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Confluence and Jira Service Management: The ultimate knowledge management duo

“

Supporting 12,000+ colleagues
with product and service
knowledge to serve 16.3 million
members





Natalie Shaw

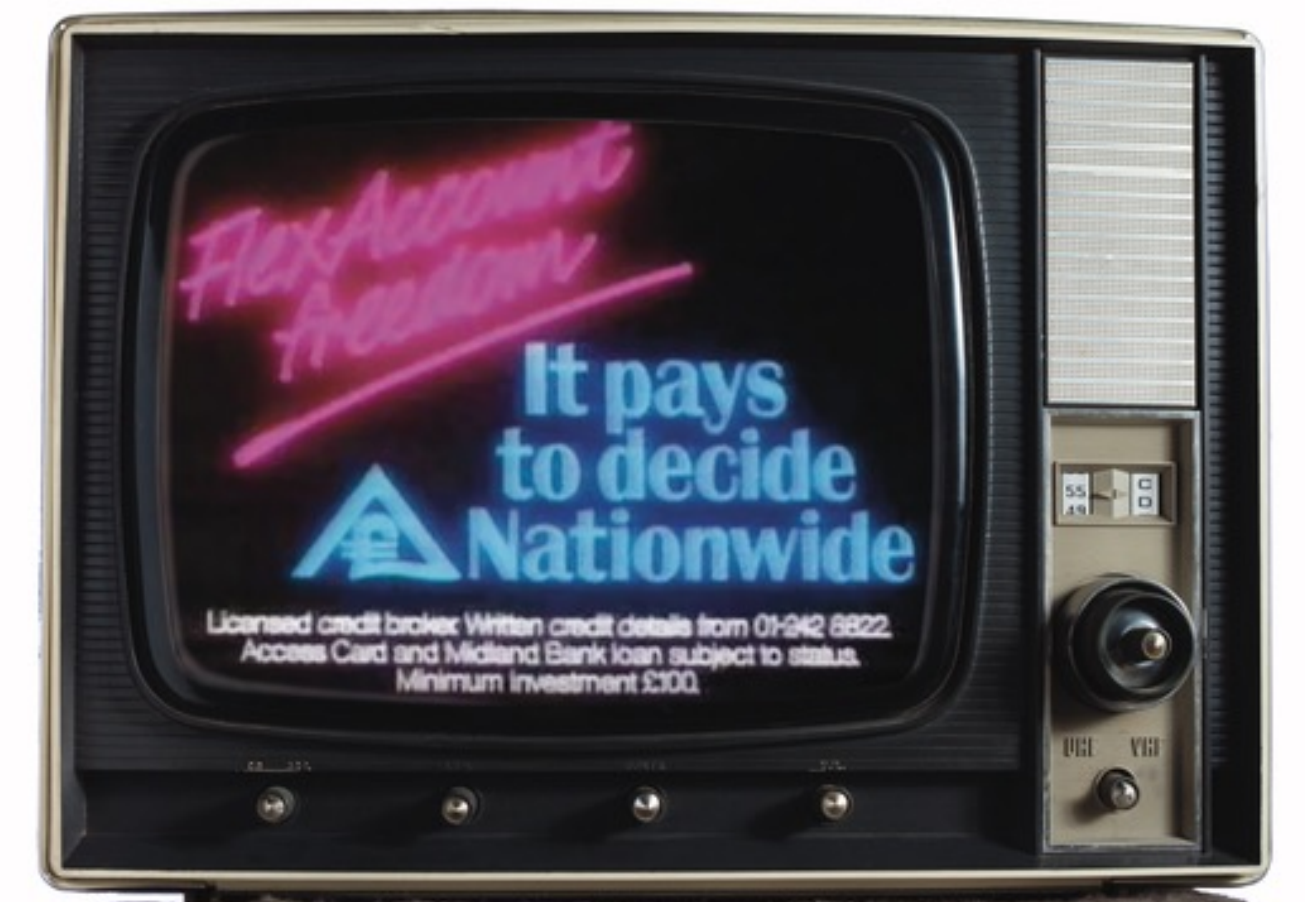
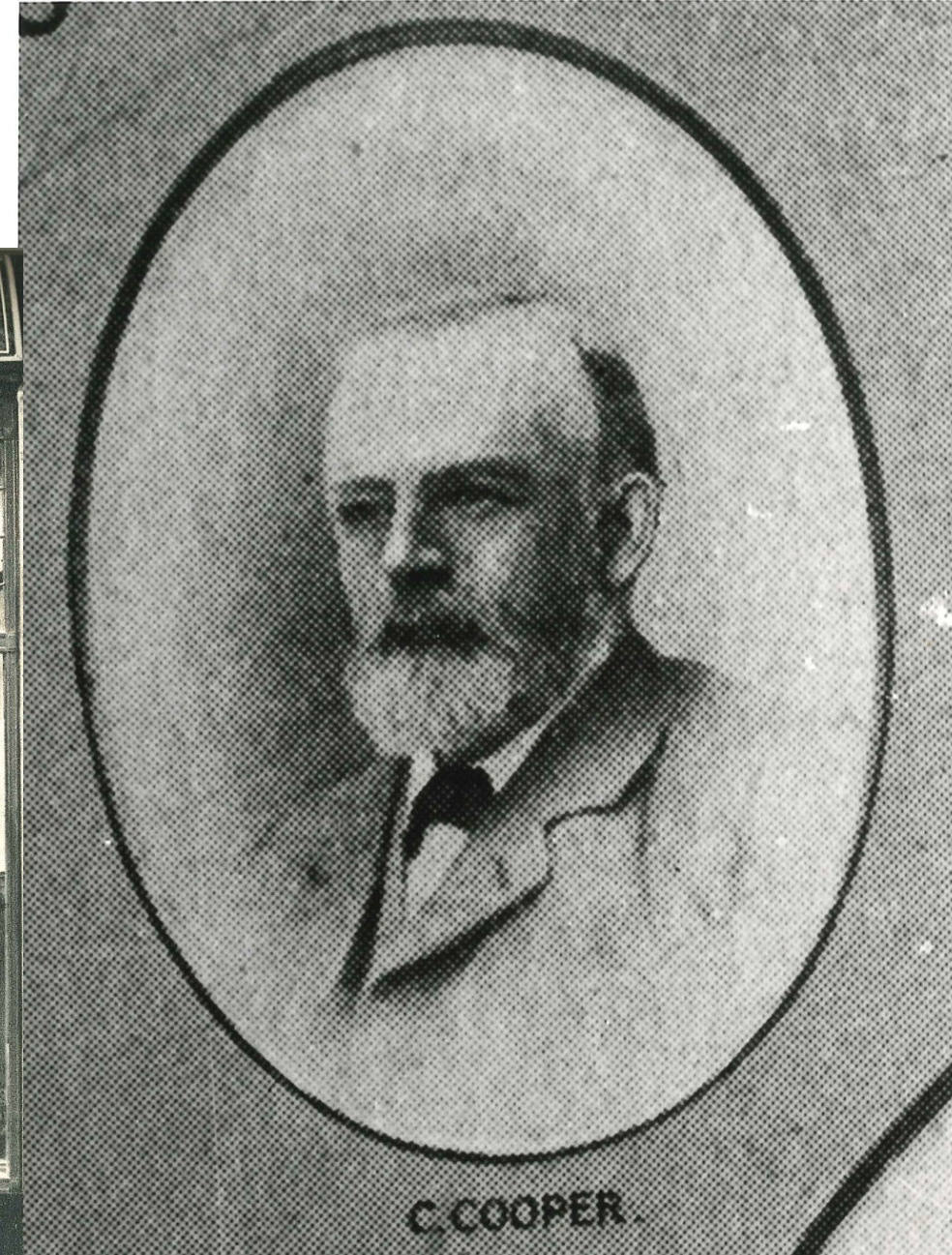


Phill Fox



A bit of history

- **Southern Co-Operative Permanent Building Society, 1884**
- **Merged with over 250 building societies throughout the 20th century**
- **Named Nationwide in 1970**
- **Committed to preserving our mutual status**



Facts & Figures

- **The UK's largest building society**
- **16.3 million members**
- **Turnover of £30 billion**
- **Headquarters in Swindon with sites around the UK**
- **603 branches**
- **17,000 employees**



External Oversight



BANK OF ENGLAND
PRUDENTIAL REGULATION
AUTHORITY

Internal Oversight



Knowledge at Nationwide



2018 Knowledge team formed and named Haynes

2019 1,200 contact centre colleagues

2020 7,000 branch colleagues

**12,000 colleagues across
the business**

Knowledge aims



2018 Knowledge team formed and named Haynes

- **“Member in”, not “business out”**
- **Single source-of-the-truth for help & support content**
- **Accurate, timely, relevant content**
- **Answer real member queries**
- Supports the specific needs of the member or colleague in the context of the journey
- **Multi-channel user feedback to improve content for everyone**

Stakeholders

Product teams



Service teams



Operational teams



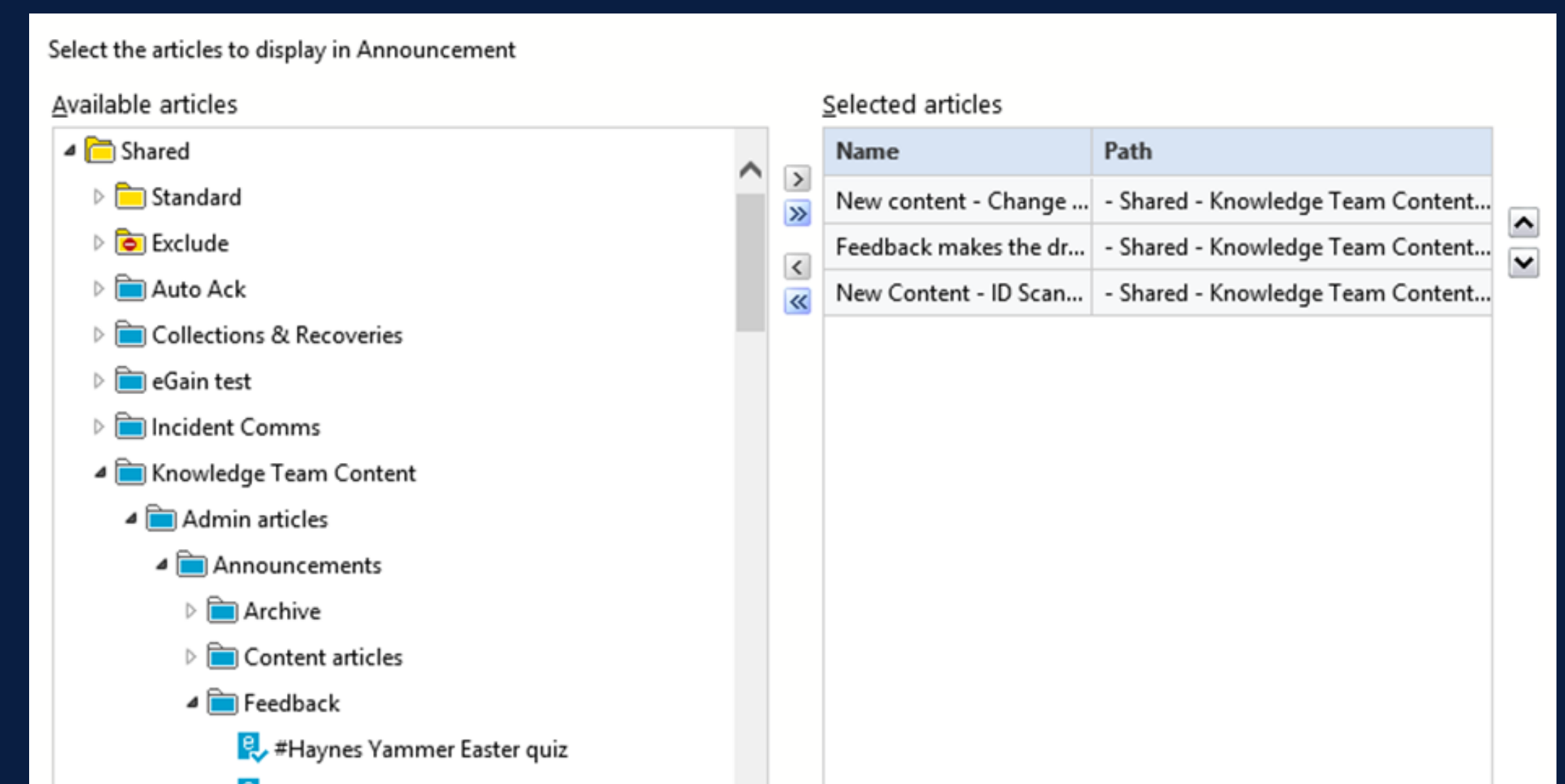
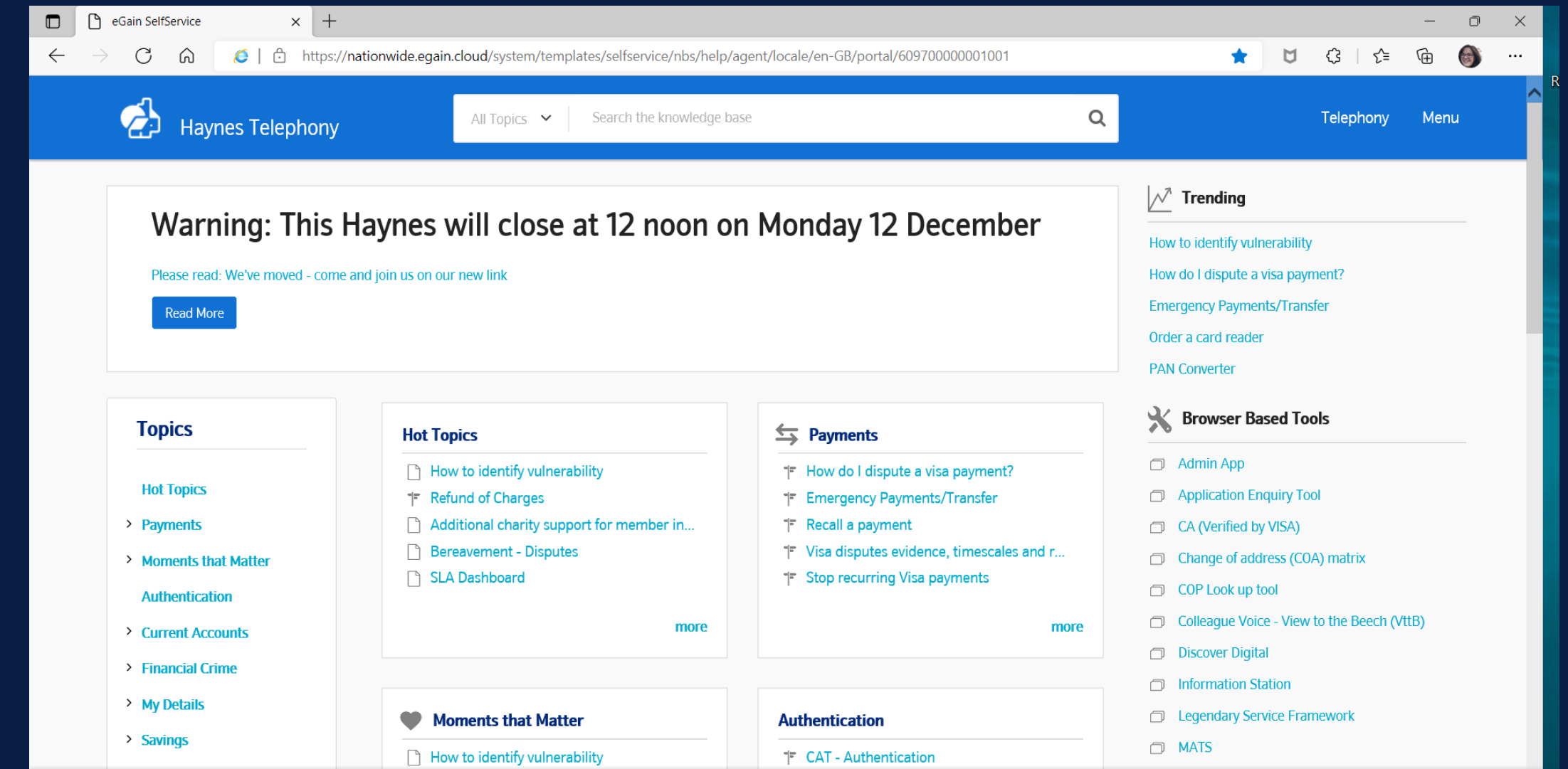
Changes in the landscape

- **Pandemic speeds up change**
 - **From on-site call centre locations to home working**
 - **Branch footfall changes**
 - **branches closed part time**
 - **but taking member calls and webchats**
- **Multi- and cross-skilling**
- **Greater dependency on knowledge**



2021 – Existing platform and emerging needs

- **Ability to flex, innovate, & iterate limited by platform**
- **Increasingly bespoke code**
- **Relationship through a third party**
- **Deployment cycles and overnight testing**
- **Instability for authors**
- **Expensive**



Contract break



Detailed business requirements

Business Requirements - Functional

Req. ID	Level	Requirement Description	Priority	Status	
KB1	HLR-1	Guided Help – Questions and Answers			
	DBR 1.1	As a content editor I want to be able to create questions and answers for a guided help so that knowledge base users can be directed to the information required to resolve member queries.	Must		
	DBR 1.2	As a content editor I want to be able to link a question to another question, a cluster, a control action or a solution article so that knowledge base users can be guided to the appropriate information to resolve member queries	Must		
		As a content editor, I need to be able to separate parts of the guided help so that they can be shared with other guided help structures.	Must		
	DBR 1.3	As a content editor I want to be able to define multiple answer options to a question, not just a binary yes/no answer so that I can accurately capture the requirements or conditions of the member, to provide the right responses for the user.	Must		
	DBR 1.5	As a content editor I want to be able to create multichoice answers for guided help questions so that knowledge base users can select all options applicable when responding to a question, and the correct information/conditions can then be served in the answer	Must		
	DBR 1.6	As a knowledge base user, I want to be able to provide all options applicable to members when responding to a guided help question, so that I can be presented with a course of action applicable to a member query.	Must		
KB2	HLR-2	Guidance Articles			
	DBR 2.1	As a content editor I want to be able to create guidance articles for questions so that I can provide additional information/clarification applicable to a question.	Must		

Atlassian Cloud

ATLASSIAN
 Confluence

ATLASSIAN
 Jira Software

ATLASSIAN
 Jira Service Management



2021 – The way forward

- **Strong business case**
- **Confluence primary candidate**
- **A major high impact change for the business**
- **Importance of UX**
- **Prove through a proof of concept**

**ROAD
AHEAD
CLOSED**

Diversion



2022 – Round two

Q1/2 – CRM knowledge use case not progressing

April – Negotiations reopened

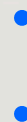
June – Confirmed cancellation

August – Agree contract for Confluence

September – Work begins

December – Deadline on 31st

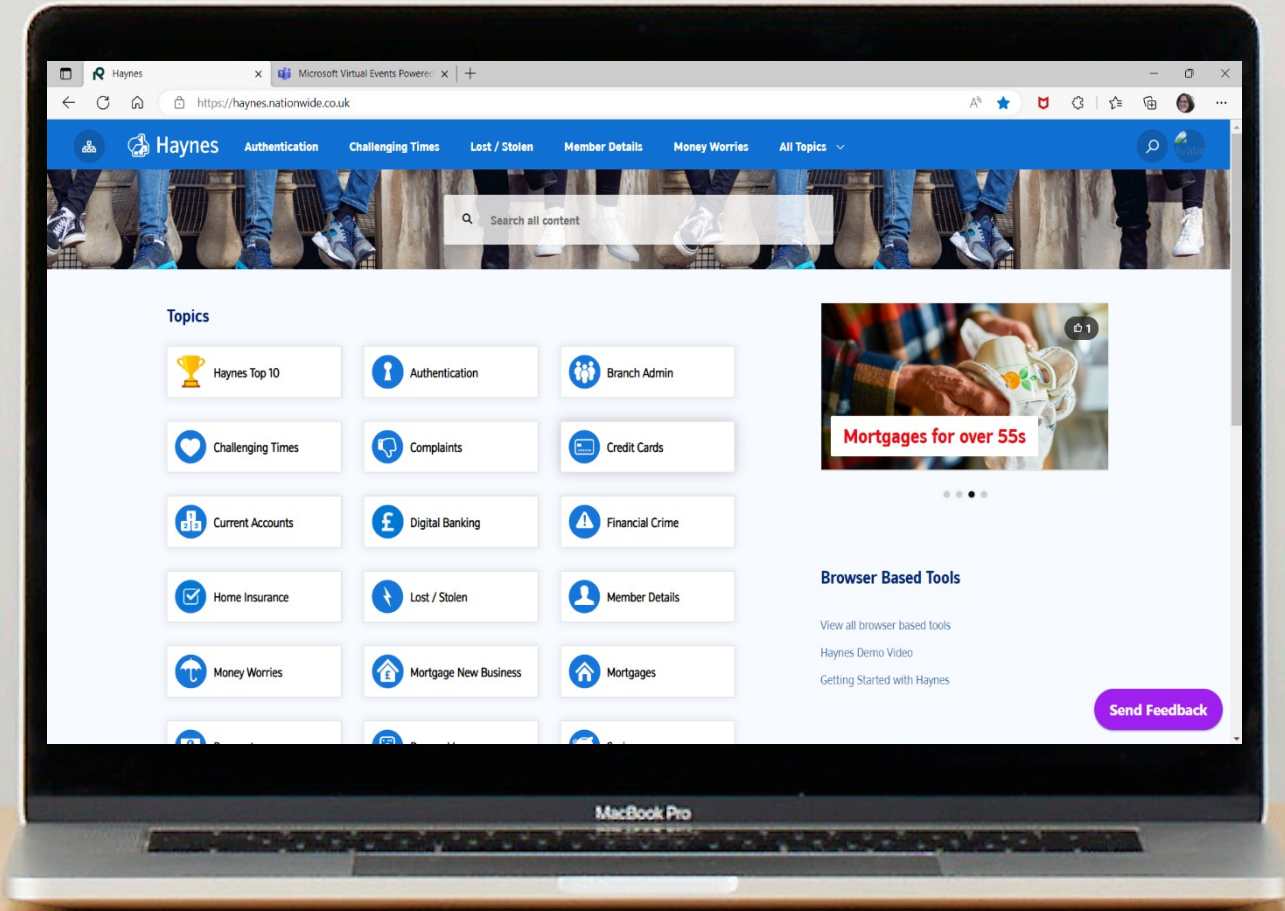
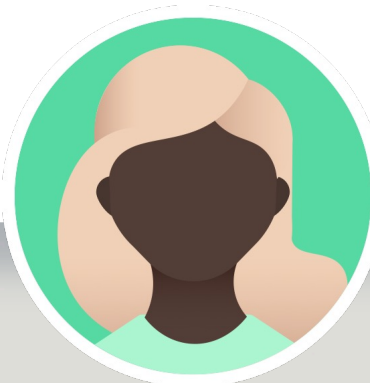




HAYNES

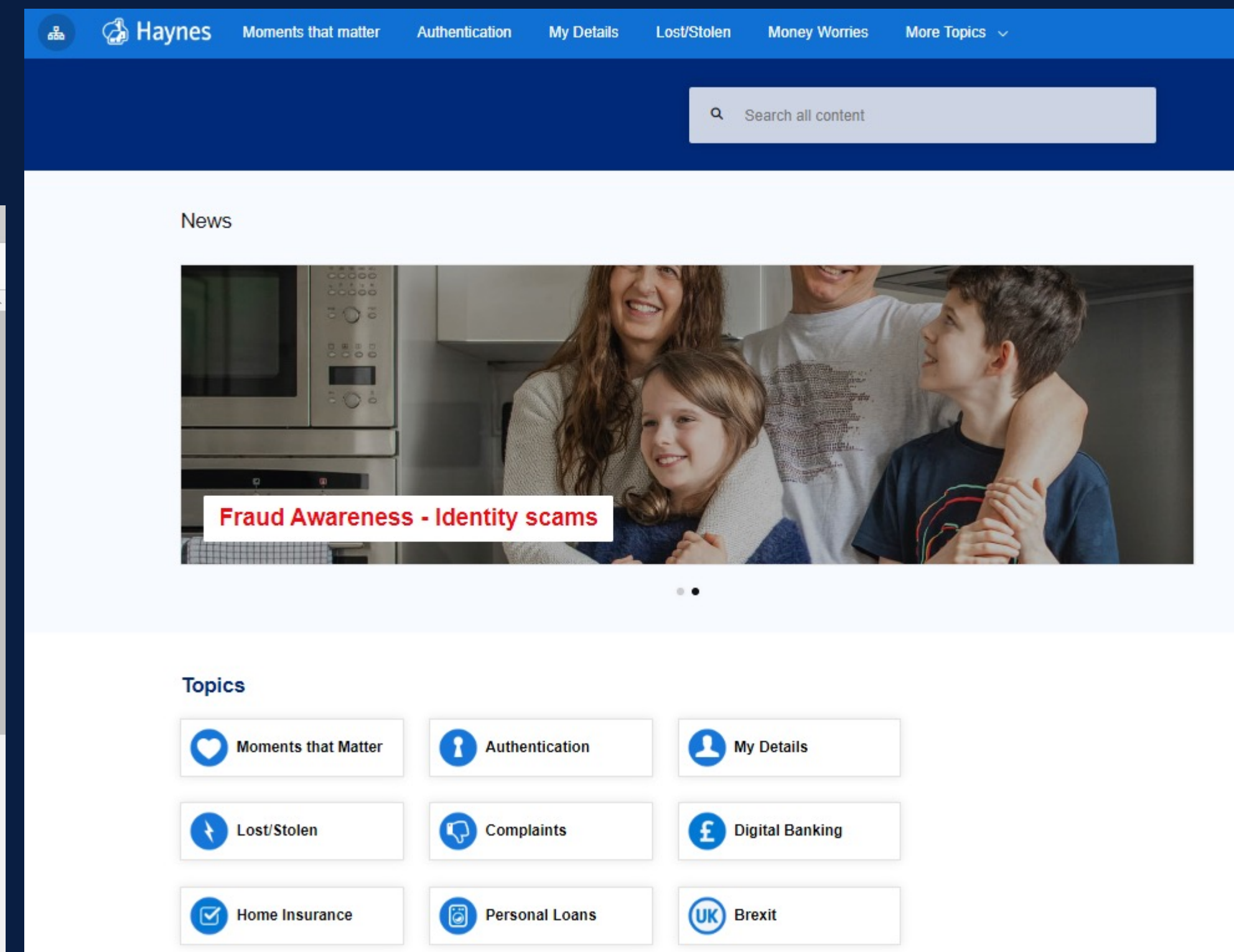
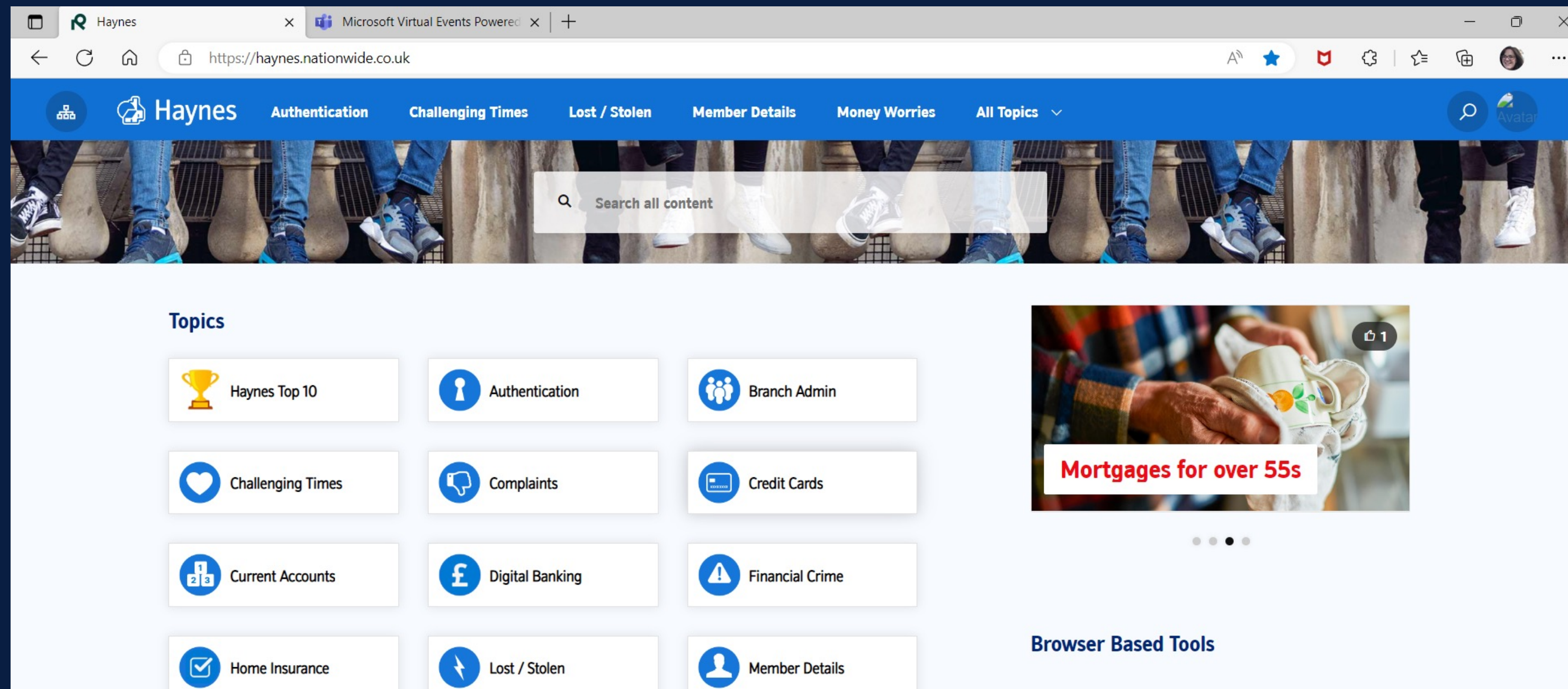


Confluence



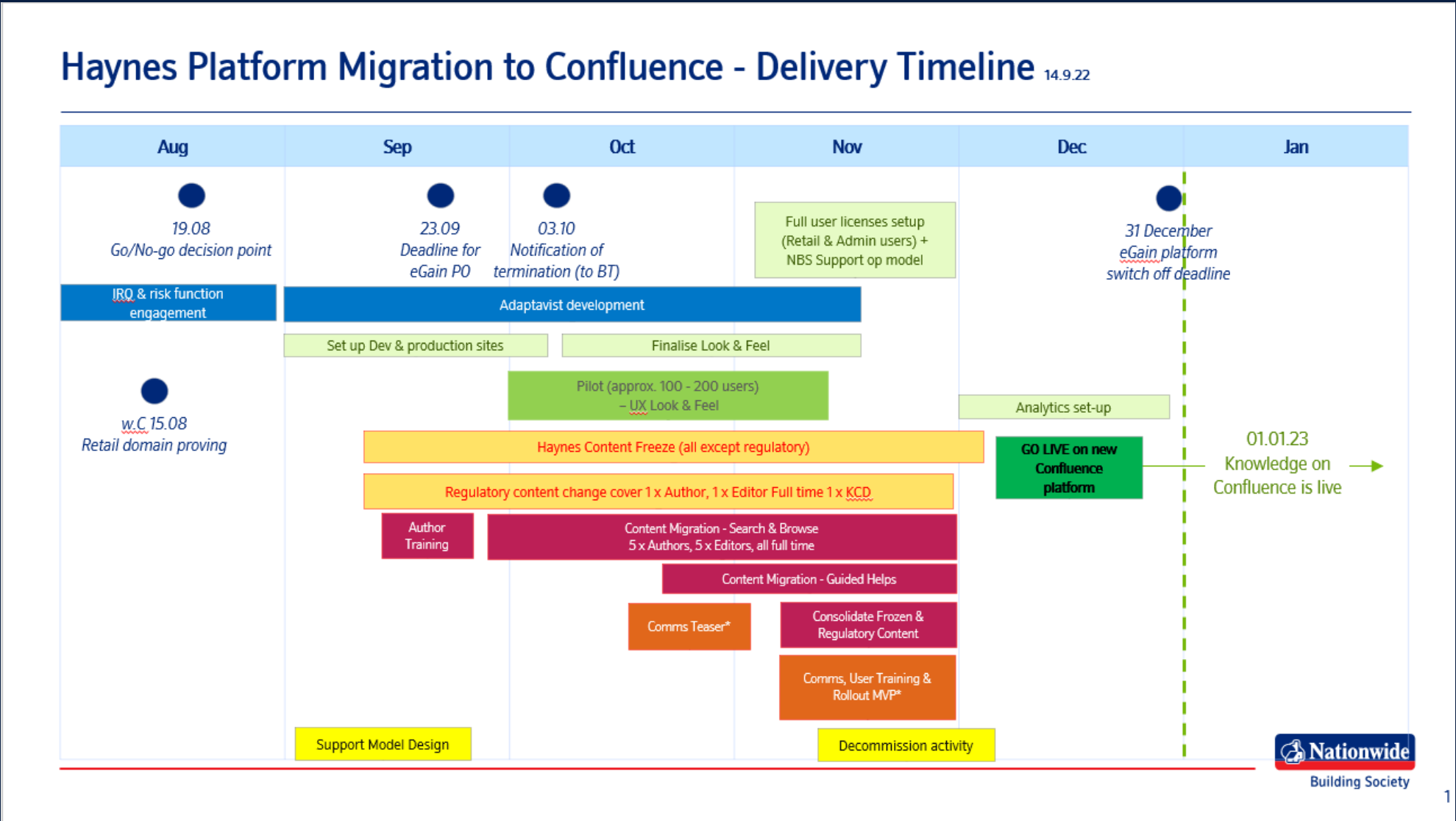
2022 – Business needs revisited

- Minimum viable product
- Importance of UX
- Minimal (no) end-user training



2022 – Story of the migration

- Adaptavist working closely with knowledge team
- Decided on key requirements/MVP for launch
- Refined plug-in becomes key
- PoC built confidence and provided foundation



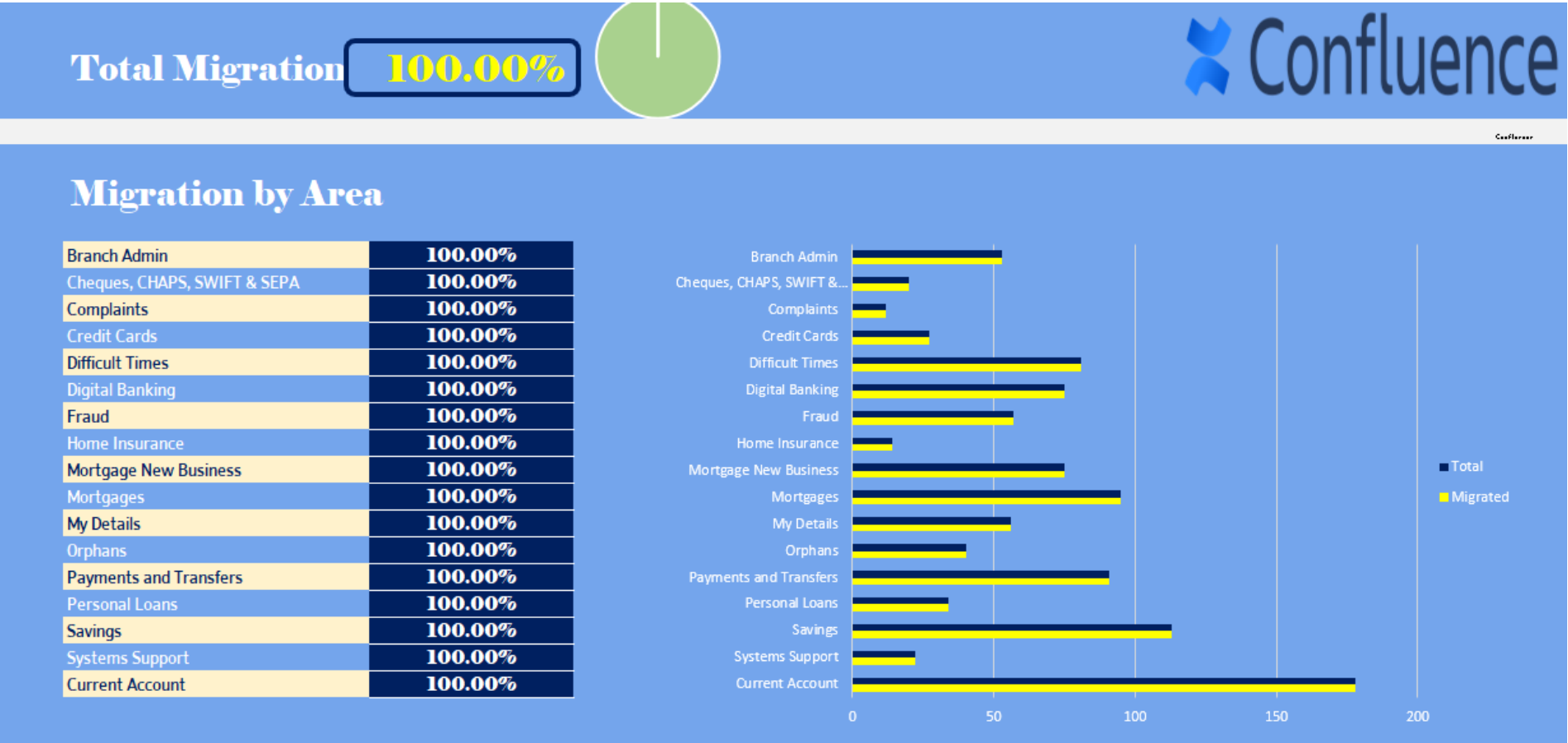
Version Report				
Status Report				
Completed Issues				
Key	Summary	Issue Type	Priority	Status
HRMVP-28	Feedback from Demo on 30th Sep	Support	Medium	CLOSED
HRMVP-20	Look and Feel - The Refined confluence page	Support	Medium	CLOSED
HRMVP-22	Divider lines on the page to stand out explicitly on the Refined View	Support	Medium	CLOSED
HRMVP-29	Search Function Workshop	Support	Medium	CLOSED
HRMVP-32	CR 1 - Mortgage Ops Teams Look and Feel	Change Request	Medium	CLOSED
HRMVP-33	CR 2 - Onboarding Team	Change Request	Medium	CLOSED
HRMVP-34	CR 3 - Licences for JSW	Change Request	Medium	CLOSED
HRMVP-23	Requirements for Style Sheets within Confluence	Support	Medium	CLOSED
HRMVP-24	Hyper links to show as little card	Support	Medium	CLOSED
HRMVP-26	Icon not visible on the Refined page	Support	Highest	CLOSED
HRMVP-2	Define Space Structure	Support	Medium	CLOSED
HRMVP-5	HLR - 1 Guided Help – Questions and Answers	Support	High	CLOSED
HRMVP-7	HLR 3 - Guided Help – General	Support	Medium	CLOSED
HRMVP-9	HLR 5 - Dynamic Elements – Topics	Support	Medium	CLOSED

2022 – The migration team

- **Whole team effort (paused BAU)**
 - **Knowledge editors**
 - **“Borrowers” from other areas**
- **Upskilling in Confluence**



Migration process dashboard



Content tracker spreadsheet

Domain	Priority rating	Ref.	eGain title	Member question	Search	Guided Help	URL	Last eGain version	Approved date	Content version	Approver	BAU change in flight Yes - Y
Payments and Transfers	52	PT5.24	Finding direct debit details	How do I find Direct Debit details?	SB			V1	23/03/2020	V1	Helen Bright	
Payments and Transfers	54	PT8.3	Cancel a payment	cancel a payment?		GH		V6.10	30/08/2022		Mark Bleach	
Payments and Transfers	54	PT8.4	There's a problem with my payment	There's a problem with my payment		GH	L	V1	23/06/2021	V4	Helen Bright	
Payments and Transfers	54	PT8.5	Money not received	Why hasn't my money been received?	SB			V2.2	24/06/2021	V3	Hannah Rushton	
Payments and Transfers	54	PT8.6	How do I set up a standing order?	Set up SO/Reg payment		GH		V1			Hannah Rushton	
Payments and Transfers	54	PT8.7	Standing order security letter	Why have I had a letter to say I need to go through security to set up a Standing Order?	SB			V1.1	23/03/2020	V1	Helen Bright	
Payments and Transfers	54	PT8.9	Standing order debited twice	Why has my standing order gone out twice?	SB			V1.1	24/06/2021	V1	Hannah Rushton	
Payments and Transfers	54	PT8.10	When is my next standing order due?	When is my next standing order due?	SB			V1.2	08/06/2021	V1	Chris Brandwood	
Payments and Transfers	54	PT8.11	Generating bill listings	Generating bill payment listings	SB			V1	21/06/2021	V2	Sarah MacKenzie-Phillips	
Payments and Transfers	16	PT9.1	Make a payment	How do I make a payment?		GH		V3.8	08/07/2021	V1	Sarah Hughes	
Payments and Transfers	16	PT9.5	Change Payment Details	How do I change the payment details?		GH		V3.5	28/06/2018	V7	Brett Whitaker	
Payments and Transfers	16	PT9.7	Recall a payment	How do I get my payment back?		GH		V2.7	01/08/2018	V7	Brett Whitaker/Helen Bright / Nicola Benn	
Payments and Transfers	16	PT9.8	Future date a payment	Can I forward date a payment?	SB			V1.4	03/05/2019	V5	Brett Whitaker	
Payments and Transfers	16	PT9.9	Third party authorisation code 10	What is 3rd party authorisation/ code 10?		GH		V1	10/06/2021	V3	Richard Haynes	
Payments and Transfers	16	PT9.11	Cash and coins	Cash and coins		GH		V2	01/08/2022	V2	Frey Nutland	
Payments and Transfers	16	PT9.12	Unrecognised credit	Where has this payment come from?	SB			V2.3	25/03/2022	V5	Nicola Benn	
Payments and Transfers	16	PT9.15	Paying in old coins and notes	Can I pay old money into my account?	SB			V1			Frey Nutland	
Payments and Transfers	16	PT9.17	Forward trace	Can you trace a payment?	SB			v2.2	03/05/2019	V4	Brett Whitaker	
Payments and Transfers	16	PT9.18	Bank Reference	What is a bankers reference?	SB			V1	08/07/2021	V3	Sarah Hughes	
Payments and Transfers	16	PT9.19	Transfer limits	What are the transfer limits?	SB			V1.3	03/05/2019	V2	Brett Whitaker/Gary Davies/ Laura Collier	
Payments and Transfers	16	PT9.20	Large purchase notification	Do I need to let you know if I'm making a large purchase?	SB			V1	06/07/2021	V1	Rachael Costello	
Payments and Transfers	16	PT9.23	Another bank attempting to take money	Why is another bank attempting to take money from my account?	SB			V1	23/06/2021	V2	Helen Bright	
Payments and Transfers	16	PT9.24	Paying in foreign currency	Can I pay foreign currency into my account?	SB			V1	23/06/2021	V4	Helen Bright	
Payments and Transfers	16	PT9.27	Make a payment over the phone	Can I make a payment over the phone?	SB			V1			Richard Haynes	

2022 – Building as we go

- Cross-organisation collaboration
- Spaces
- Structure
- Permissions
- UX and visual design
- Scripting



JIRA SOFTWARE DEEP DIVE

Kanban

Kanban board

Search backlog

JS

LH

LM

ML

+2

Quick filters

ON HOLD 5

Guided Help Buttons - Multiple Choice option

HRMVP-47

DBR 9.3 Create macro to show available channels icons to complete specific processes

HRMVP-4

Conditional Validation for when feedback category is "New content suggestion"

HRMVP-71

Revisit emojis for decision trees and flat articles

HRMVP-96

Life without Refined.

HRMVP-101

TO DO 2

Transfer ownership of nbs-manual.atlassian.net to NBS

HRMVP-1

Decision Tree's not working in confluence

HRMVP-116

IN PROGRESS 8

Questions/Bugs for Refined

HRMVP-60

Workflow and refined view

HRMVP-100

Exploring Analytics options (Adobe)

HRMVP-108

Search Questions /Requirements for Refine

HRMVP-111

Trending Questions /Requirements for Refine

HRMVP-112

Analytics Questions /Requirements for Refine

HRMVP-113

Enhancements Questions /Requirements for Refine

HRMVP-114

WITH NBS 4

Snippets

HRMVP-102

General question - Broken Link reports

HRMVP-104

Analytics - User & Search Reports

HRMVP-105

Favouriting from headers

HRMVP-106

DONE 3

JSM KBRFs Project Creation

HRMVP-88

Date on the carousel

HRMVP-99

Search Questions /Requirements for Refine

HRMVP-110

We're only showing recently modified issues.

Looking for an older issue?

Version Report

Status Report

Completed Issues

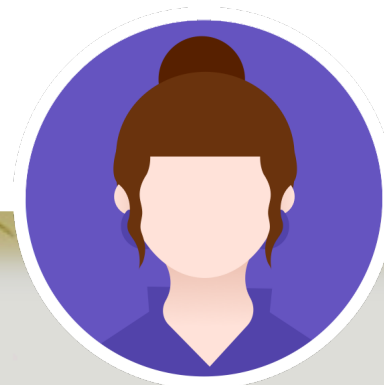
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NEW STARTERS



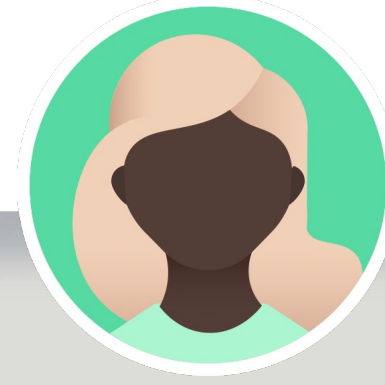
Confluence



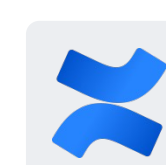
HAYNES



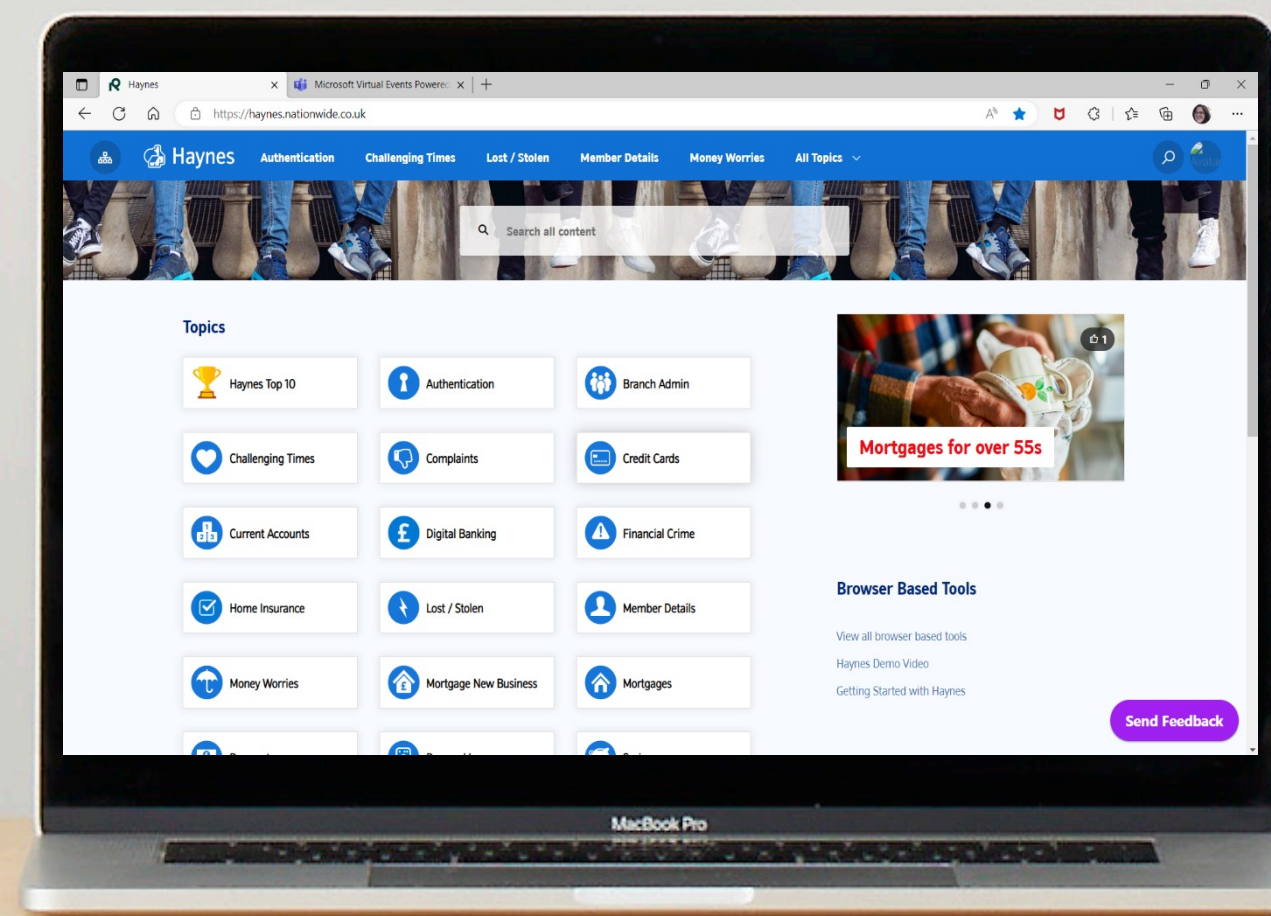
Confluence



MORTGAGE OPERATIONS



Confluence



2022 – User testing

Challenges

Capturing feedback




JSM – The gadget

Haynes Moments that matter Authentication My Details **Lost/Stolen** Money Worries More Topics

Lost/Stolen

Search all content



Fraud Awareness - Identity scams

Trending in Lost/Stolen

- How do I dispute a visa payment
- How do I dispute a visa payment?
- Pan Converter
- Change of address process
- Change Current Account

Send Feedback

Send Feedback

Topic Areas (optional)
Select...

Feedback Category
Select...

Feedback title/summary

Feedback details

Haynes Page URL

Powered by Jira Service Management

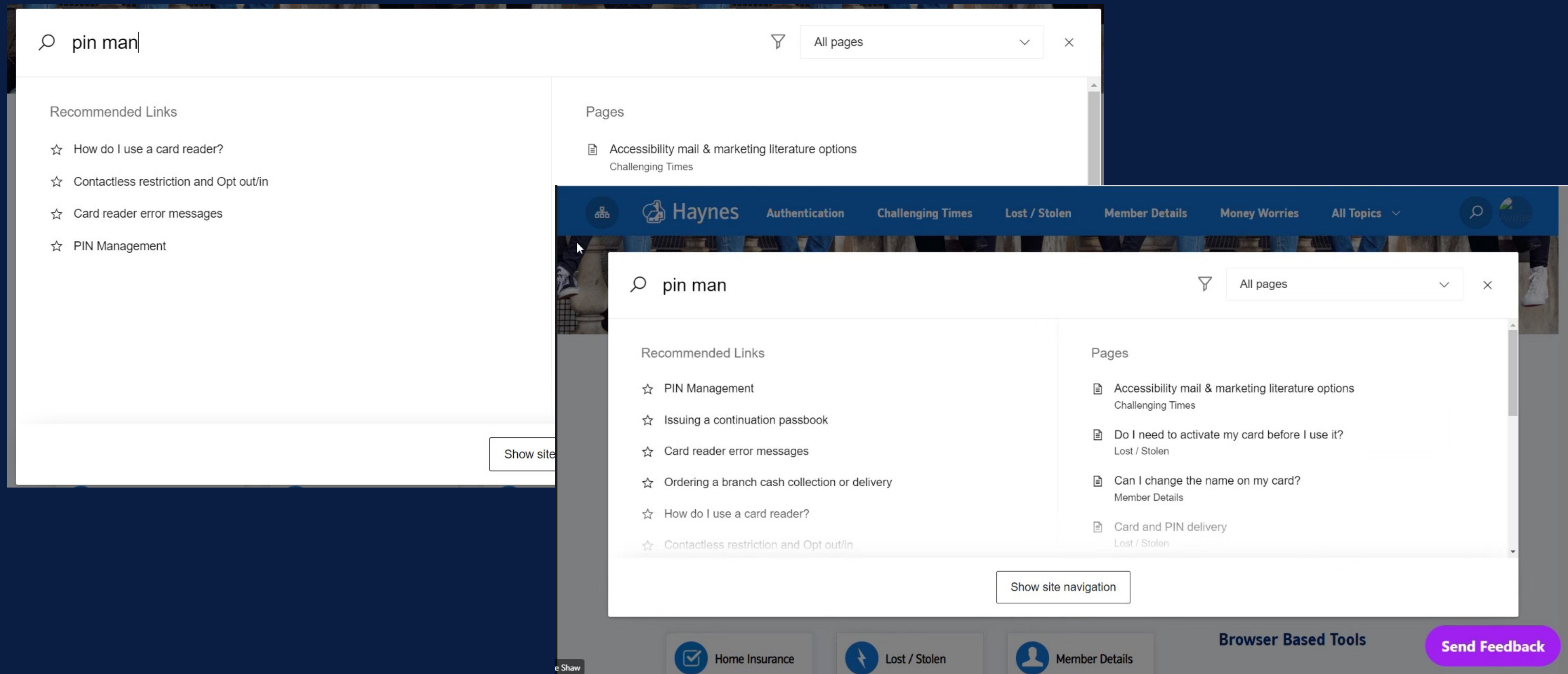
JSM – Handling feedback

2022 – DECEMBER LAUNCH





After the launch



BEYOND MVP

More search

Granular analytics

Decision trees evolution

Automated workflow/approvals



16.3 million members

12,600 colleagues

3 instances

20 editors

3 months

THANK YOU
