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Making incidents suck **less**

10 battle-tested tips



KATE CLAVET | SENIOR TECHNICAL PRODUCT MARKETING MANAGER | ATLASSIAN

What we'll cover

"The single biggest problem in communication is the illusion that it has taken place."

- George Bernard Shaw



som^{ee}cards
user card

- Setting up processes
- Defining key information
- Communicating well

Credit: Someecards.com

INCIDENTS ARE **COSTLY** AND STRESSFUL

MAJOR INCIDENT

Website is slow

Create subtask

Investigate

Link issue

Add form

Add PIR

Abby Cole raised this request via API

[View request in portal](#)

Hide details

Affected service(s)

Website

Affected application(s)

Billing

Customer Support

Security

AJ

Automation for Jira

March 14, 2023 at 5:53 PM

Internal note

Major Incident Escalation

This incident has been declared a Major Incident. The priority has been increased to Critical and the Responders are being alerted according to the escalation policies and on-call schedule(s).

Note:

Only managers may de-escalate a Major Incident. If you have raised this in error, please contact the manager on-call.

Edit

Delete

+ Add object

WITH THE RIGHT TOOLS & PROCESSES, INCIDENTS CAN SUCK *LESS*

Jira Service Managem...

Threads

Mentions & reactions

Slack Connect

More

Channels

general

help-triage

itsm-13042

mobile

primary-ops

retail

social

+ Add channels

Direct messages

Kate you

+ Add coworkers

Apps

Assist

+ Add apps

itsm-13042

Monday, March 6th

Jira Service Management - Incidents

 12:57 PM
joined #itsm-13042.

Jira Service Management - Incidents

 12:57 PM
set the channel description: Main Website is down, customers are receiving a 404 <https://banclyinc.atlassian.net/browse/ITSM-13042>

Pinned by Jira Service Management - Incidents

Jira Service Management - Incidents

 12:57 PM

! 40727* - Main Website is down, customers are receiving a 404 *

Priority: Critical

Status: Completed

Teams:

[Mobile Operations]

Services:

[Mobile]

Last updated:

March 6th 1:01:12 PM

Description:

Customers see a 404 error when trying to find the website, payments cannot be collected and sales cannot be made.

Add responder

Inform stakeholders

...

Serena Mehta

 12:57 PM
was added to #itsm-13042 by Jira Service Management - Incidents, along with Sammy Vito. Also, Kate joined.

Jira Service Management - Incidents

 12:59 PM

! 40727* - Main Website is down, customers are receiving a 404 *

Automation

Rule executions

More fields

Labels

None

Request participants

None

Approvers

None

Organizations

None

Affected services

+ Add service

Affected hardware

None

Urgency

None

Impact

None

Severity

None

Slack

Create channel

Microsoft Teams

Join meeting

Zoom

Create meeting

Operational categorization

None

Responders

0 Responders

Major incident

Time tracking

No time logged

Original estimate

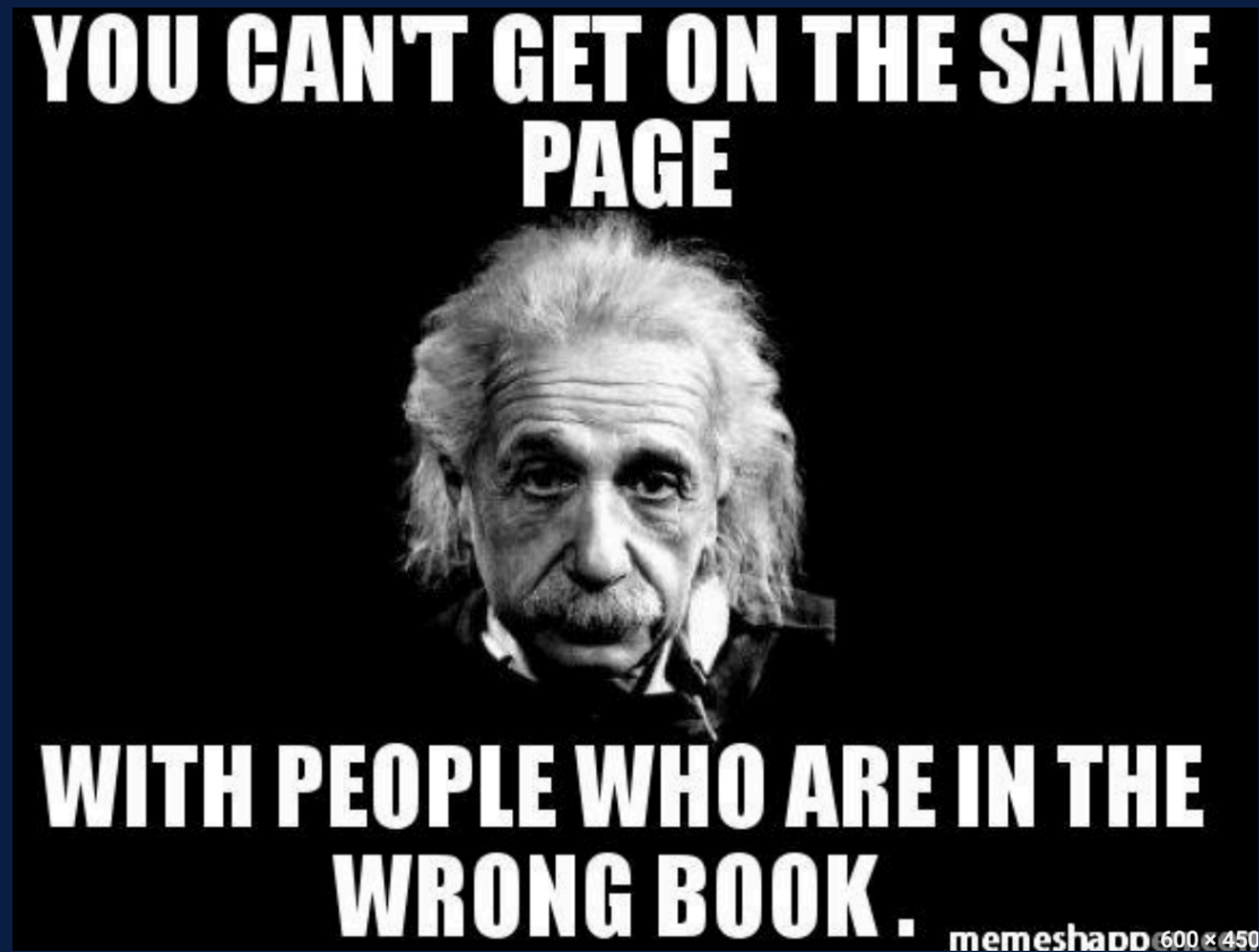
0%

Created 5 minutes ago

Updated 3 minutes ago

Configure

1. Get on the same page



- Assume nothing
- Define everything
- Talk about the obvious
- Over-communicate

2. Define key terms

Term	ITIL definition	(Your company's) example
Alert	Notification that a threshold has been reached, something has changed, or a failure has occurred.	Scheduled maintenance during shopping hours for AWS EC2.
Incident	An unplanned interruption to or quality reduction of an IT service.	45 second web app outage, or 100 users can't access their account information.
Major Incident	The highest category of impact for an incident. A major incident results in significant disruption to the business.	Web app outage for more than five minutes.

3. Capture and identify key fields



Examples include priority, impact, urgency, reported to, and assigned to.

Secondary examples include time to first response, time to resolution, time incident began, time incident closed, components, services, and many more.


4. Define & socialize SLAs & priorities

	Low	Medium	High	Critical
Priority description	Little to no effect on the ability to do one's job.	Limited loss of normal functionality.	Loss of normal functionality.	Severe disruption or degradation.
Example	Customer is a graphic designer and the request is for access to Spotify.	Customer can access email via web browser, but not directly via the email application.	Customer can't access their account profile.	Retail store website is down.
Urgency	Low	Medium	High	Critical
SLA target	48-72 hours	8-12 hours	4-6 hours	2 hours

4. Define & socialize SLAs & priorities


Projects / Central Operations / Project settings

Service level agreements


Add SLA 

Set time goals with Service Level Agreements (SLAs) to help drive better quality of service across your service project team.


SLAs in this project:

 Time to triage normal change


Edit ... >

 Time to first response


Edit ... >

 Time to resolution

Edit ... >

 Time to close after resolution

Edit ... >

 Time to soak

Edit ... >

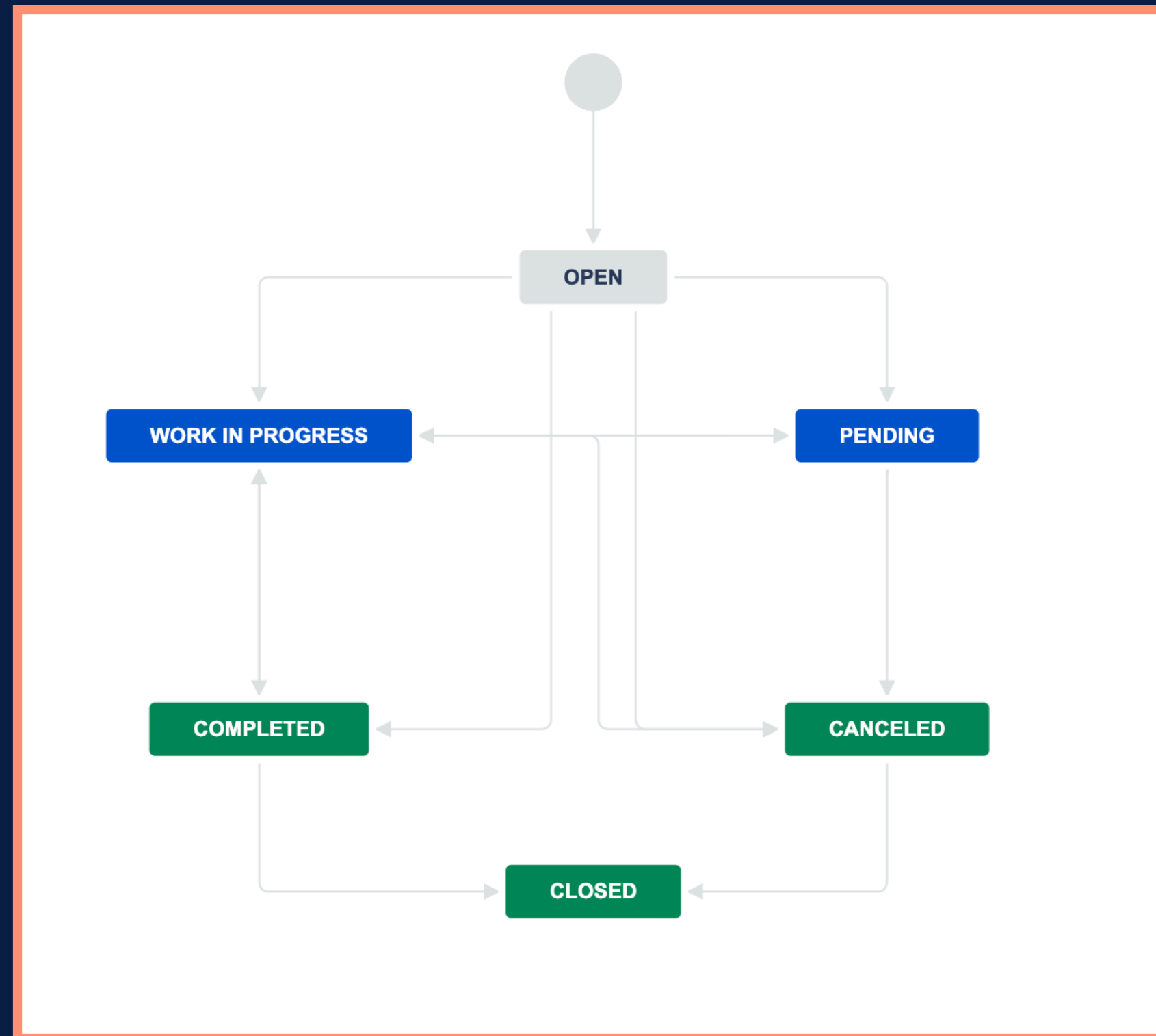


“Everything starts and ends with processes and expectations you set for communications. One of the best changes we made was adding an SLA for the time we expect a technician to communicate back to the customer.”

Michael Marques

ITIL-certified ITSM Incident Manager

5. Outline workflows & status changes



- Don't overcomplicate or over-customize
- Determine if alert priority and incident priority should match
- Define which parameters change an "alert" to an "incident"
- Put failsafes in place to prevent "false incidents"

5. Outline workflows & status changes

“

“When we changed our ITSM system a few years ago, instead of changing the way everyone works and leveraging what the tool had in place, we customized the new system as much as we did the old system. There is no end to the headaches this causes. If you’re just starting, I would stay away from overly complicated customizations – use what’s there to the best of your ability.”

Michael Marques

ITIL-certified ITSM Incident Manager



6. Communicate well

Questions to ask yourself for both internal & external communication

- What channel(s) will be used for communication?
- What does effective communication look like?
- Have expectations been set and clearly communicated?
- Is the chosen style and method of communication building trust?



No but really, communicate *well*

✓ Here's an example of a helpful communication:

November 11, 2020 05:45 a.m. UTC

Service is currently down for North American customers. The issue was first detected at 05:30 this morning. Our team is aware and looking into the problem as well as working toward restoration. We will post the next update at 06:00. As a result of the outage customers are unable to access their profiles, don't hesitate to reach out to support with questions.

Includes:

- ✓ Time & date
- ✓ Description of problem
- ✓ When next update is coming
- ✓ Where to go with questions

7. Define incident response roles



“Let the responders do their incident-related jobs. Responding to frantic managers and customers AND trying to fix something takes more time than just working on the problem.”

Patricia Francezi
Jira Admin Service Manager,
Community Leader

Incident commander	Responsible for managing the incident response process and providing direction to the responder teams.
Communications officer	Responsible for handling communications with the stakeholders and responders.
Scribe/Note taker	Responsible for documenting information related to the incident and its response process.
Subject matter expert	Technical domain experts who support the incident commander in incident resolution.

8. Practice & reflect

- 1 Did everyone know what to do?
- 2 Did everyone understand their roles?
- 3 Was the internal communication clear?
- 4 Did external stakeholders feel informed?
- 5 Did the process work well for the team?



“Plan for the disasters. Test the plans. Assume the worst will happen. Don’t panic.”

Matt Doar

Senior Jira Administrator, Community Leader

9. Socialize the processes & expectations

Socialize both internally and externally to stakeholders. Process and expectations mean nothing if they aren't well-known.

Make expectations clear to responders, stakeholders, and leadership.



10. Celebrate the good



CREDIT: SARAH JANE VICKERY

Parting wisdom

1. Get on the same page
2. Define key terms
3. Capture and identify key fields
4. Define and socialize SLAs
5. Outline workflow and status changes



Parting wisdom

6. Communicate; i.e., over-communicate
7. Define incident response roles
8. Practice & reflect
9. Socialize processes & expectations
10. Celebrate wins





Full guide at [atlassian.com/whitepapers/
incident-management-guide](https://atlassian.com/whitepapers/incident-management-guide)