create Search ? ⚙️

System

- General configuration
- TRUBLESHOOTING AND SUPPORT
- Audit Log
- SECURITY
- Project roles
- Global permissions
- Issue collectors
- AUTOMATION
- Global automation
- USER INTERFACE
- Default user preferences
- Default dashboard
- Look and feel
- Announcement banner**

Edit Announcement Banner

You can set text that will be shown in a banner at the top of all pages in Jira. This is useful for alerting users of upcoming system-wide changes.

Announcement

Welcome to Jira Cloud! Please review our onboarding guide to learn about Jira Cloud, changes from the previous version, and take training courses to get started with Jira: bit.ly/traininglink. If you have any questions, please reach out to IT at [#help-jira-cloud](#)

Banner is shown to users

Users can dismiss the banner

Visibility level ^{*}

- Private:** show to logged in users only
- Public:** show to anyone on the internet

Save

STEP 10

Monitor & engage

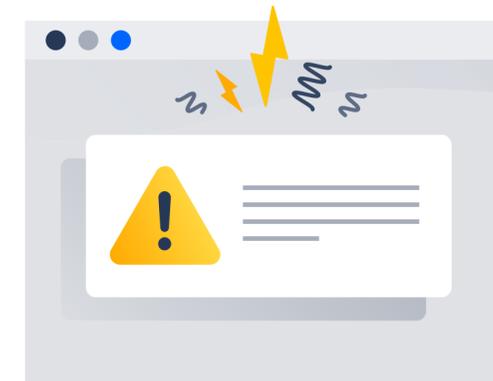
SIGNS THE CHANGE WAS UNSUCCESSFUL



Backsliding into old ways of working



Decrease in activity usage



Presence of Shadow IT

1

2

3

4

5

6

7

8

9

10

STEP 10

Monitor & engage

IMPROVING ADOPTION



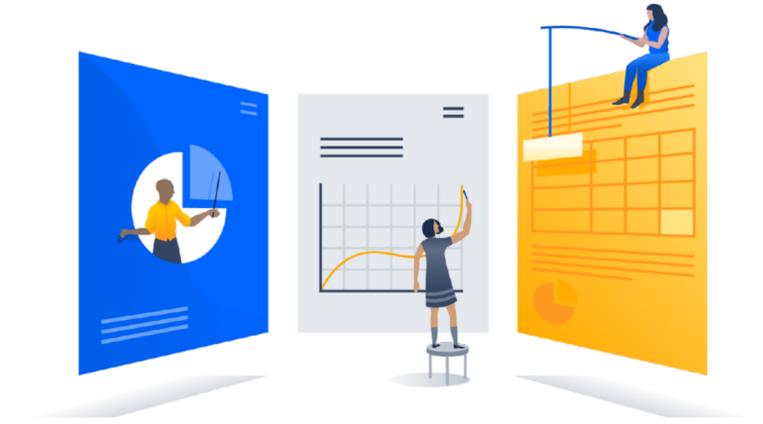
Re-rollout

to departments with lower adoption; include targeted communication and training plans.



Identify

Champions to drive change and reinforce adoption from within teams.



Spread

current tooling across the organization; adopt new product use cases to fit team needs.

1

2

3

4

5

6

7

8

9

10

Agenda

The people side of change

Your plan for a successful rollout

Driving lasting change

Supporting your adoption journey



Q&A

Resources to support your Atlassian journey



Atlassian University

Quickly get started with free courses and hands-on trainings to upskill, get certified, or guide your team to new heights.

Partners

Extend the power of our tools with trusted Atlassian Partners, offering a wide range of accredited services and solutions.

Customer Success & Advisory Services

Tap into Enterprise services to access personalized support from experienced advisors.

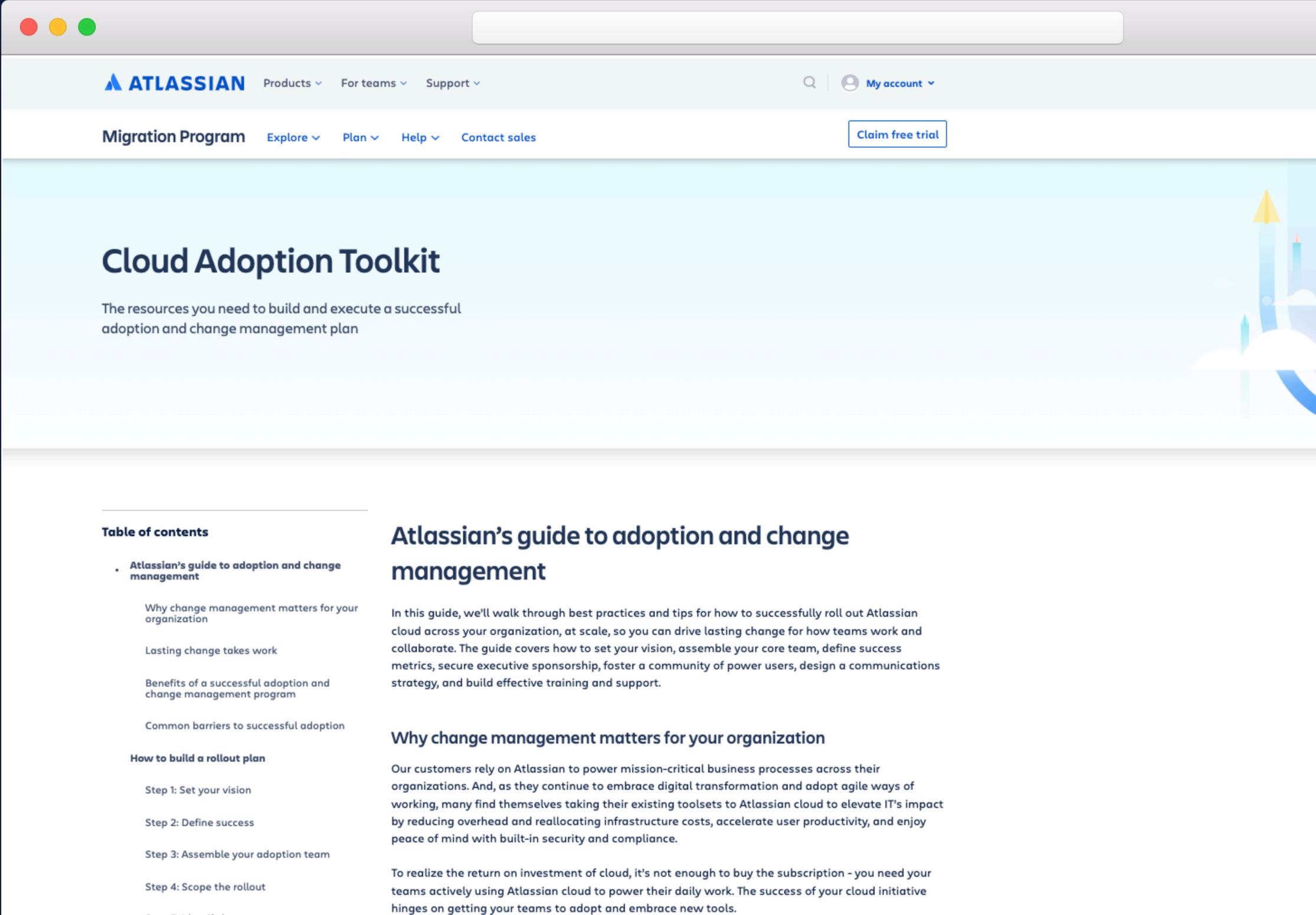


HIT THE GROUND CLOUD RUNNING

Check out the [Cloud Adoption Toolkit](#) for everything you need to build an adoption & change management plan and set your users up for success.

INTRODUCING THE **CLOUD ADOPTION TOOLKIT**

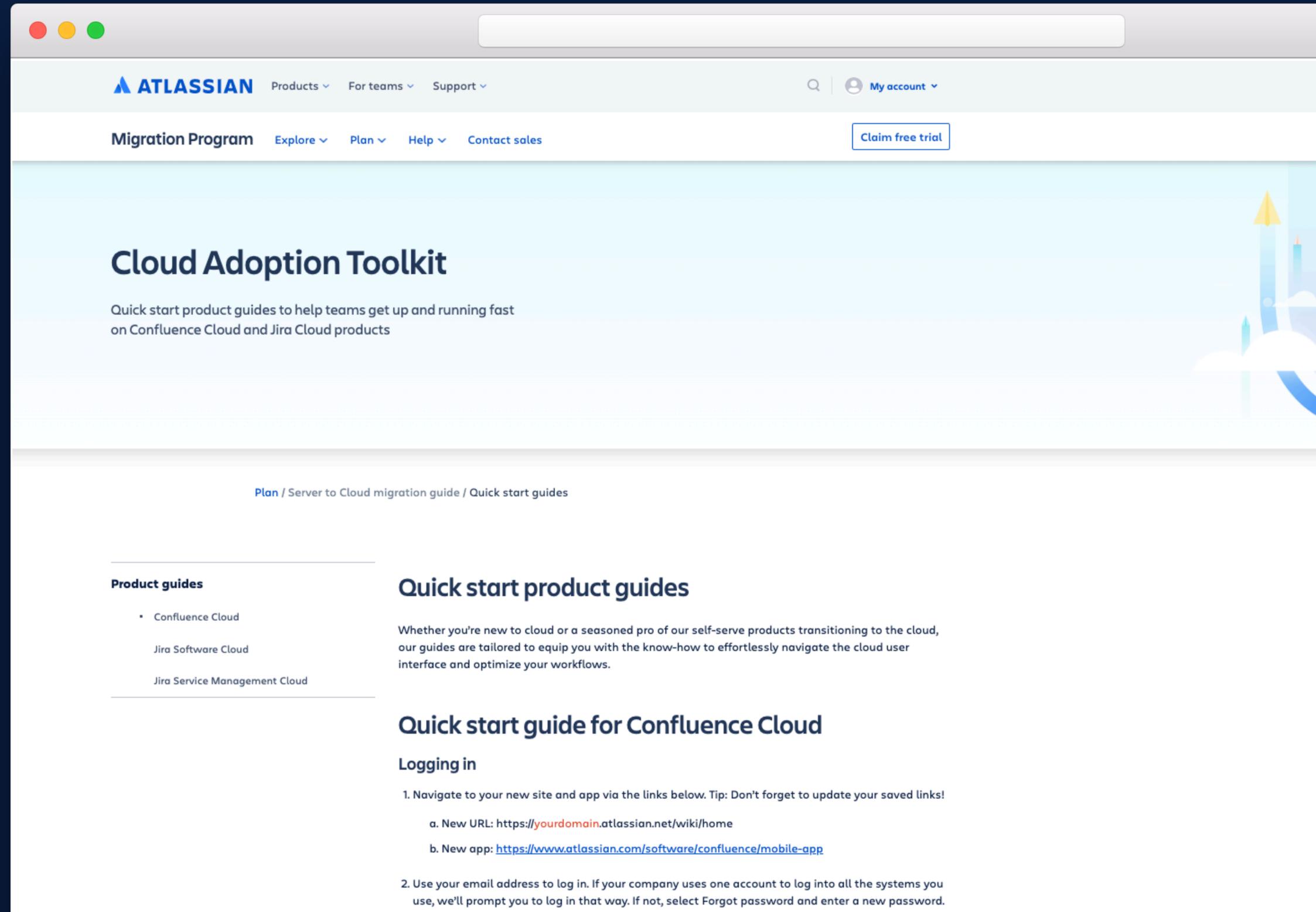
Step-by-step guidance
Learn about the importance of adoption & change management and follow our steps to a successful rollout plan.



INTRODUCING THE **CLOUD ADOPTION TOOLKIT**

Quick start guides for users

Give your users a high-level overview of UX changes they can expect moving to cloud so they can get productive, fast.



The screenshot shows a web browser window displaying the Atlassian Cloud Adoption Toolkit page. The page features a navigation bar with the Atlassian logo and links for Products, For teams, and Support. Below the navigation bar, there is a section for the Migration Program with links for Explore, Plan, Help, and Contact sales, and a 'Claim free trial' button. The main content area is titled 'Cloud Adoption Toolkit' and includes a subtitle: 'Quick start product guides to help teams get up and running fast on Confluence Cloud and Jira Cloud products'. Below this, there is a breadcrumb trail: 'Plan / Server to Cloud migration guide / Quick start guides'. The page is divided into two columns. The left column is titled 'Product guides' and lists three items: Confluence Cloud, Jira Software Cloud, and Jira Service Management Cloud. The right column is titled 'Quick start product guides' and contains two sections: 'Quick start product guides' with a paragraph about tailored guides, and 'Quick start guide for Confluence Cloud' with a sub-section 'Logging in' and two numbered steps for navigating to the new site and logging in.

ATLASSIAN Products ▾ For teams ▾ Support ▾

Migration Program Explore ▾ Plan ▾ Help ▾ Contact sales [Claim free trial](#)

Cloud Adoption Toolkit

Quick start product guides to help teams get up and running fast on Confluence Cloud and Jira Cloud products

[Plan](#) / [Server to Cloud migration guide](#) / [Quick start guides](#)

Product guides

- Confluence Cloud
- Jira Software Cloud
- Jira Service Management Cloud

Quick start product guides

Whether you're new to cloud or a seasoned pro of our self-serve products transitioning to the cloud, our guides are tailored to equip you with the know-how to effortlessly navigate the cloud user interface and optimize your workflows.

Quick start guide for Confluence Cloud

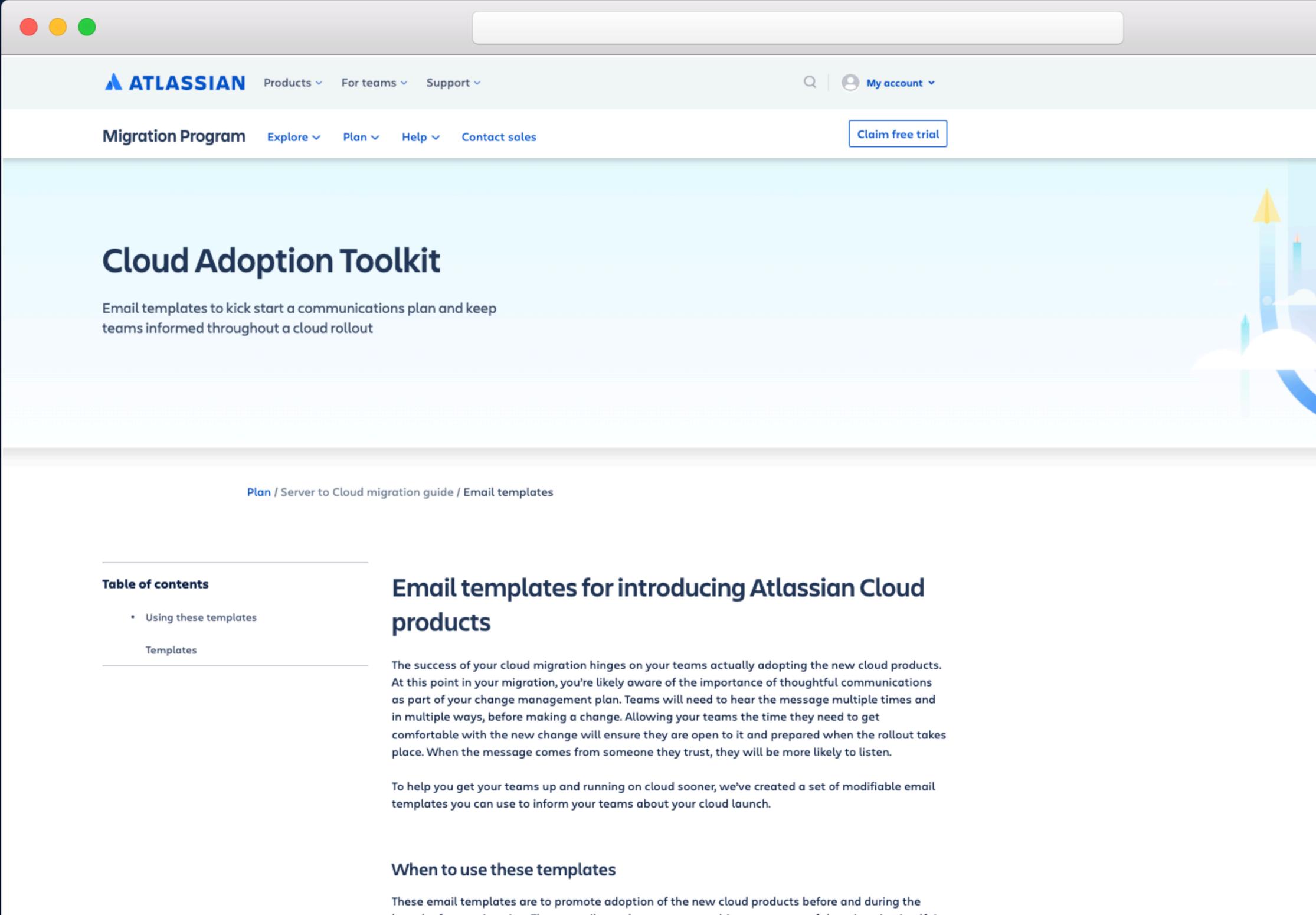
Logging in

- Navigate to your new site and app via the links below. Tip: Don't forget to update your saved links!
 - New URL: <https://yourdomain.atlassian.net/wiki/home>
 - New app: <https://www.atlassian.com/software/confluence/mobile-app>
- Use your email address to log in. If your company uses one account to log into all the systems you use, we'll prompt you to log in that way. If not, select Forgot password and enter a new password.

INTRODUCING THE **CLOUD ADOPTION TOOLKIT**

Customizable email templates

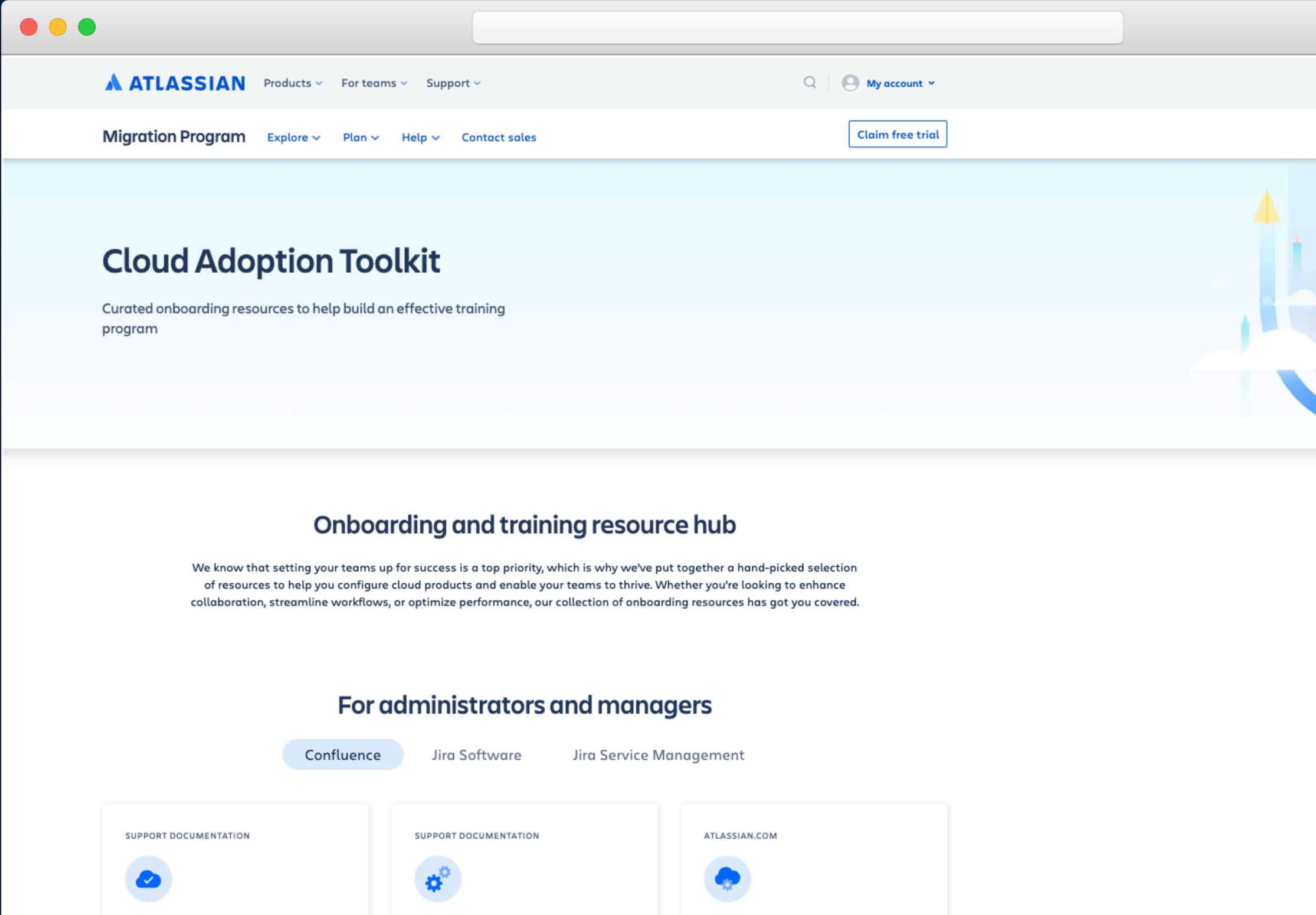
Ace your communications plan with a set of email templates designed to prepare your users for upcoming change.



INTRODUCING THE **CLOUD ADOPTION TOOLKIT**

Comprehensive training resources

Get inspiration for your user training plan by exploring our curated list of popular training materials for users and admins.





Key Takeaways

- 1** The people side of change is as critical as the technical side of change.
- 2** Organizational change is the result of *individual* change. We all move through change at different speeds.
- 3** Your strategic rollout plan for adoption and change management will set you up for long-term success.
- 4** The Cloud Adoption Toolkit is your go-to resource for Atlassian cloud adoption & change management!



Access the
Cloud Adoption Toolkit
atlassian.com/adoption