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

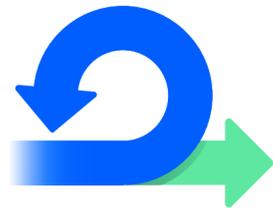
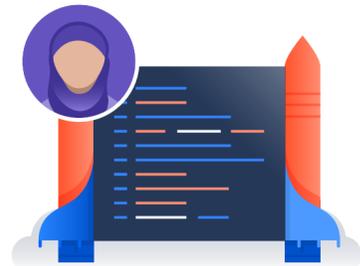
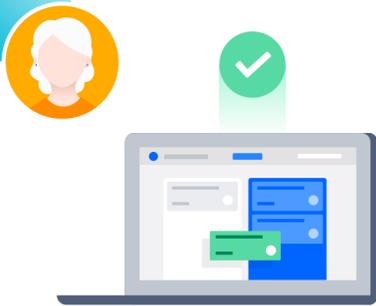
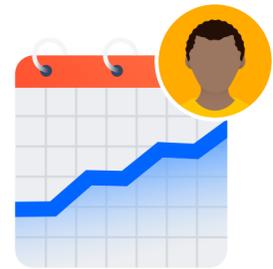
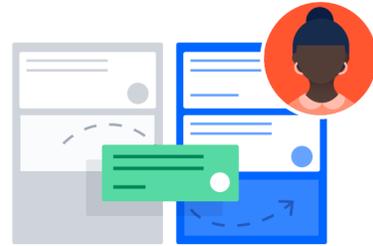
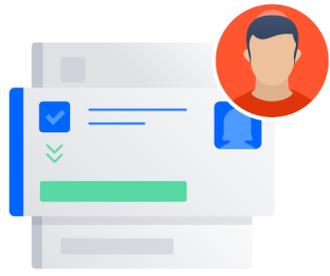


Chaos to collaboration:

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

The screenshot shows a Confluence Team Space interface for "Banc.ly Marketing". The top navigation bar includes "Home", "Recent", "Spaces", "People", "Apps", "Templates", and a "Create" button. A search bar is located on the right. The left sidebar contains a navigation menu with "Overview", "Analytics", and "Space Settings". Below this is a "SHORTCUTS" section with links to "Dropbox Folder", "Google Sheets", "Miro Board", and "Trello Board". At the bottom of the sidebar are "Pages" (with a plus sign) and "Archived pages".

The main content area is titled "Banc.ly Marketing" and features a welcome message: "Welcome to the Banc.ly marketing space! Meet our team, read company updates, and track company OKRs all from here." Below the message is a search bar. To the right of the main content are icons for editing, commenting, and viewing, along with a "Share" button and a "Star this space" button.

The "OKRs" section lists three objectives:

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

The "Work with us" section includes a Slack channel "#bancly-marketing" and an email address "marketing@bancly.com".

The "Meet the team" section at the bottom shows two team members: Alana Grant and Jose.

COMING SOON

Guest access

The screenshot displays a web browser window with the Confluence logo and navigation elements. The main content area is titled "Project plan" and lists three users: @Mia Snyder (GUEST), @Will Allen, and @Jie Song. A task is assigned to @Jie Song "to review". A comment from Mia Snyder (GUEST) asks @Will Allen to share designs. A sidebar on the left shows a "Space shared with guests" notification with five user icons.

← → ↻

Confluence +

Space shared with guests

Project plan

@Mia Snyder **GUEST** @Will Allen @Jie Song

@Jie Song to review

Mia Snyder **GUEST**

@Will Allen Can you share the designs? 😊

1

CONFLUENCE

Project spaces

The screenshot displays the Confluence web application interface. At the top, the navigation bar includes 'Confluence', 'Home', 'Recent', 'Spaces', 'People', 'Apps', 'Templates', and a 'Create' button. A search bar is located on the right side of the navigation bar. The main content area is divided into a left sidebar and a central workspace.

Left Sidebar:

- Banc.ly Marketing** (Current space)
- Overview** (Selected)
- 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

Spaces Dropdown Menu:

- CURRENT**
 - Banc.ly Marketing
- STARRED**
 - Cindy Ji
 - Marketing team
- RECENT**
 - Outreach Campaign
 - Marketing team
- View all spaces
- Create a space

Central Workspace (Banc.ly Marketing Space):

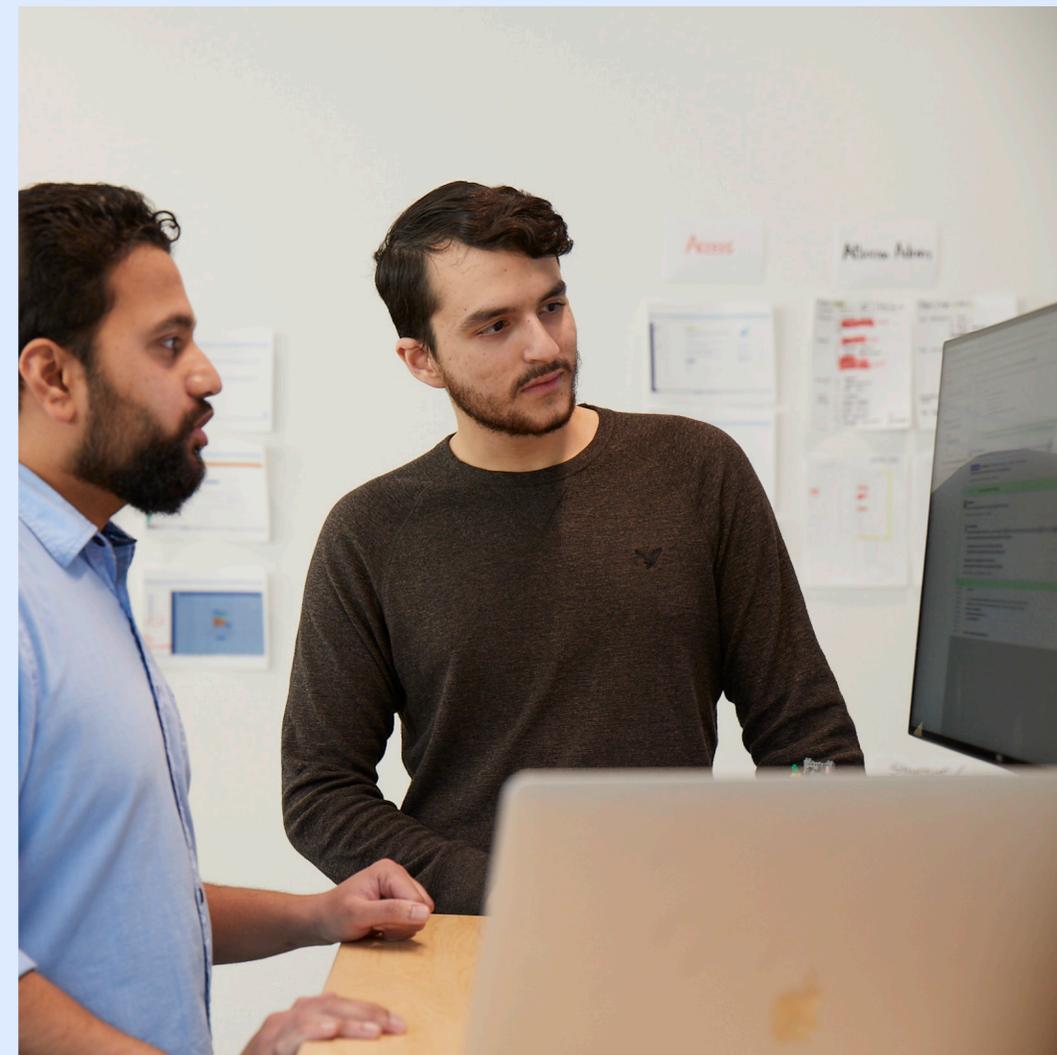
- Header: Banc.ly Marketing, Share, Star this space
- Introductory text: "Banc.ly marketing space! Meet company updates, and track from here."
- Search bar
- OKRs** section: "customers through product + marketing", "we raise awareness", "customers as we supercharge our card"
- Contact us** section: "#bancly-marketing", "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 left side of the frame. He is looking towards a whiteboard that is covered with numerous colorful sticky notes (blue, yellow, orange, pink) and some printed documents. He is holding a blue pen and a small stack of sticky notes in his hands. The background is a bright, slightly blurred office environment.

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

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 | <ul style="list-style-type: none">Fewer dependenciesFace-to-face customer exposureHigh cost and manpowerPhysical units storage problem | <ul style="list-style-type: none">Build long-lasting relationships with and support local communitiesTime-intensiveDependencies on community center representatives and 3rd party approval |
| 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

- Hire new freelancers
- Lead innovation for new campaigns
- Organize team events, socials, and off sites

Roles and responsibilities template

Seamless team alignment

Project overview

Page hierarchy

Search macro

Single-space guests

The screenshot shows a workspace titled "Banc.ly Marketing" with a navigation bar at the top containing "Home", "Recent", "Spaces", "People", "Apps", and "Templates", along with a "Create" button and a search bar. The main content area includes a welcome message, a search bar, a section for "OKRs" with three items, a "Work with us" section with social media links, and a "Meet the team" section with two team members: Alana Grant (Customer Support Manager) and Jose (Events Lead).

Home Recent Spaces People Apps Templates Create Search

Banc.ly Marketing

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

Work with us

- #bancly-marketing
- marketing@bancly.co

Meet the team

Alana Grant
Customer Support Manager | @Alana Grant

Jose
Events Lead | @Jose

Seamless team alignment

Project overview

Page hierarchy

Search macro

Single-space guests

The screenshot displays a Notion workspace for 'Banc.ly Marketing'. The left sidebar shows a page hierarchy under 'Pages', including 'New hire resources!', 'Banc.ly Design Principles', 'OKRs', 'Q1 Product Launch', and 'Q2 Product Launch'. The 'Q2 Product Launch' section is expanded, showing sub-pages like 'Q2 Product Roadmap', 'Q2 Cross-functional brainstorm', 'Q2 Product + Marketing: Strategic Plan', 'Finding Balance with Asynchronous Collaboration', 'Q2 Spring Product Launch FAQ', and 'Project Poster: 5% Cashback Campaign'. The main content area shows a 'Project Poster: Q1 Campaign' page, which is 'Ready for review'. It includes a title, a 'Created by Jose' note, and a list of roles and names: Driver (@Jose), Approver (@Alana Grant), Contributors (@Harvey, @Emma, @Will), and Informed (@Mia). A table at the bottom lists 'Key Outcomes' with a 'NEW' badge and the text 'New signups as we raise awareness'.

Home Recent Spaces People Apps Templates Create

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

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 | NEW New signups as we raise awareness |

Seamless team alignment

Project overview

Page hierarchy

Search macro

Single-space guests

The screenshot shows a web application interface for 'Banc.ly Marketing'. At the top, there is a navigation bar with a grid icon, a blue logo, and menu items: Home, Recent, Spaces, People, Apps, and Templates. A blue 'Create' button is on the right, along with a search bar. Below the navigation bar, the main content area is titled 'Banc.ly Marketing'. It features a welcome message: 'Welcome to the Banc.ly marketing space! Meet our team, read company updates, and track company OKRs all from here.' Below this is a search bar with a 'Search' button. To the right, there are two overlapping credit cards, one green and one blue. Below the search bar, there is a section titled 'OKRs' with three items: 'Add net new customers through product + marketing', 'New signups as we raise awareness', and 'Gross new customers as we supercharge our card'. To the right of the OKRs, there is a section titled 'Work with us' with two items: '#bancly-marketing' and 'marketing@bancly.c'. At the bottom, there is a section titled 'Meet the team' with two team members: Alana Grant, Customer Support Manager (@Alana Grant), and Jose, Events Lead (@Jose).

Seamless team alignment

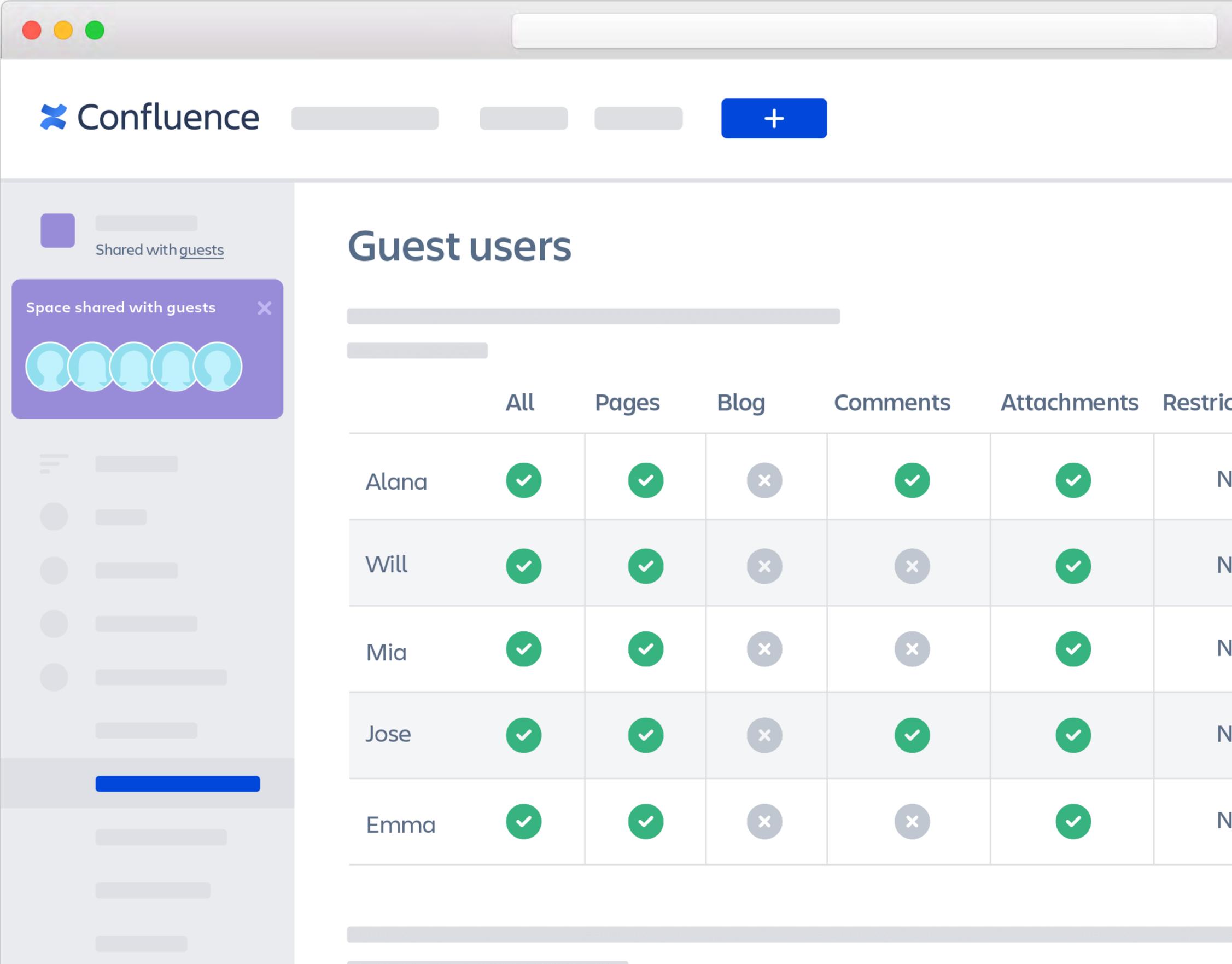
Project overview

Page hierarchy

Search macro

Single-space guests

COMING SOON



Agenda



Create seamless
team alignment

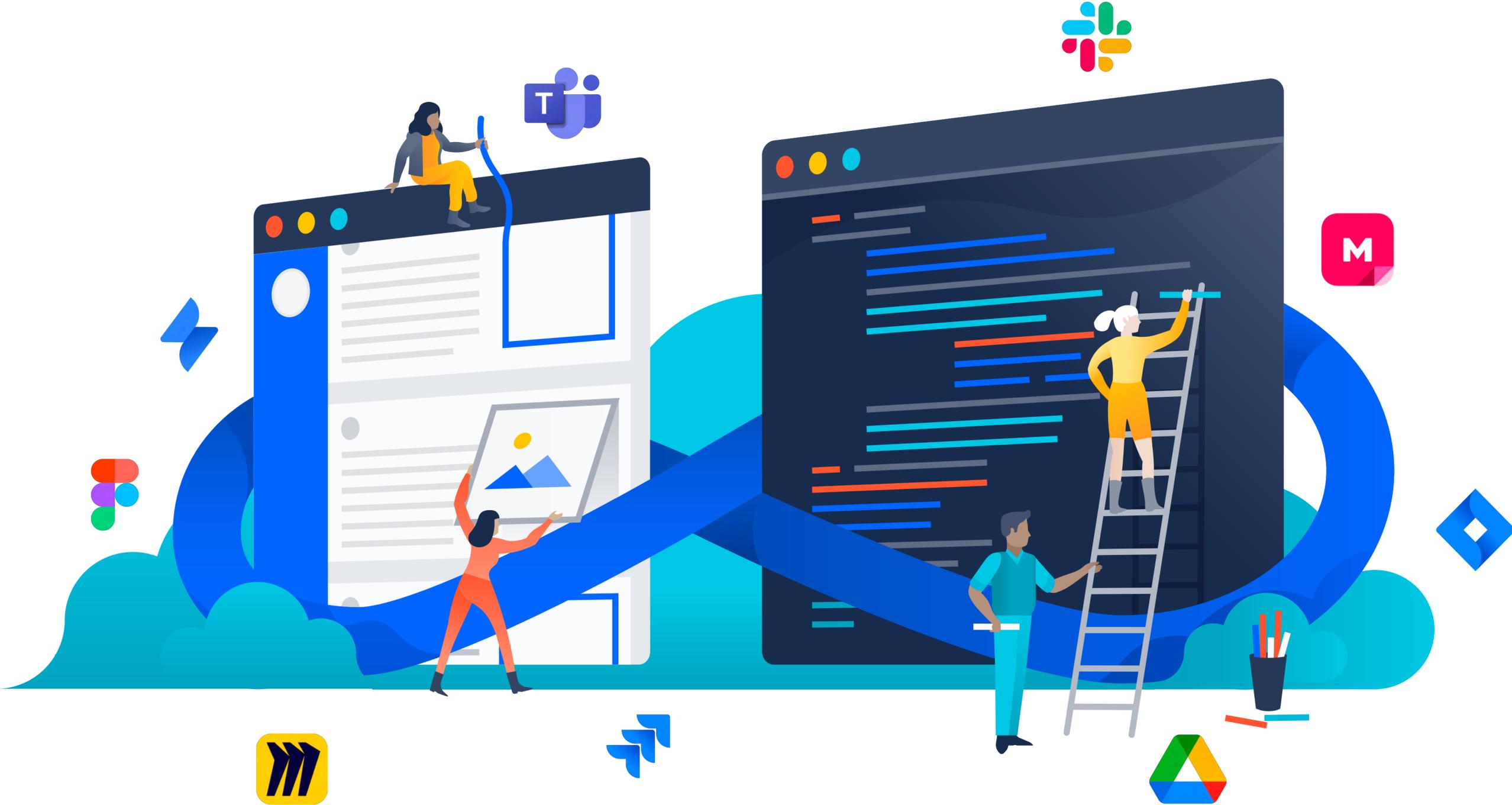


Get cross-functional
projects done faster



Build scalable
frameworks

Connect your team's tools



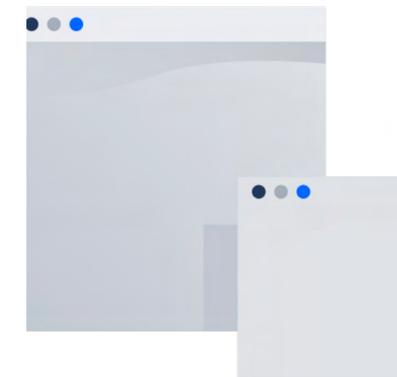
Integrate with popular communication apps



Take action quickly



Respond faster



Reduce context switching

CONFLUENCE FOR

Slack + Microsoft Teams



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

 **Confluence Cloud** APP 9:30 AM
@Summer just published  [Project poster - Brand refresh.](#)
 1

Only visible to you

 **Confluence Cloud** APP 9:30 AM
I've liked [Project poster - Brand refresh](#) for you in Confluence Cloud. To unlike it, just get rid of the  reaction you added to the undefined preview.



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

The screenshot displays the Microsoft Teams interface. On the left, the navigation pane shows the 'Marketing' team selected. The main chat area shows a conversation in the 'Marketing' channel. Alana Grant posts a message asking for feedback on a Confluence Cloud page. The page content includes the title 'Product Launch Campaign', a subtitle 'Campaign project', and metadata 'Created 4 months ago by Alana Grant' and 'Last updated 14 days ago'. A 'View' button is visible below the page content. Other team members, Charlotte de Crum and Babak Shammass, respond with questions and feedback. Alana Grant replies that she will make an edit. The bottom of the chat shows a text input field and a toolbar with icons for emojis, GIFs, and attachments.



Format, comment, and collaborate

The screenshot displays the Microsoft Teams interface. On the left, the navigation pane shows 'Teams' with 'Acme Corp' and 'Marketing Team' selected. The main area shows the 'Marketing Team' channel with a 'Product Launch Campaign' page. The page has a rich text editor at the top with a 'Publish' button. Below the editor, the page title is 'Product Launch Campaign'. An objective is listed: 'Objective: Plan and track campaign activities for Q1 2023'. The team members listed are @Alana, @Mia, @Harvey, and @Will. The main content is a paragraph titled 'Campaign Overview' describing the planning and distribution phases. At the bottom, there is a photo of four people collaborating around a computer screen and the text 'Powered by Confluence'.



Search and share Confluence from chat

The screenshot shows a Microsoft Teams chat interface. On the left, a sidebar lists recent chats with participants like Charlotte and Babak, Emiliano Ceballos, Marie Beaudouin, and Oscar Krogh. The main chat area shows a conversation with Marie Beaudouin. A search overlay is active, displaying results for 'Confluence Cloud' documents. The search results include:

- 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 messages such as 'I know Krystal really wanted to make a good impression especially since this is a new client.' and 'I'm pretty confident that this launch will be successful. The team has worked tirelessly to make it possible. This is going to be awesome.'



A person is sitting on a yellow stool, holding a tablet. The tablet screen shows a calendar application with a grid view for the month of April. The text is overlaid on the image in a mix of white and orange colors.

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

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](#)

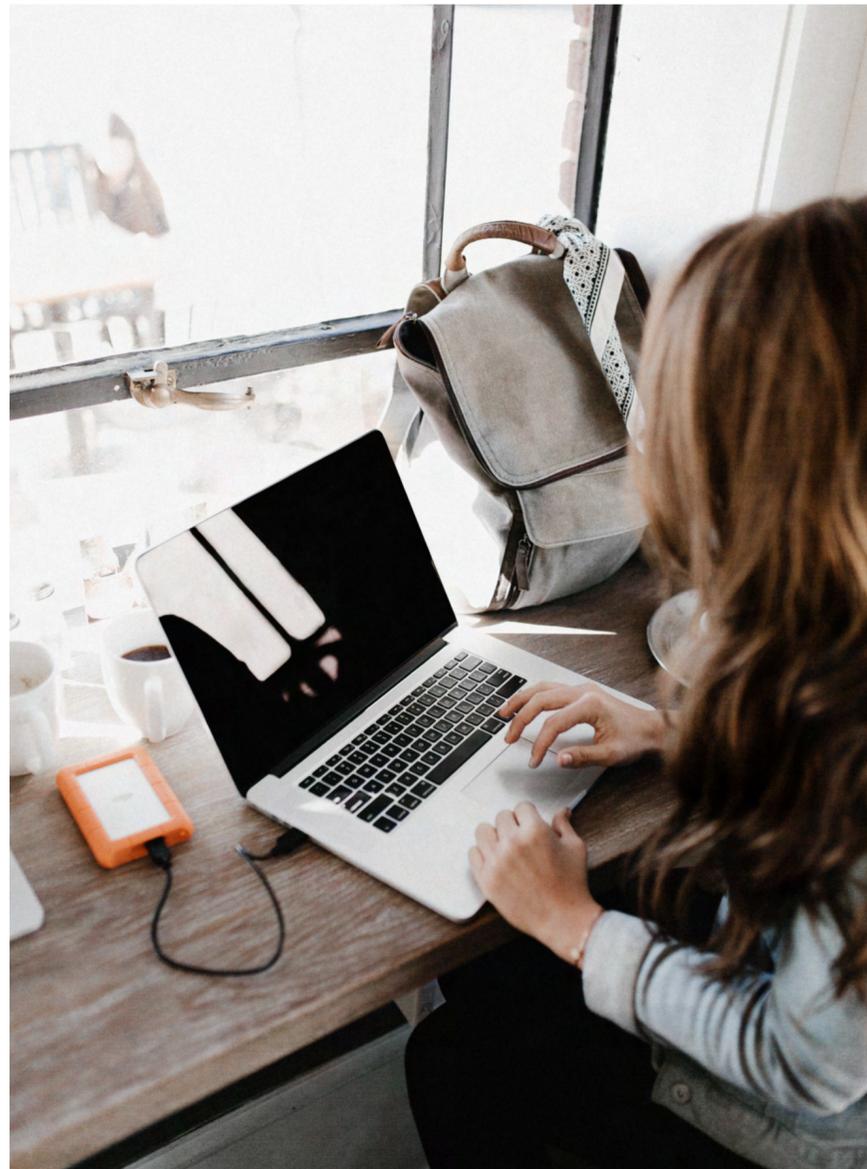
Hype video

Publish date: Jan 20, 2023

Confluence is your new digital workspace

Watch later
 Share

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 | <ul style="list-style-type: none"><input type="checkbox"/> Write copy<input type="checkbox"/> Type your action, use '@' to assign to so... |
| Email campaign | <ul style="list-style-type: none"><input type="checkbox"/> Illustrations<input type="checkbox"/> A/B test<input type="checkbox"/> Complete registration<input type="checkbox"/> Signup form |



| | |
|------|--|
| | 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 child are sitting at a desk in a home office, looking at a computer monitor. The man is on the left, and the child is on the right. The monitor displays a website with a grid of images. The background is a window with a view of trees. The text is overlaid on the image in white and green colors.

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

Agenda



Create seamless
team alignment



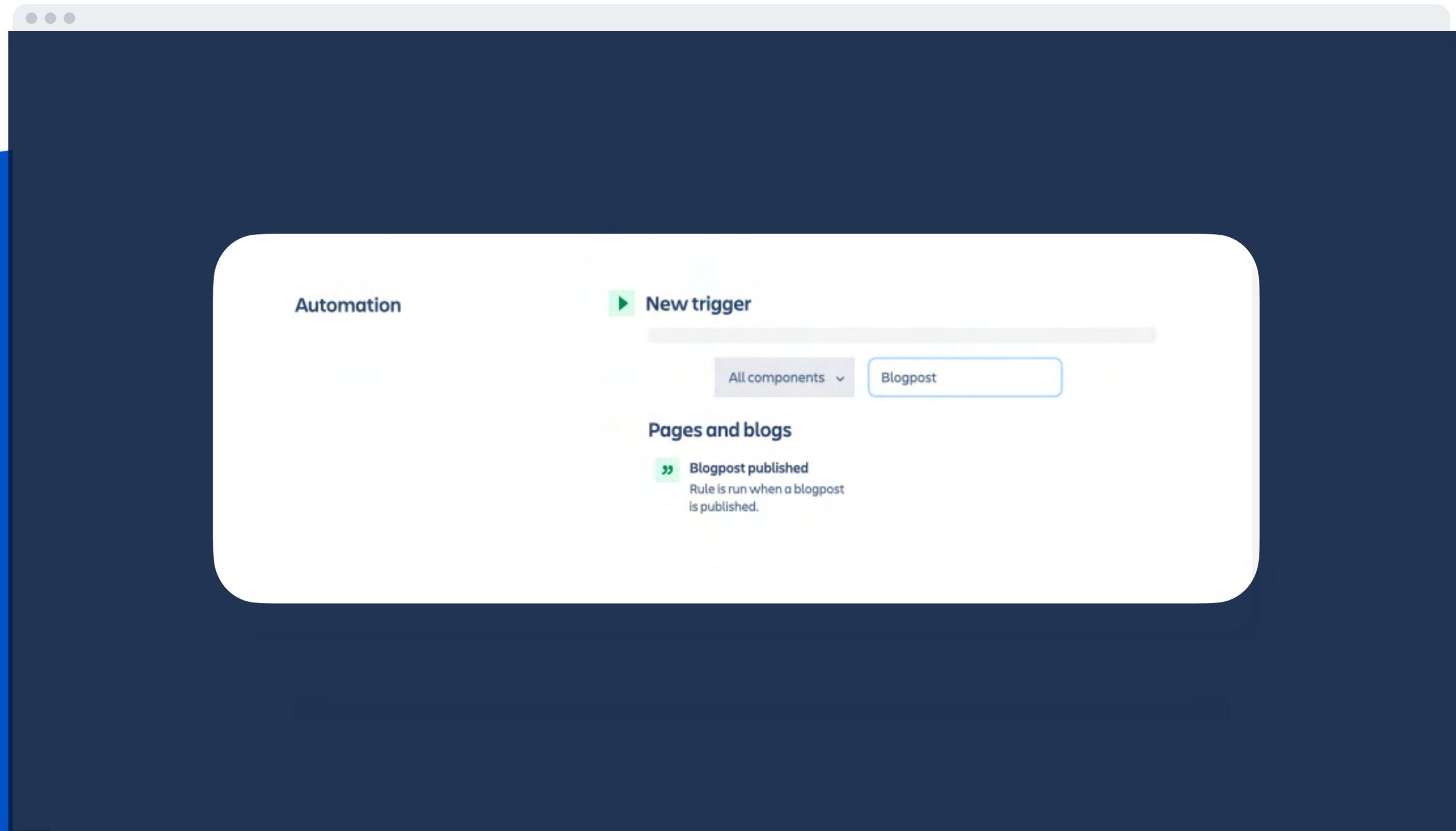
Get cross-functional
projects done faster



**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.dateLateUpdated]]
and you might want to consider archiving it: [[page.url]]

Cancel

Save



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

Publish new page

Publish a new page in:

CONFLUENCE

Scaling with automation

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"

Space:

Same space as trigger

Enter page title *

{{now.shortDate}} Template page

Template Space

Template

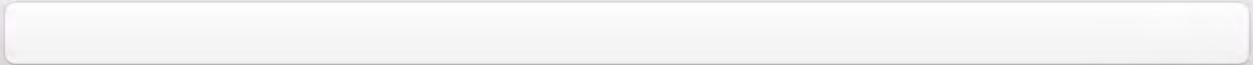
Select a space

Select a template

Cancel

Save

Add component



[← 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 *

Parent page

Enter page title *

Template Space

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](#) [More]

[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



Automation actions:

- Create pages for recurring meetings
- Auto-label pages of certain authors
- any activity in 90 days and send a slack summary
- which are due soon

Learnings



Create seamless
team alignment



Get cross-functional
projects done faster



Build scalable
frameworks



Visit Confluence product guides

atlassian.com/software/confluence

