



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.



# The subtle art of not building an awful Confluence site



**GABBY WILLIAMS | SENIOR PRODUCT MARKETING MANAGER**

**SHAZIYA TAMBAWALA | SENIOR PRODUCT DESIGNER**



OPERATIONS

MARKETING

DESIGN

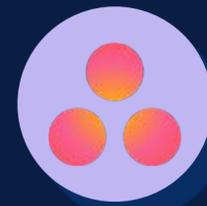
Collaboration  
is **painful** and slow  
when teams work  
in **silos**

LEGAL

DEV

IT

HR



OPERATIONS

MARKETING

DESIGN

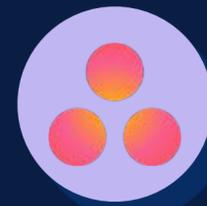
Collaboration  
is painful and slow  
when teams work  
in silos

LEGAL

DEV

IT

HR



# Agenda



**Confluence  
overview**



**User Experience  
psychology**



**Aligning to  
intentions**



**Examples of  
real sites**

# Agenda



**Confluence  
overview**



User Experience  
psychology



Aligning to  
intentions



Examples of  
real sites

# Confluence is your team's remote workspace

The screenshot displays the Confluence user interface. At the top, the navigation bar includes the Confluence logo, a search bar, and menu items for Home, Recent, Spaces, People, Apps, and Templates, along with a 'Create' button. The main content area is divided into three columns:

- Left Column (User Profile):** Features a profile card for 'Cindy Ji' with a 'Go to personal space' button and a sidebar menu with 'Overview', 'Recent', 'Starred', and 'Drafts'.
- Middle Column (Recent Activity):** Titled 'Pick up where you left off', it lists recent visits to pages such as 'Project Poster: 5% Cashback Campaign', 'Banc.ly Marketing', 'Overview', 'Campaign Launch - Banc.ly Marketing', and 'Template - Product requirements'. A 'Show more' link is at the bottom.
- Right Column (Spaces and Announcements):** Contains a 'Spaces' section with a 'Create a space' button and a list of spaces including 'Cindy Ji', 'Marketing team', 'Banc.ly Marketing', 'Campaign Launch', and 'Outreach Campaign'. Below this are 'Announcements' and 'Calendars' sections, each with a right-pointing arrow.

Below the recent activity section, there is a 'Discover what's happening' section with 'Following' and 'Popular' tabs. It shows two posts:

- 3/6/23 Retro Meeting Notes:** Created by Sheerine Baucum on March 6, 2023. The content includes an overview of a retrospective play and a link to the Atlassian team-playbook.
- Get the most out of your software project space:** Created by Cindy Ji on March 6, 2023. The content discusses defining requirements in Confluence and using Jira epics.

# Tools that organize work

Macros

Integrations

Smart Links

The screenshot shows a task management application interface. At the top, there is a navigation bar with a logo, undo/redo buttons, a text format dropdown (Normal text), bold/italic options, a list view dropdown, a color picker, and various icons for linking, attachments, mentions, emojis, and a grid view. A 'Saved' status and a user profile icon are on the right.

The main content area features a task card with the text: "Sync with Courtney to determine demo requirements." Below the text are "Edit", "Delete", and a smiley face icon. To the right of the card, there are "Labels" (banc.ly, demo, marketing) and "Priority" (Major).

Below the task card is a section titled "Next Steps" with a thumbs-up icon. It contains a table with two columns: "Deliverable" and "Tasks".

Deliverable	Tasks
Content hub	<input type="checkbox"/> Write copy <input type="checkbox"/> Design assets @Emma <input type="checkbox"/> Publish blog @Will
Email campaign	<input type="checkbox"/> Illustrations <input type="checkbox"/> A/B test <input type="checkbox"/> Complete registration <input type="checkbox"/> Signup form

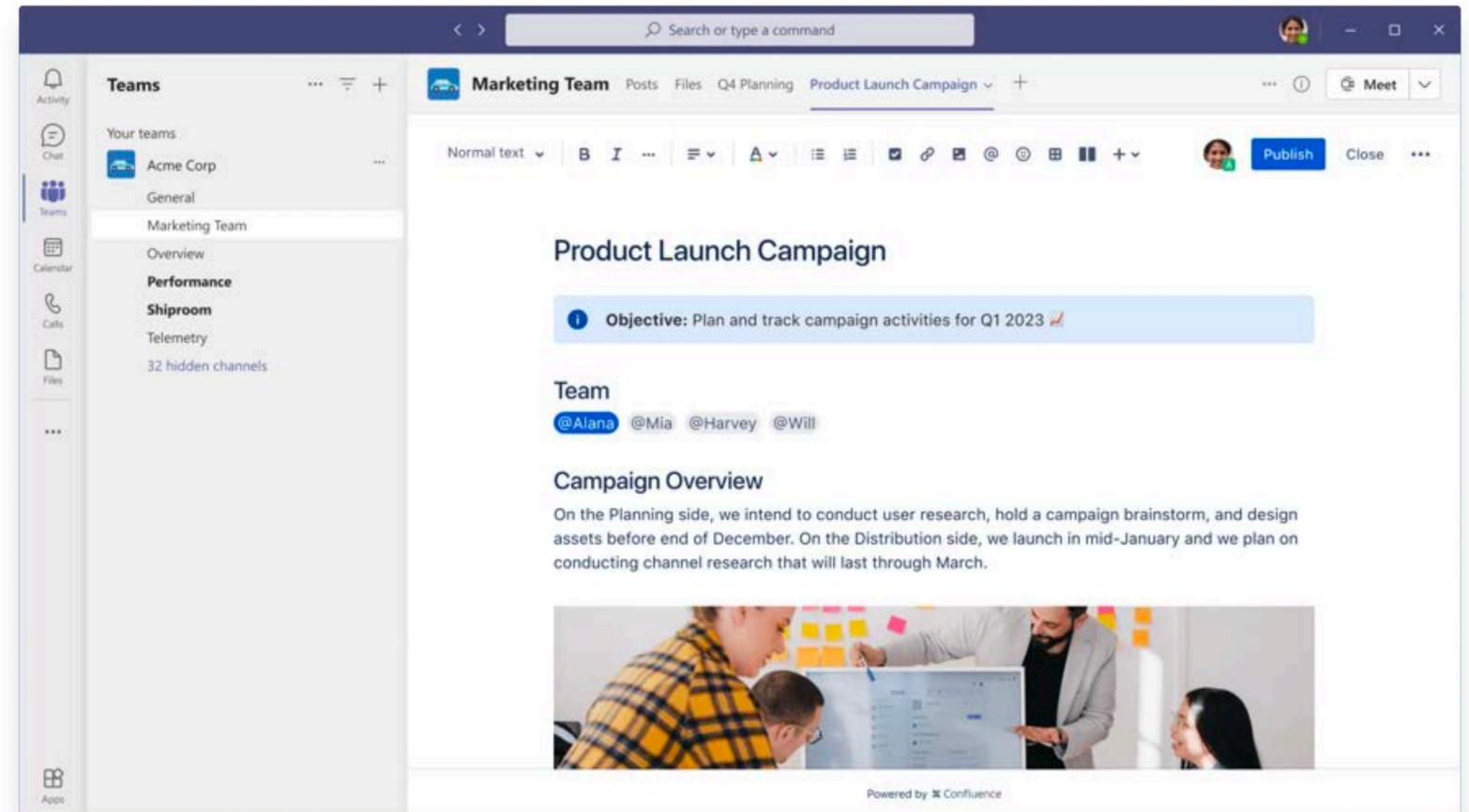
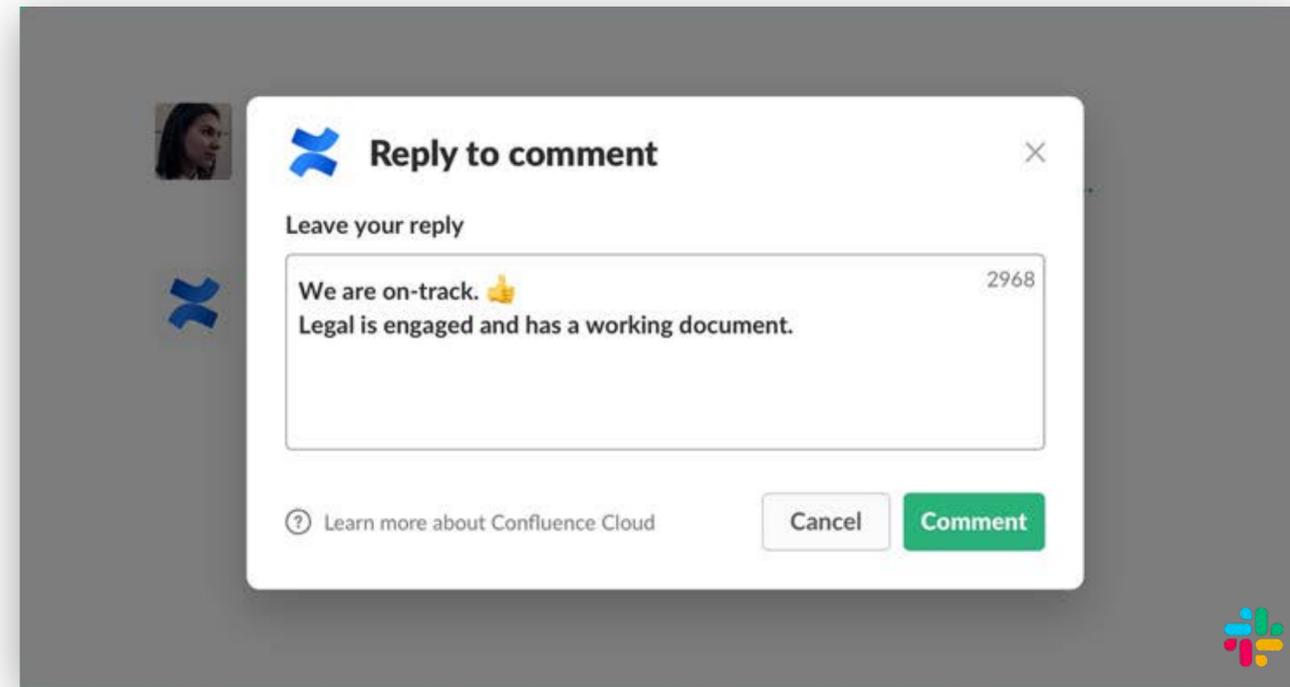
A question mark icon is visible in the bottom left corner of the application window.

# Tools that organize work

Macros

Integrations

Smart Links

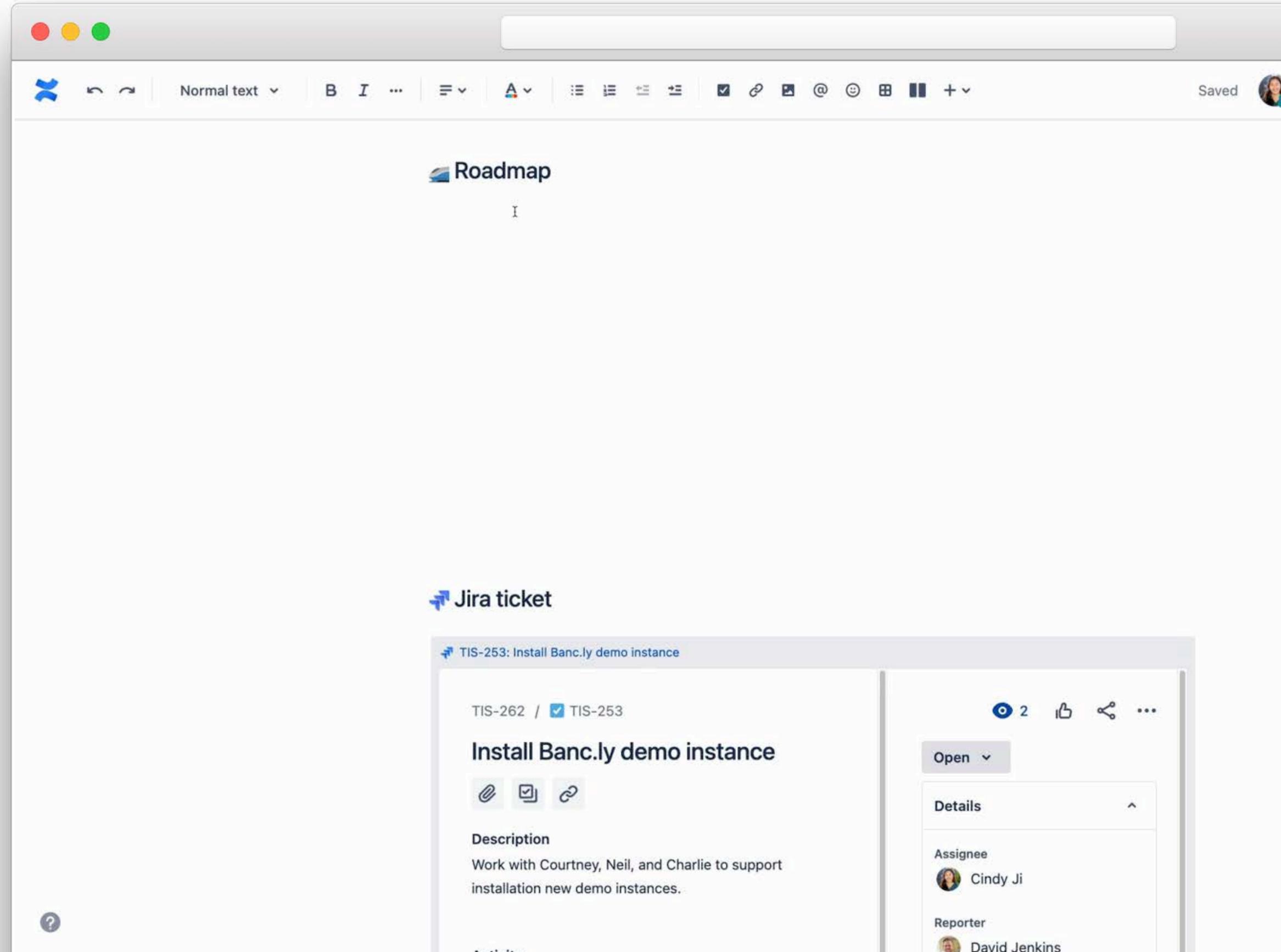


# Tools that organize work

Macros

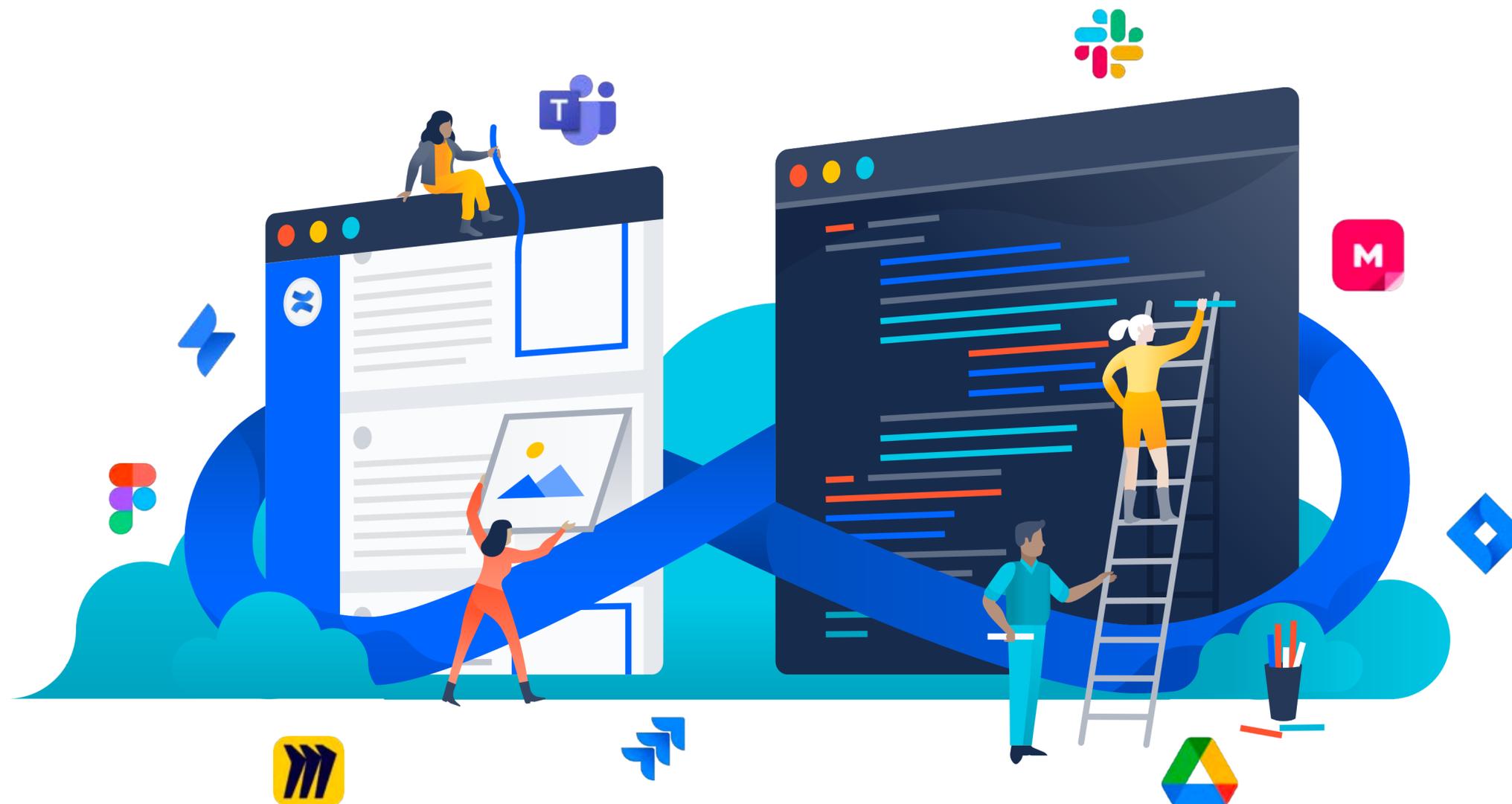
Integrations

Smart Links

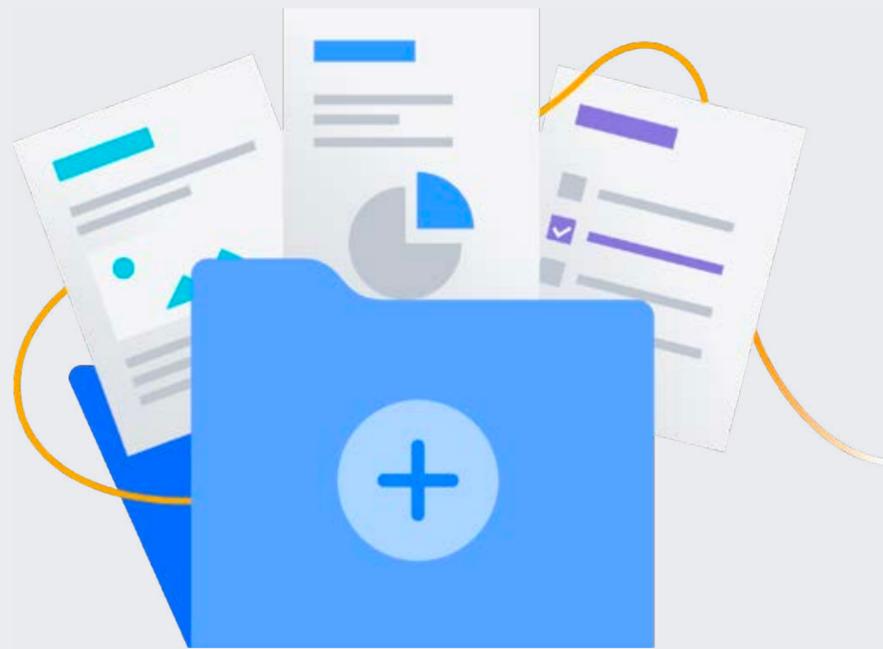


# 96% of customers agree that Confluence has superior integrations

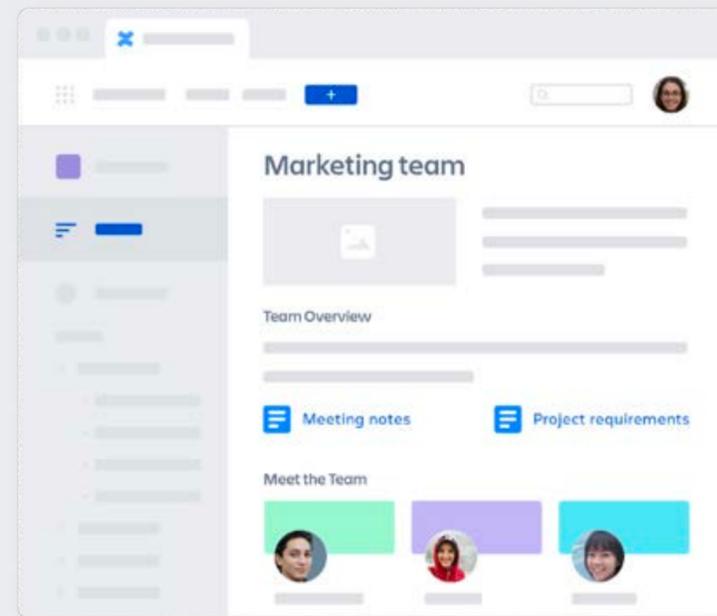
Try Confluence with Slack, Jira, Microsoft Teams, or 3,000 other apps



# Top Confluence use cases



Knowledge sharing

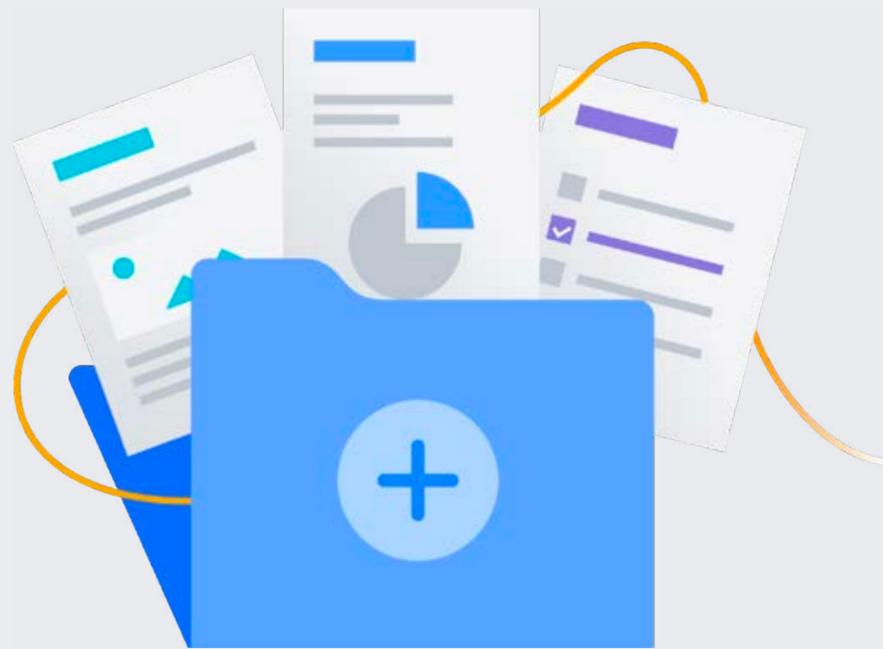


Project collaboration

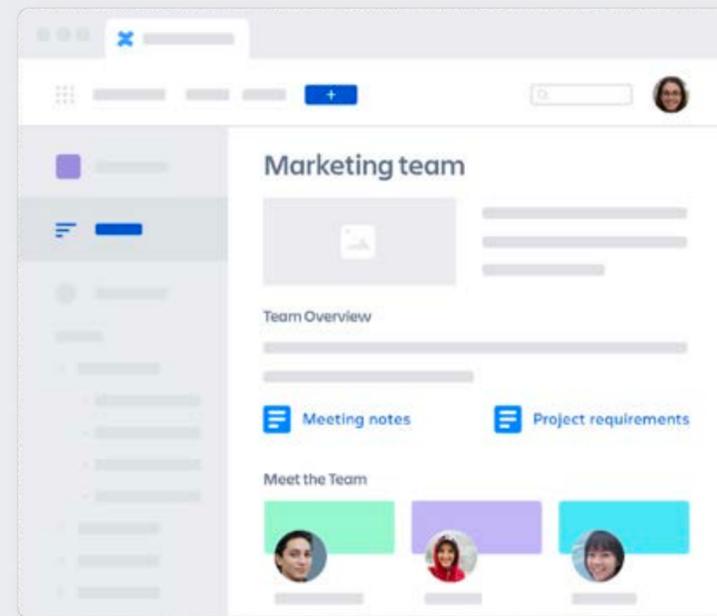


Company-wide collaboration

# Top Confluence use cases



Knowledge sharing



Project collaboration



Company-wide collaboration

Marketing team

Overview

Blog +

Whiteboards ALPHA +

Analytics

Calendars

Space Settings

Bulk Archive

SHORTCUTS +

Pages ... +

- Team homepage
- Weekly meeting notes
- Brainstorming

Archived pages

# Marketing team

[Share](#) ... [Star this space](#)



**Welcome to your team space!**

Team | Overview | Team news | Recently updated

**Team**

@ mention people

**Overview**

Describe your team goals

**Team news**

Share updates with your team

- Banc.ly Marketing
- Whiteboards ALPHA
- Overview**
- Analytics
- Space Settings
- SHORTCUTS
- Dropbox Folder
- Google Sheets
- Miro Board
- Trello Board
- Pages
  - > New hire resources!
  - > Banc.ly Design Principles
  - > OKRs
  - > Q1 Product Launch
  - > Q2 Product Launch
    - Q2 Product Roadmap
    - Q2 Cross-functional brainstorm

# Banc.ly Marketing

Share ... Star this space

Welcome to the Banc.ly marketing space! Meet our team, read company updates, and track company OKRs all from here.



Search [Search]

## OKRs

- ▲ Add net new customers through product + marketing
- NEW New signups as we raise awareness
- ⚡ Gross new customers as we supercharge our card

## Contact us 📧

- 🌐 : #bancly-marketing
- ✉ : marketing@bancly.com

## Our team

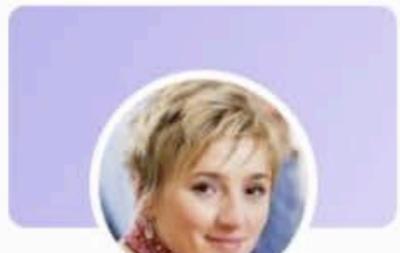
### Mission 🚀

Banc.ly is a best-in-class credit card company that empowers businesses to do banking, better.



### Important Links 🔗

- 📄 Internal blog: Multi-Year Banc.ly Strategy
- 📄 Banc.ly Brand Standards and Guidelines
- 📄 Q1 Product Roadmap



Marketing Activities

Search

- Default
- ABM
- Nurture
  - Website Leads Nurture
    - Email Assets
      - 01 - Learn more about Marketo
      - 02 - Marketo Secret Tips
      - 03 - Customer Obsessed
    - Programs
      - 01 - Early Stage
      - 02 - Mid Stage
      - 03 - Late Stage
  - Finance Workspace
  - Horizon Workspace
  - Jira Workspace
  - Micky Workspace

## Website Leads Nurture

Type: Engagement Program Last modified: June 16, 2020 4:09 PM PDT by Jill Jackson

Program Actions

Overview Streams Assets Setup My Tokens Members

Program: OFF

Content People Engagement

+ Add Stream

### Stream 1



Every Thu | 1:53 PM PDT

Enter Description

Content

Transition Rules



Add Emails, Default Programs and Event Programs

Add content

### Stream 2



Set cadence

Enter Description

Content

Transition Rules



Add Emails, Default Programs and Event Programs

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### Stream 3



Set cadence

Enter Description

Content

Transition Rules



Add Emails, Default Programs and Event Programs

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Set cadence

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### Stream 3



Set cadence

Enter Description

Content

Transition Rules



Add Emails, Default Programs and Event Programs

Add content

Marketing Activities

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Add Emails, Default Programs and Event Programs

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# Agenda



Confluence  
overview



User Experience  
psychology



Aligning to  
intentions

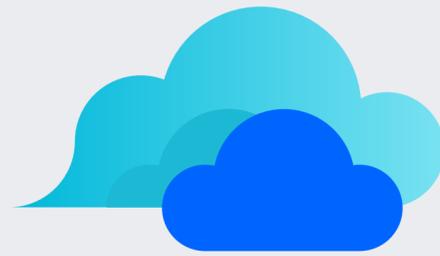


Examples of  
real sites

# Understanding user behavior



Attention



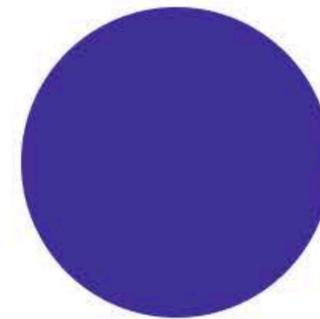
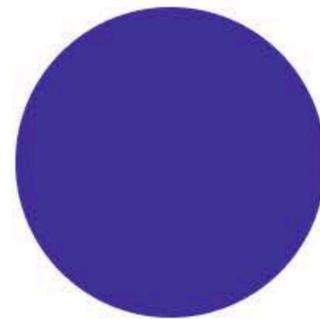
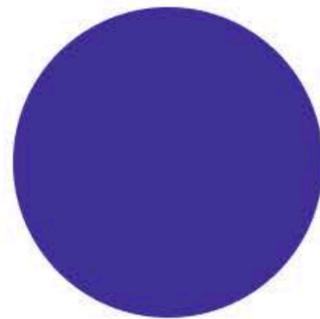
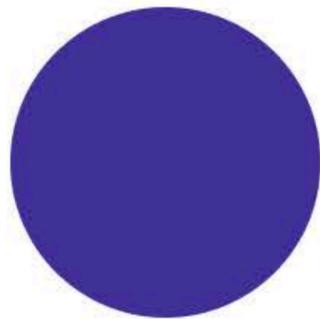
Memory



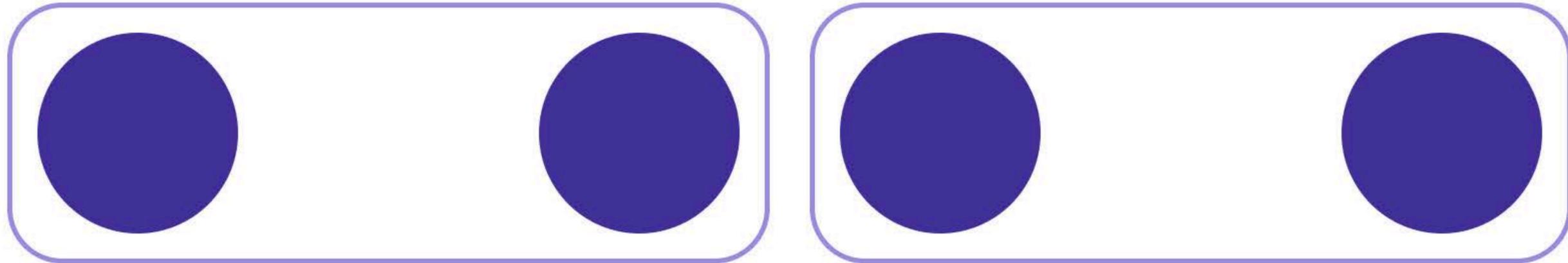
Influence



 ATTENTION



 ATTENTION

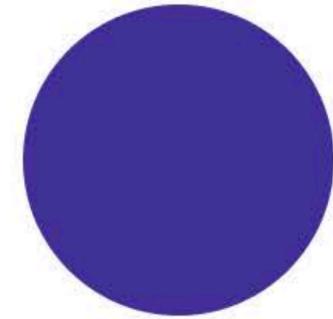
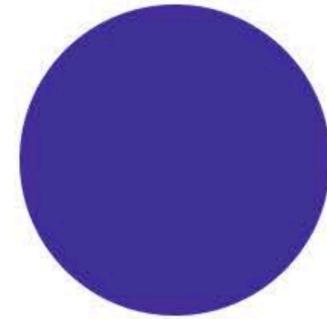
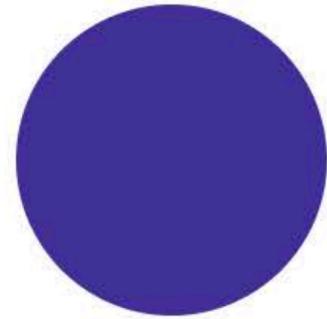
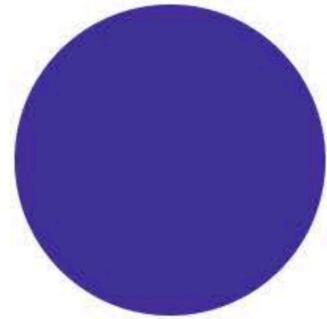




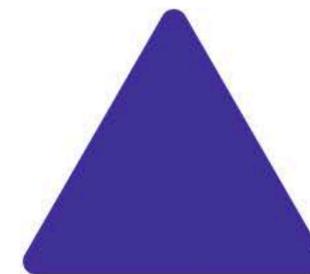
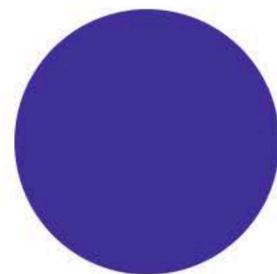
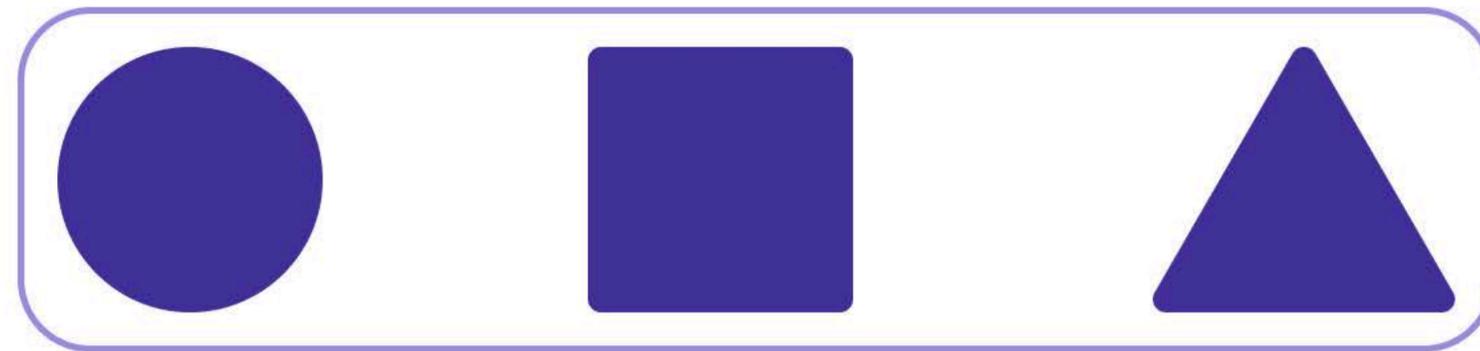
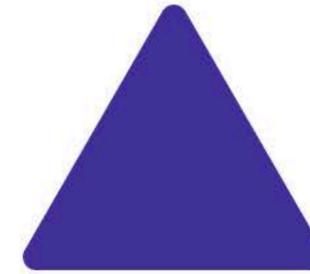
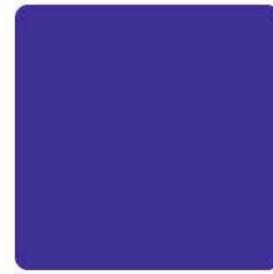
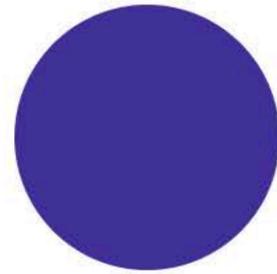
ATTENTION

# Gestalt principle of **common region**

 ATTENTION



 ATTENTION





MEMORY

# Spangled drongo

**Spangled drongo bird**

**Recognition is easier**  
than recall.



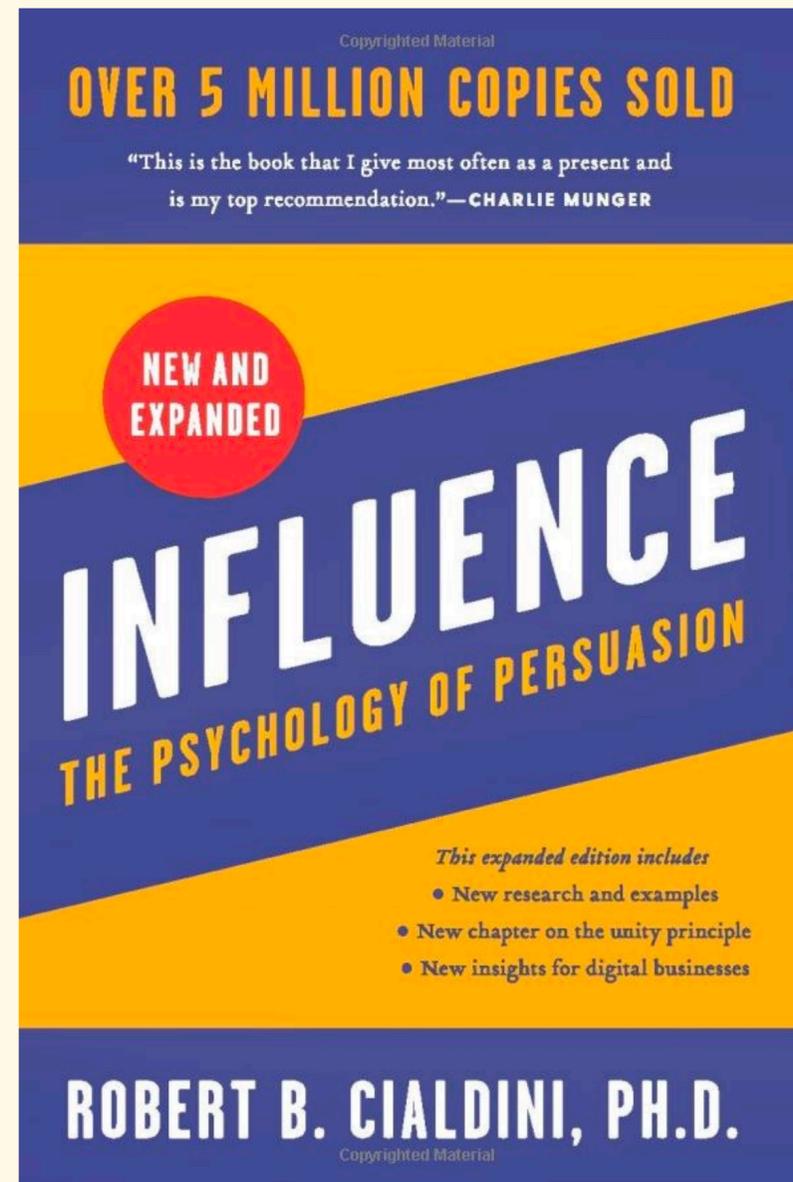
# INFLUENCE

**Social proof**

**‘Liking’ principle**



**Social proof**



**‘Liking’ principle**

Social proof



‘Liking’ principle



# Agenda



Confluence  
overview



User Experience  
psychology



Aligning to  
intentions



Examples of  
real sites



Desktop 1



Google Chrome



Keynote

**Jira Software**

Project Poster: 5% Cashback Campaign

Overview

Project name: Project Poster: 5% Cashback Campaign

Team members: 1 member

Status: Done

Discover what's happening

Get the most out of your software project space

**Jira Software**

Pick up where you left off

Project Poster: 5% Cashback Campaign

Overview

Discover what's happening

Get the most out of your software project space

Backup Project workspace

Backup Project workspace

Backup Project workspace

Downloads

File Explorer

Documents

Downloads

Desktop

Documents

Downloads

Desktop

Documents

Downloads

Desktop

Documents

**Trello**

My Projects

For Others

My Backlog

My Board

My Board

My Board

Activity Center

Quick sync about...

Activity Center

Quick sync about...

**Jira Software**

Pick up where you left off

Overview

Discover what's happening

Get the most out of your software project space

**Jira Software**

Pick up where you left off

Overview

Discover what's happening

Get the most out of your software project space

Next Steps

Deliverables

Tasks

Checklist

Checklist

Checklist

No Notes

No Notes

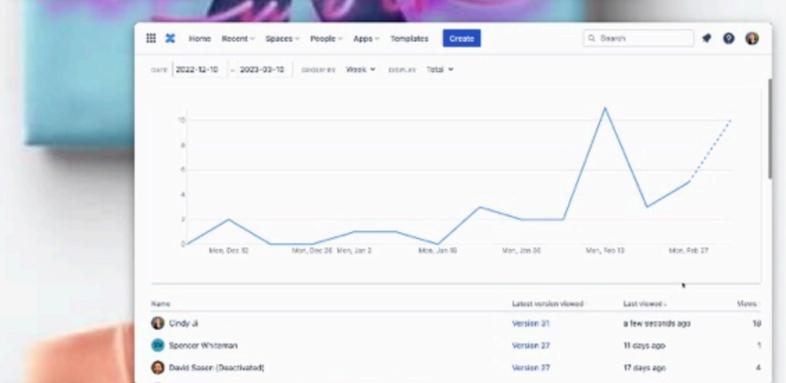
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**Jira ticket**

Install Bancy demo instance

Download

Details

Comments

Welcome, Emma!

Hi, @Emma

Welcome to the marketing team! We're glad you're here!

I've put together this onboarding plan to help you

**Jira ticket**

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Details

Comments

**Slack**

Channels

Messages

Search

Channels

Messages

Search

**Spotify**

Recently played

Your top mixes

Search

Recently played

Your top mixes

**Calendar**

March 2023

Calendar

March 2023

Next Steps

Deliverables

Tasks

Checklist

Checklist

Checklist

**Who**

What they can help with

Who

What they can help with





Desktop 1



Google Chrome



Keynote

**Confluence** - Home - Recent - Spaces - People - Apps - Templates - Create

Search

Project Poster: 5% Cashback Campaign

Overview

Discover what's happening

Next Steps

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**Confluence** - Home - Recent - Spaces - People - Apps - Templates - Create

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Pick Up where you left off

Project Poster: 5% Cashback Campaign

Discover what's happening

Next Steps

Deliverables

Tasks

Backup your workspace

Backup Now

Cancel

Downloads

File Explorer

Documents

Desktop

Downloads

Music

Pictures

Public

Recent

Workspaces

**Trello** - Home - Recent - Spaces - People - Apps - Templates - Create

Search

My Projects

For Others

My Backlog

My Board

Activity Center

Quick sync about...

1:27 PM

13:27 - 14:27

15:27 - 16:27

17:27 - 18:27

19:27 - 20:27

21:27 - 22:27

23:27 - 00:27

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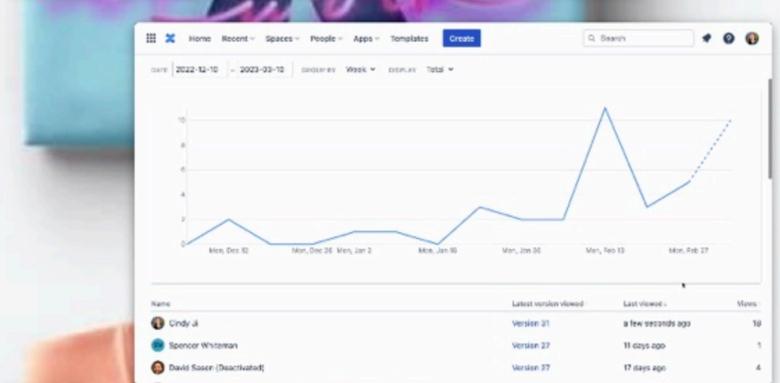
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**Roadmap**

Install Bancy demo instance

Download

Details

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Install Bancy demo instance

Details

**Slack**

Channels

Messages

**Spotify**

Recently played

Your top mixes

**Calendar**

March 2023

Events

Next Steps

Deliverables

Tasks

**Who**

What they can help with

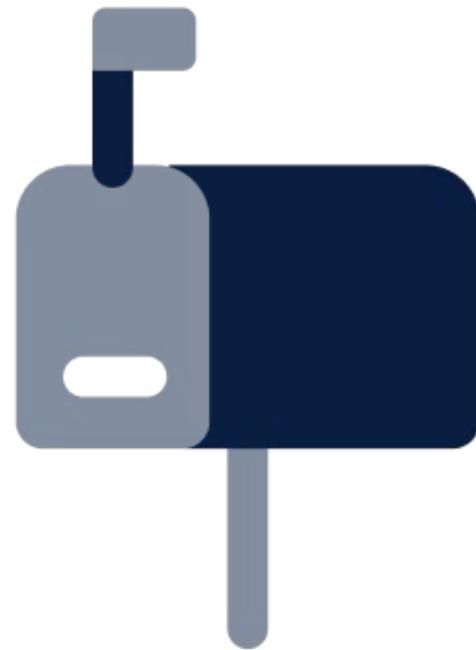
Wili

Mia

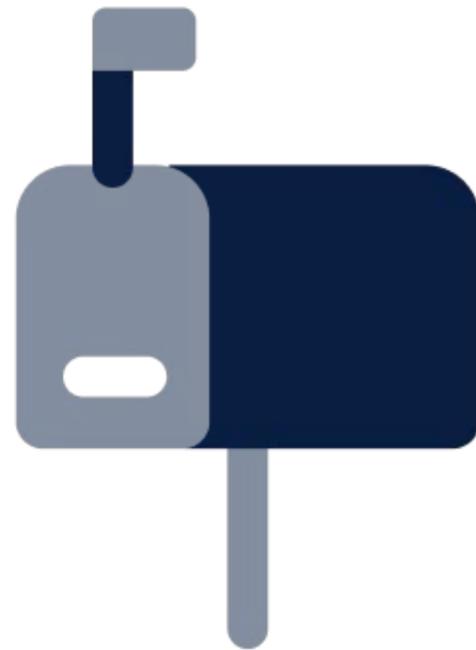
Jose's Jams



**Do you spend time thinking  
about your mail?**



**Do you spend time thinking  
about your mail?**



# Setting intentions



## Pain: finding information

Goal: Confluence is the single source of truth for documentation.



## Pain: managing access

Goal: Confluence enables everyone to have access to the information they need.



## Pain: updating information

Goal: Confluence acts as a living library for content.



## Pain: moving work forward

Goal: Confluence is the hub for collaboration and knowledge sharing.

# Setting intentions



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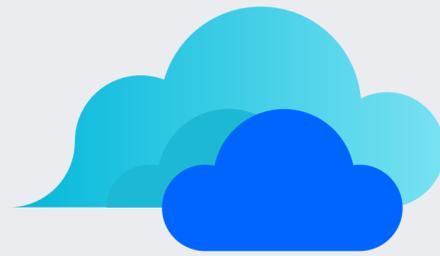
Goal: Confluence is the hub for collaboration and knowledge sharing.

# Applying UX principles



Attention

The principle of  
common region



Memory

Recognition is  
easier than recall

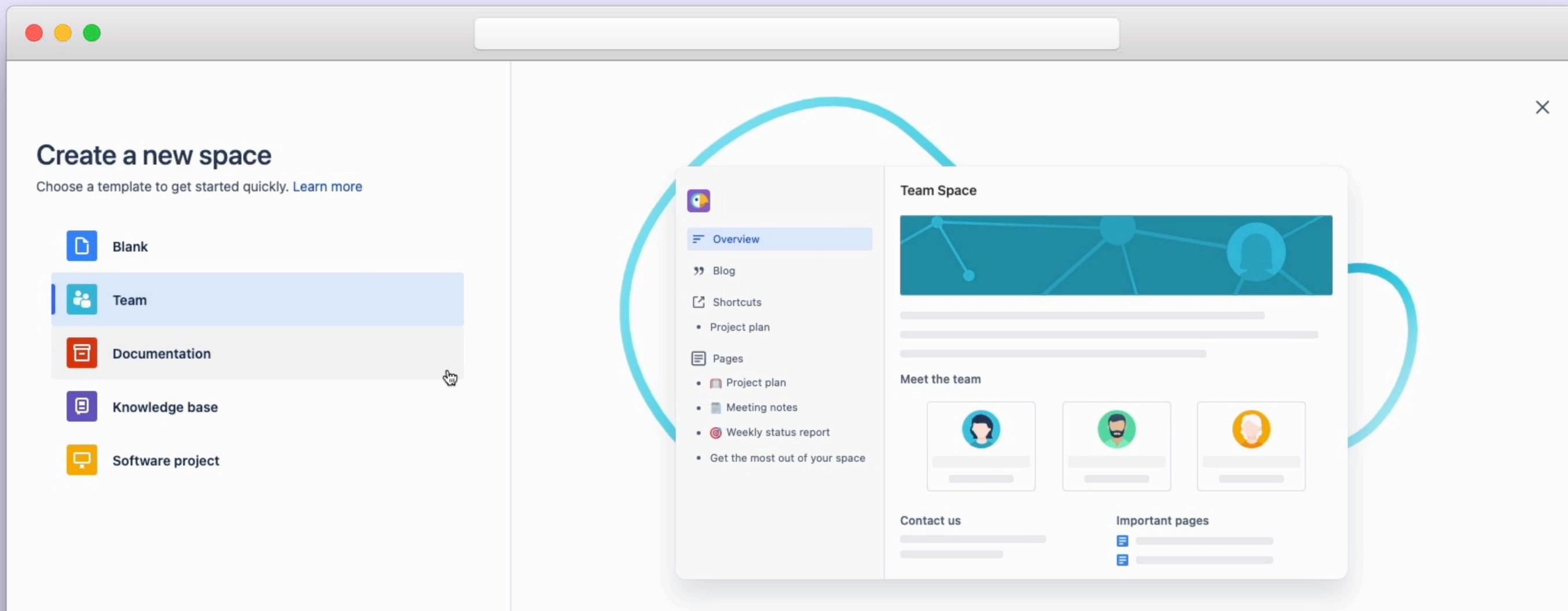


Influence

Social proof & the  
Liking principle



# ATTENTION: PRINCIPLE OF COMMON REGION



## Team space

Create an organized place for your team to collaborate.



### Showcase your team's work

Showcase your team and the work they're doing. Easily find and connect with the right people to move work forward.



### Keep your team in sync

Create actionable meeting notes, keep track of progress, and share processes.



## ATTENTION: PRINCIPLE OF COMMON REGION

### Clear naming conventions

For example, being invited to a space titled “Space - Corporate Team” is more explanative than “Corporate”



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### Flat page structure

A quick rule of thumb is to not have more than 6 levels of pages within your space structure



## ATTENTION: PRINCIPLE OF COMMON REGION

### Clear naming conventions

For example, being invited to a space titled “Space - Corporate Team” is more explanative than “Corporate”

### Flat page structure

A quick rule of thumb is to not have more than 6 levels of pages within your space structure

### Restricted content level

View restrictions on a page are inherited. More restricted content should live at a higher page level

# MEMORY: RECOGNITION OVER RECALL

The screenshot shows a Confluence page for 'Banc.ly Marketing'. The left sidebar contains a 'Pages' list with various documents. The main content area is titled 'Campaign deliverables' and features a table with columns for Workstream, Tasks, Deadline, and Status. Below the table is a callout box with a team instruction. At the bottom, there is a 'Project validation' section with two rows of content.

**Pages**

- > New hire resources!
- > Banc.ly Design Principles
- > OKRs
- > Q1 Product Launch
- ▼ Q2 Product Launch
  - Q2 Product Roadmap
  - Q2 Cross-functional brainstorm
  - Q2 Product + Marketing: Strate...
  - Q2 Spring Product Launch FAQ
  - ▼ Project Poster: 5% Cashback C...
    - Finding Balance with Async...
    - UX Principles for Confluenc...
    - DACI Documentation: Cash...
    - Cashback Campaign: Roles ...
    - Financial Literacy Events Ca...
- > Confluence Design team
- GTM Plan - Working page
- Add net new customers through pr...

### 👍 Campaign deliverables

Workstream	Tasks	Deadline	Status
Content hub	<input type="checkbox"/> Write copy @Alana Grant <input type="checkbox"/> Design assets @Emma	Mar 20, 2023	DONE
Email campaign	<input type="checkbox"/> Gather content illustrations @Will <input type="checkbox"/> Set up A/B test and tracking @Emma	Mar 31, 2023	IN PROGRESS
Community activation	<input type="checkbox"/> Organize social media strategy plan @Alana Grant <input type="checkbox"/> Send out event registration @Emma	Apr 10, 2023	NOT STARTED

**📢 To team:** Once you've finished a task, check it off in the table above.

### ✅ Project validation

<b>What do we already know?</b>	<ul style="list-style-type: none"><li>• Selection criteria</li><li>• Performance metrics</li><li>• Benchmarks and final numbers</li></ul>
<b>What are possible solutions?</b>	<ul style="list-style-type: none"><li>• Content hub with submission deadlines</li><li>• Guidelines for how to create high quality content</li><li>• <b>FINAL</b> Community event in partnership with local nonprofits</li></ul>

# MEMORY: RECOGNITION OVER RECALL

The screenshot shows a Notion workspace interface. At the top, there's a navigation bar with icons for Home, Recent, Spaces, People, Apps, and Templates, along with a search bar and a user profile. The main content area is titled 'Banc.ly Marketing' and includes a welcome message, a search bar, a list of OKRs, and contact information. The OKRs list includes 'Add net new customers through product + marketing', 'New signups as we raise awareness', and 'Gross new customers as we supercharge our card'. The contact information includes a hashtag '#bancly-marketing' and an email address 'marketing@bancly.com'. The interface is clean and modern, with a light blue and white color scheme.

Home Recent ▾ Spaces ▾ People ▾ Apps ▾ Templates +

Q Search

> Banc.ly Marketing

Share Star this space

Welcome to the Banc.ly marketing space! Meet our team, read company updates, and track company OKRs all from here.

Search Search

**OKRs**

- ✓ Add net new customers through product + marketing
- NEW New signups as we raise awareness
- ⚡ Gross new customers as we supercharge our card

**Contact us** 🤝

- #bancly-marketing
- ✉ : marketing@bancly.com

**Our team**



## MEMORY: RECOGNITION OVER RECALL

### Give more visual cues

Emojis in the page title is an example of how content can be better distinguished in the space sidebar or pages home

### Offer help in-context

Using the search macro in the space overview is one way to achieve this

### Declutter your page tree

Remove outdated content. It needs to be a part of your team's routine, so encourage and promote the archive efforts of space gardeners

**links**

- Technical support
- Payroll and benefits
- People directory
- Previous guide of acronyms
- Learning and Development Budget
- Performance Development Hub: Homepage

**ing thoughts**

Already a part of the [Banc.ly](#) team but these tenants still hold true!

**Time to learn.** Don't get sucked into the minutia of decision-making or project involvement too early. There will be plenty of time for that later. In your first 30 days, try to focus on getting comfortable and learning how things work.

**Build relationships.** By day 60, you'll be in execution mode. In your first two months, spend as much time as you can getting to know people and forming relationships.

**Be afraid to ask.** No one expects you to know how things at Banc.ly work right away. Take advantage of that and ask for help when you need it.

1 of 1

 **Gabby Williams**  
September 25, 2022

@Jena Pender can you add the latest reporting dashboard?

Resolve 

 **Jena Pender**  
September 26, 2022

@Gabby Williams will do!

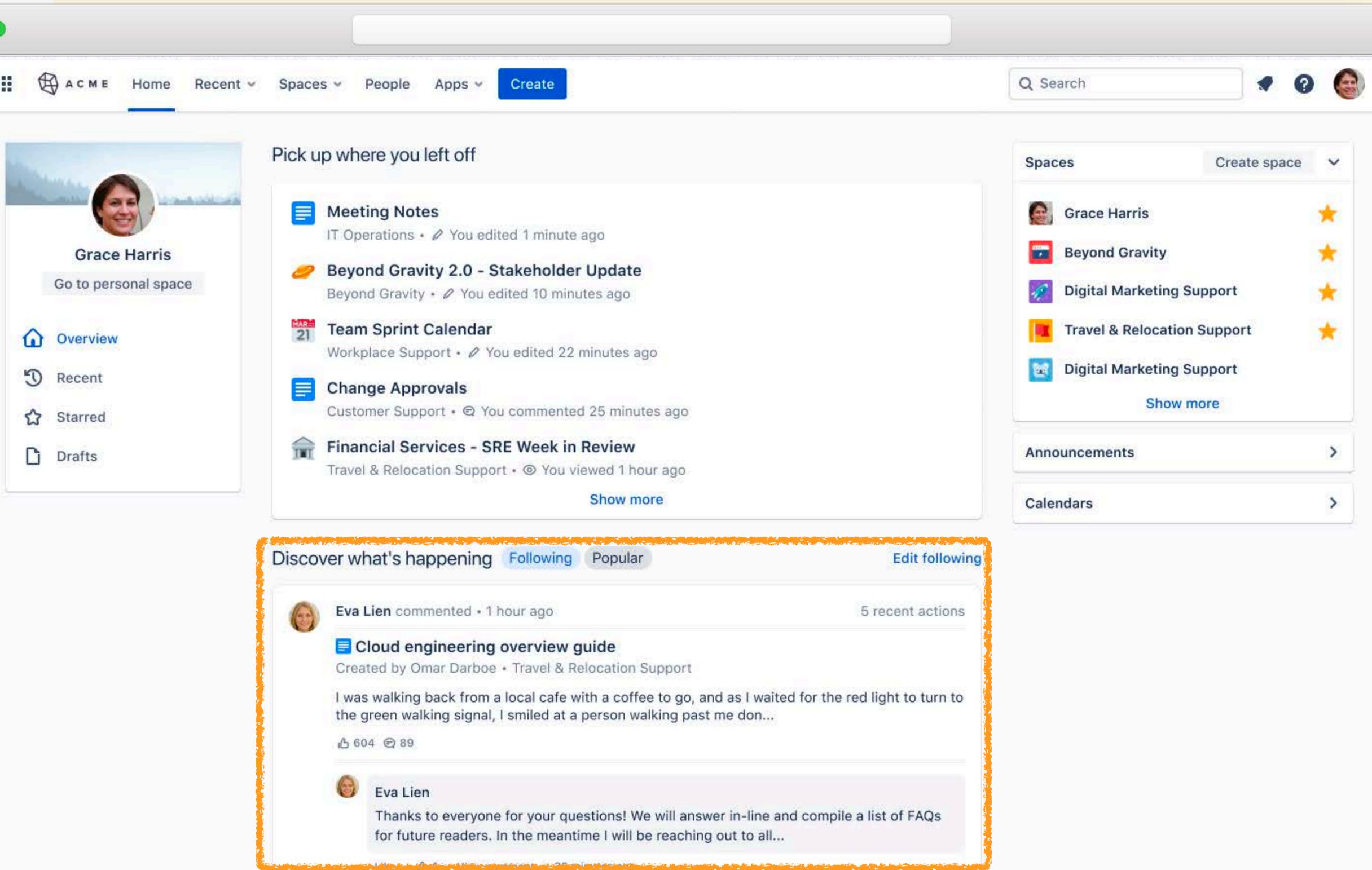


 **Cindy Ji**

New metrics a|

Cancel Save

# Social proof



The screenshot shows a user interface for a social collaboration platform. At the top, there is a navigation bar with 'ACME', 'Home', 'Recent', 'Spaces', 'People', 'Apps', and a 'Create' button. A search bar and user profile icons are on the right. The main content area is divided into several sections: a user profile for 'Grace Harris' on the left; a 'Pick up where you left off' section with a list of recent activities like 'Meeting Notes', 'Beyond Gravity 2.0 - Stakeholder Update', and 'Team Sprint Calendar'; a 'Spaces' sidebar on the right listing various groups like 'Beyond Gravity' and 'Digital Marketing Support'; and a 'Discover what's happening' section at the bottom, which is highlighted with an orange border. This section shows a post by 'Eva Lien' about a 'Cloud engineering overview guide' with 604 likes and 89 comments.

Social proof



# Agenda



Confluence  
overview



User Experience  
psychology



Aligning to  
intentions



Examples of  
real sites

# 1. NEW USER

---

## Goals:

- Better visibility
- Higher productivity
- Greater innovation

# 2. EXISTING USER

---

# 1. NEW USER

---

## Goals:

- Better visibility
- Higher productivity
- Greater innovation

## Needs:

- Secure place for everyone to work
- Long-term scalability
- Central knowledge base
- Training hub

# 2. EXISTING USER

---



# Settings

## SITE ADMINISTRATION

User management

Billing

## AUTOMATION

Global automation

## CONFIGURATION

General Configuration

Further Configuration

Languages

Shortcut Links

Global Templates and Blueprints

Import Templates

PDF Export Language Support

Configure Code Macro

## LUCIDCHART ADD-ON

Configure

## Global permissions

Manage groups

Manage what different groups of users (and apps) can do on your Confluence site. [Learn more](#)

User groups Guest access Anonymous access JSM access Apps

Enter group name



Filters

Edit

Groups (5)

Personal Space

Create Space

>	site-admins <b>CONFLUENCE ADMIN</b> 110 people	<input type="checkbox"/>	<input type="checkbox"/>
>	administrators <b>CONFLUENCE ADMIN</b> 11 people	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>	trusted-users-43fca4ac-d034-4d4b-a36a-b7e830b0e17a <b>CONFLUENCE ADMIN</b> 1 person	<input type="checkbox"/>	<input type="checkbox"/>
>	confluence-users 277 people	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>	simpleStory 1 person	<input type="checkbox"/>	<input type="checkbox"/>

Acme Marketing Agency  
Shared with guests

Space shared with guests.



Space Settings

Manage space

Space permissions

Manage pages

Look and feel

Integrations

Automation

Bulk Archive

SHORTCUTS

Pages

Archived pages

### Guest users

External collaboration with guests is a beta feature. Let us know what you think! [Give feedback](#)

Grant permissions to individual users, regardless of which groups they are a member of.

	All		Pages			Blog		Comments		Attachments		Restrictions	Mail
	View	Delete Own	Add	Archive	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete
Cindy Ji	✓	✗	✓	✗	✗	✗	✗	✓	✗	✓	✗	N/A	✗

Edit Permissions

### Anonymous Access

If your Confluence site is public, you can grant permissions to people who are not logged in. Anonymous users can be granted almost any permission, but we recommend you limit this to viewing and commenting.

	All	Pages			Blog		Comments		Attachments		Restrictions	Mail	Space		
	View	Delete Own	Add	Archive	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Ad
Anonymous	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗

Edit Permissions

Acme Marketing Agency  
Shared with [guests](#)

Space shared with guests.



Space Settings

Manage space

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	All		Pages			Blog		Comments		Attachments		Restrictions	Mail
	View	Delete Own	Add	Archive	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete
Cindy Ji	✓	✗	✓	✗	✗	✗	✗	✓	✗	✓	✗	N/A	✗

Edit Permissions

### Anonymous Access

If your Confluence site is public, you can grant permissions to people who are not logged in. Anonymous users can be granted almost any permission, but we recommend you limit this to viewing and commenting.

	All	Pages			Blog		Comments		Attachments		Restrictions	Mail	Space
	View	Delete Own	Add	Archive	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Ad
Anonymous	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗

Edit Permissions

**Q4 Outreach Campaign**  
Shared with [guests](#)

Space shared with guests.



Overview

Blog

Whiteboards **ALPHA**

Analytics

Calendars

Space Settings

**Manage space**

Space permissions

Manage pages

Look and feel

Integrations

Automation

Archived pages

< Space settings

## Manage space

Jump to setting...

[Space details](#)

[Edit sidebar](#)

[Archive space](#)

[Delete space](#)

[Export space](#)

[Content statuses](#)

[Related pages](#)

### Edit Space Details

Name: Q4 Outreach Campaign

Description: Marketing team campaign for Q4 in partnership with Acme Marketing Agency

Status: Current

Home page: Marketing team

The page that displays when users navigate to this space.

Save Cancel

## Create a new space

Choose a template to get started quickly. [Learn more](#)

- Blank
- Team
- Documentation
- Knowledge Base
- Personal space
- Software Project**
- Marketing
- Design
- Operations
- Project Manamagent

**Software Project Space**

- Overview
- Shortcuts
  - JIRA Board
- Pages
  - Product requirements
  - Weekly meeting notes
  - DACI: Decision documentation
  - Get the most out of your space

Status

Recently updated

Jira issues

Roadmap

## Software project space

Kickstart a project with a flexible workspace.



### Jira integrations

Connect plans to development work with powerful Jira integrations including issue-tracking and dynamically updating roadmaps.



### Best practice templates

Q4 Outreach Campaign  
Shared with guests

Space shared with guests.



Space Settings

Manage space

Space permissions

Manage pages

Look and feel

Integrations

Automation

Bulk Archive

SHORTCUTS +

Pages ... +

Archived pages

Back to library



Publish a new meeting notes page when scheduled (recurring)

Turn it on

Publish a new meeting notes page when scheduled (recurring)

Rule details  
Actor: Cindy Ji

When: Scheduled  
Every week on Mon at 9:00 AM

Then: Publish new page  
"{{now.shortDate}} Meeting notes" in same space as trigger

Add component

Scheduled

Execute rules on a recurring schedule (e.g. every 7 days from the time of publication) or create an advanced schedule using a CRON expression. Run time can vary up to 5 minutes.

Basic Advanced (CRON expression)

Run rule every

1 Weeks

On

Mon Tue Wed Thu Fri Sat Sun

At

9:00 AM America/Los Angeles

Next run: Monday, April 17, 2023 9:00 AM PDT Show next 10 runs

Cancel Save



# Banc.ly Marketing

Welcome to the [Banc.ly](#) marketing space! Meet our team, read company updates, and track company OKRs all from here.





## OKRs

- Add net new customers through product + marketing
- New signups as we raise awareness
- Gross new customers as we supercharge our card

## Contact us

- #bancly-marketing
- : [marketing@bancly.com](mailto:marketing@bancly.com)

## Our team

Mission

Important Links

## Automation

### ▶ New trigger

All components ▾

Blogpost

#### Pages and blogs

- » **Blogpost published**  
Rule is run when a blogpost is published.

Microsoft Teams

Search

Team Galactic - Q1 Proje... Posts Confluence 7 more + Meet

Normal text B I ...

## Meeting notes

**Date**  
May 18, 2022

**Participants**  
List meeting participants using their @ mention names

- @Lennon Liao
- @ mention a person to add them as an attendee and they will be notified.

**Goals**  
List goals for this meeting (e.g., Set design priorities for FY19)

- 

**Discussion topics**

Time	Item	Presenter	Notes
			<ul style="list-style-type: none"> <li>Add notes for each discussion topic</li> </ul>

**Action items**  
Add action items to close the loop on open questions or discussion topics:

Type your action, use '@' to assign to someone.

**Decisions**  
Type /decision to record the decisions you make in this meeting:

Add a decision...

Jira

Your work Projects Filters Dashboards People Apps Create

Search

Back DEMO-3

Demo service project  
Service project

Back to project

Queues

STARRED  
Select the star icon next to your queues to add them here.

TEAM PRIORITY

All open 7

Assigned to me 1

Unassigned issues 6

Manage queues

Give feedback

Example Customer raised this request via Email  
View request in portal Hide details

Description  
Refer to document below for our checklist:

Basic Printer Troubleshooting Checklist

Created by Leonard boyle  
Last updated: just a moment ago - 3 min read

Here are the troubleshooting steps to address printer connection issues while in AXP-100

Printers continue to be a serious cause for frustration. There is a reason the scene in Office Space, where they tear apart a printer in the field, still resonates with us. As other technology gets more sophisticated, printers have remained as frustrating and difficult to manage as ever.

Fortunately, some common issues that relatively easy to fix. If you run into a printer issue that can't be fixed with this checklist, it is something that will need serious attention.

Permissions Requirements

Waiting for support

SLAs

23 Aug 09:00 AM  
Time to first response within 8h

24 Aug 09:00 AM  
Time to resolution within 16h

Details

Assignee  
Unassigned  
Assign to me

Reporter  
Example Customer

Request Type  
IT help

# 1. NEW USER

---

## Goals:

- Better visibility
- Higher productivity
- Greater innovation

## Needs:

- Secure place for everyone to work
- Long-term scalability
- Central knowledge base
- Training hub

# 2. EXISTING USER

---

## Goals:

- Stay aligned across multiple time zones
- Connect work across disparate tools and teams

# 1. NEW USER

---

## Goals:

- Better visibility
- Higher productivity
- Greater innovation

## Needs:

- Secure place for everyone to work
- Long-term scalability
- Central knowledge base
- Training hub

# 2. EXISTING USER

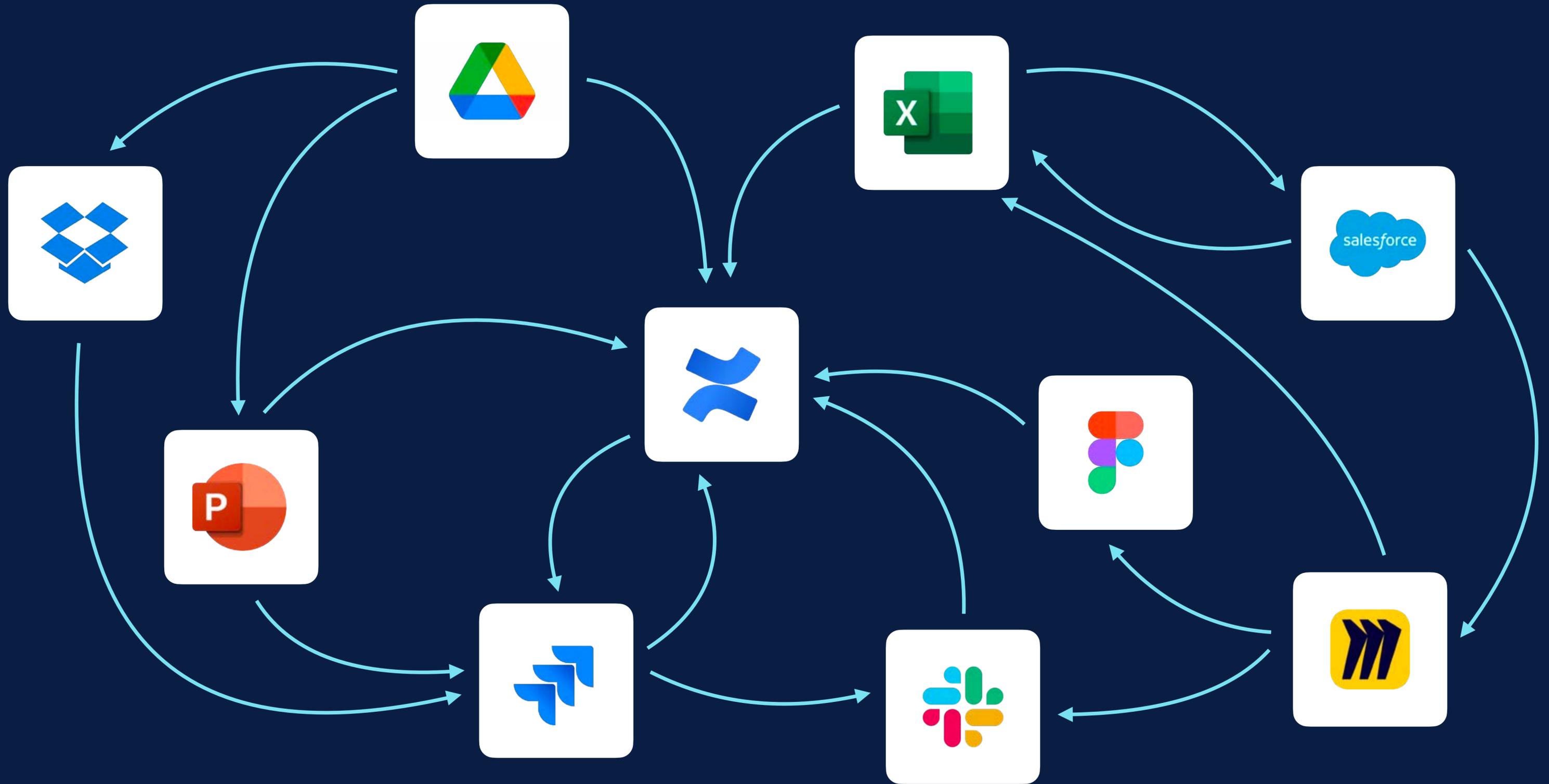
---

## Goals:

- Stay aligned across multiple time zones
- Connect work across disparate tools and teams

## Needs:

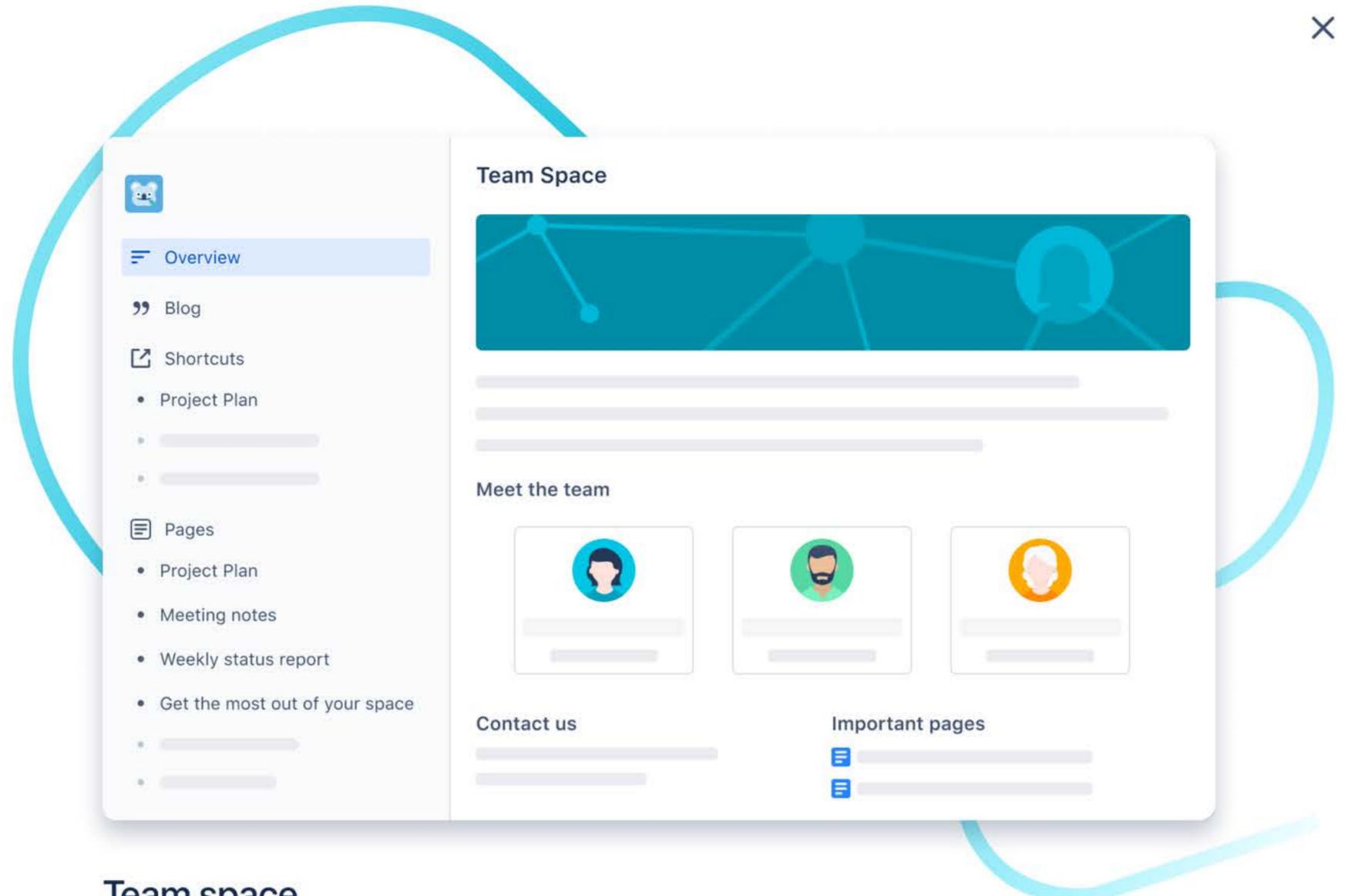
- Connected and integrated projects
- Bring everyone onto same page quickly



## Create a new space

Choose a template to get started quickly. [Learn more](#)

- Blank
- Team**
- Documentation
- Knowledge Base
- Personal space
- Software Project
- Marketing
- Design
- Operations
- Project Managment



**Team Space**

Overview

Blog

Shortcuts

- Project Plan

Pages

- Project Plan
- Meeting notes
- Weekly status report
- Get the most out of your space

Meet the team

Contact us

Important pages

### Team space

Create an organized place for your team to collaborate.



#### Showcase your team's work

Showcase your team and the work that they're doing. Easily find and connect with the right people to move work forward.

## Create a new space

Choose a template to get started quickly. [Learn more](#)

- Blank
- Team
- Documentation
- Knowledge Base
- Personal space
- Software Project**
- Marketing
- Design
- Operations
- Project Manamagent

**Software Project Space**

Overview

- Shortcuts
  - JIRA Board
- Pages
  - Product requirements
  - Weekly meeting notes
  - DACI: Decision documentation
  - Get the most out of your space

Status

Recently updated

Jira issues

Roadmap

## Software project space

Kickstart a project with a flexible workspace.

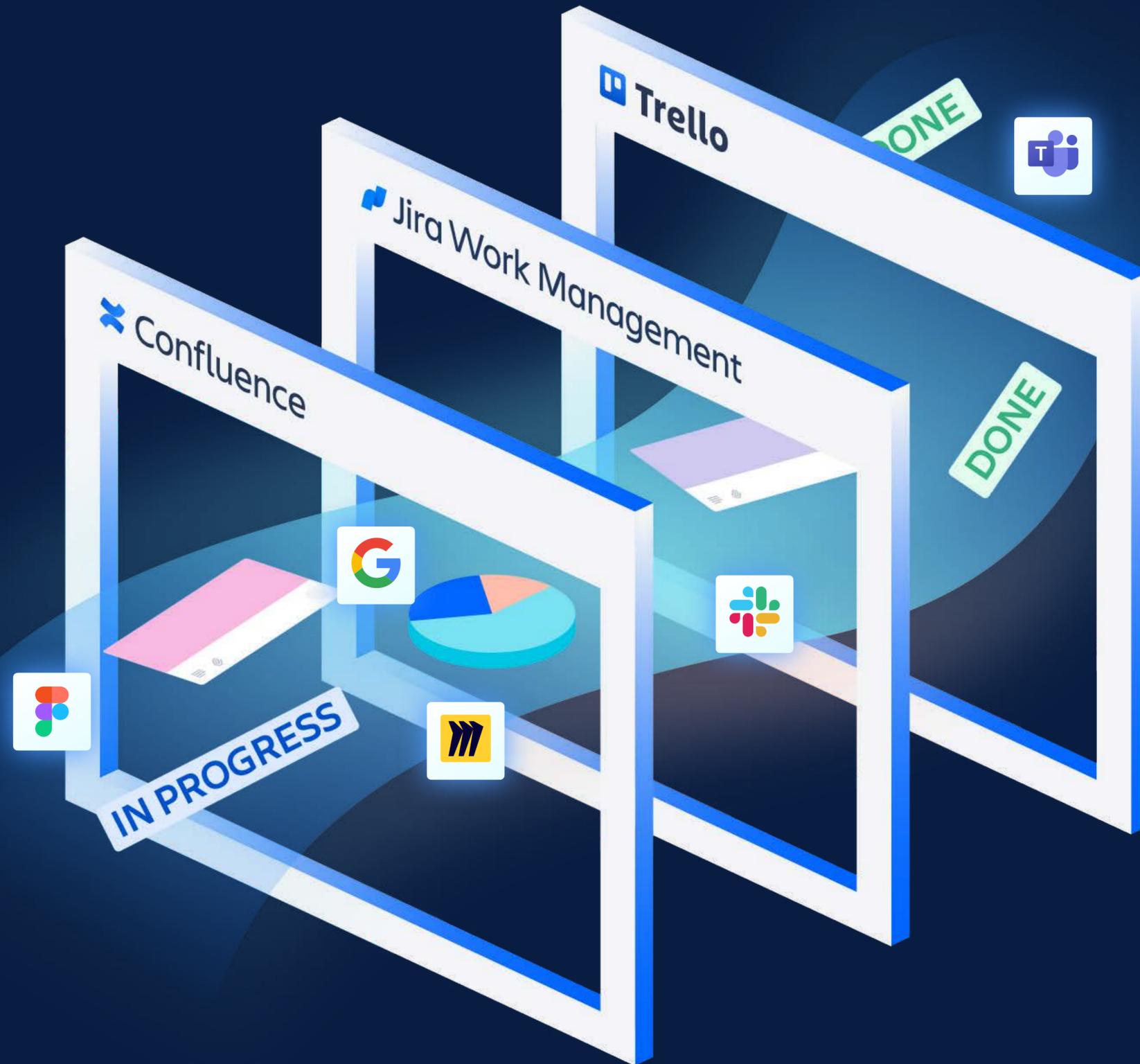


### Jira integrations

Connect plans to development work with powerful Jira integrations including issue-tracking and dynamically updating roadmaps.



### Best practice templates





Normal text ▾

**B** *I* ...



Saved



**Publish**

Close



Banc.ly Marketing / ... / OKRs / Quick Links



## Performance Tracking

I





Create

Search



# Banc.ly Marketing

Share Star this space

Welcome to the Banc.ly marketing space! Meet our team, read company updates, and track company OKRs all from here.



Search

## OKRs

- Add net new customers through product + marketing
- NEW New signups as we raise awareness
- ⚡ Gross new customers as we supercharge our card ARCHIVED

## Contact us

- #bancly-marketing
- ✉ : marketing@bancly.com

## Our team

### Mission

Banc.ly is a best-in-class credit card company that

### Important Links

- 📄 Internal blog: Multi-Year Banc.ly Strategy

Calendars



FY19 Webinars Calendar



- Birthdays
- Demos
- Events
- Q3 Server PMM Webi...
- Q4 Cloud PMM Webi...
- Q4 Server PMM Webi...

FY20 Webinars Calendar



- Data Center Demo
- Events
- FY20 Demos
- FY21Q1Webinar
- FY21Q2JSMLightening
- FY21Q2Webinar
- FY21Q3JSMLightening
- FY21Q3Webinar
- FY21Q4Webinar
- HOLIDAY

Today < > March 2021



Month



Add event

SUN	MON	TUE	WED	THU	FRI	SAT
28	1	2 7:00 AM JSW Demo 8:00 AM Data Cente +2 more	3 WBI-631 - JSM Ligh WBI-686 - Adopting	4 10:00 AM JSW Dem 12:00 PM JSM Dem	5	6
7	8	9 WBI-672 - Tips for I 7:00 AM JSW Demo 10:00 AM JSM Dem	10 7:00 AM Migrations 10:00 AM Migration:	11 10:00 AM JSW Dem 12:00 PM JSM Dem	12	13
14	15	16 7:00 AM JSW Demo 8:00 AM Data Cente +2 more	17 WBI-661 - JSM Ligh	18 WBI-690 - Q3 Gove 10:00 AM JSW Dem +2 more	19	20
21	22	23 WBI-682 - How rem 7:00 AM JSW Demo 10:00 AM JSM Dem	24 7:00 AM Migrations 10:00 AM Migration:	25 WBI-675 - Custome 10:00 AM JSW Dem 12:00 PM JSM Dem	26	27
28	29	30 WBI-683 - AWS/Atl: 7:00 AM JSW Demo +3 more	31 WBI-668 - Jira Aligr	1 10:00 AM JSW Dem 12:00 PM JSM Dem	2	3



- Banc.ly Marketing**
- OKRs
  - NEW New signups as we raise awa...
  - Quarterly Plans
  - Performance Tracking
  - Benefit information
  - Q1 Product Launch** ... +
  - Q2 Product Launch
  - Confluence Design team
  - Project poster: Cashback Campaign
  - GTM Plan - Working page
  - Add net new customers through ...
- Archived pages

Banc.ly Marketing

| [Share](#) ...

## OKRs

Created by Meg Bailey  
 Last updated: less than a minute ago by Cindy Ji • 1 min read • 26 people viewed

<b>Team</b>	@Gabby Williams @Brittany Sudlow
<b>Timeline</b>	Apr 20, 2023
<b>OKR Key Updates</b>	<div data-bbox="1549 1191 2932 1585"> <p> <b>Q4 Marketing Campaigns</b> <span>ON TRACK</span></p> <p>Updated 1 hour ago <span>1</span> APR 20, 2023</p> <p>Launch new financial literacy event series in partnership with community centers.</p> <p> Atlas <a href="#">Full screen view</a></p> </div>

## Objectives

Q4 Outreach Campaign  
Shared with guests

Space shared with guests.



Pages

- > Campaign Team Homepage
- > OKRs
- > Banc.ly Design Principles
- > Project Poster: 5% Cashback Promotion
- > Q1 Product Launch
- Q2 Product Launch
  - Q2 Product Roadmap
  - Q2 Cross-functional brainstorm
  - Q2 Product + Marketing: Strategic Plan
  - Q2 Spring Product Launch FAQ

Archived pages

Q4 Outreach Campaign / Q2 Product Launch

Share, Edit, Comment, Star, Lock, etc. icons

## Q2 Product Roadmap

Created by Cindy Ji  
Last updated: 11 minutes ago • 1 min read • 1 person viewed

### Team mission

- Understand the state of Banc.ly and the room for improvement
- Understand the vision, focus areas, OKR, and the roadmap

### Project information

- ITSM Foundation - FY21 OKRs

### Detailed quarterly roadmap

Feature	Initiative	Dates	Priority	Status
Early Issue Detection, reduce incidents discovered in production	Confluence	Jul 1, 2022 - Jul 17, 2022	HIGH	SHIPPED
Define standard SLIs and SLOs across Confluence Cloud	Jira	Jul 6, 2022 - Jul 31, 2022	MEDIUM	SHIPPED



Back to library



Notify people about inactive pages when scheduled (recurring)

Turn it on

### Notify author that outdated page will be archived soon

Rule details  
Actor: Cindy Ji

When: Scheduled  
Every week on Wed at 9:00 AM

Branch rule / for each page

Then: Send email  
{{page.author.emailAddress}}  
For review: This page may need updating

Add component

### Branch rule / for each page

Perform actions and conditions on multiple related pages

Where Last updated more than

3 months ago

Add more criteria +

Cancel Save



Back to library → Archive inactive pages when scheduled (recurring) Turn it on

### Archive pages inactive for 12 months

**Rule details**  
Actor: Cindy Ji

**When: Scheduled**  
First day of the month at 9:00 AM

**Branch rule / for each page**

**Then: Archive page**

Add component

### Branch rule / for each page

Perform actions and conditions on multiple related pages

Where Last updated more than

3 months ago

Add more criteria +

Cancel Save



Home

Recent ▾

Spaces ▾

Teams ▾

Apps ▾

Templates

Create

Search



# Automation

NEW

Publish rule

Return to list

Rule details  
Actor: Cindy Ji

When: Space created  
Rule is run when a new space is created.

Then: Publish new page

And: Publish new page

Add component

## Publish new page

Publish a new page in:

Space \*

Same space as trigger

Parent page

None

Enter page title \*

Part

Partner Onboarding

Template space

Select a space

Template

Select a template

Cancel

Save



Home

Recent ▾

Spaces ▾

Teams ▾

Apps ▾

Templates

Create

Q Search



> e.g., Do these policies begin on my start date, or do I have to wait a probationary period?

> e.g., What if I need to change my plan mid year?

+ Add label

Related pages ⓘ



GTM Plan - Working page

Banc.ly Marketing



Organized together



Email Drip Campaign Q4 '23

Banc.ly Marketing



Organized together



Write a comment...



The screenshot shows a Confluence page with a navigation bar at the top containing 'Spaces', 'Teams', 'Apps', 'Templates', and a 'Create' button. A search bar is on the right. Below the navigation is a toolbar with icons for edit, comment, star, eye, lock, and a 'Share' button. The main content area features a header with a 'ux' icon and the title 'principles for your Confluence site'. Below this is a sub-header 'UX principles for organizing and scaling your Confluence site' with a 'ux' icon. The author information shows 'Created by Shaziya Tambawala' and 'Last updated: less than a minute ago · 3 min read · 2 people viewed'. The text discusses the pain of finding information and managing access, and introduces the 'Principle of Common Region' with an 'ATTENTION' tag. It explains the Gestalt principle of common region and lists best practices for space structure. At the bottom, three wireframe diagrams illustrate different space structures for a 'Sales - Corporate Team' space, showing various content items and their arrangement.

aces Teams Apps Templates Create

Search

Share

ux principles for your Confluence site

UX principles for organizing and scaling your Confluence site

Created by Shaziya Tambawala  
Last updated: less than a minute ago · 3 min read · 2 people viewed

**Pain → Finding information and managing access**

For Confluence to be your single source of knowledge where everyone has access to the information they need, it's important to structure content in groupings that make navigation easy both within a space and across spaces.

**Principle of Common Region** **ATTENTION**

The Gestalt principle of common region tells us that people perceive items within a container as related, regardless of other characteristics. That container in Confluence could be a page or a space. Best practices for space structure are:

Sales - Corporate Team

- Sales - Corporate Team Overview
- New hire resources
- Meeting notes
- APAC 2023 Q3 Sales Progress





# Thank you

The subtle art of not building an awful Confluence site



**GABBY WILLIAMS | SENIOR PRODUCT MARKETING MANAGER**

**SHAZIYA TAMBAWALA | SENIOR PRODUCT DESIGNER**