



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.

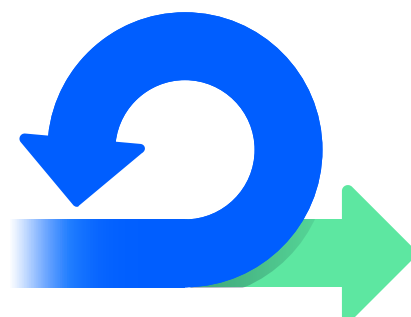
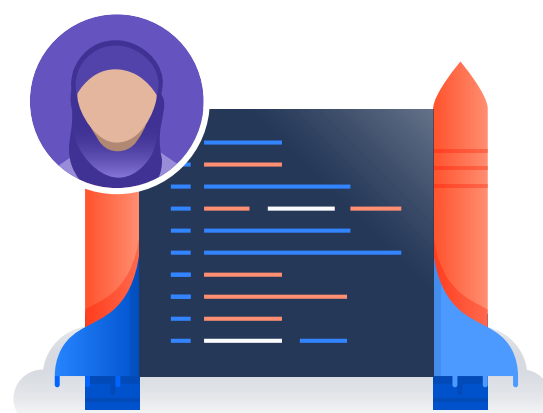
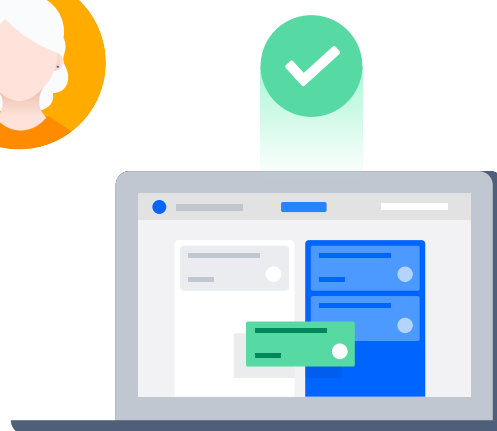
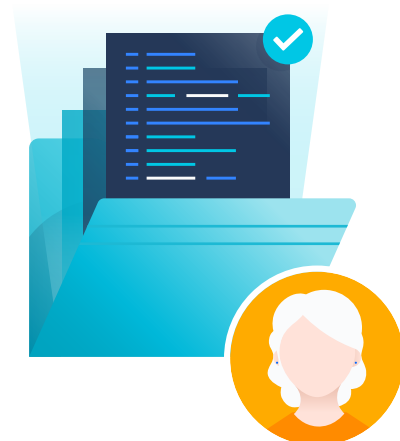
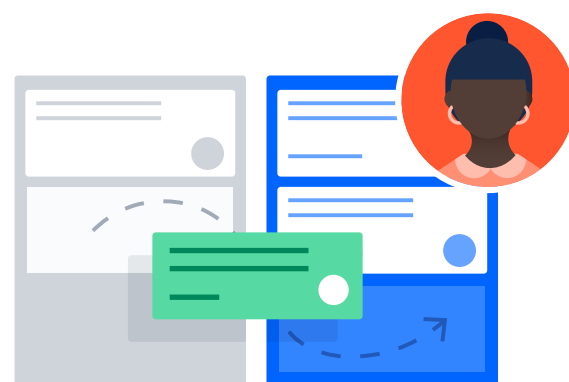
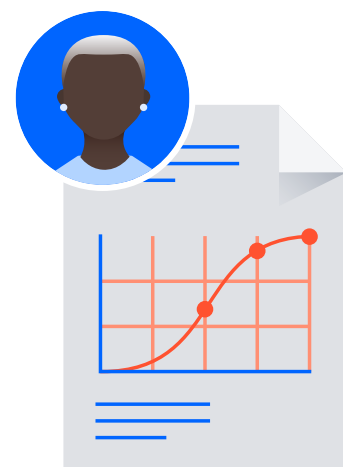
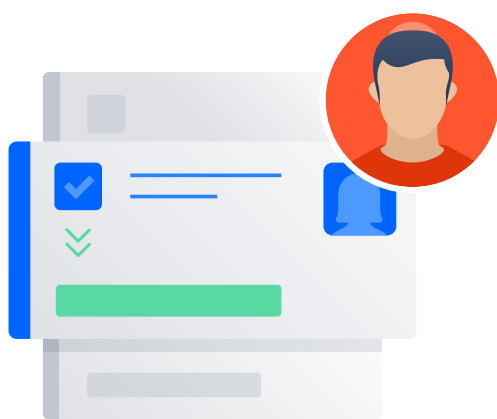


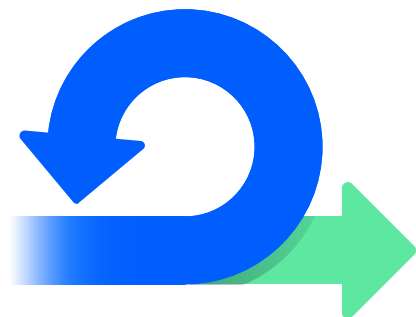
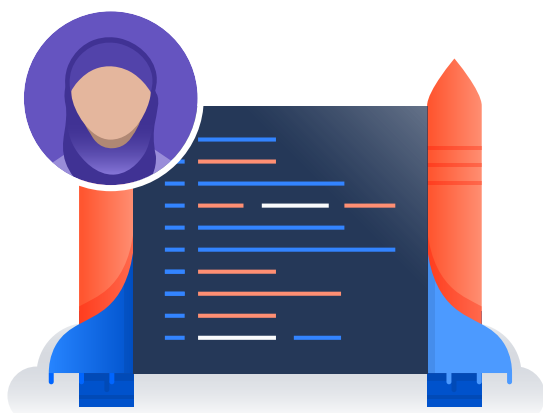
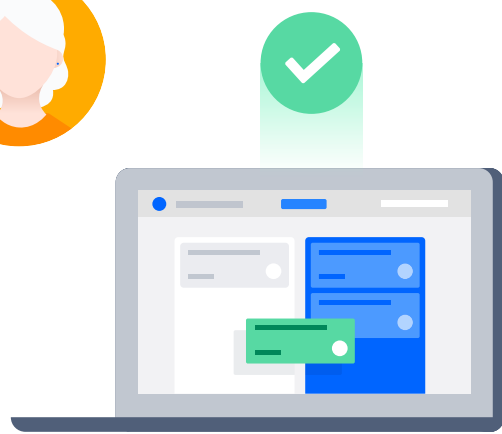
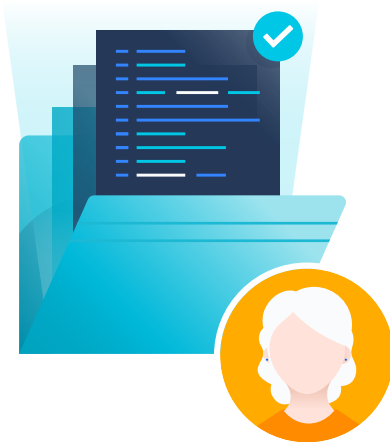
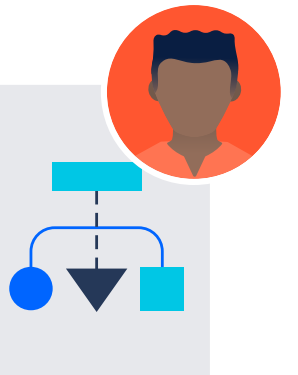
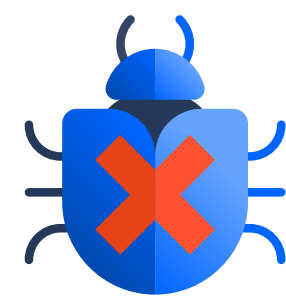
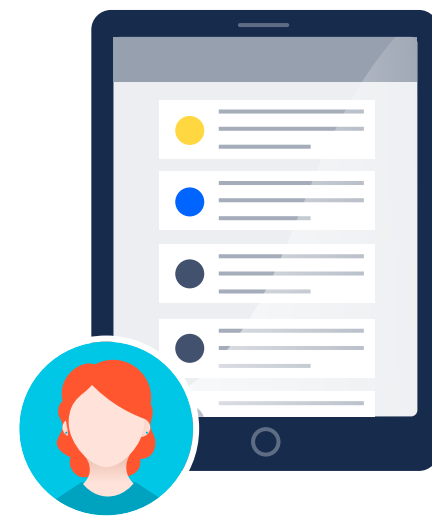
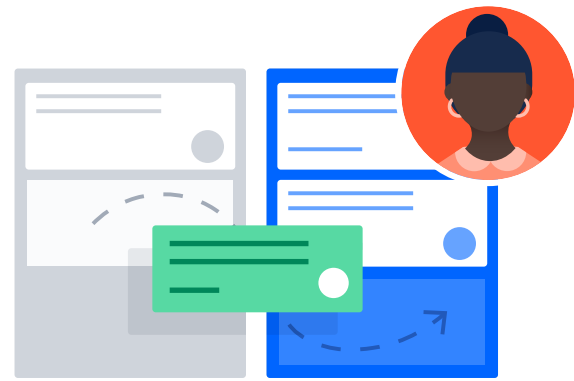
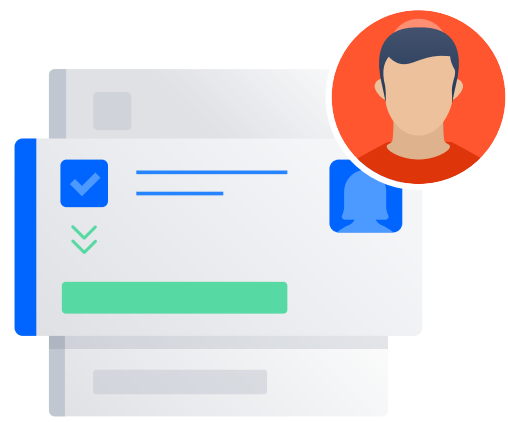
Chaos to collaboration:

Bringing cross-functional teams together with Confluence



JENA PENDER | PRODUCT MARKETING MANAGER | TEAM '23







Agenda



**Create seamless
team alignment**



**Get cross-functional
projects done faster**



**Build scalable
frameworks**

Agenda



Create seamless
team alignment



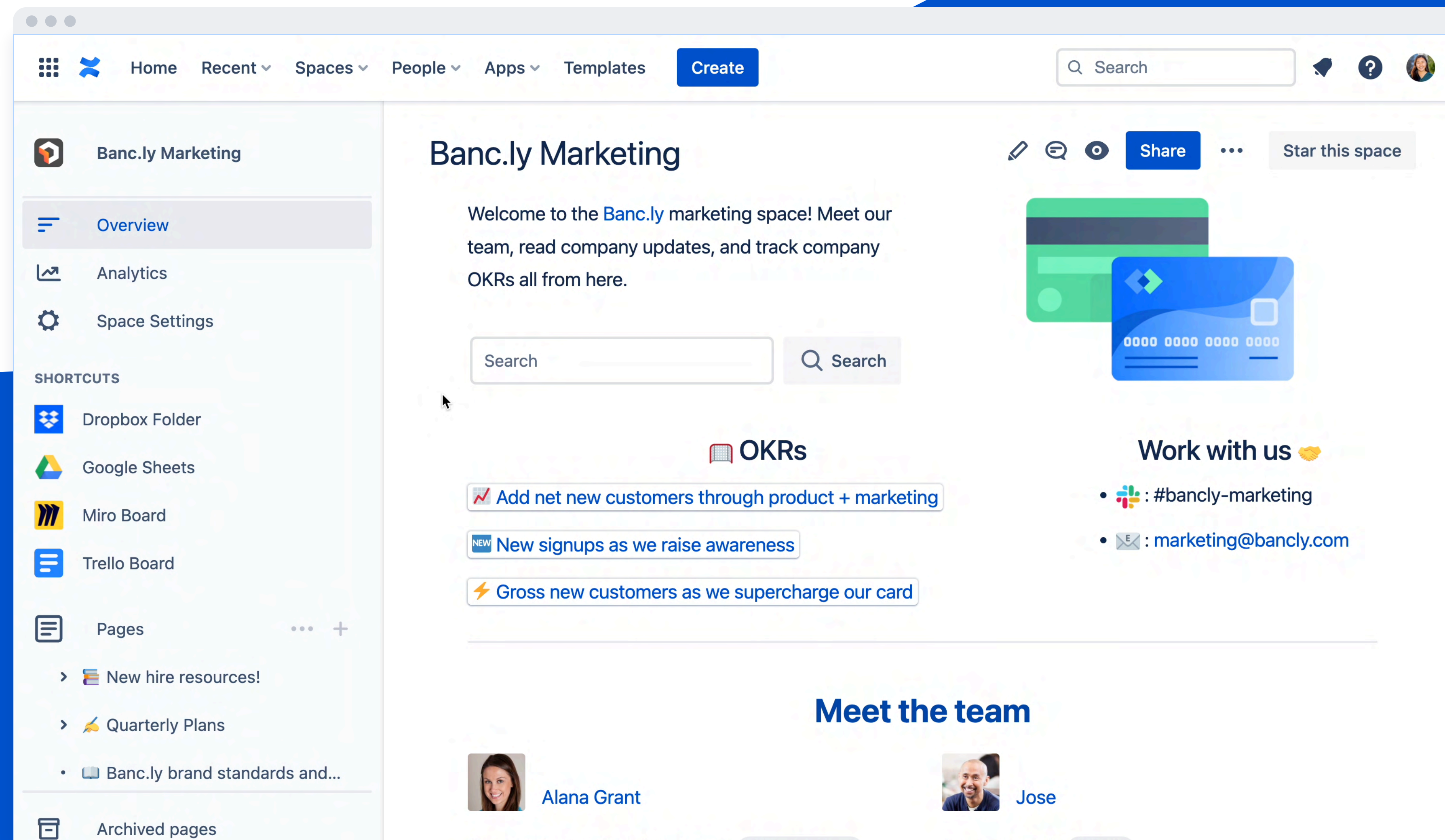
Get cross-functional
projects done faster



Build scalable
frameworks

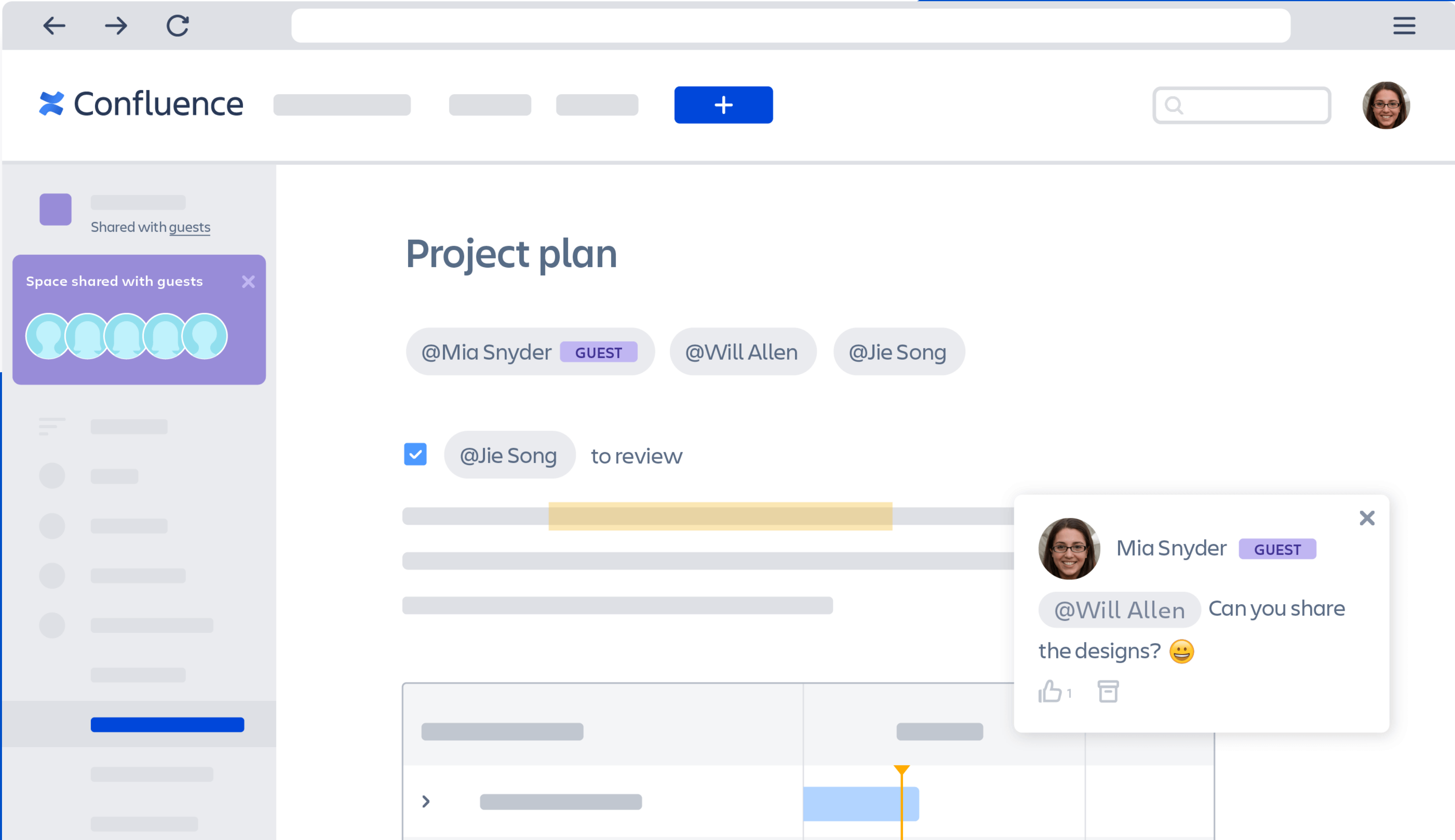
CONFLUENCE

Team spaces



COMING SOON

Guest access



CONFLUENCE

Project spaces

The screenshot shows the Confluence interface for the 'Banc.ly Marketing' space. The 'Spaces' dropdown menu is open, displaying a list of spaces categorized into 'CURRENT', 'STARRED', and 'RECENT'. The 'CURRENT' section lists 'Banc.ly Marketing'. The 'STARRED' section lists 'Cindy Ji' and 'Marketing team'. The 'RECENT' section lists 'Outreach Campaign' and 'Marketing team'. At the bottom of the dropdown are links for 'View all spaces' and 'Create a space'.

Confluence Navigation Bar:

- Home
- Recent
- Spaces** (dropdown menu open)
- People
- Apps
- Templates
- Create


Search Bar: Search

Left Sidebar:

- Banc.ly Marketing**
- 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
 - Q1 Product Roadmap
- Archived pages

Main Content Area:

- Share** button
- Star this space** button
- OKRs** section: customers through product + marketing, we raise awareness, mers as we supercharge our card
- Contact us** section:
 - #bancly-marketing
 - marketing@bancly.com
- Our team** section
- Mission** section: Banc.ly is a best-in-class credit card company that empowers businesses to do banking, better.
- Important Links** section:
 - Internal blog: Multi-Year Banc.ly Strategy
 - Banc.ly Brand Standards and Guidelines
 - Q1 Product Roadmap

A man with short dark hair and glasses, wearing a black t-shirt, is shown in profile from the chest up. He is looking at a whiteboard that is covered with numerous colorful sticky notes (yellow, orange, blue, pink) and some printed documents. He is holding a blue pen in his right hand and a small stack of sticky notes in his left hand. The background is a plain white wall.

9 out of 10 customers
agree that Confluence
provides their team with
a single source of truth
to help increase
efficiency and decrease
misunderstandings.

According to a 2022 TechValidate survey of Confluence customers

SEAMLESS TEAM ALIGNMENT

Using project spaces





\$ Project Poster: 5% Cashback Campaign



Created by Cindy Ji, with a template
Last updated: just a moment ago • 1 min read • 7 people viewed

📄 Overview 🔗

Define your project's scope and problem space by following the instructions for the [Project Poster Play](#).

Project owner	@Cindy Ji
Team members	@Jena Pender @Reni Carlson
Date	Jan 27, 2023
Status	DONE

? Problem space 🔗

Why are we doing this?	We're playing in an increasingly competitive market. Need to double down on our key differentiators to spread awareness and visibility into our innovative initiatives.
How do we judge success?	<ul style="list-style-type: none">• Improve customer satisfaction score of 4.5/5• Increase page created per author to 2.3
What are possible solutions?	<ul style="list-style-type: none">• Content hub with submission deadlines and predefined deliberation period• Guidelines for how to create high quality content

✅ Validation 🔗

What do we already know?	Final product must include: <ul style="list-style-type: none">• Selection criteria• Performance metrics• Benchmarks and final numbers
How do we judge success?	<ul style="list-style-type: none">• Improve customer satisfaction score of 4.5/5• Increase page created per author to 2.3
What do we need to answer?	<ul style="list-style-type: none">• Where will the final content live?• What other stakeholders need to be involved?

Project poster template

DACI Documentation: Cashback Campaign

Created by Cindy Ji, with a template
Last updated: Mar 04, 2023 • 1 min read • 1 person viewed

Status	IN PROGRESS
Impact	HIGH
Driver	@Jose
Approver	@Jena Pender
Contributors	@Alana Grant @Will
Informed	@Gabby Williams @Emma
Due date	Apr 20, 2023
Resources	Cashback GTM launch Project Poster: Q1 Campaign Cashback Product Requirements Doc

Background

We’re playing in an increasingly competitive market. Need to double down on our key differentiators to spread awareness and visibility into our innovative initiatives.

Options considered

	Campaign 1	Campaign 2
Description	Raise brand awareness through pop-up booths around Chicago	Partner with local community centers to host financial literacy events
Pros and cons	<div>Fewer dependencies</div> <div>Face-to-face customer exposure</div> <div>High cost and manpower</div> <div>Physical units storage problem</div>	<div>Build long-lasting relationships with and support local communities</div> <div>Time-intensive</div> <div>Dependencies on community center representatives and 3rd party approval</div>
Estimated cost	LARGE	MEDIUM



DACI
template



👤 Cashback Campaign: Roles and Responsibilities

 Created by Cindy Ji, with a template
Last updated: just a moment ago • 1 min read • 📊 Analytics

📋 Overview 🔗

Identify and discuss team responsibilities by following the instructions for the [Roles and Responsibilities Play](#).

Team	Banc.ly Marketing team
Team members	@Will @Emma @Alana Grant @Jose
Date	Apr 18, 2023
Team mission	Our team empowers businesses to do banking, better. 🌱💳🔧

📋 Roles and responsibilities 🔗

Roles	Responsibilities (what others think)	Responsibilities (what I think)
@Alana Grant	<ul style="list-style-type: none">Determine quarterly roadmapManage and track project statusesDelegate campaigns to owners	<ul style="list-style-type: none">Resolve roadblocksEnsure tasks are running smoothlyAct as final approver of team actions
@Will	<ul style="list-style-type: none">Lead training workshopsAct as team representative to Banc.ly customers	<ul style="list-style-type: none">Liaison between internal team and external stakeholdersPlan, organize, and execute trainings
@Emma	<ul style="list-style-type: none">Run social media accountsLead brand awareness campaigns	<ul style="list-style-type: none">Lead strategy on ToFu messagingContent champion and knowledge hub

Unassigned responsibilities
<ul style="list-style-type: none">Hire new freelancers
<ul style="list-style-type: none">Lead innovation for new campaigns
<ul style="list-style-type: none">Organize team events, socials, and off sites

Roles and responsibilities template

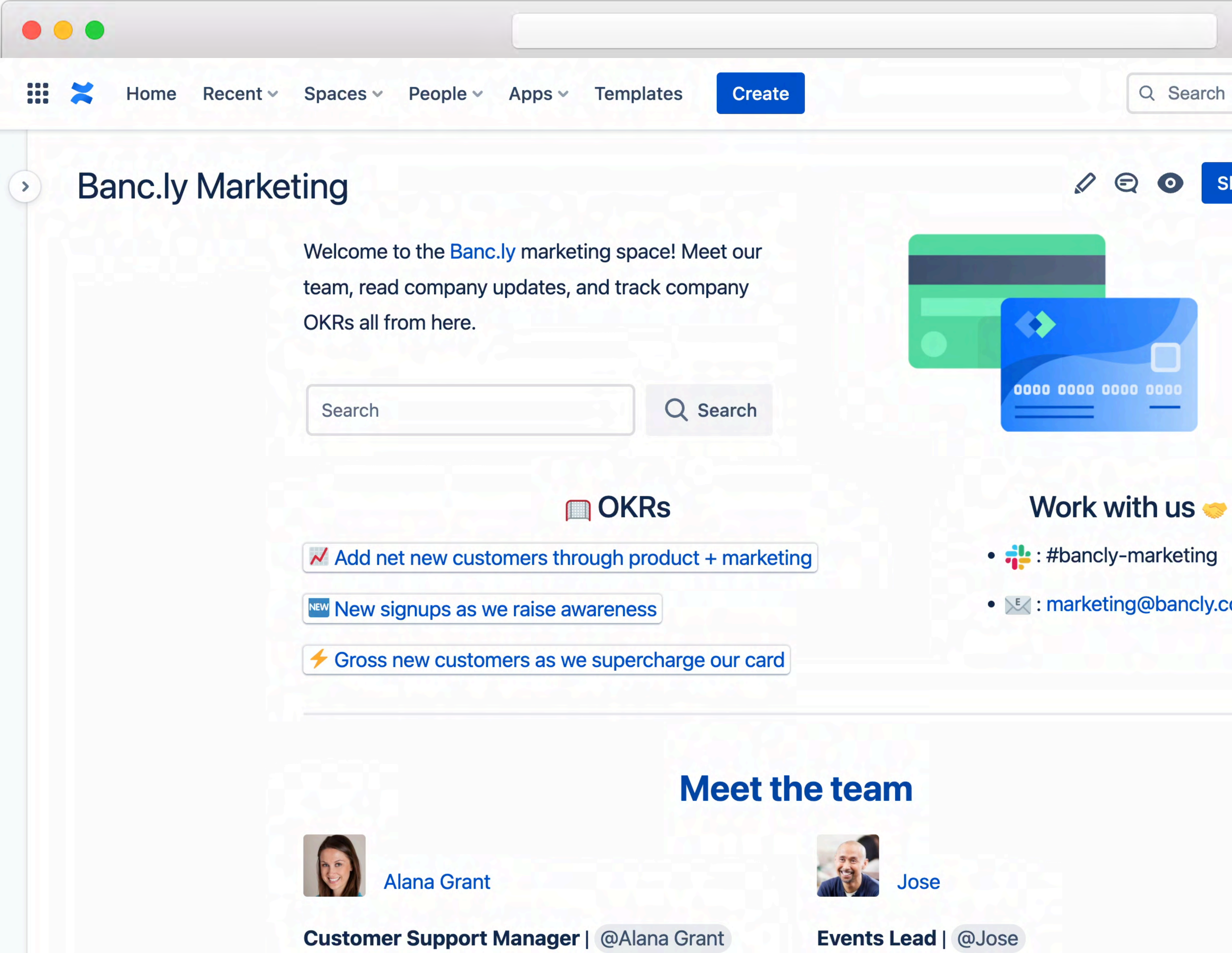
Seamless team alignment

Project overview

Page hierarchy

Search macro

Single-space guests



Seamless team alignment

Project overview

Page hierarchy

Search macro

Single-space
guests

HomeRecentSpacesPeopleAppsTemplatesCreate

Banc.ly Marketing

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: Strategic Plan
- Finding Balance with Asynchronous Collaboration
- Q2 Spring Product Launch FAQ
- > Project Poster: 5% Cashback Campaign

Archived pages

Banc.ly Marketing / Q1 Product Launch

Ready for review

1 Jira link



+9

Project Poster: Q1 Campaign

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

Driver	@Jose
Approver	@Alana Grant
Contributors	@Harvey @Emma @Will
Informed	@Mia
Key Outcomes	<div>NEW</div> New signups as we raise awareness

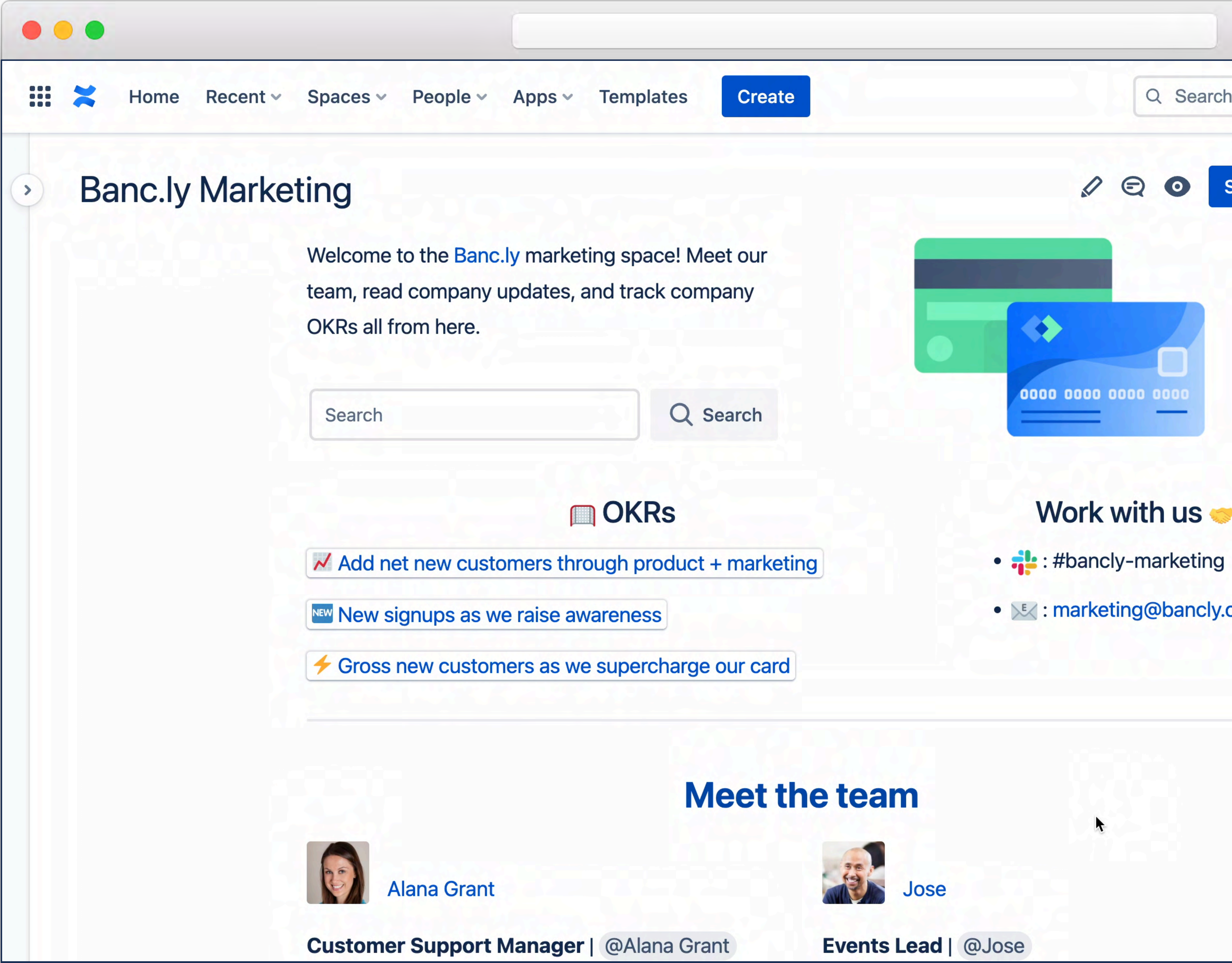
Seamless team alignment

Project overview

Page hierarchy

Search macro

Single-space guests



Seamless team alignment

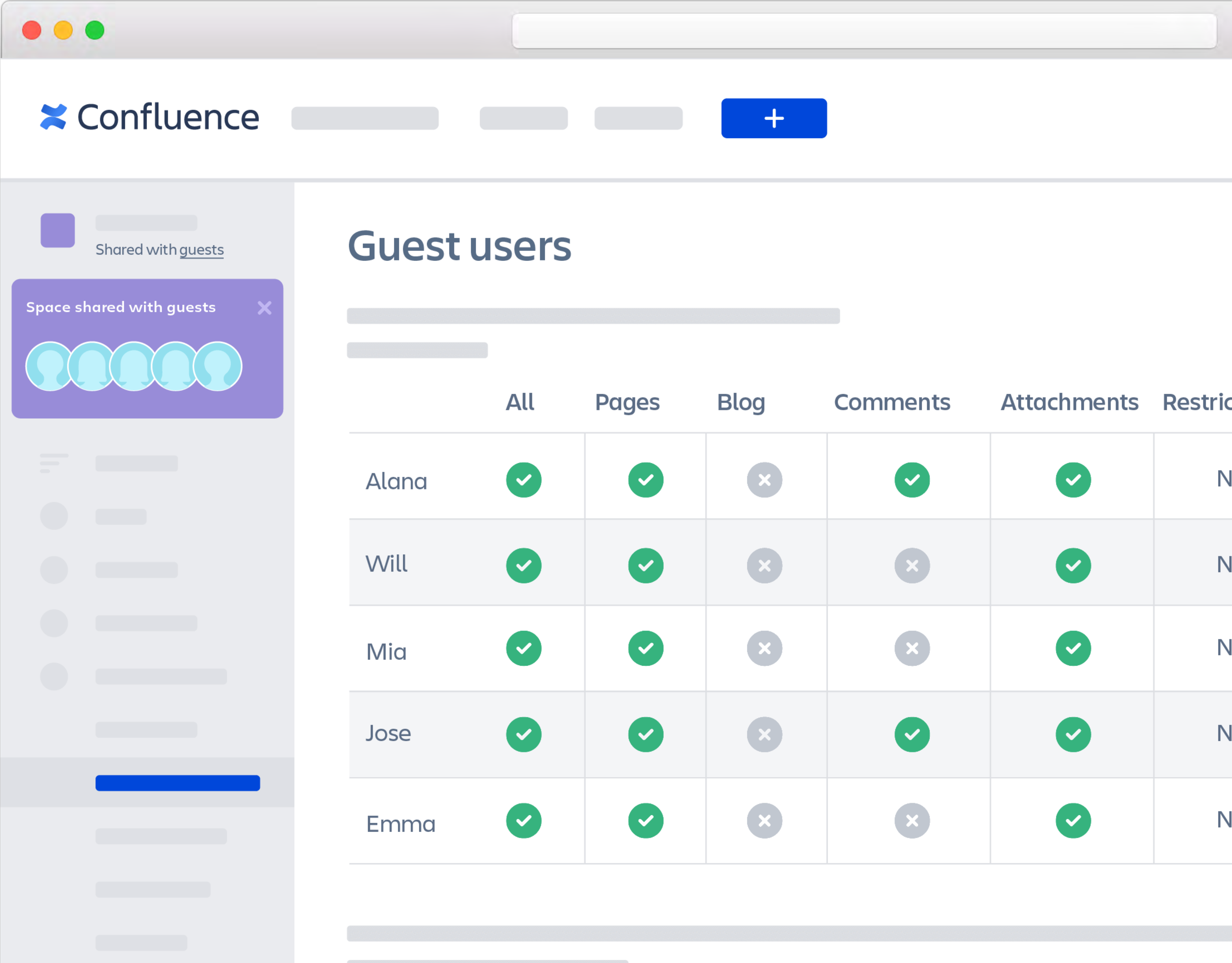
Project overview

Page hierarchy

Search macro

Single-space guests

COMING SOON



Agenda



Create seamless
team alignment

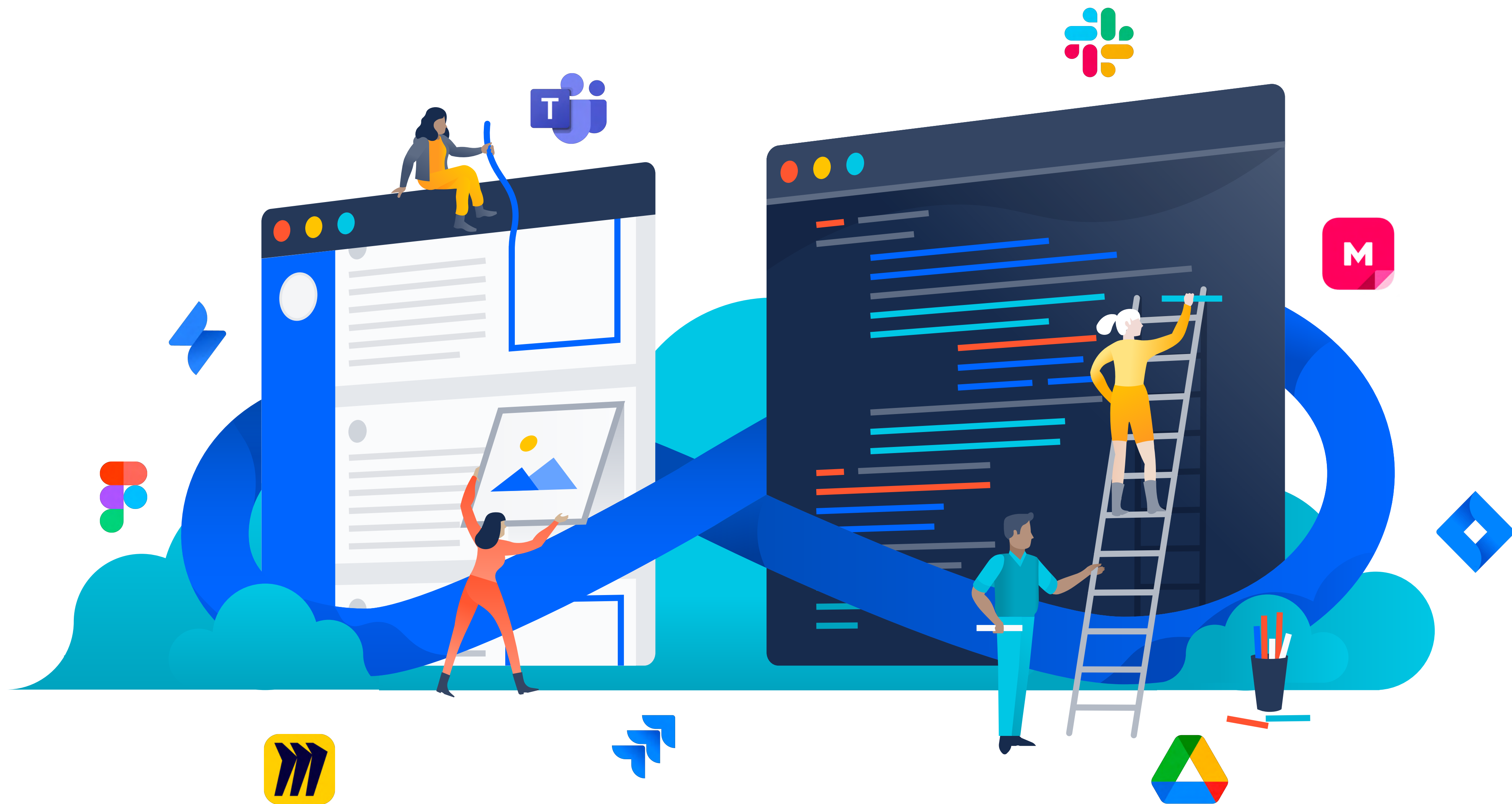


Get cross-functional
projects done faster



Build scalable
frameworks

Connect your team's tools



Integrate with popular communication apps



Take action quickly



Respond faster



**Reduce context
switching**

CONFLUENCE FOR

Slack + Microsoft Teams
Integrate with popular communication apps



Receive granular notifications to stay on top of the work that matters most



Confluence Cloud

APP

Only visible to you

These are the Confluence pages this channel is subscribed to. To subscribe to another page, type `/confluence connect<url>`



Wavee

Send notifications when someone:

Adds a page

Edits a page

Comments on a page

Adds a blog post

Edits a blog post

[Show more](#)

Edit subscription

Delete



Preview links of pages, blogs, and comments when you share them in your channel



Kaitlyn Prouty 11:16 AM

Folks, here is the legal document. <http://demo.atlassian....>



Confluence Cloud APP 11:16 AM

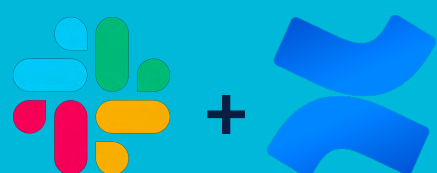


Legal Review

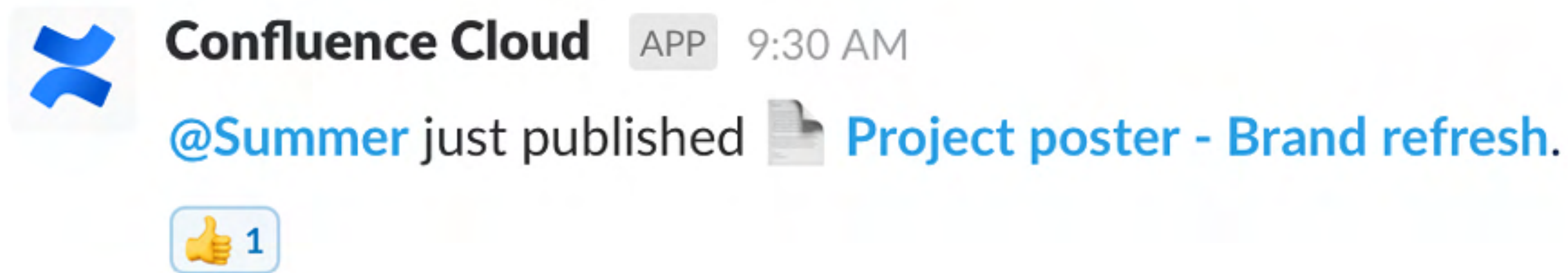
in **Wavee**

Created by **Kaitlyn Prouty** 7 minutes ago

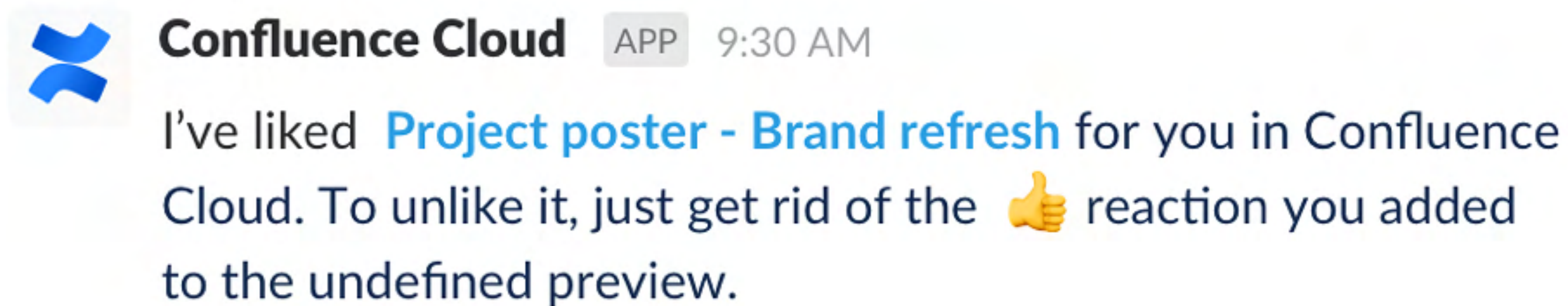
0 comments



Spread the love by liking pages and blogs within Slack



Only visible to you



Reply to comments on pages to share your feedback without leaving your channel



Reply to comment



Leave your reply

We are on-track. 👍
Legal is engaged and has a working document.

2968

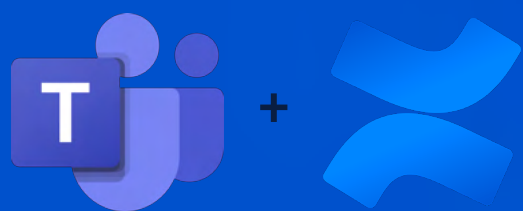
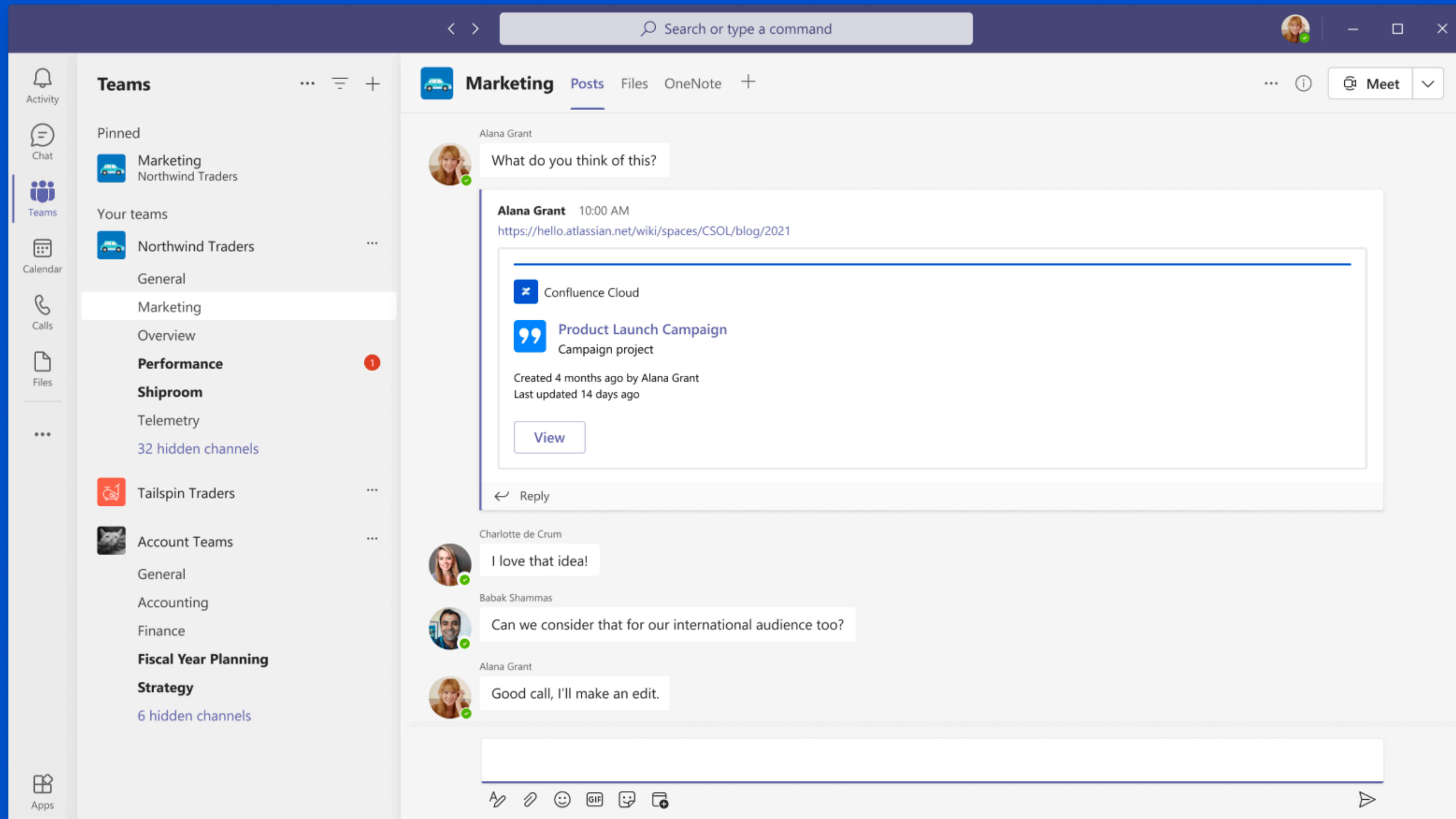
[? Learn more about Confluence Cloud](#)

Cancel

Comment



Get more done with Confluence and Microsoft Teams



Format, comment, and collaborate

Activity Chat Teams Calendar Calls Files Apps

Teams

Your teams

- Acme Corp
- Marketing Team
- Overview
- Performance
- Shiproom
- Telemetry
- 32 hidden channels

Marketing Team Posts Files Q4 Planning **Product Launch Campaign**

Normal text **B** *I* ... **≡** **A** ... **☑** **🔗** **📷** **@** **😊** **📅** **🔊** **+**

Publish **Close** ...

Product Launch Campaign

Objective: Plan and track campaign activities for Q1 2023 📈

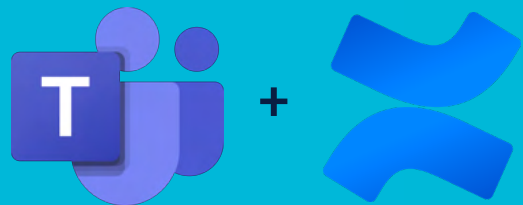
Team

@Alana @Mia @Harvey @Will

Campaign Overview

On the Planning side, we intend to conduct user research, hold a campaign brainstorm, and design assets before end of December. On the Distribution side, we launch in mid-January and we plan on conducting channel research that will last through March.

Powered by Confluence

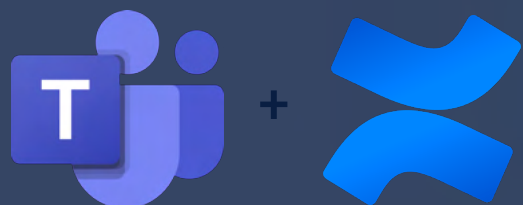


Search and share Confluence from chat

The screenshot shows a Microsoft Teams chat interface. On the left, the 'Chat' sidebar lists recent conversations. The main chat area shows a conversation with Marie Beaudouin. A search bar at the top of the chat area is active, displaying 'Search or type a command'. Below the search bar, a dropdown menu titled 'Confluence Cloud' is open, showing a list of documents. The documents listed are:

- Weekly Team Planning (2021-19-04) - Marketing Team • Updated 20 mins ago
- Q4 Planning - Samuel Hall • Updated 20 mins ago
- Team Rituals - Company Onboarding • Updated 20 mins ago
- FY22 Budget - Banc.ly Finance • Updated 20 mins ago
- Compensation Hub - Banc.ly HR • Updated 20 mins ago
- Email Assets - Samuel Hall • Updated 20 mins ago


The chat history shows several messages, including one from Marie Beaudouin: 'Thank you for always being so positive! 🙌 1'. The chat area also shows a search bar at the bottom with the text 'Type'.





4 out of 5 customers agree
that Confluence has **better**
integrations with their
favorite tools compared to
other solutions.

Go To Market Strategy

 Workspace visible

000 Board

Filter

 Share

In Progress

ted references on
eting pages

Gather customer quotes/testimonials

Social promotion

🕒 Aug 21

+ Add a card

Ready For Launch

Blog post - Announcement

Jul 19

In-App Announcement











Jul 23

Fix alignment issue on pricing

Oct 6



+ Add a card

- Email Drip Campaign - engage...
- ›  OKRs
- Project poster: Cashback Cam...
- ✓  5% Cashback Credit Card ...
 -  17 Cashback GTM launch
 -  Cashback Product Req...
 -  Cashback product laun...
 - **Cashback Campaign - Proj...**
- Banc.ly Design Principles
- ›  Quarterly Plans
-  Banc.ly brand standards an...
- ›  Q1 Product Launch
- ›  Q2 Product Launch
- ✓  New hire resources!

Banc.ly Marketing

Banc.ly Marketing / 5% Cashback Credit Card Project P... / Cashback Campaign - Project Poster

[edit] [comment] [star] [eye] [lock] Share [more]

Pages

- > New hire resources!
- > 5% Cashback Credit Card Pr...
 - Cashback GTM launch
 - Cashback Product Requir...
 - Cashback product launc...
 - Cashback Campaign - Proje...
- > OKRs
- > Quarterly Plans
- Banc.ly brand standards and...
- > Q1 Product Launch
- > Q2 Product Launch
- > New hire resources!
- Trello Boards
- OKR meeting notes

Archived pages

Mockup

New Templates














Figma

Version B

New Templates Edited 24 days ago

Visible to Atlassian

Pages

- >  New hire resources!
- ▼  5% Cashback Credit Card Pr...
 -  Cashback GTM launch
 -  Cashback Product Requir...
 -  Cashback product launc...
 - [Cashback Campaign - Proje...](#)
- >  OKRs
- >  Quarterly Plans
 -  Banc.ly brand standards and...
- >  Q1 Product Launch
- >  Q2 Product Launch
- >  New hire resources!
 -  Trello Boards
 -  OKR meeting notes

 Archived pages

Performance Tracking

Campaign Performance Tracking							
	A	B	C	D	E	F	
1		OR	MoM Change	% Diff from Avg	CTR	MoM Change	% Diff from Avg
29	Sept 2021	34.85%	-3.25%	-2%	0.52%	-21%	
30	Oct 2021		N/A	N/A	N/A	N/A	N/A
31	Nov 2021	34.77%	-0.23%	-2%	0.60%	15%	
32	Dec 2021	37.82%	8.77%	6%	1.09%	82%	
33	Jan 2022	33.10%	-12.48%	-7%	1.54%	41%	
34	Feb 2022	34.66%	4.71%	-3%	0.70%	-55%	
35	Mar 2022	39.62%	14.31%	11%	1.29%	84%	
36	Apr 2022		N/A	N/A	N/A	N/A	N/A
37	May 2022	38.21%	4.00%	7%	1.43%	11%	
38	Jun 2022	38.97%	1.99%	9%	1.70%	19%	
39	Jul 2022	39.10%	0.34%	9%	1.78%	5%	
40	Aug 2022	41.22					
41	Average	36.55%	-6.20%	2%			
42							
43							
44							
45							
46							
47							

+

☰

5% Cashback Campaign

📈

Explore

Banc.ly Marketing

Pages

...

+

>

New hire resources!

>

Banc.ly Design Principles

>

OKRs

▼

Q1 Product Launch

•

Q1 Product Roadmap

•

Product + Marketing: Strateg...

>

Project Poster: Q1 Campaign

•

Q1 Campaign brainstorm

>

Q2 Product Launch

>

Confluence Design team

Archived pages

Banc.ly Marketing / Q1 Product Launch 6 Jira links

Share

...

Hype video

Publish date: Jan 20, 2023

Confluence is your new digital workspace

Confluence is your new digital workspace

Watch later

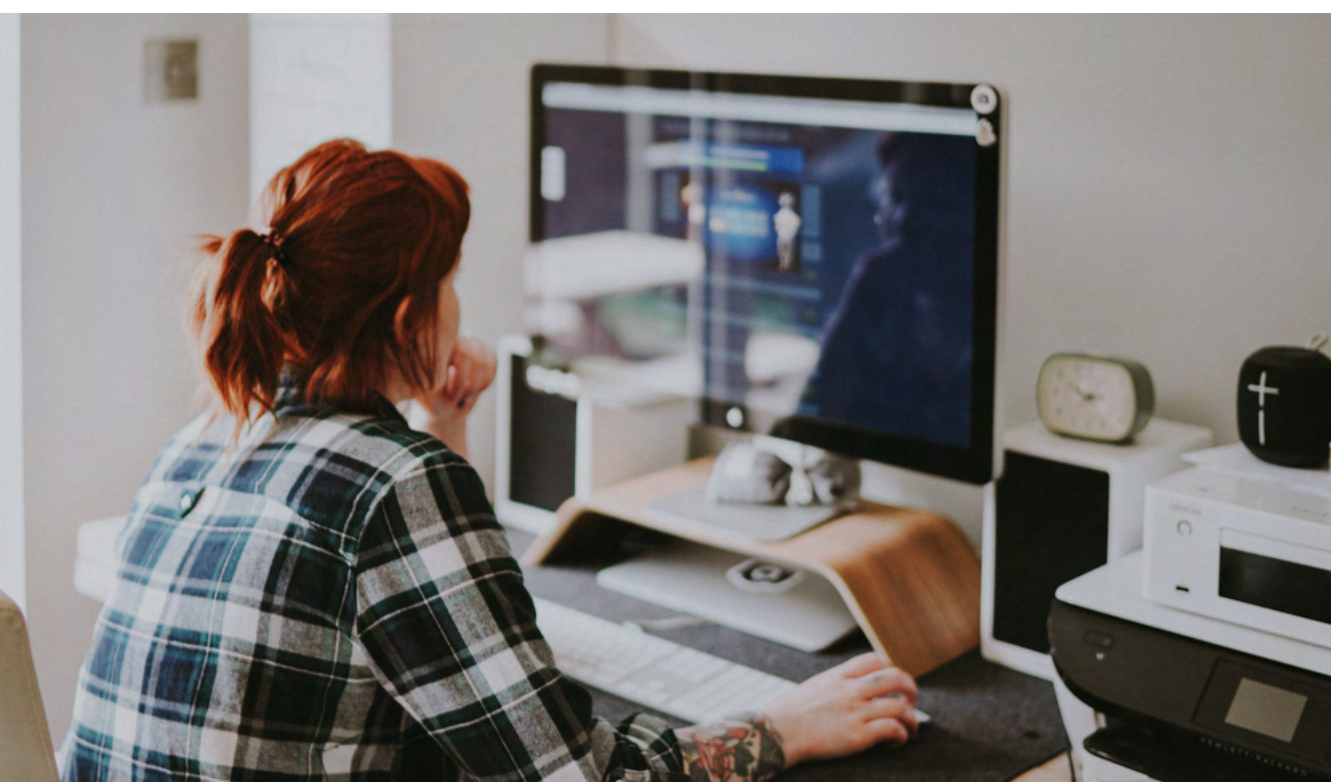
Share

ATLASSIAN

onfluence

Watch on

YouTube



Let's talk about

ASYNCHRONOUS WORK

“

Confluence makes it easy to
communicate information
between different teams.

WALESA D., CO-FOUNDER – CODELIME

Next Steps

Deliverable	Tasks
Content hub	<div><input type="checkbox"/> Write copy</div> <div><input type="checkbox"/> Type your action, use '@' to assign to so...</div>
Email campaign	<div><input type="checkbox"/> Illustrations</div> <div><input type="checkbox"/> A/B test</div> <div><input type="checkbox"/> Complete registration</div> <div><input type="checkbox"/> Signup form</div>

	We're playing in an increasingly competitive market. Need to double down on our key differentiators to spread awareness and visibility into our innovative initiatives.
s?	<ul style="list-style-type: none">• Improve customer satisfaction score of 4.5/5• Increase page created per author to 2.3
ons?	<ul style="list-style-type: none">• Content hub with submission deadlines and pre-deliberation period• Guidelines for how to create high quality content

v?	Final product must include: <ul style="list-style-type: none">• Selection criteria
----	---




Cindy Ji



Type @ to mention someone. We'll let them know.



Save

A man and a young child are sitting at a desk in a home office, looking at a large computer monitor. The man is pointing at the screen, and the child is looking on with interest. The background shows a window with a view of greenery outside. The text is overlaid on the image in a mix of white and teal colors.

9 out of 10 customers
agree Confluence allows
their teams to stay in sync
no matter where they are
working from.

According to a 2022 TechValidate survey of Confluence customers

Agenda



Create seamless
team alignment



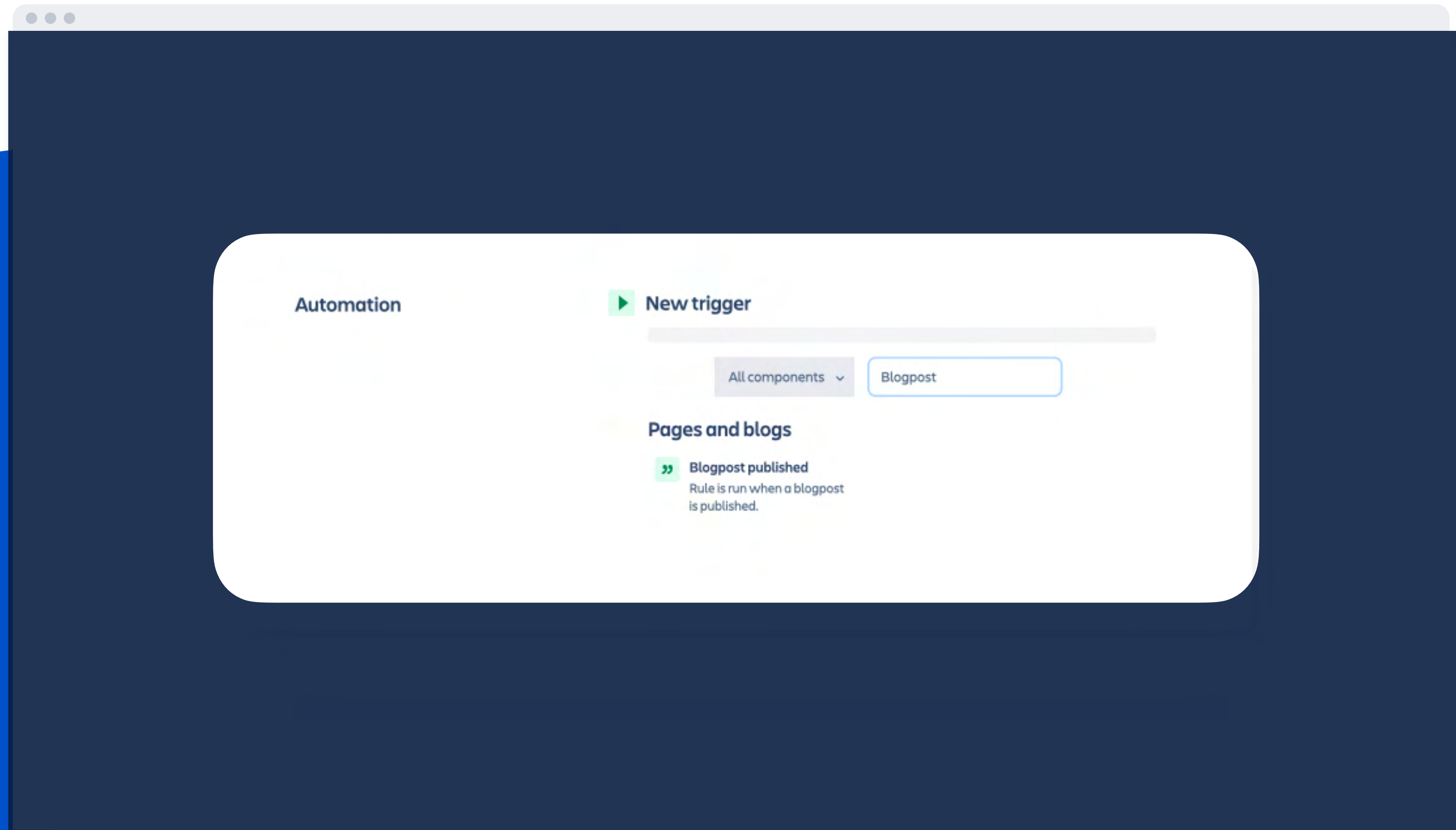
Get cross-functional
projects done faster



Build scalable
frameworks

AUTOMATION

available in Confluence Premium




Send a summary notification of inactive pages to the author

 When: Scheduled

 If: Compare two values

 Branch rule / related entities



 Then: Send email
{{page.author.emailAddress}}
You have an inactive page to review

Send email

To*

{{page.author.emailAddress}} x



Subject*

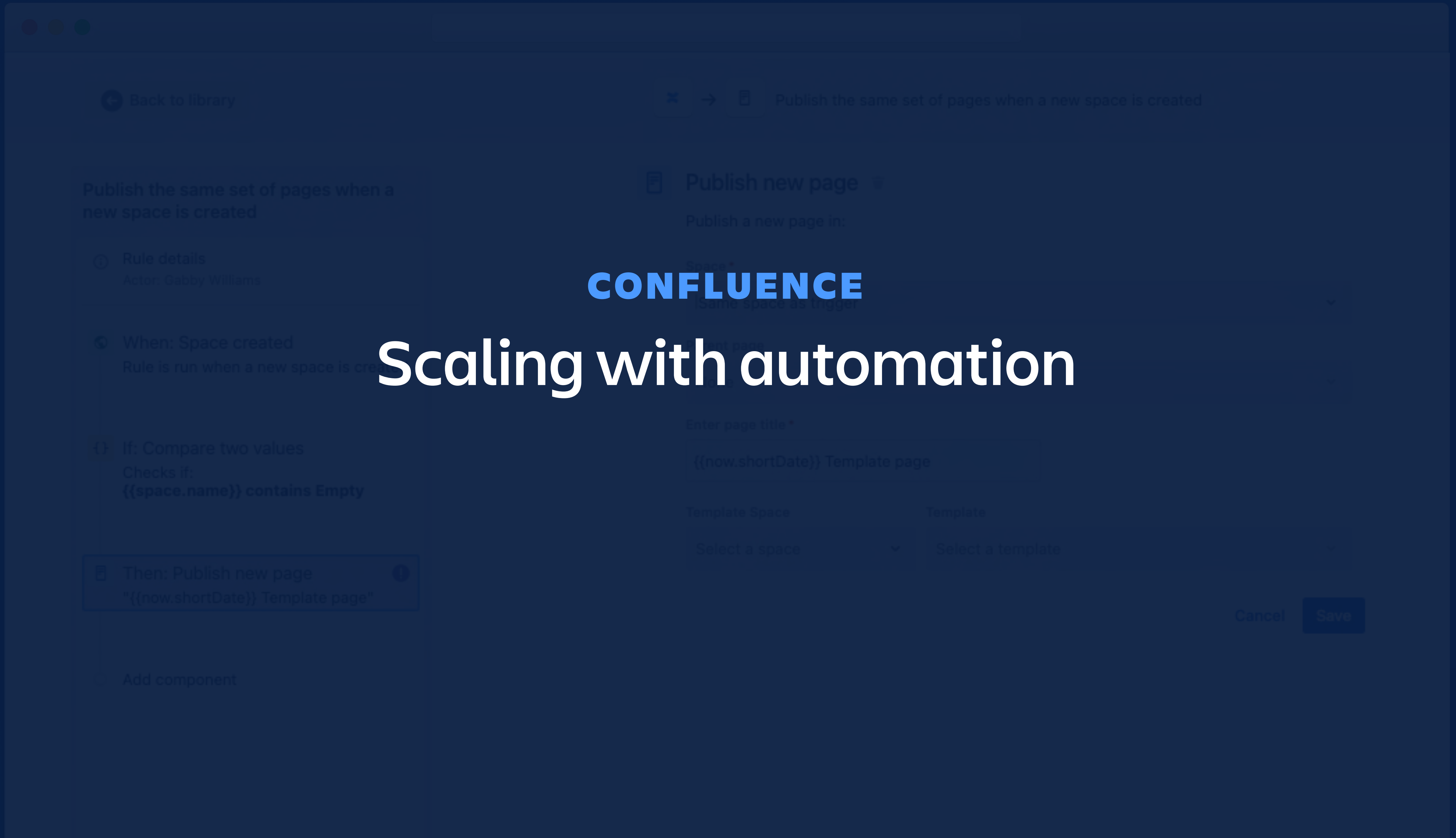
You have an inactive page to review

Content*

The following page hasn't been updated since {{page.dateLastUpdated}}
and you might want to consider archiving it: {{page.url}}

Cancel

Save



CONFLUENCE

Scaling with automation

← Back to library



Publish the same set of pages when a new space is created

Publish the same set of pages when a new space is created



Rule details

Actor: Gabby Williams



When: Space created

Rule is run when a new space is created.



If: Compare two values

Checks if:

{{space.name}} contains Empty



Then: Publish new page

"{{now.shortDate}} Template page"



Add component



Publish new page



Publish a new page in:

Space *

Same space as trigger



Parent page

None



Enter page title *

{{now.shortDate}} Template page

Template Space

Select a space



Template

Select a template



Cancel

Save



- Beyond Gravity
- ≡

 Overview
- ”

 Blog
- ☰

 Pages
- ⚙

 Space settings
- Manage space
- Space permissions
- Manage pages
- Look and feel
- Integrations
- Automation

←

 Space settings

Automation

Global administration

Create rule

⋮

- Rules
- Audit log
- Library

Automate any task or process with a few clicks

Let Confluence take care of the busywork, so your team can focus on work that matters. Create your own automation rules, or browse our rule templates to get started.

Templates

Popular

- Create pages for recurring meetings
- Auto-label pages of certain authors
- Archive pages that haven't had any activity in 90 days and send a slack summary
- Remind user of incomplete tasks which are due soon

CONFLUENCE

Scan to
access the
automation
library



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Create pages for recurring meetings

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Auto-label pages of certain authors

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any activity in 90 days and send a slack summary

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which are due soon

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tasks

Learnings



Create seamless
team alignment



Get cross-functional
projects done faster



Build scalable
frameworks



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