



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

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Agenda



Confluence
overview



User Experience
psychology



Aligning to
intentions



Examples of
real sites

Agenda



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overview



User Experience
psychology

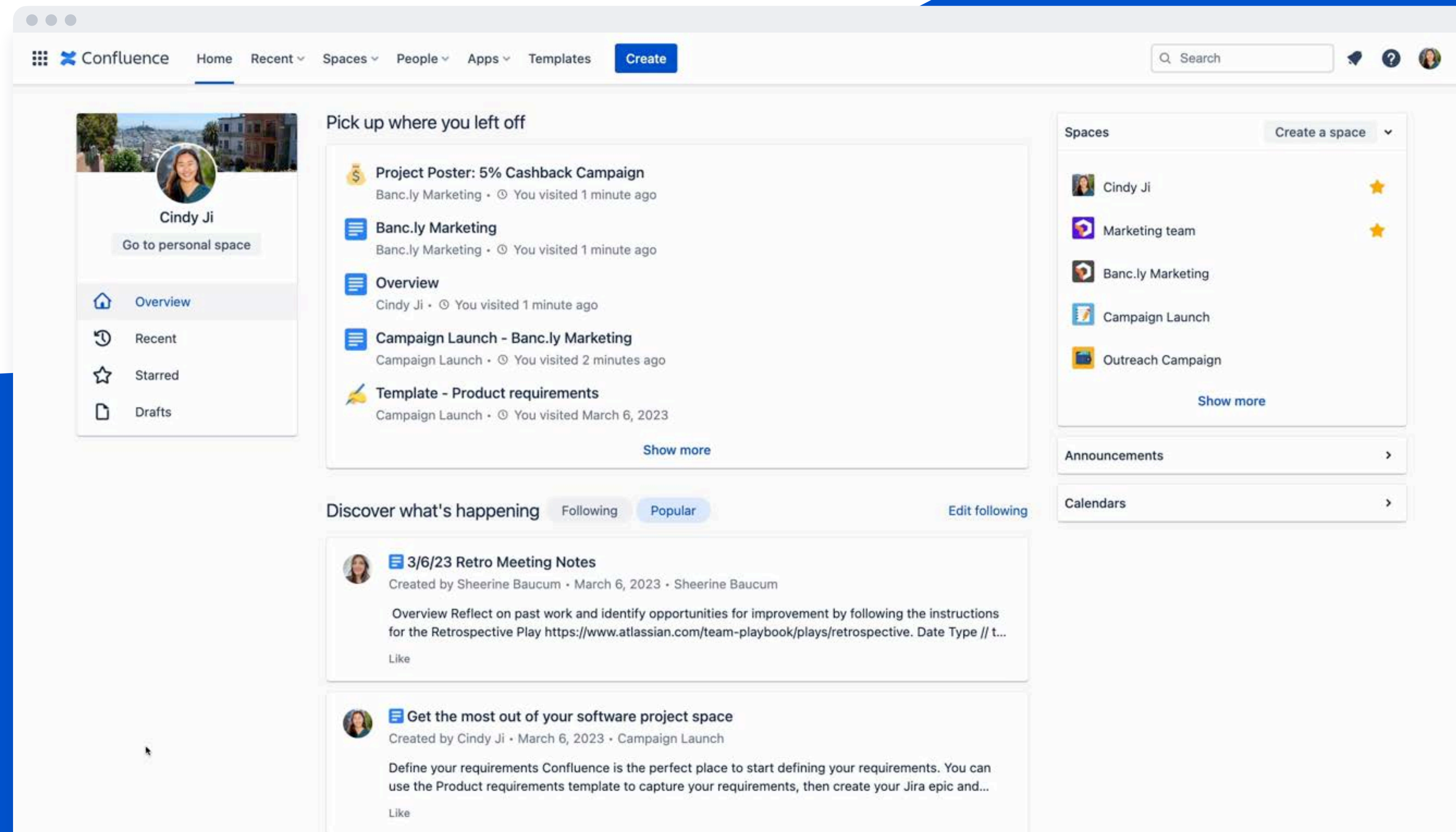


Aligning to
intentions



Examples of
real sites

Confluence is your team's remote workspace

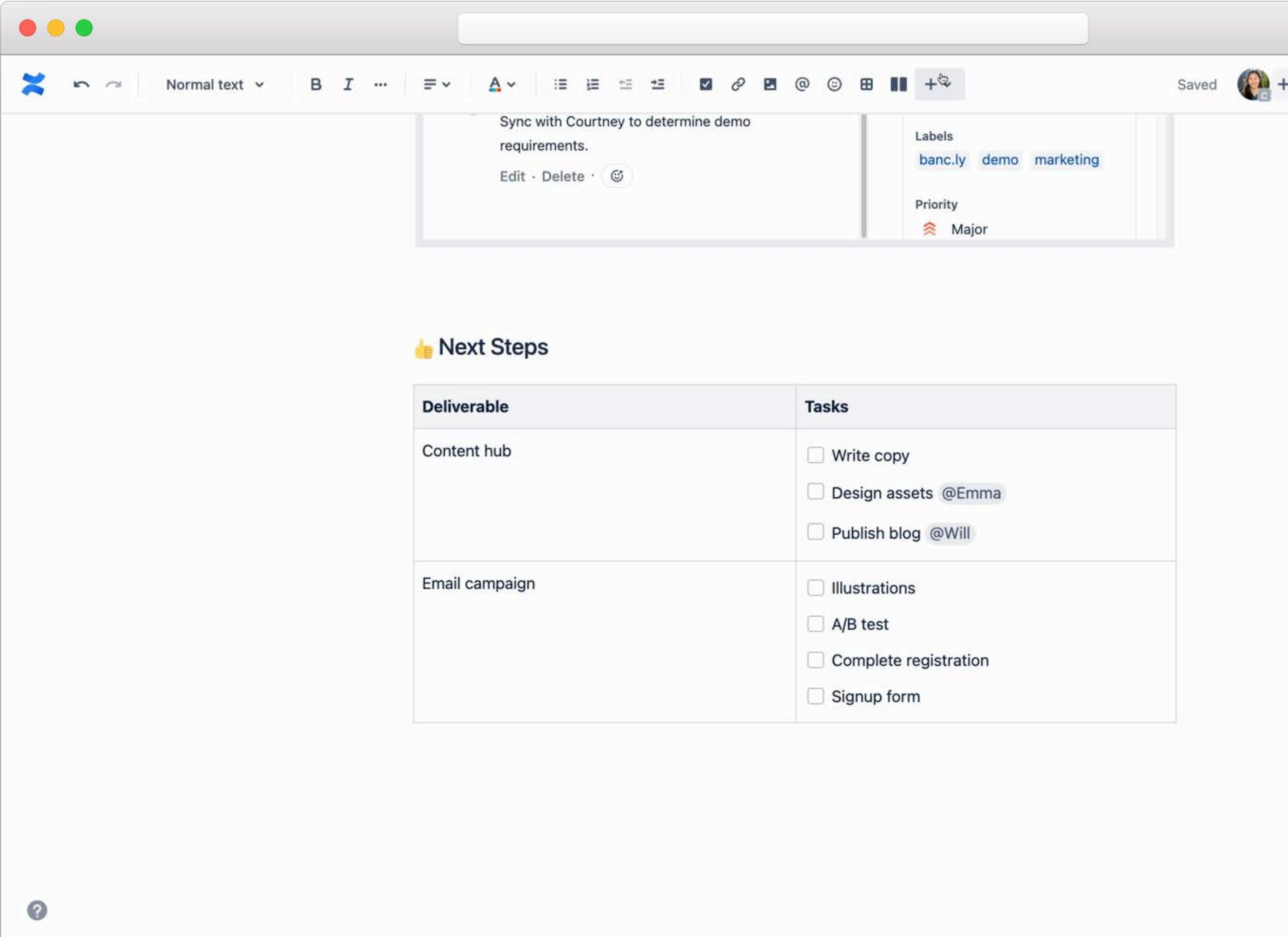


Tools that organize work

Macros

Integrations

Smart Links

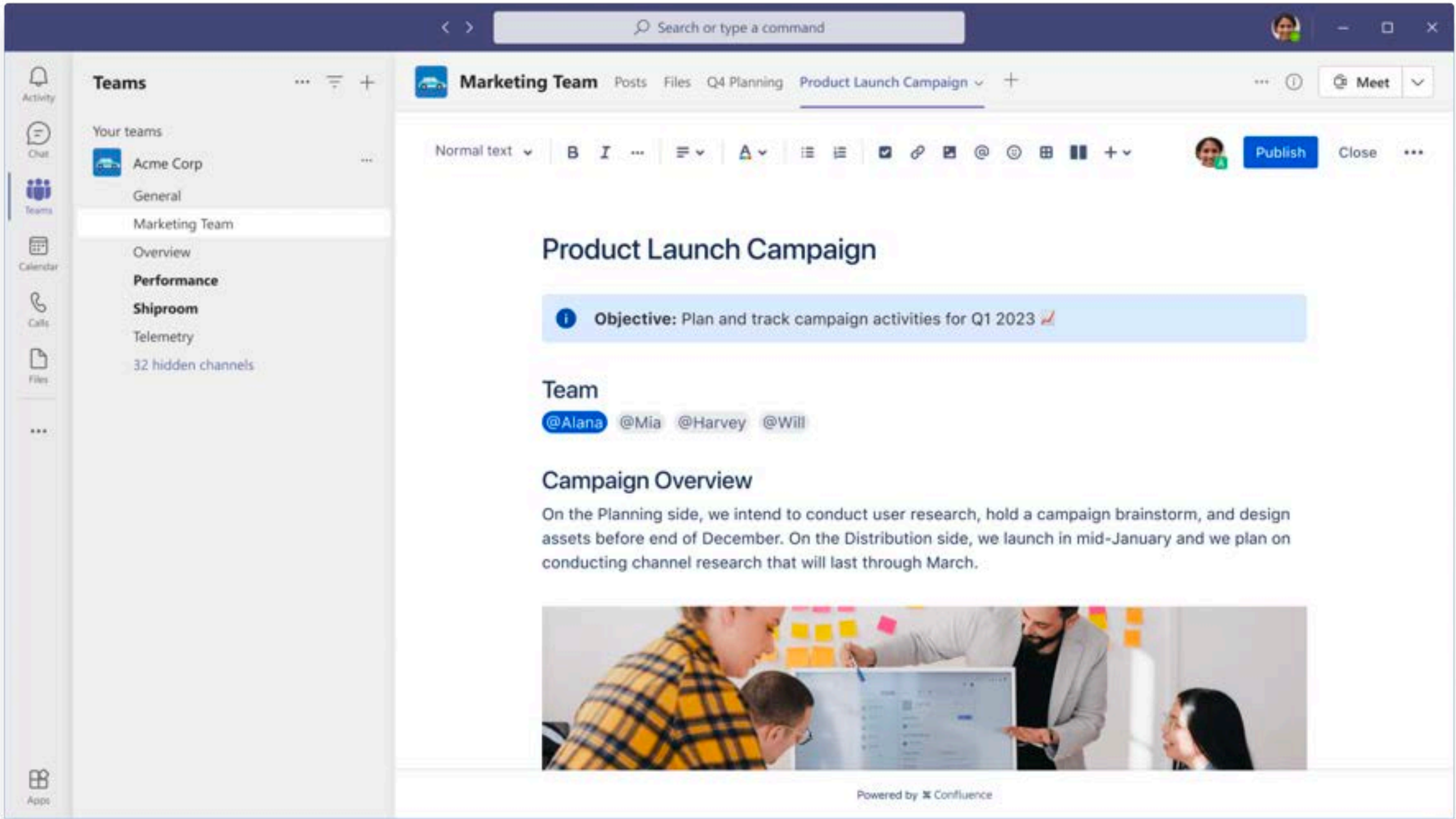
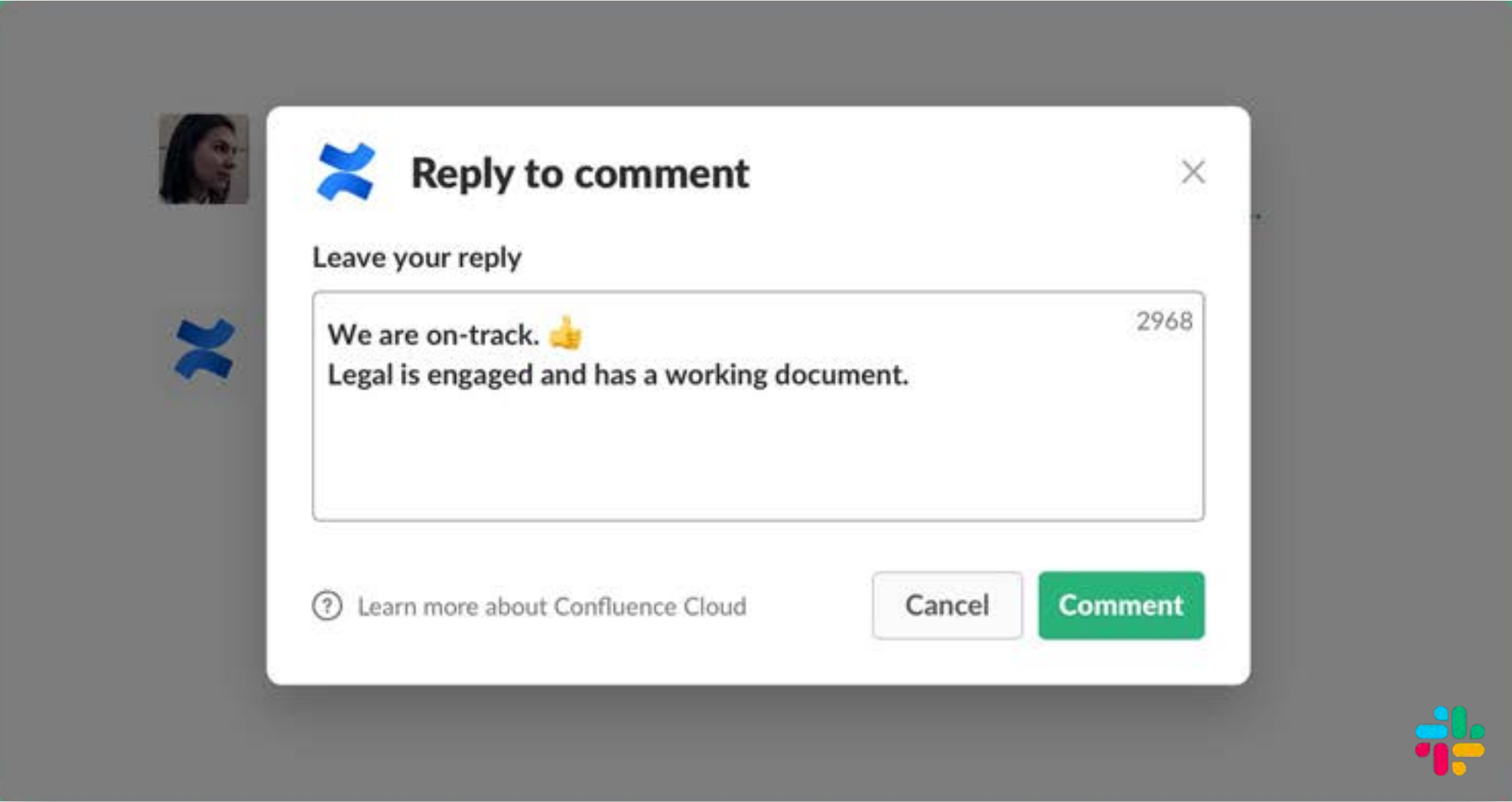


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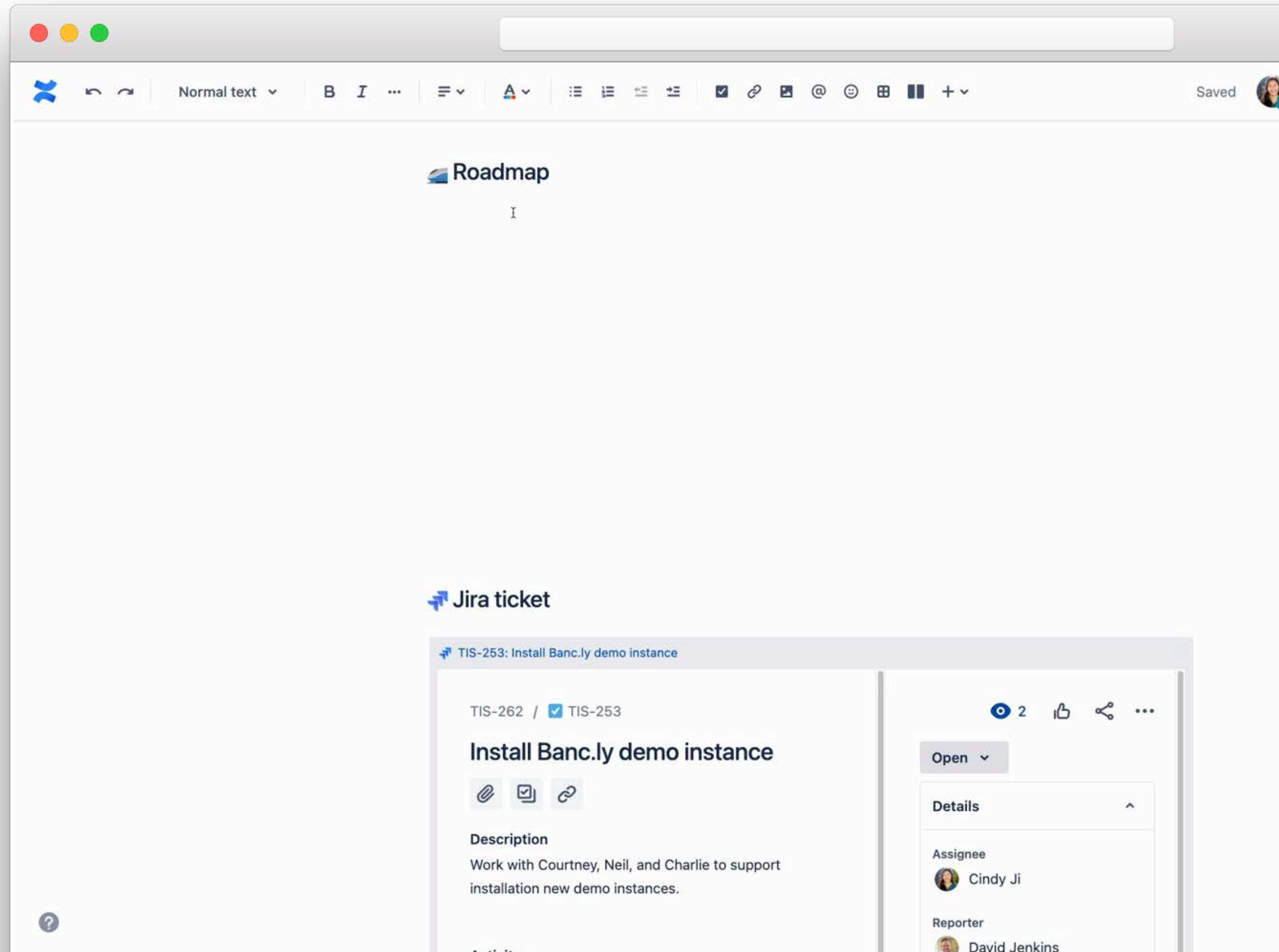


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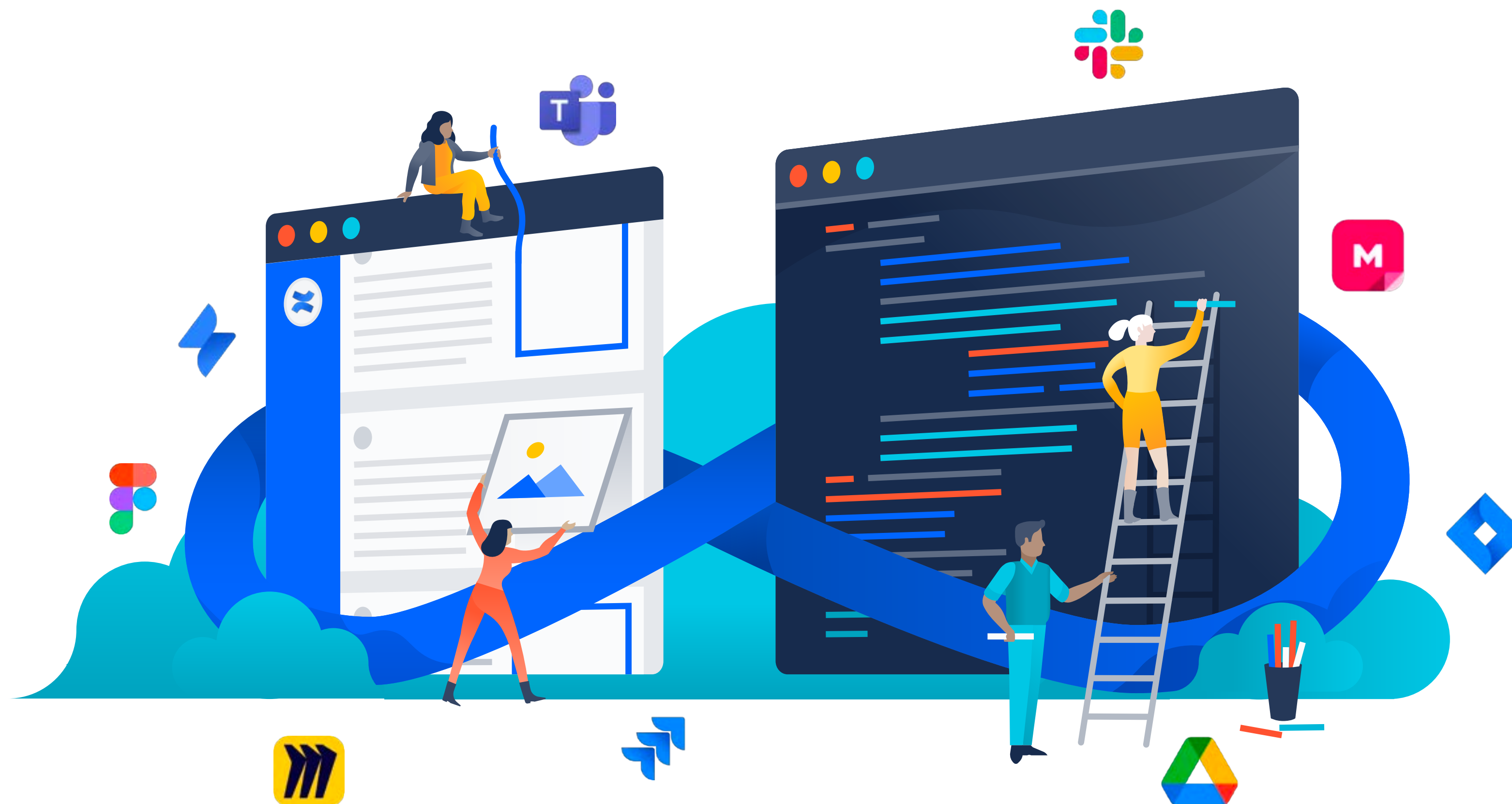
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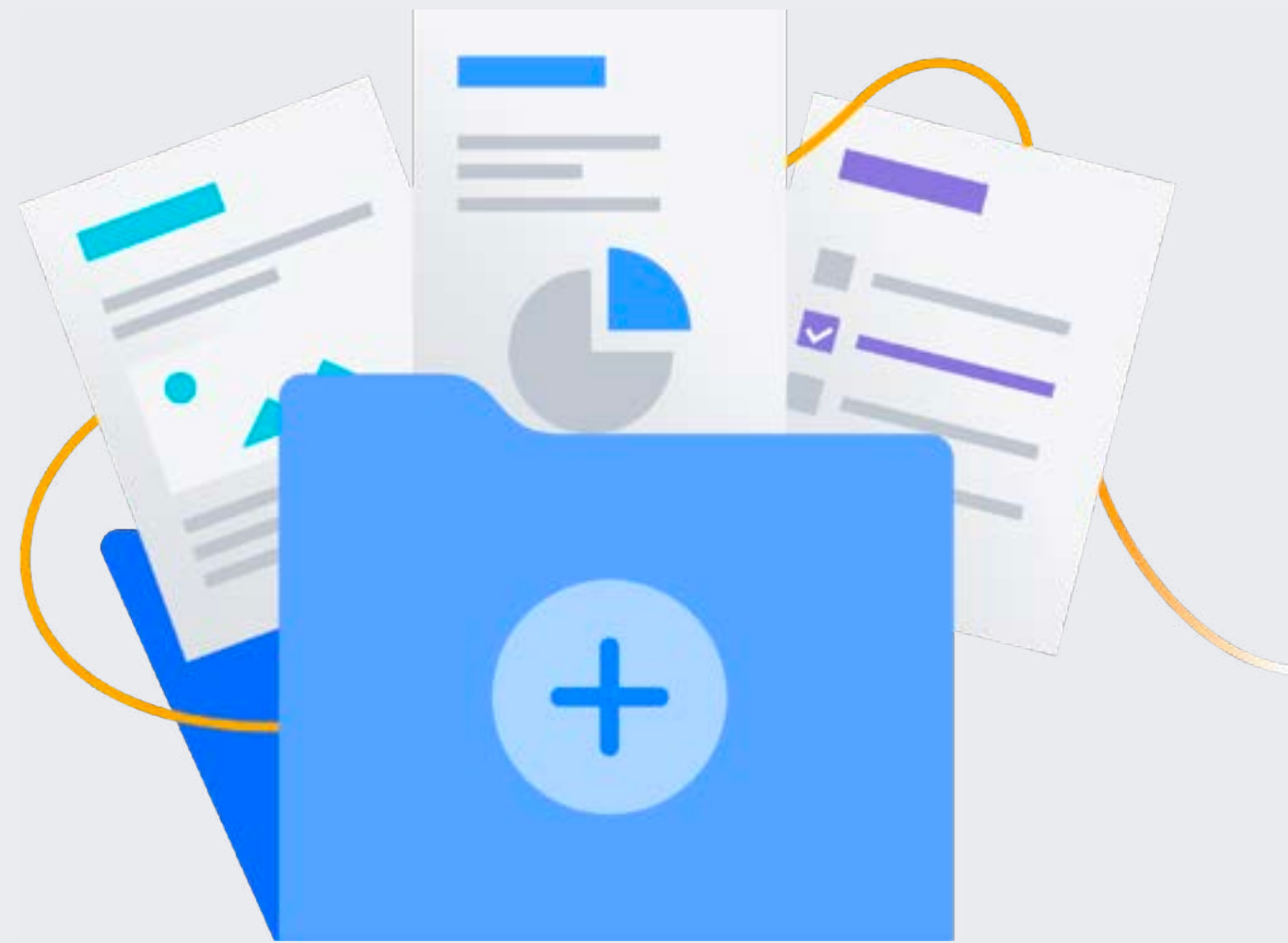


96% of customers agree that Confluence has **superior integrations**

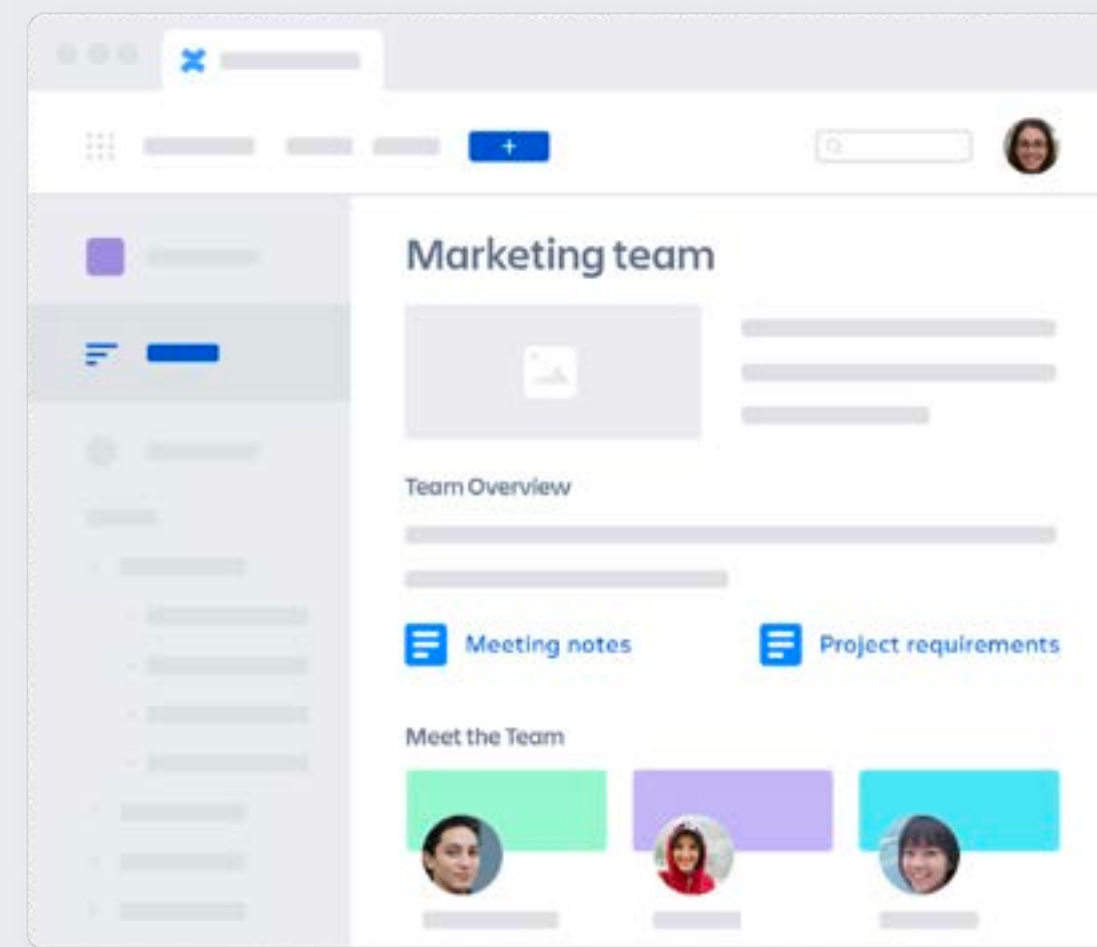
Try Confluence with Slack, Jira, Microsoft Teams, or 3,000 other apps



Top Confluence use cases



Knowledge sharing

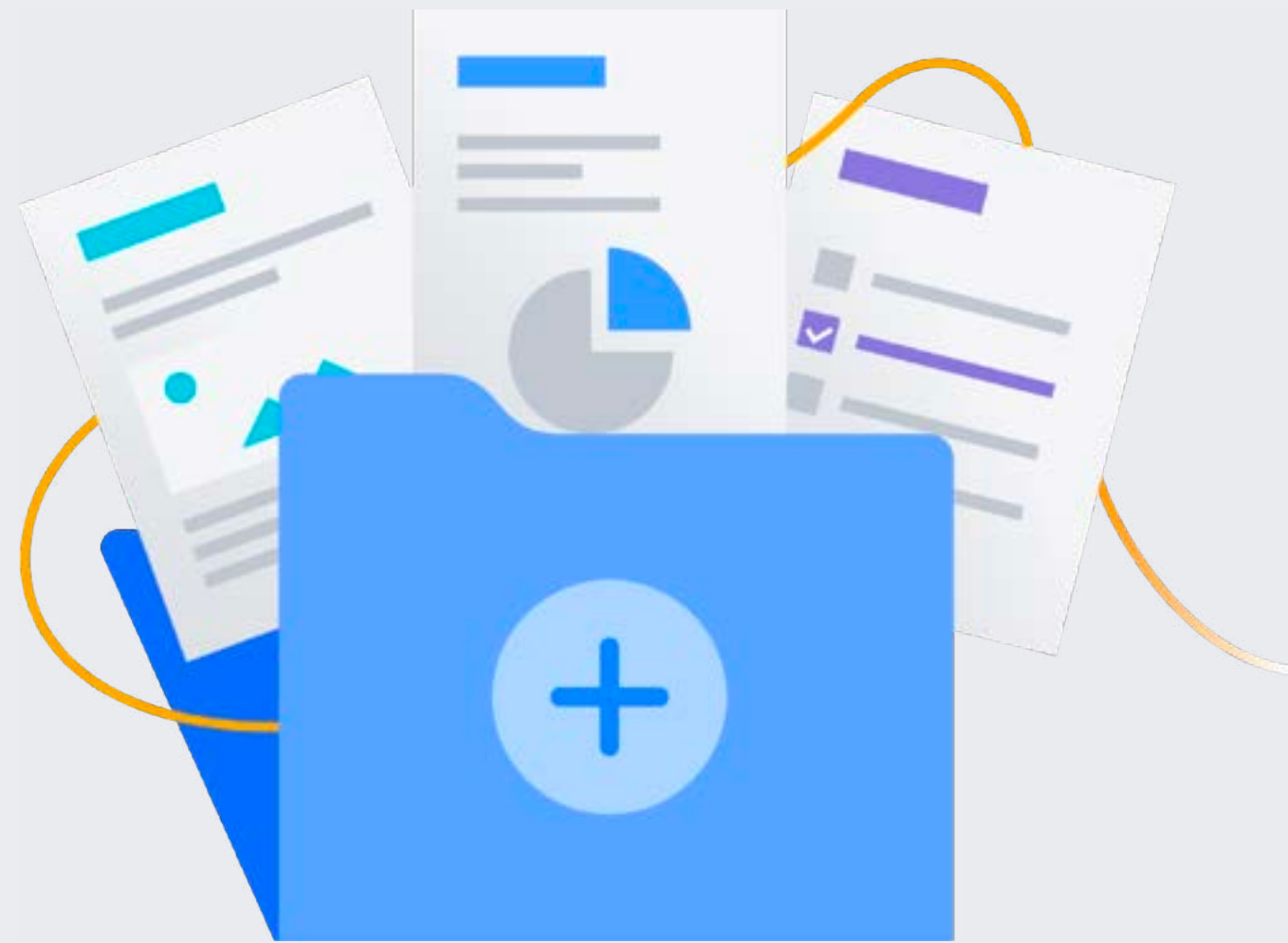


Project collaboration

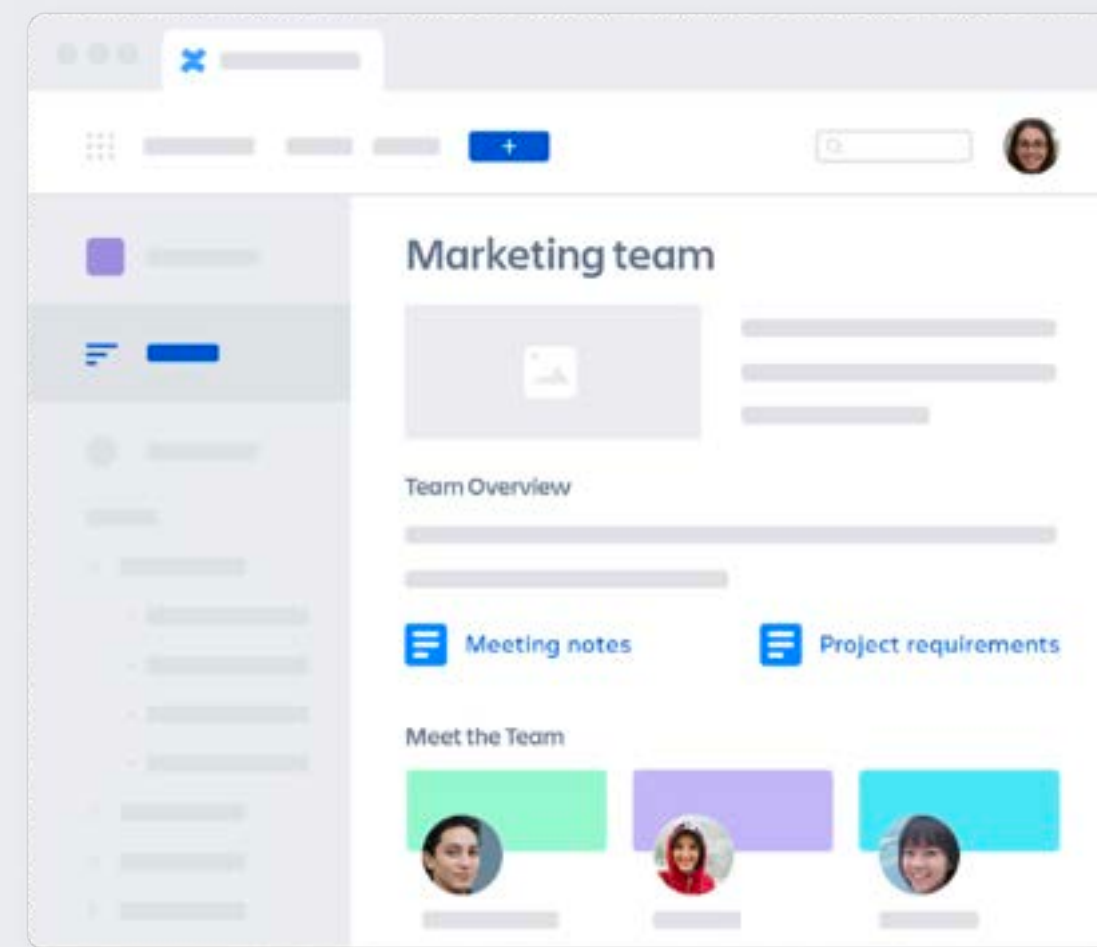


Company-wide collaboration

Top Confluence use cases



Knowledge sharing



Project collaboration




Company-wide collaboration

Archived pages

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



 **Welcome to your team space!**

[Team](#) | [Overview](#) | [Team news](#) | [Recently updated](#)

 Search for a page

 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

Archived pages

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 signups as we raise awareness

Gross new customers as we supercharge our card

Contact us

- #bancly-marketing
- marketing@bancly.com

Our team

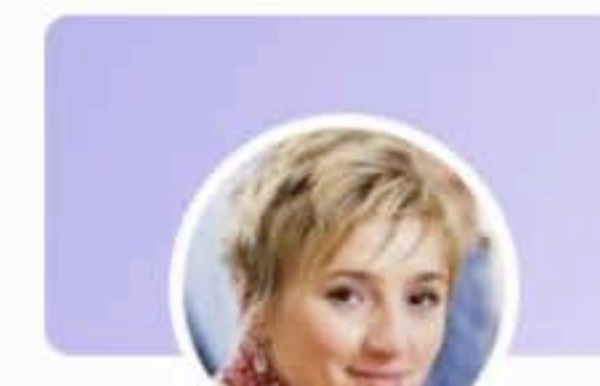
Mission

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



Market Engage

My Marketo

Marketing Activities

Design Studio

Database

Analytics

Admin

Give Feedback

Company, Inc.

Search

History

Notifications

Help

Astrid Bryant

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

OverviewStreamsAssetsSetupMy TokensMembers

Program: OFF

ContentPeopleEngagement

Add Stream

Stream 1

Every Thu | 1:53 PM PDT

Enter Description

ContentTransition Rules

Add content

Stream 2

Set cadence

Enter Description

ContentTransition Rules

Add content

Stream 3

Set cadence

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ContentTransition Rules

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psychology

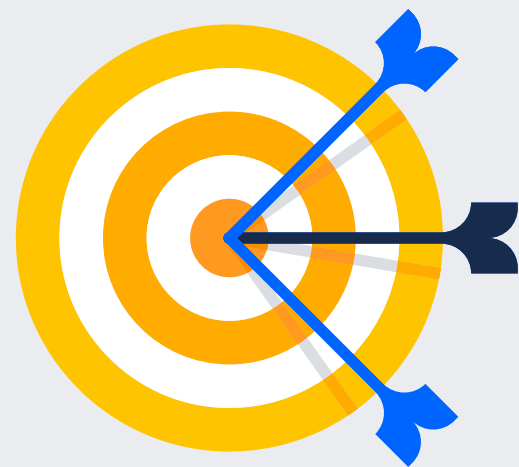


Aligning to
intentions



Examples of
real sites

Understanding user behavior



Attention

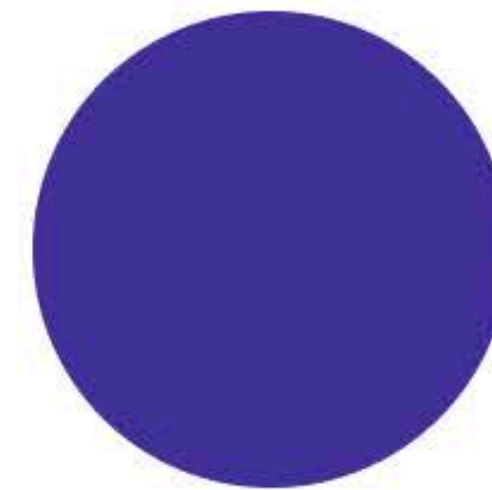
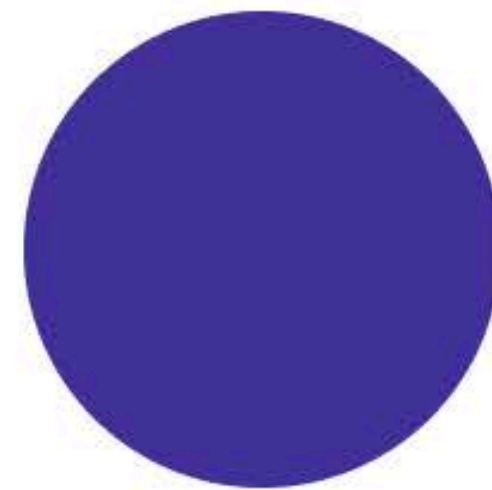
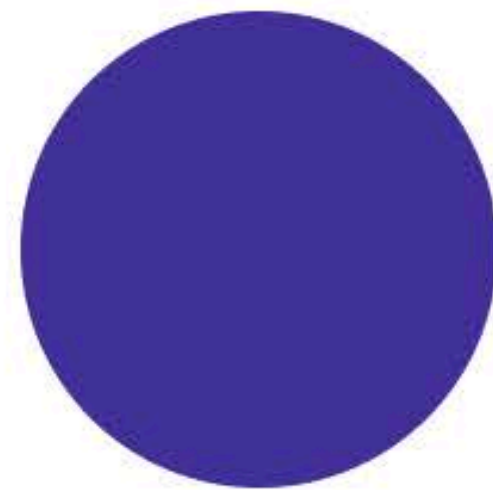
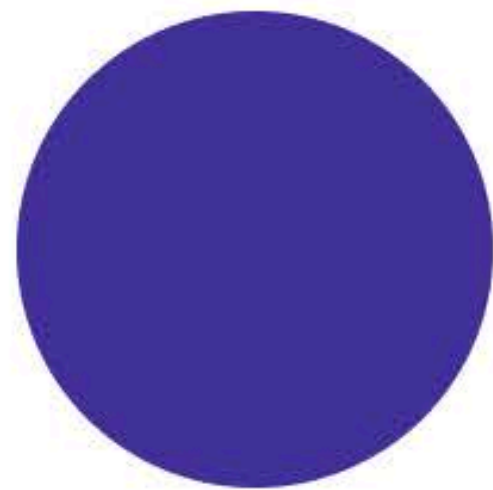


Memory

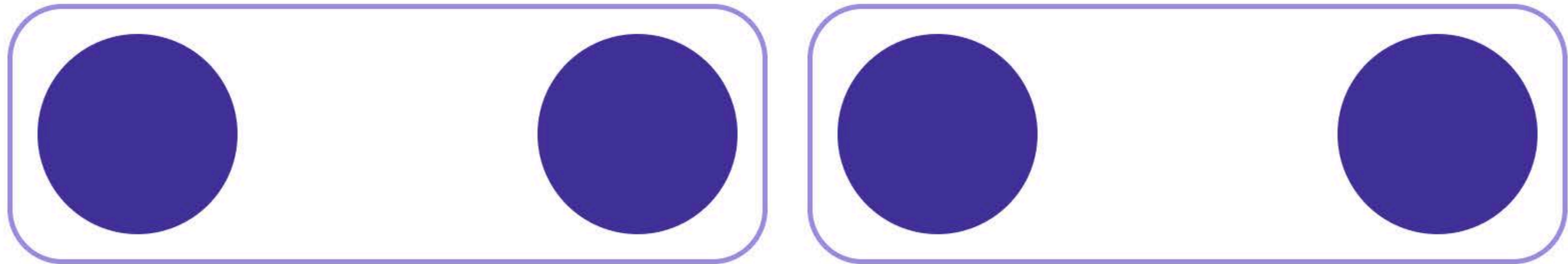


Influence





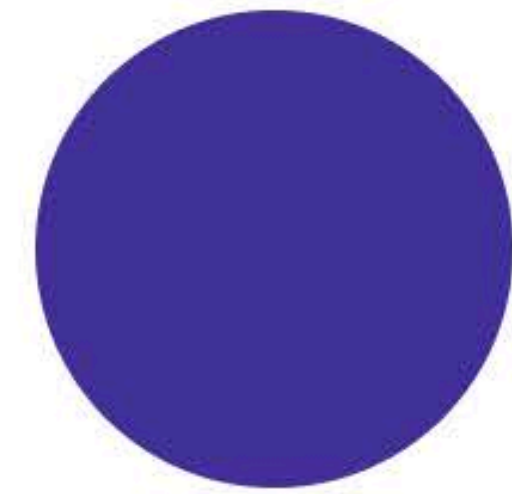
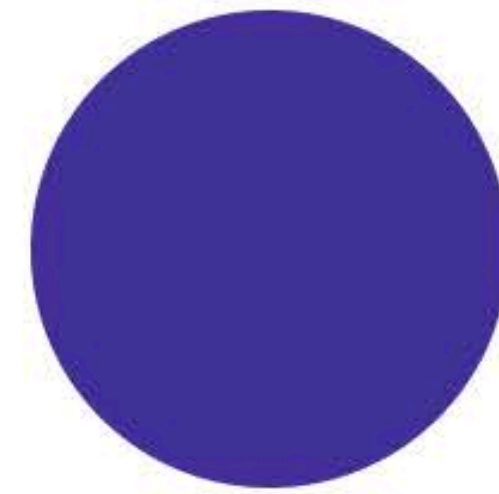
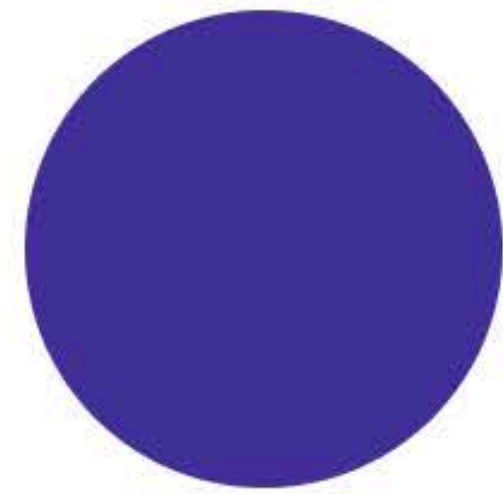
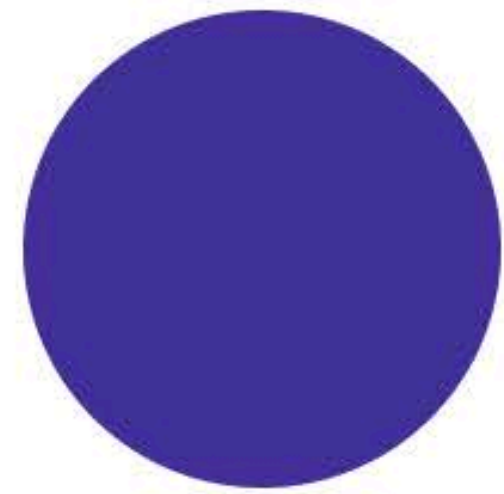
ATTENTION



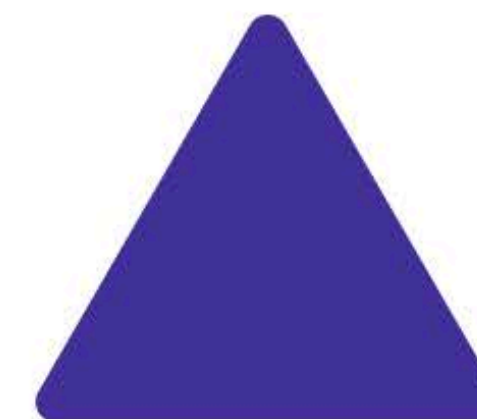
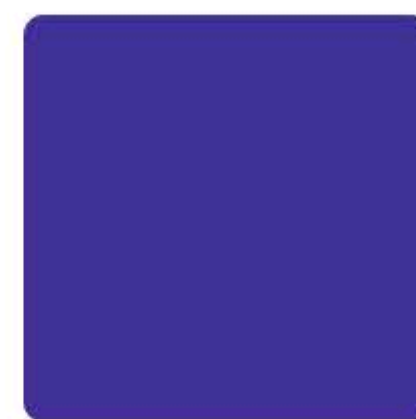
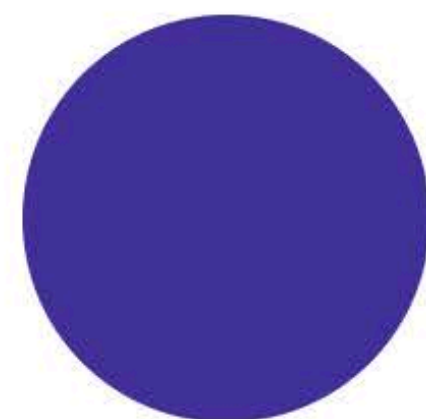
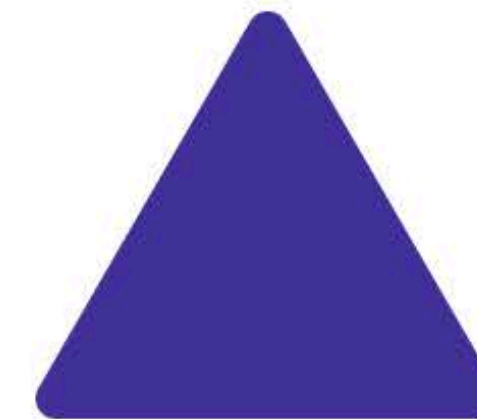
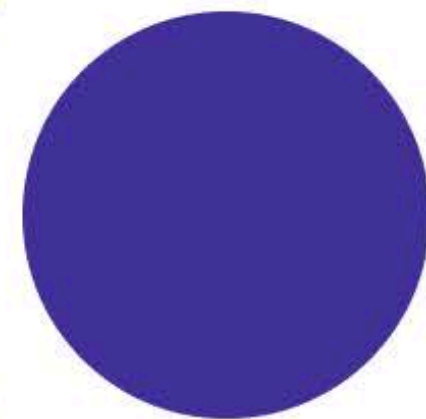
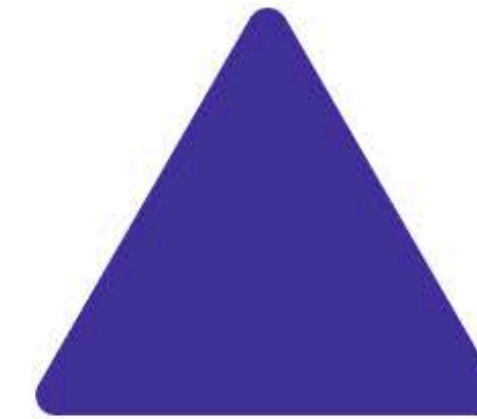
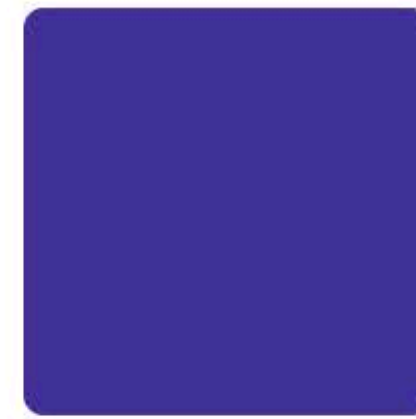
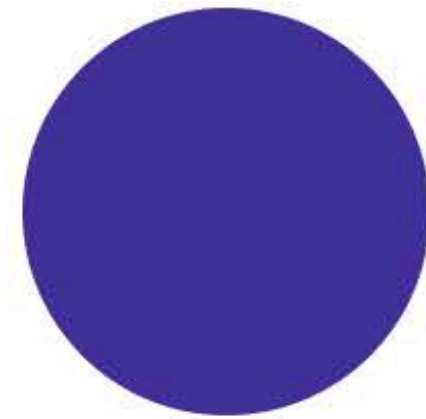


Gestalt principle of **common region**

 ATTENTION



 ATTENTION







Spangled drongo



MEMORY

Spangled drongo bird

Recognition is easier
than recall.



INFLUENCE



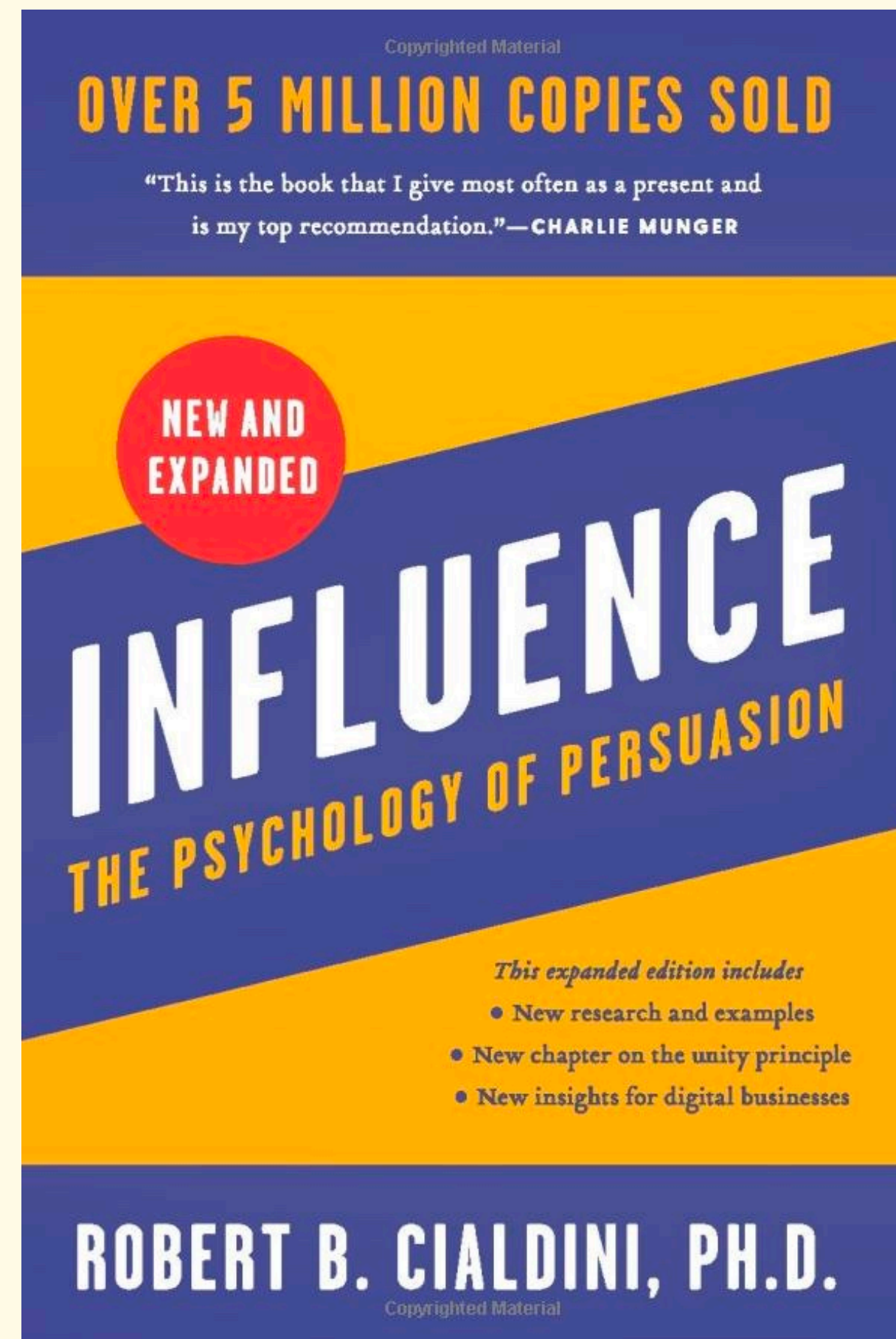
INFLUENCE

Social proof

‘Liking’ principle



Social proof



‘Liking’ principle



Social proof



INFLUENCE

‘Liking’ principle

Source

Agenda



Confluence
overview



User Experience
psychology



Aligning to
intentions



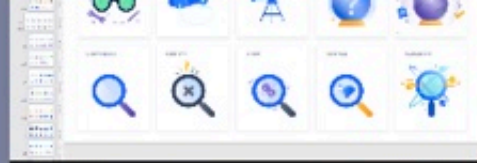
Examples of
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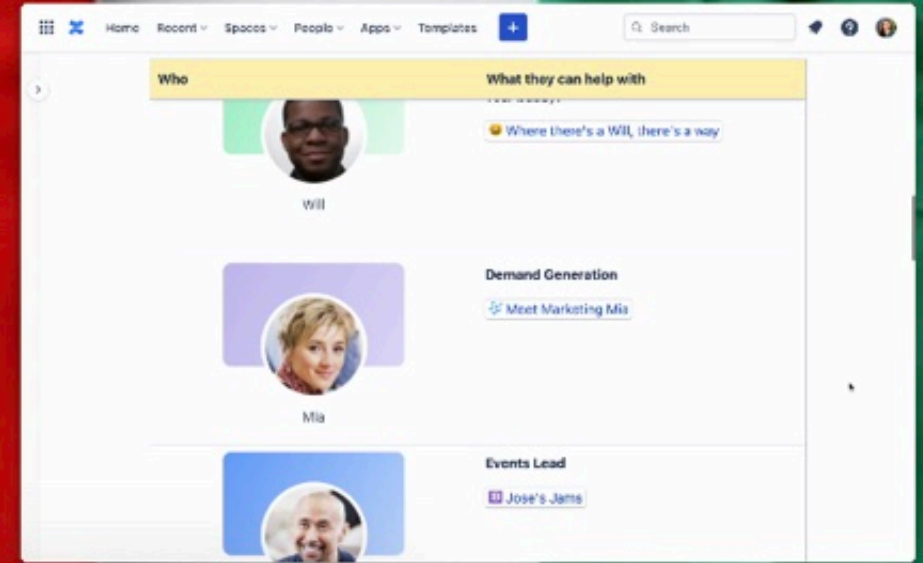
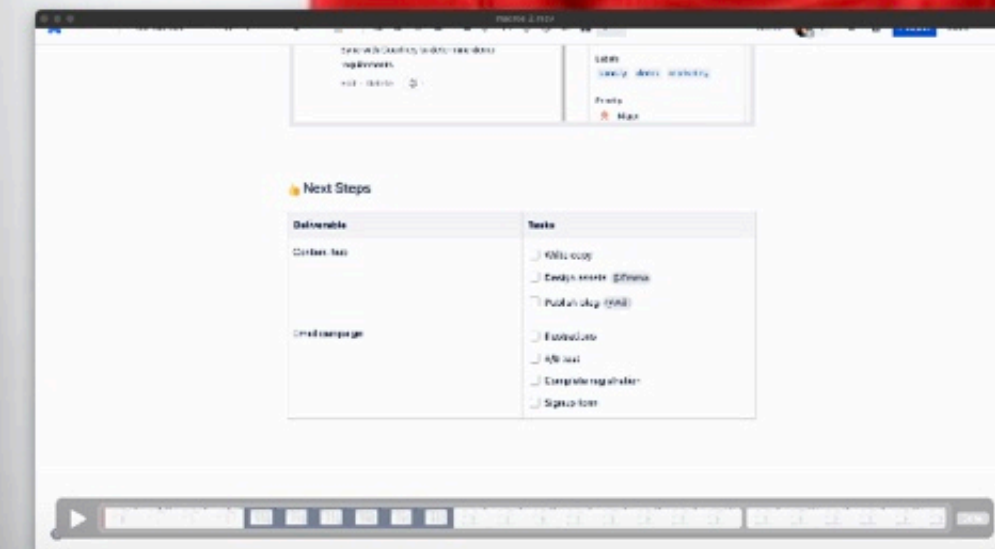
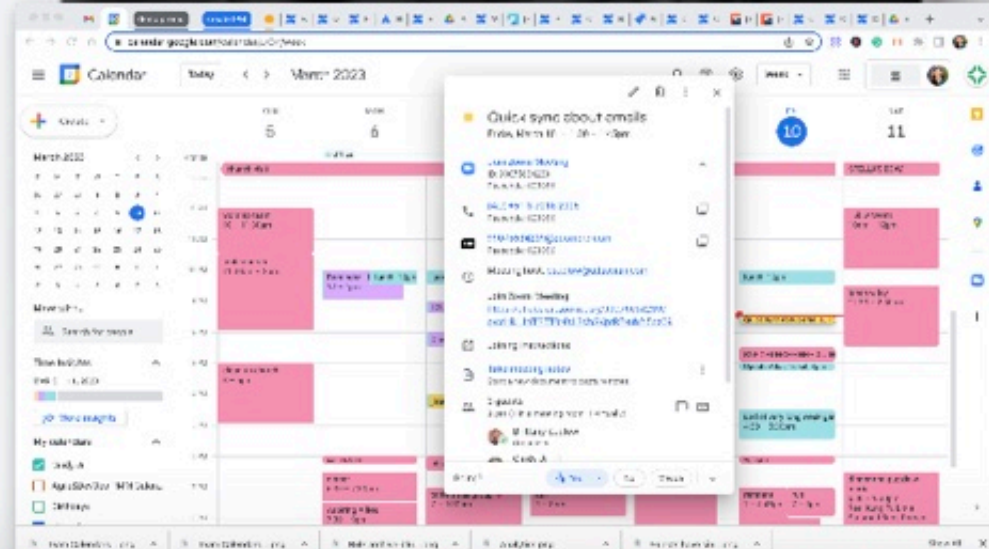
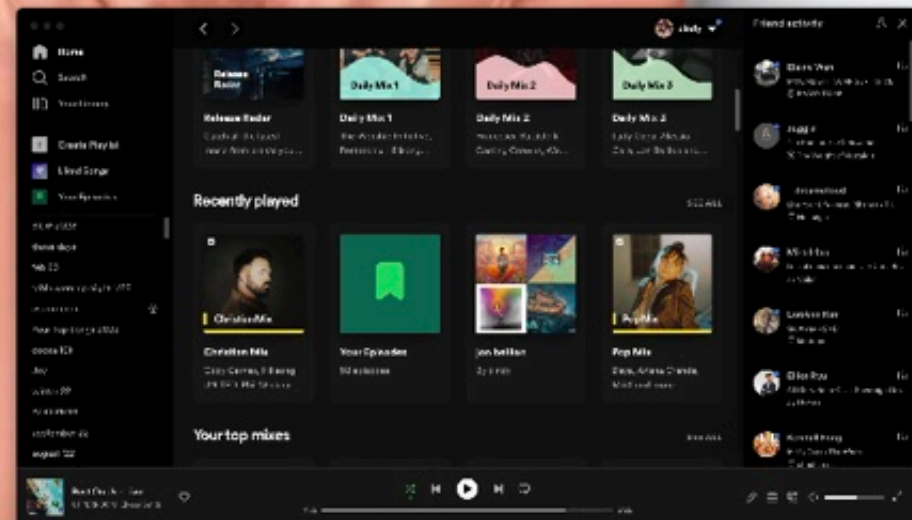
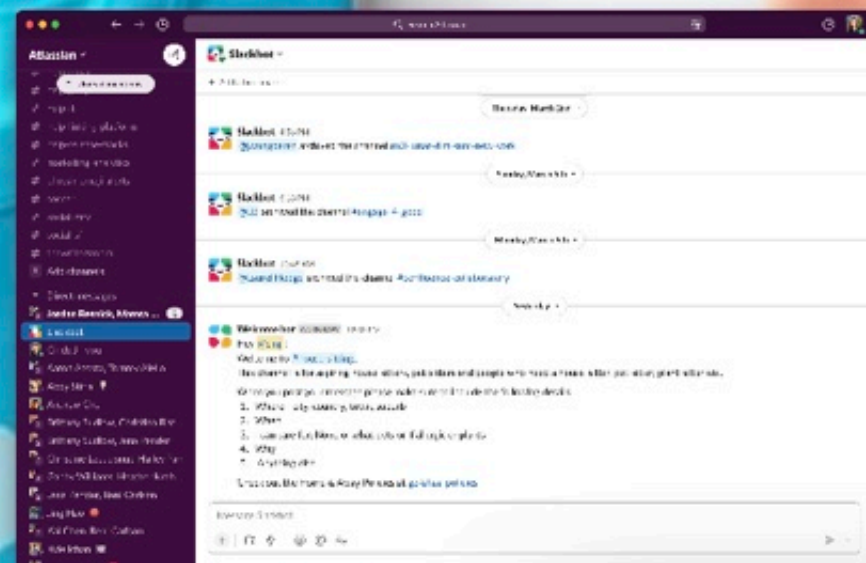
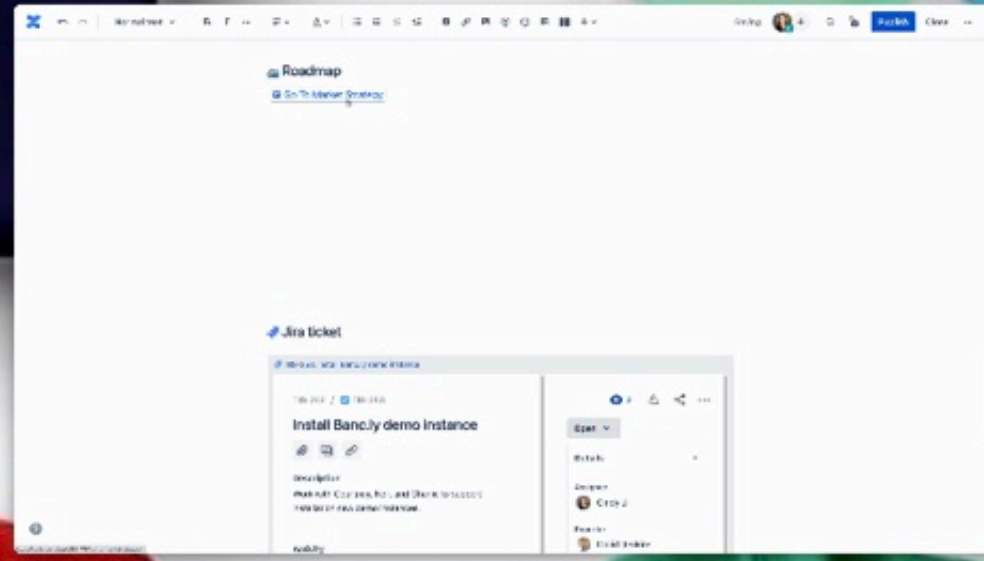
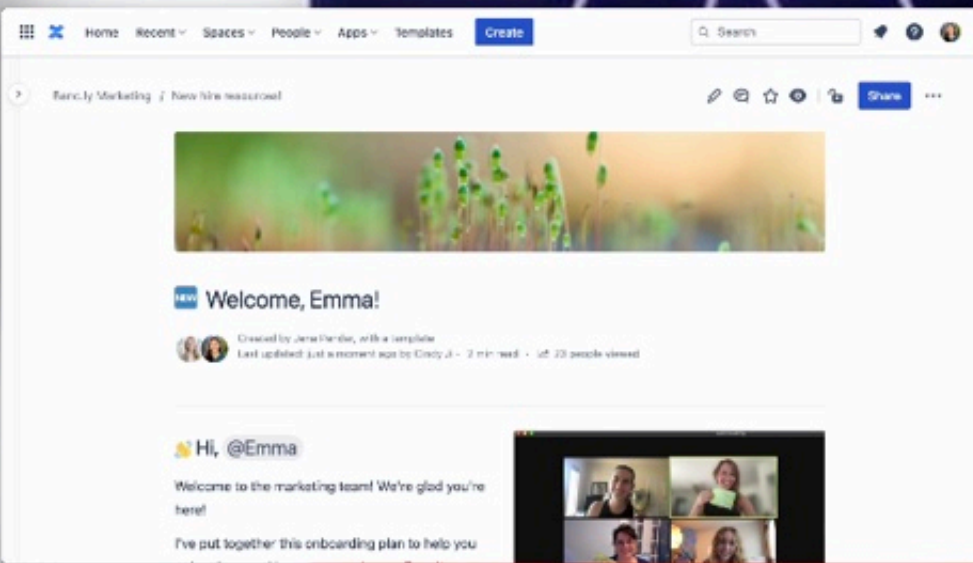
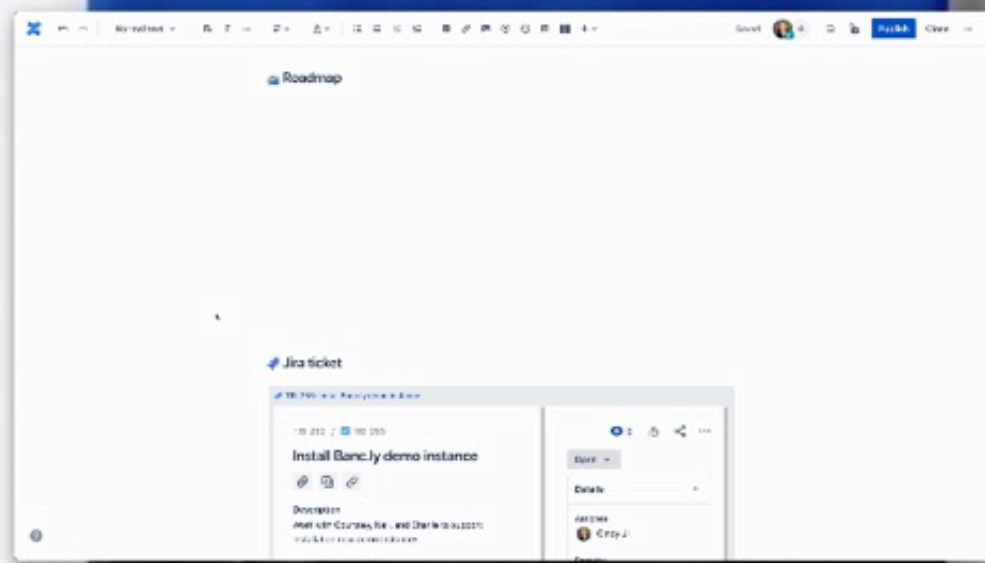
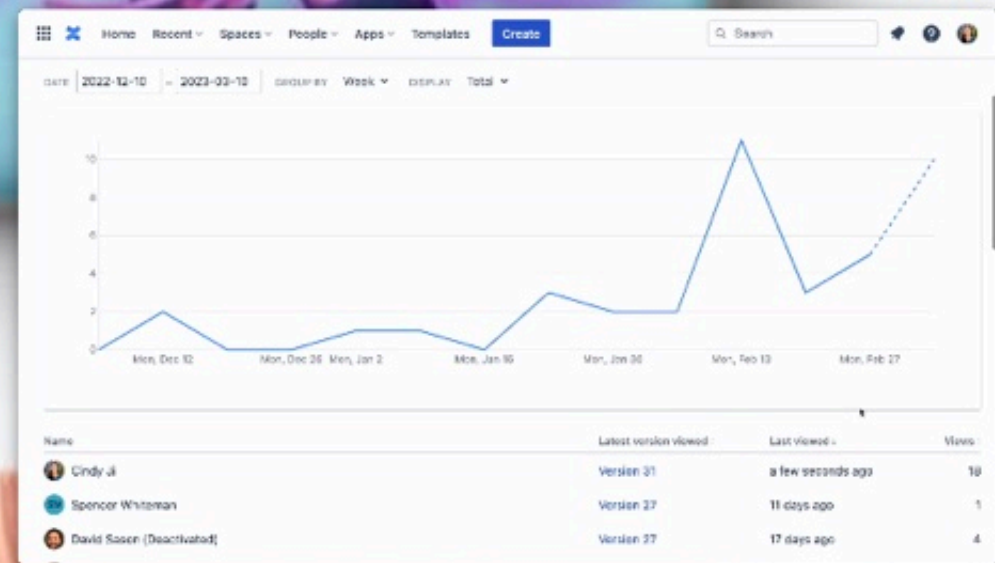
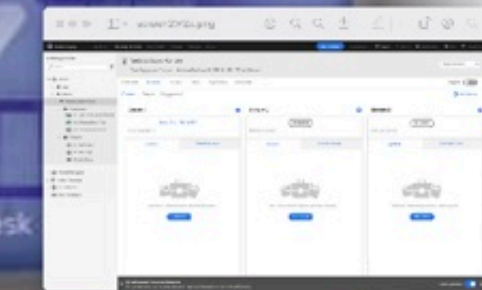
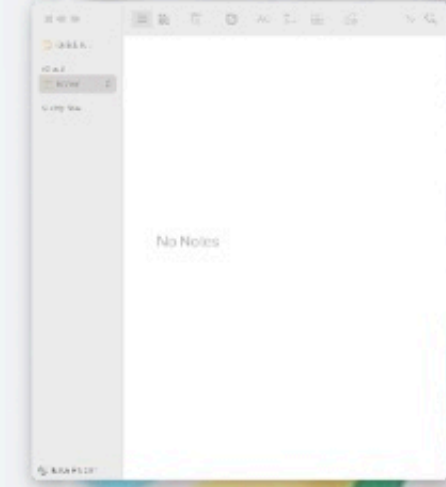
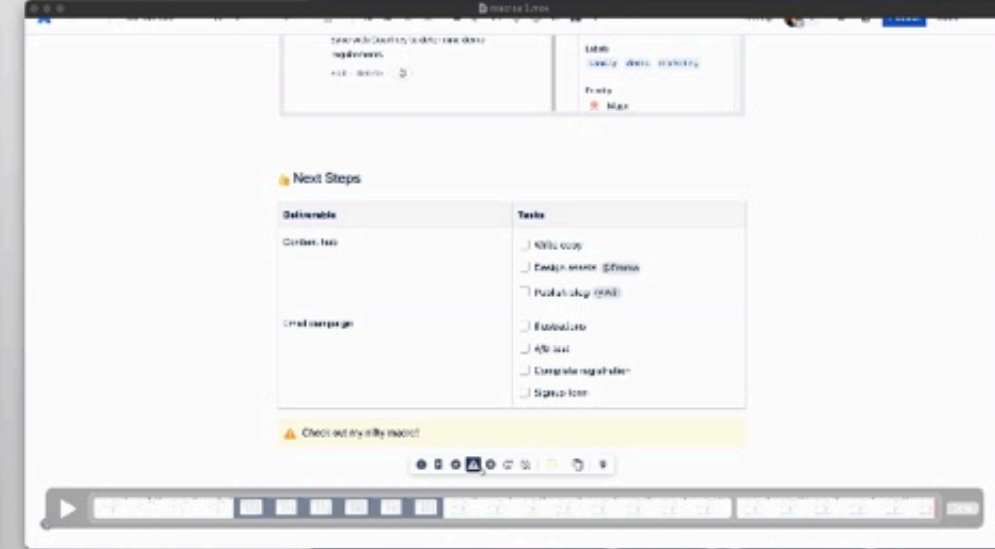
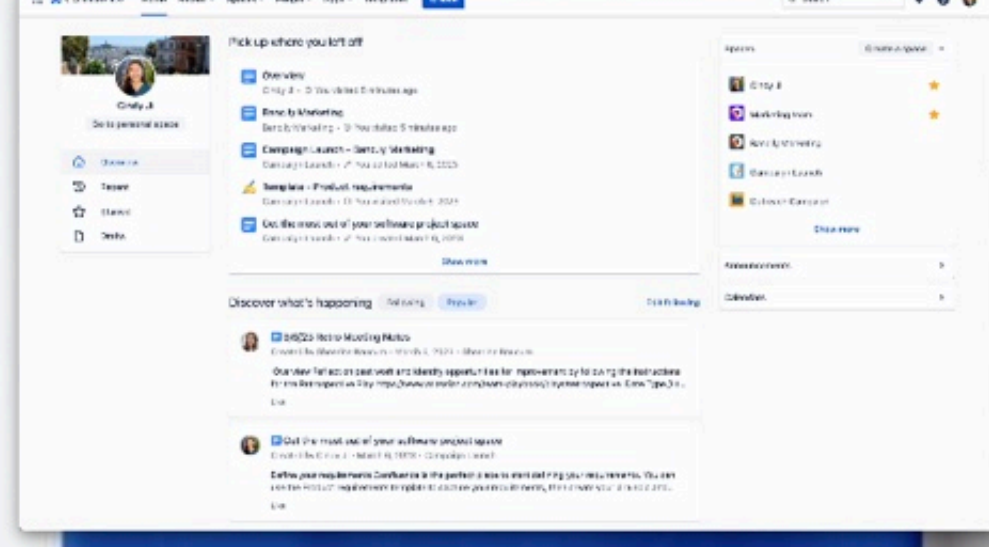
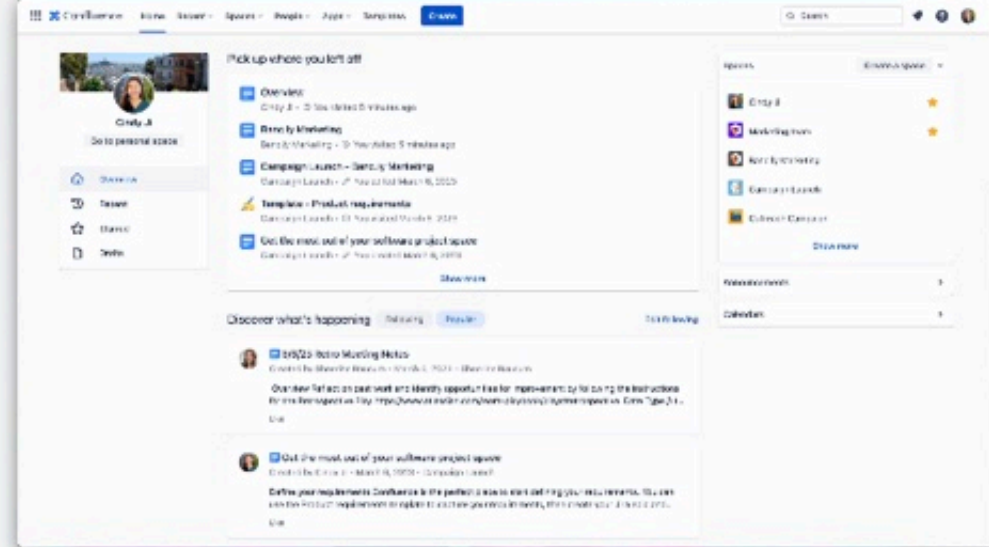
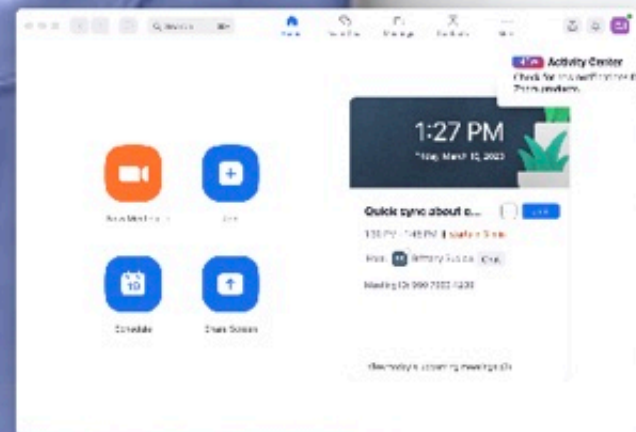
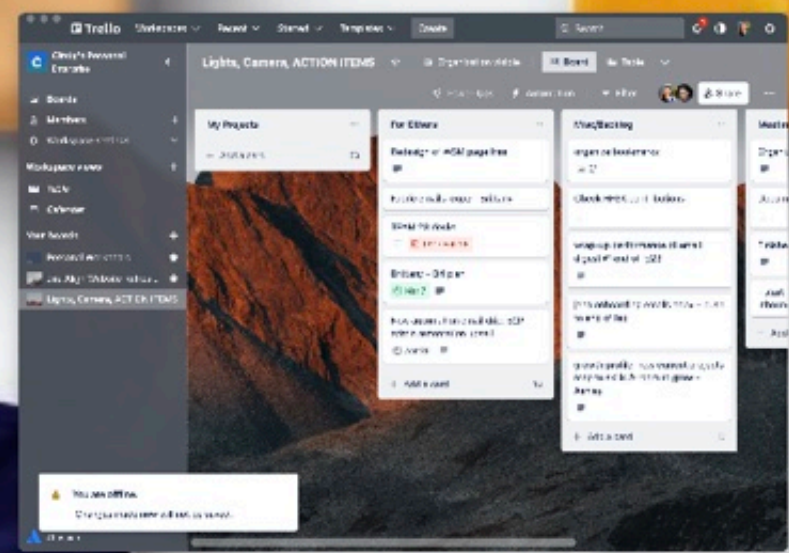
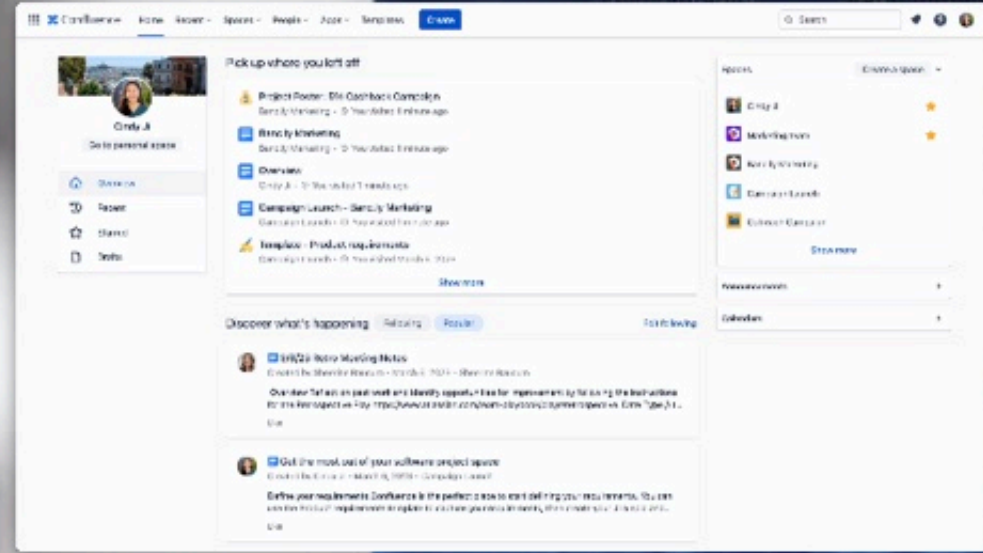
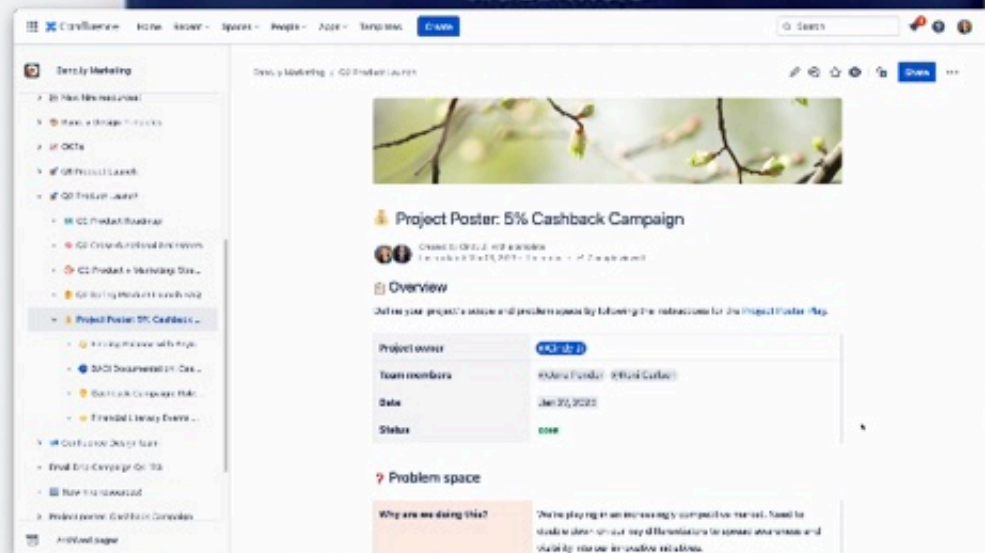
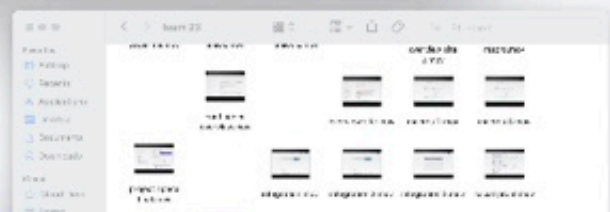
Desktop 1



Google Chrome



Keynote

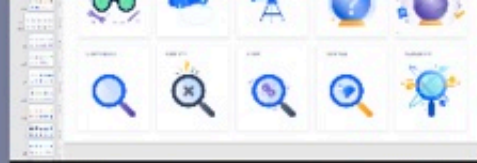




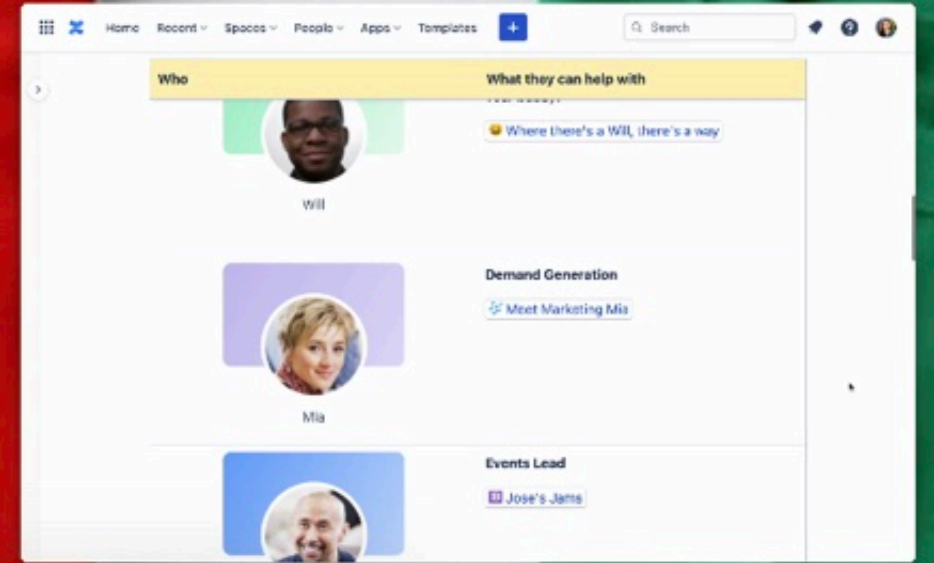
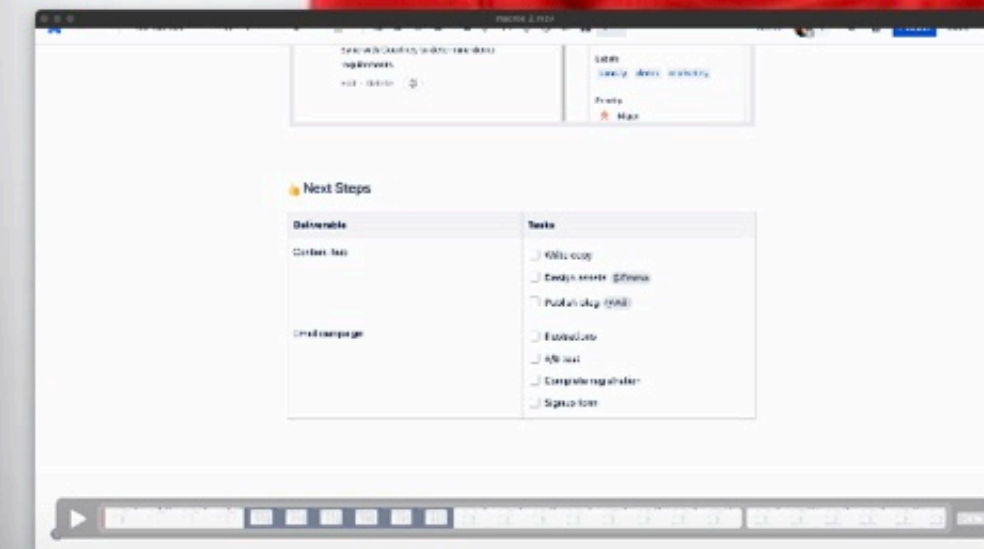
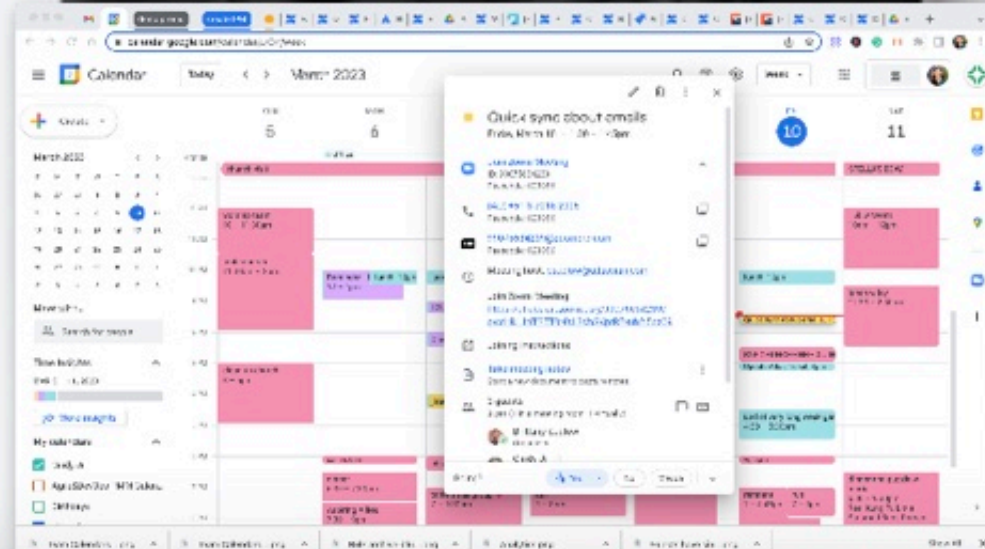
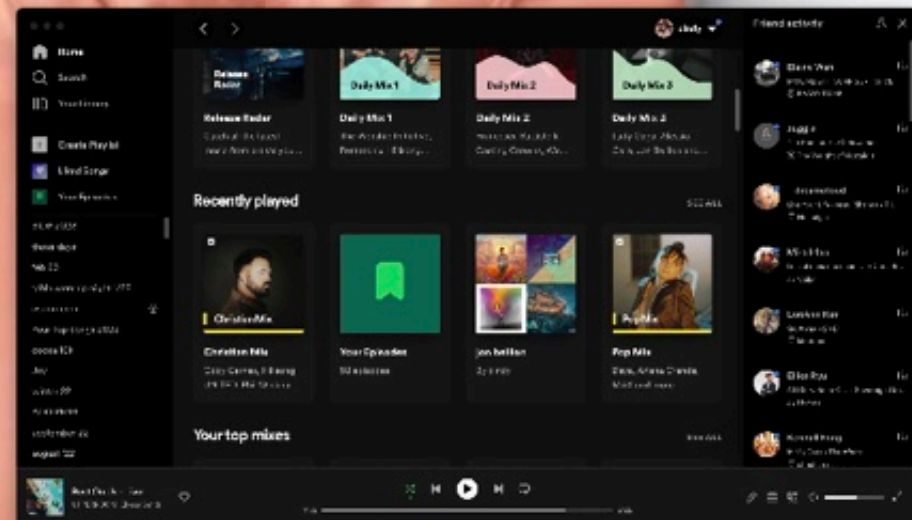
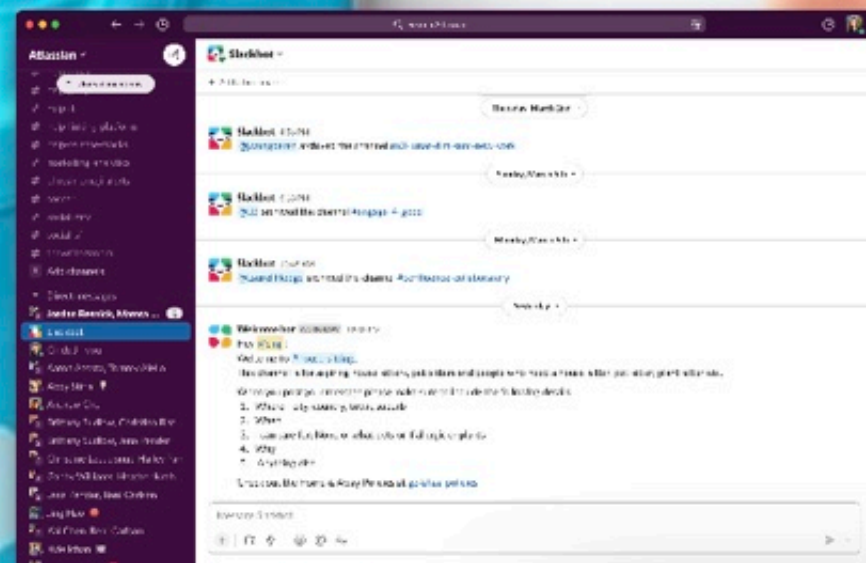
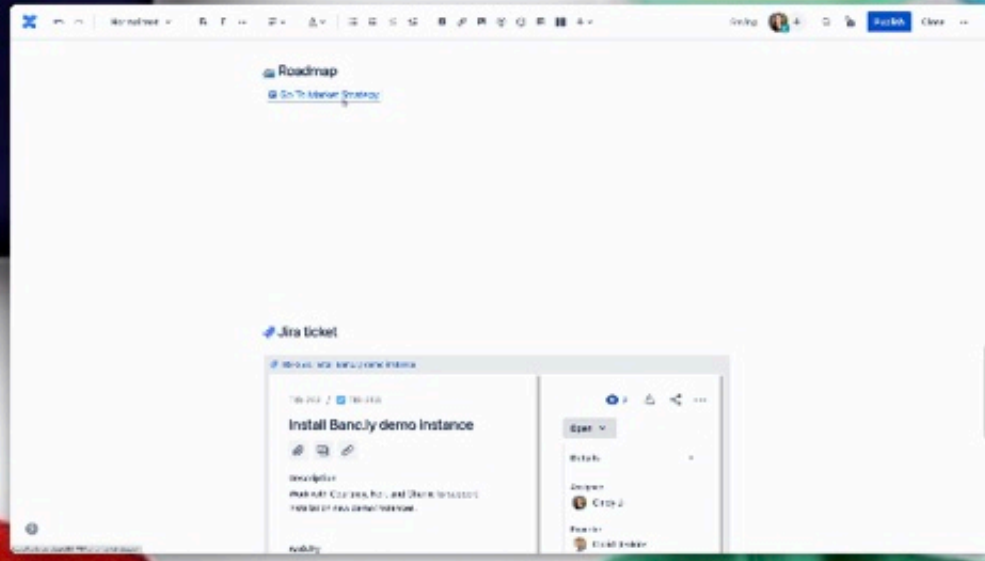
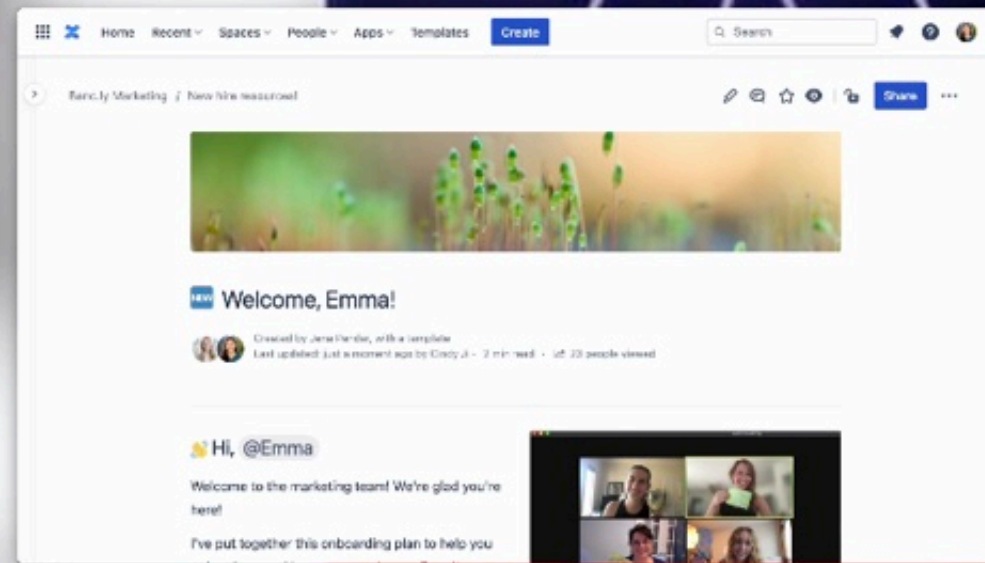
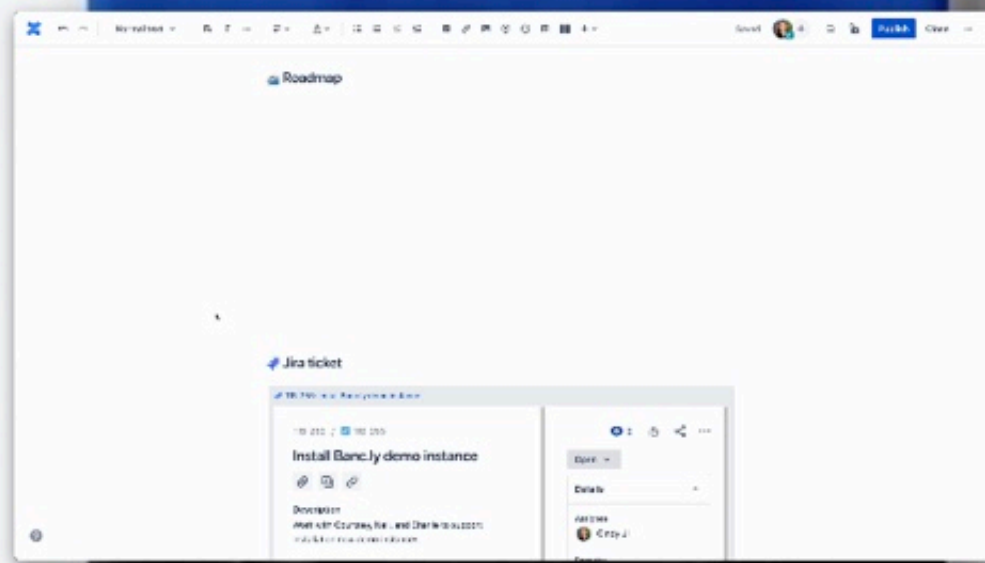
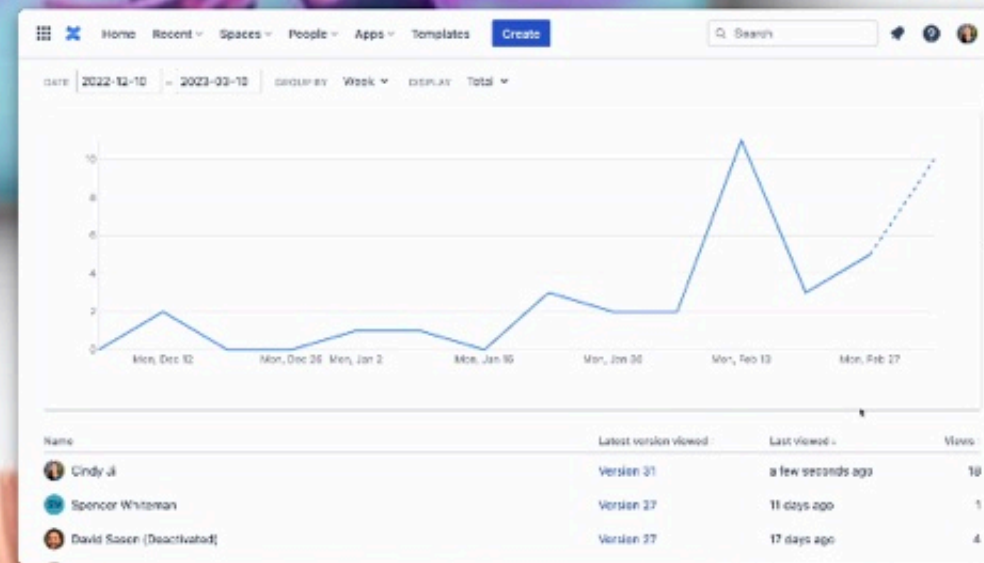
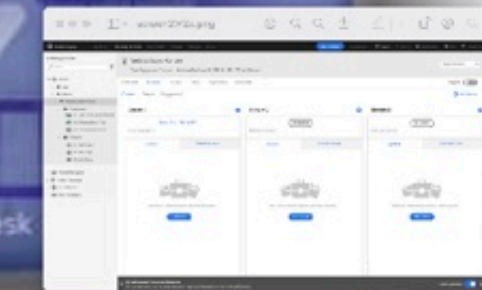
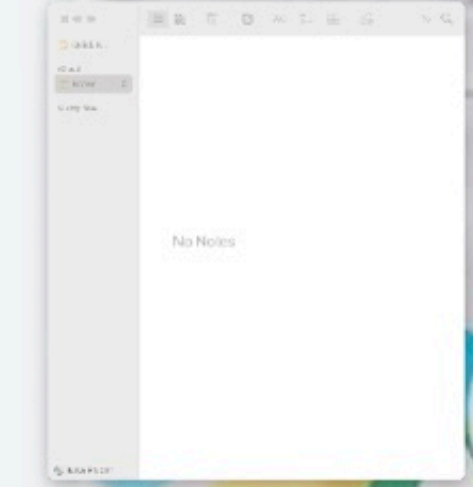
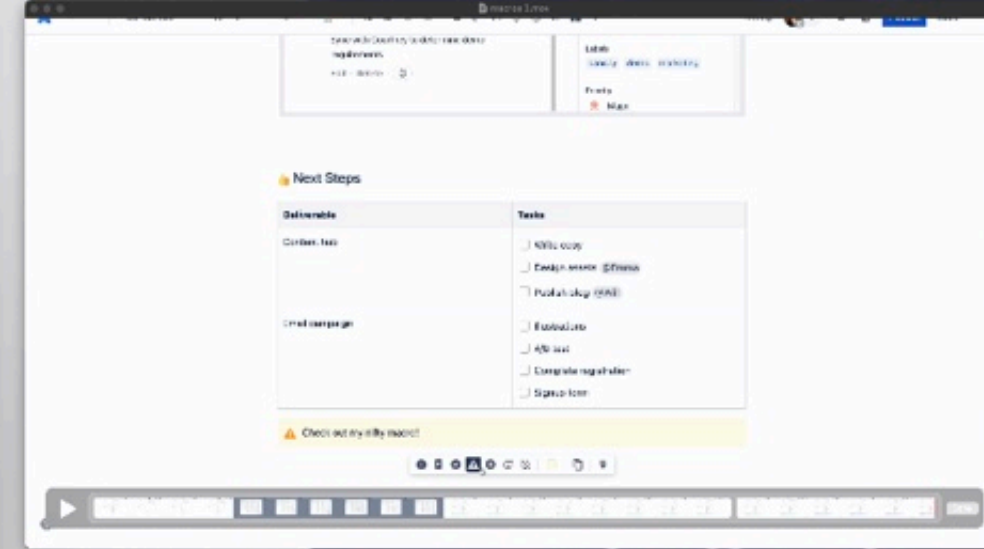
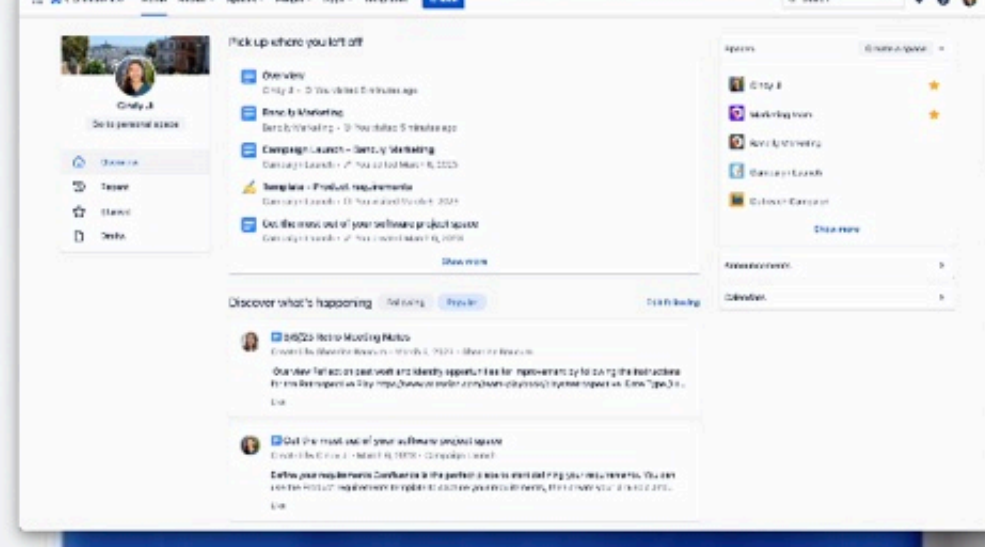
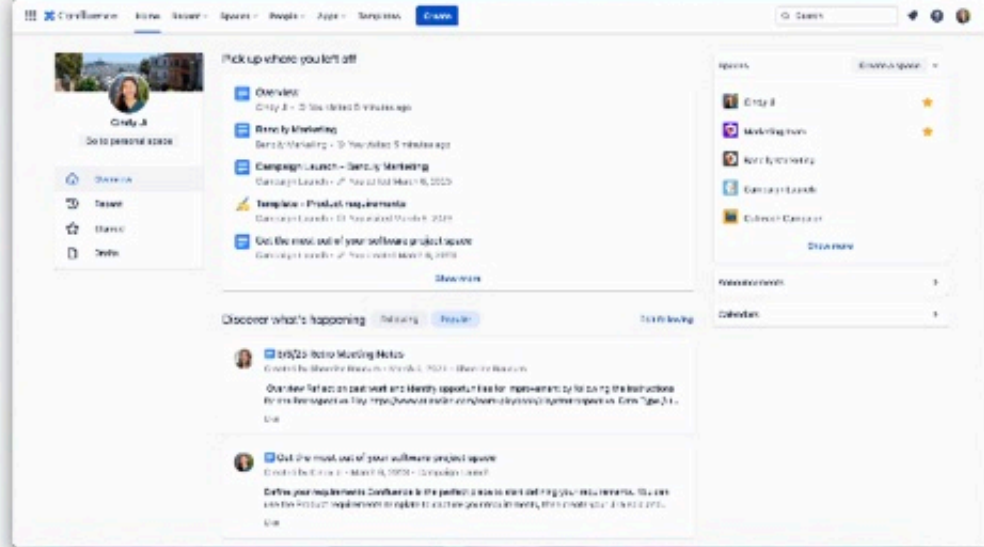
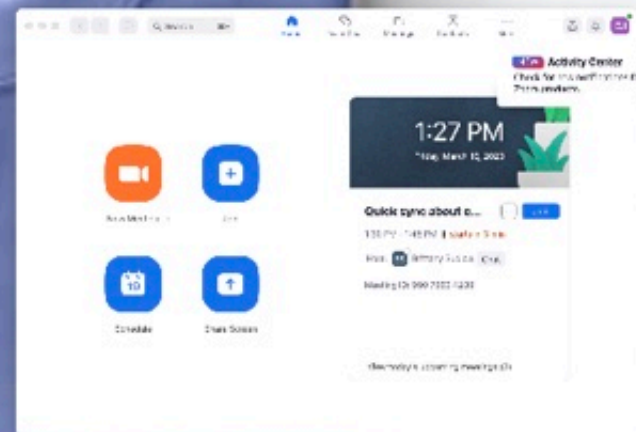
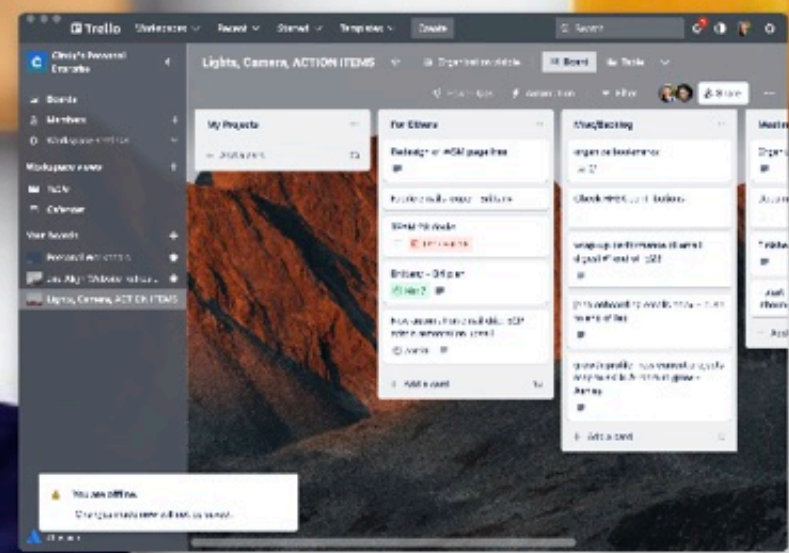
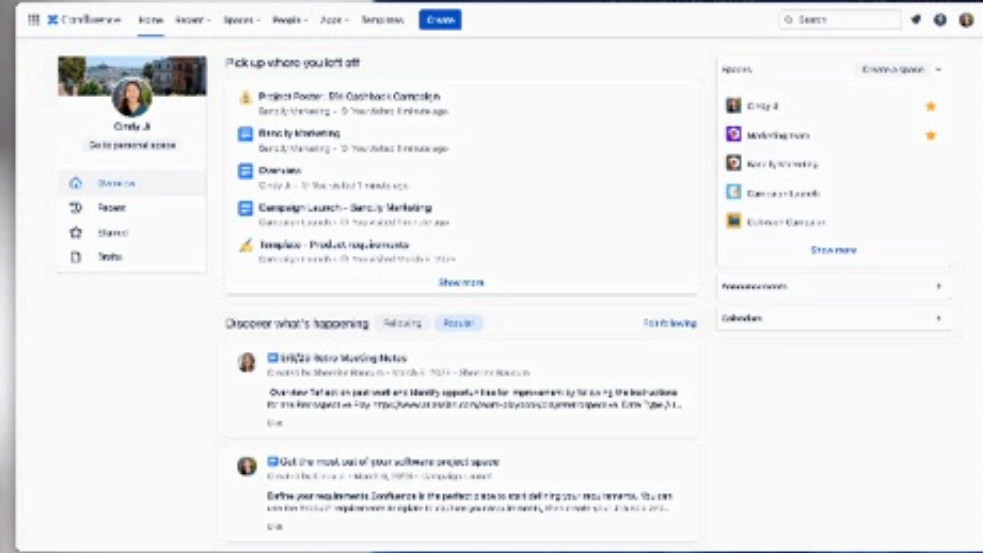
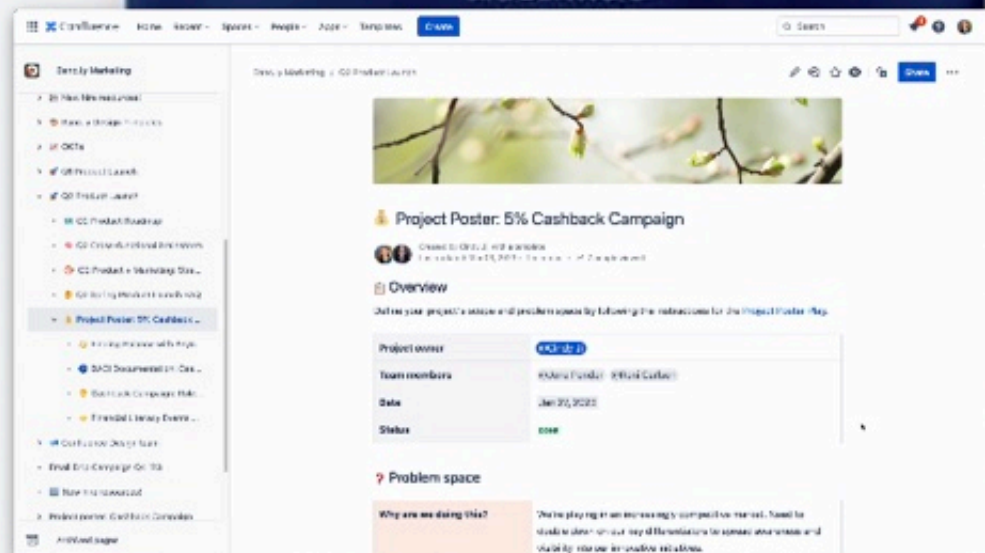
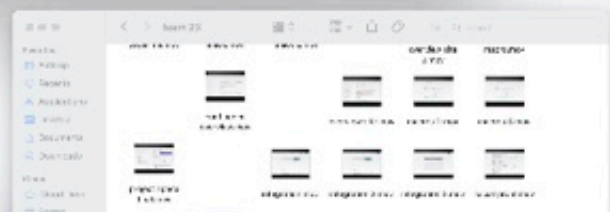
Desktop 1



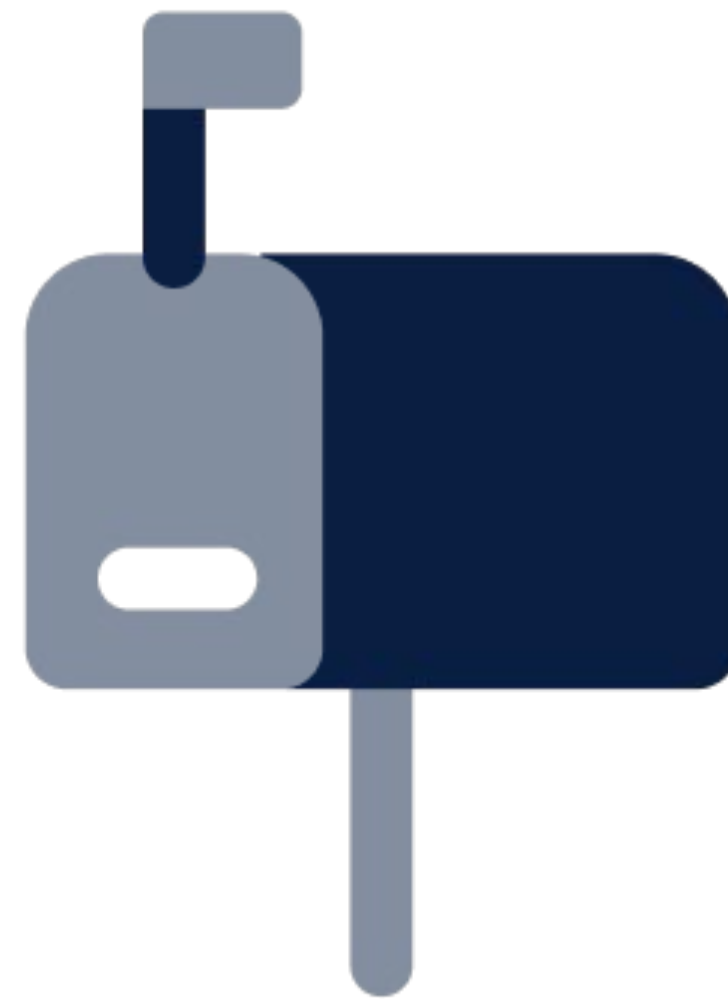
Google Chrome



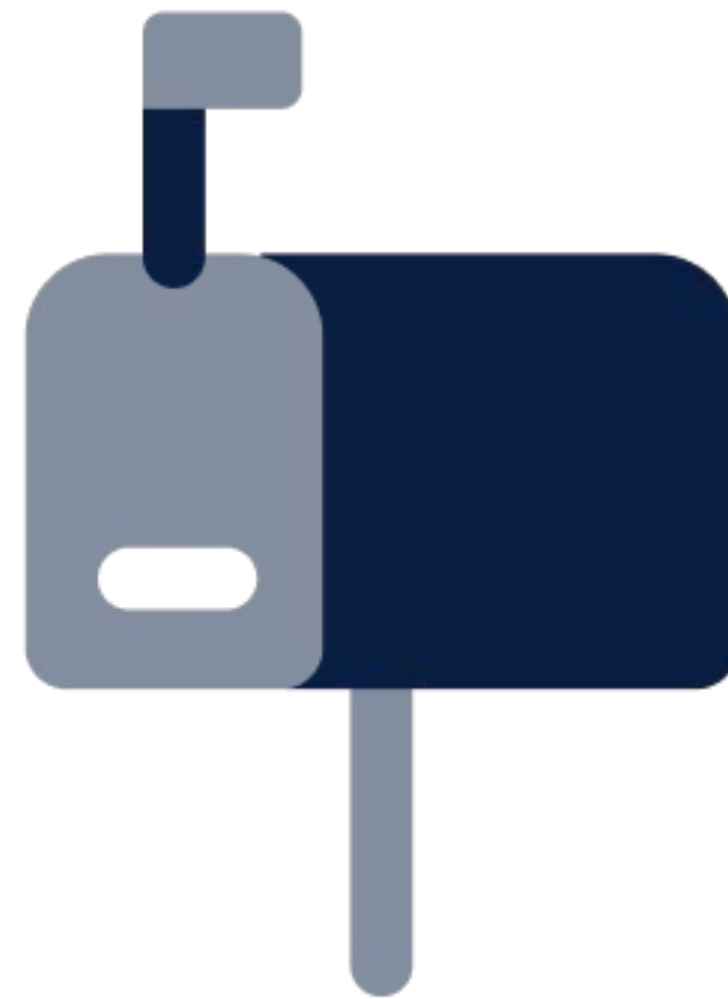
Keynote



**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.

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Applying UX principles



Attention

The principle of
common region



Memory

Recognition is
easier than recall

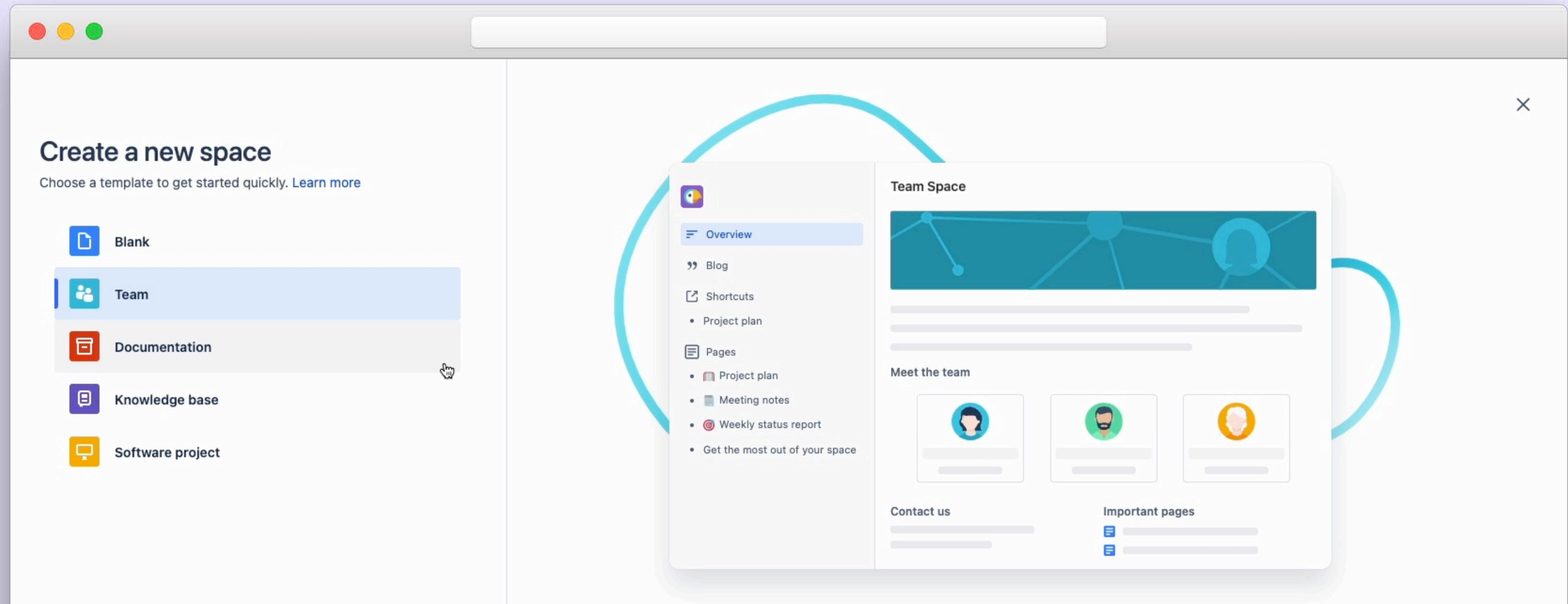


Influence

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”



ATTENTION: PRINCIPLE OF COMMON REGION

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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

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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

Restricted content level

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

MEMORY: RECOGNITION OVER RECALL

Confluence

Home

Recent

Spaces

People

Apps

Templates

Create

Search

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

To team:

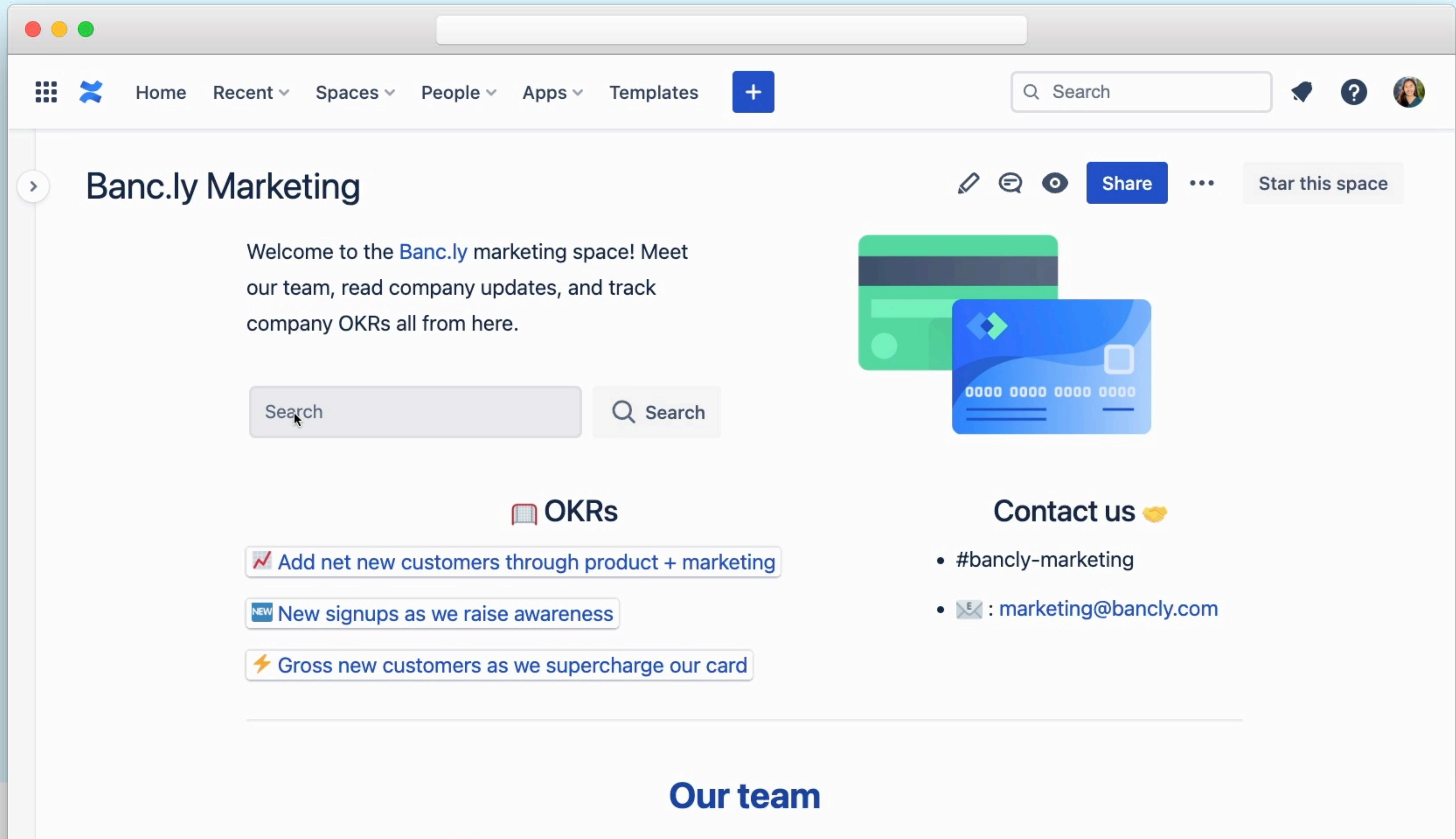
 Once you've finished a task, check it off in the table above.

Project validation

What do we already know?	<ul style="list-style-type: none">Selection criteriaPerformance metricsBenchmarks and final numbers
What are possible solutions?	<ul style="list-style-type: none">Content hub with submission deadlinesGuidelines for how to create high quality contentFINAL Community event in partnership with local nonprofits



MEMORY: RECOGNITION OVER RECALL





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!

Be 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

ACME

Home

Recent

Spaces

People

Apps

Create

Search

?

Grace Harris

Go to personal space

Overview

Recent

Starred

Drafts

Pick up where you left off

Meeting Notes

IT Operations • You edited 1 minute ago

Beyond Gravity 2.0 - Stakeholder Update

Beyond Gravity • You edited 10 minutes ago

Team Sprint Calendar

Workplace Support • You edited 22 minutes ago

Change Approvals

Customer Support • You commented 25 minutes ago

Financial Services - SRE Week in Review

Travel & Relocation Support • You viewed 1 hour ago

Show more

Spaces

Create space

Grace Harris

★

Beyond Gravity

★

Digital Marketing Support

★

Travel & Relocation Support

★

Digital Marketing Support

★

Show more

Announcements

>

Calendars

>

Discover what's happening

Following

Popular

Edit following

Eva Lien

commented • 1 hour ago

5 recent actions

Cloud engineering overview guide

Created by Omar Darboe • Travel & Relocation Support

I was walking back from a local cafe with a coffee to go, and as I waited for the red light to turn to the green walking signal, I smiled at a person walking past me don...

604

89

Eva Lien

Thanks to everyone for your questions! We will answer in-line and compile a list of FAQs for future readers. In the meantime I will be reaching out to all...


Social proof

HomeRecent ▾Spaces ▾People ▾Apps ▾TemplatesCreate

Q Search🔔?👤



Banc.ly Marketing / New hire resources!

✎💬☆👁🔒Share⋮



NEW

Welcome, Emma!




Created by Jena Pender, with a template
Last updated: just a moment ago by Cindy Ji • 2 min read • 📄 23 people viewed

👋 Hi, @Emma

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

I've put together this onboarding plan to help you get up to speed in your new role as a Growth Marketer. Feel free to reach out if you have any questions 😊

❤️ @Alana Grant



The team!

‘Liking’ technique

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

Confluence

HomeRecentSpacesTeamsAppsTemplates

Create

Search

Settings

SITE ADMINISTRATION

User managementBilling

AUTOMATION

Global automation

CONFIGURATION

General ConfigurationFurther ConfigurationLanguagesShortcut LinksGlobal Templates and BlueprintsImport TemplatesPDF Export Language SupportConfigure Code Macro

LUCIDCHART ADD-ON

Configure

Global permissions

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

User groupsGuest accessAnonymous accessJSM accessApps

Enter group nameFilters

Edit

Groups (5)	Personal Space	Create Space
<div>></div> <div><div></div><div>site-admins</div><div>CONFLUENCE ADMIN</div><div>110 people</div></div>	<div></div>	<div></div>
<div>></div> <div><div></div><div>administrators</div><div>CONFLUENCE ADMIN</div><div>11 people</div></div>	<div></div>	<div></div>
<div>></div> <div><div></div><div>trusted-users-43fca4ac-d034-4d4b-a36a-b7e830b0e17a</div><div>CONFLUENCE ADMIN</div><div>1 person</div></div>	<div></div>	<div></div>
<div>></div> <div><div></div><div>confluence-users</div><div>277 people</div></div>	<div></div>	<div></div>
<div>></div> <div><div></div><div>simpleStory</div><div>1 person</div></div>	<div></div>	<div></div>

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	Admin
Anonymous															

Edit Permissions

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	View	Delete Own	Add	Archive	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete
Cindy Ji	✓	✗	✓	✗	✗	✗	✗	✓	✗	✓	✗	N/A	✗

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	All		Pages			Blog		Comments		Attachments		Restrictions	Mail	Space	
	View	Delete Own	Add	Archive	Delete	Add	Delete	Add	Delete	Add	Delete	Add/Delete	Delete	Export	Admin
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

Q 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](#)

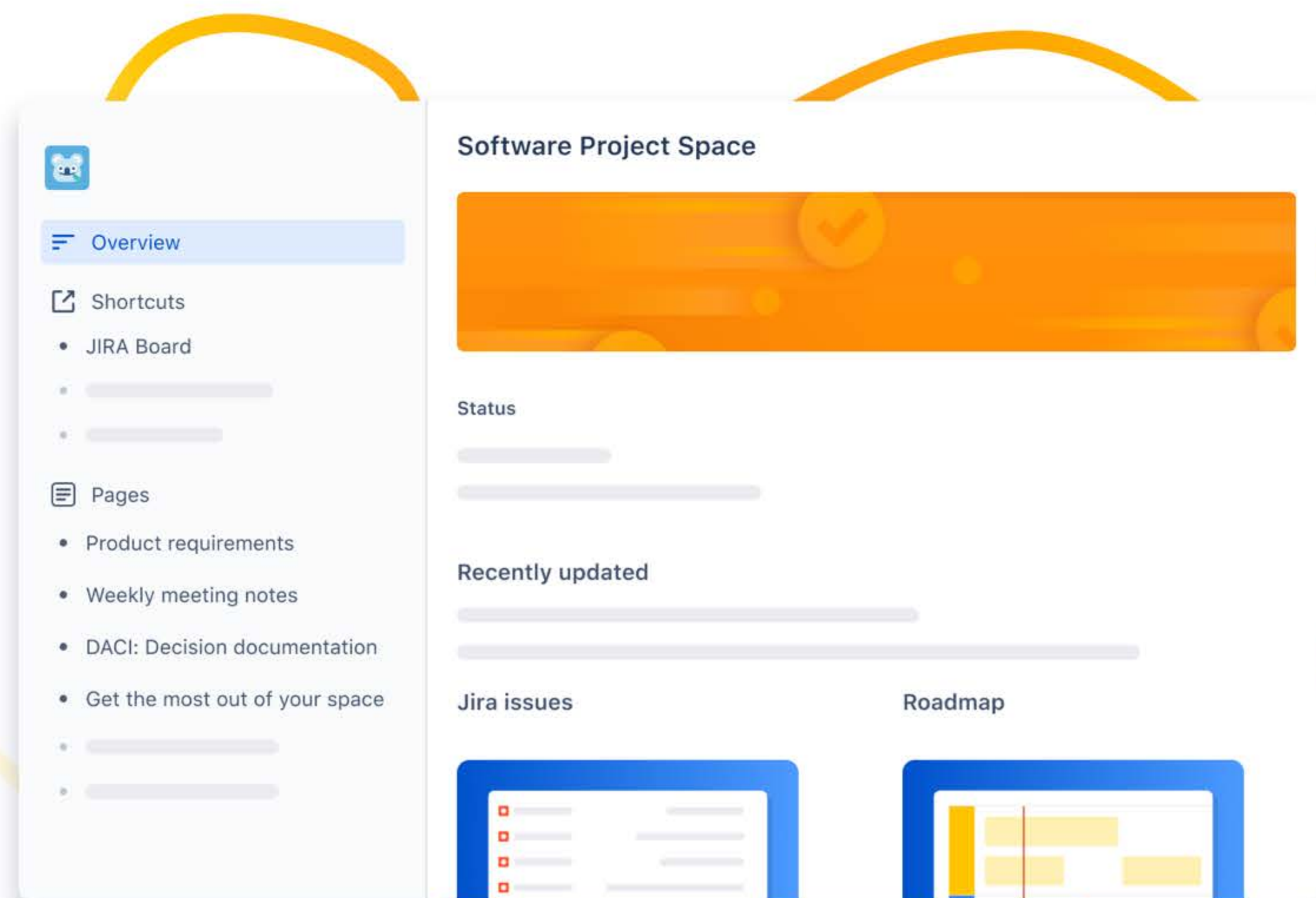
The page that displays when users navigate to this space.

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

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

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

Q 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

Important Links ?

Automation

New trigger

All components ▾

Blogpost

Pages and blogs

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

Microsoft Teams

Activity

Chat

Teams

Calendar

Calls

Files

Apps

Help

Teams

Pinned

Team Galactic - Q1 Projec...
PI Teams

Team Delorean
PI Teams

Your teams

PI Teams

General

Bitbucket Notifications

Confluence Cloud for M... 6

MS Teams Product Ideas

Team Delorean

Team Galactic - Q1 Proje... 6

23 hidden channels

Join or create a team

Search

Team Galactic - Q1 Projec... Posts Confluence 7 more +

Normal text B I ... ≡ ▴ @ ⌨ + 🔍 Publish Close

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">Add notes for each discussion topic

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...

The screenshot displays the Jira web interface. At the top, there's a navigation bar with 'Jira', 'Your work', and various filters like 'Projects', 'Filters', 'Dashboards', 'People', and 'Apps'. A 'Create' button is visible. Below this, a sidebar on the left shows a 'Demo service project' and a 'Back to project' link. The main content area shows a request titled 'Example Customer raised this request via Email' with a 'View request in portal' link. The request description states: 'Refer to document below for our checklist: Basic Printer Troubleshooting Checklist'. Below this, there's a section titled 'Basic Printer Troubleshooting Checklist' created by Leonard Boyle, with a note: 'Here are the troubleshooting steps to address printer connection issues while in AXP-100'. The text continues: '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.' A link for 'Permissions Requirements' is at the bottom. On the right, a sidebar shows 'Waiting for support', 'SLAs' (Time to first response within 8h, Time to resolution within 16h), and 'Details' (Assignee: Unassigned, 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

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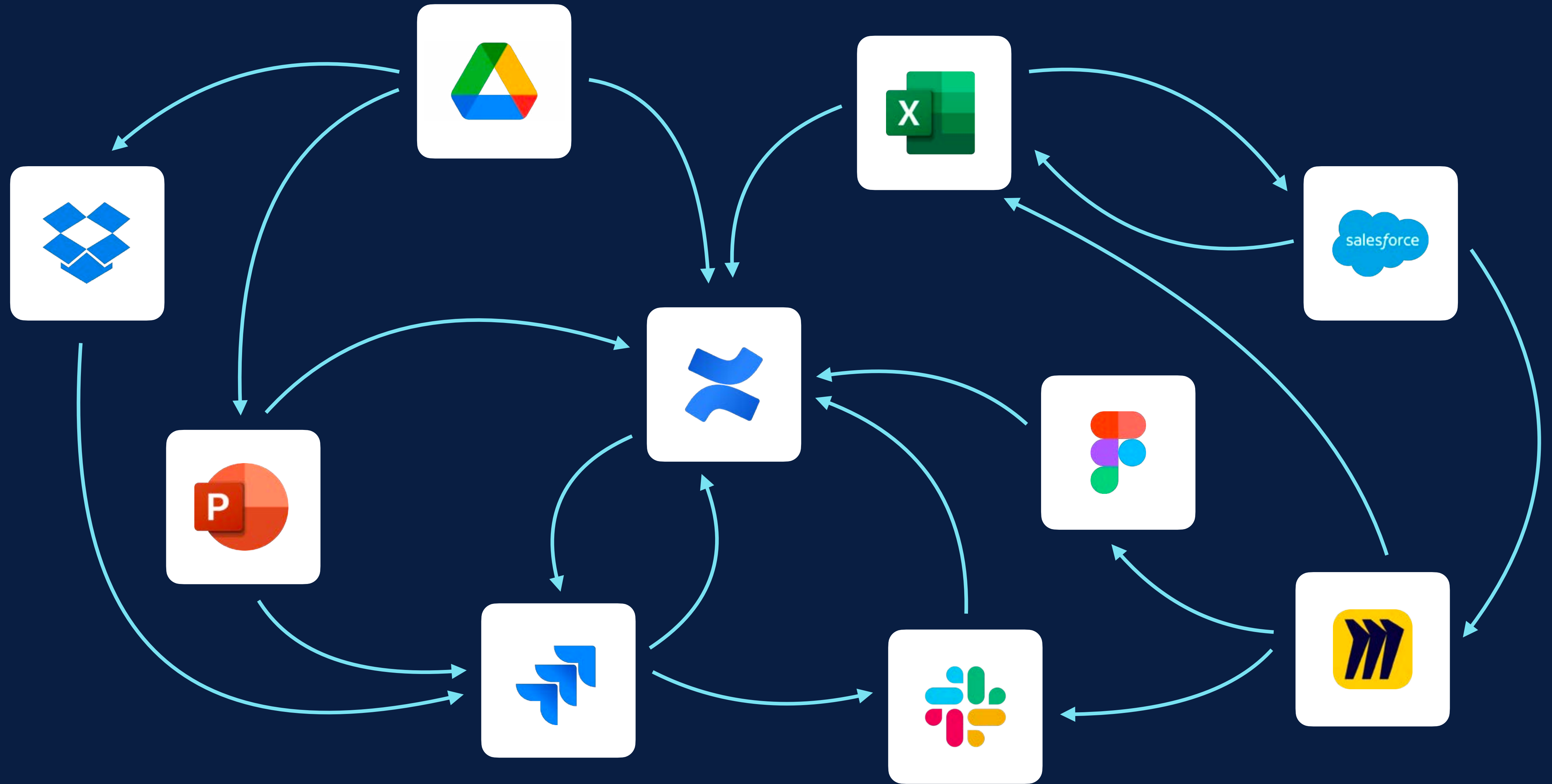
2. EXISTING USER

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



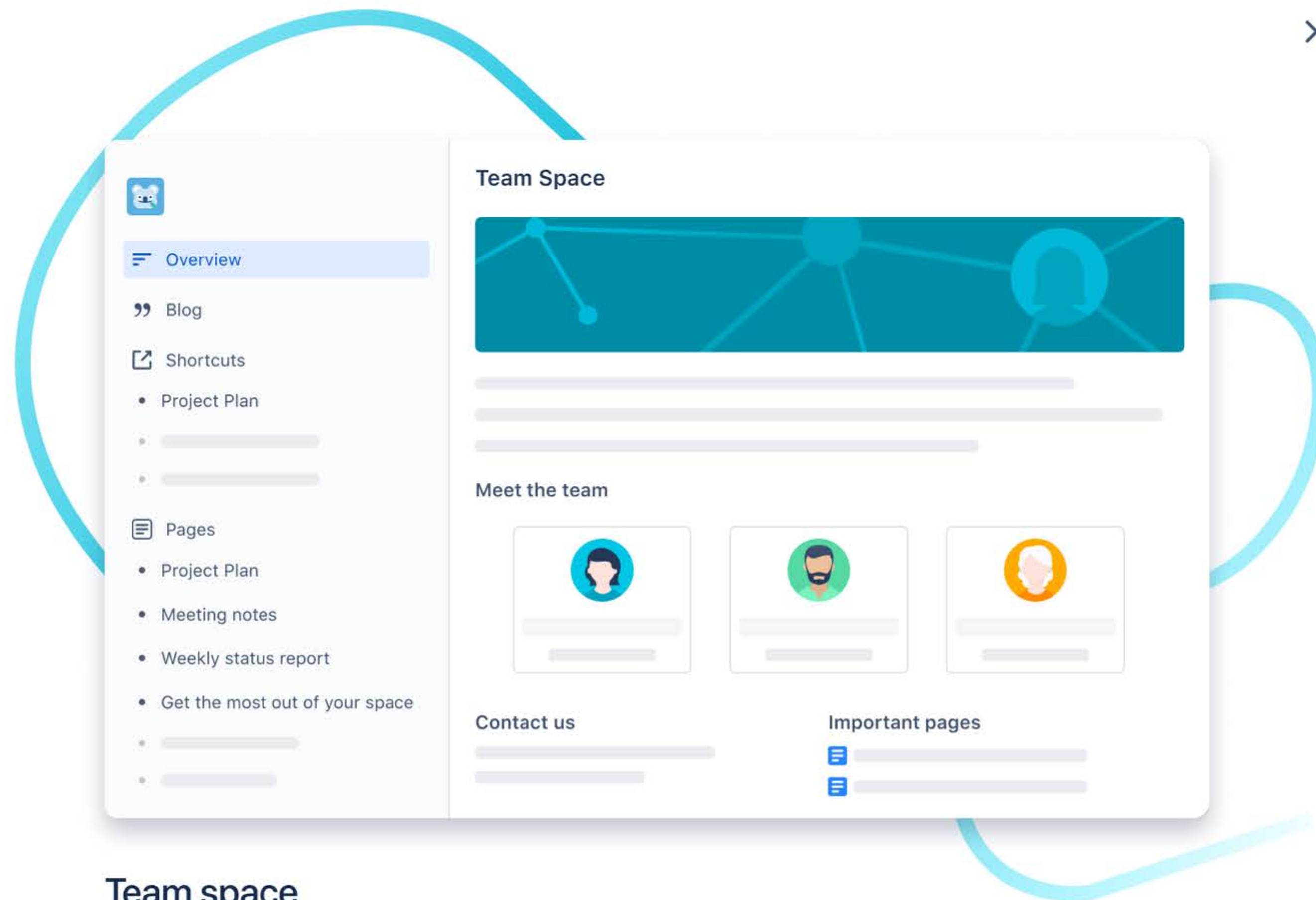
Design



Operations



Project Management



Team space

Create an organized place for your team to collaborate.



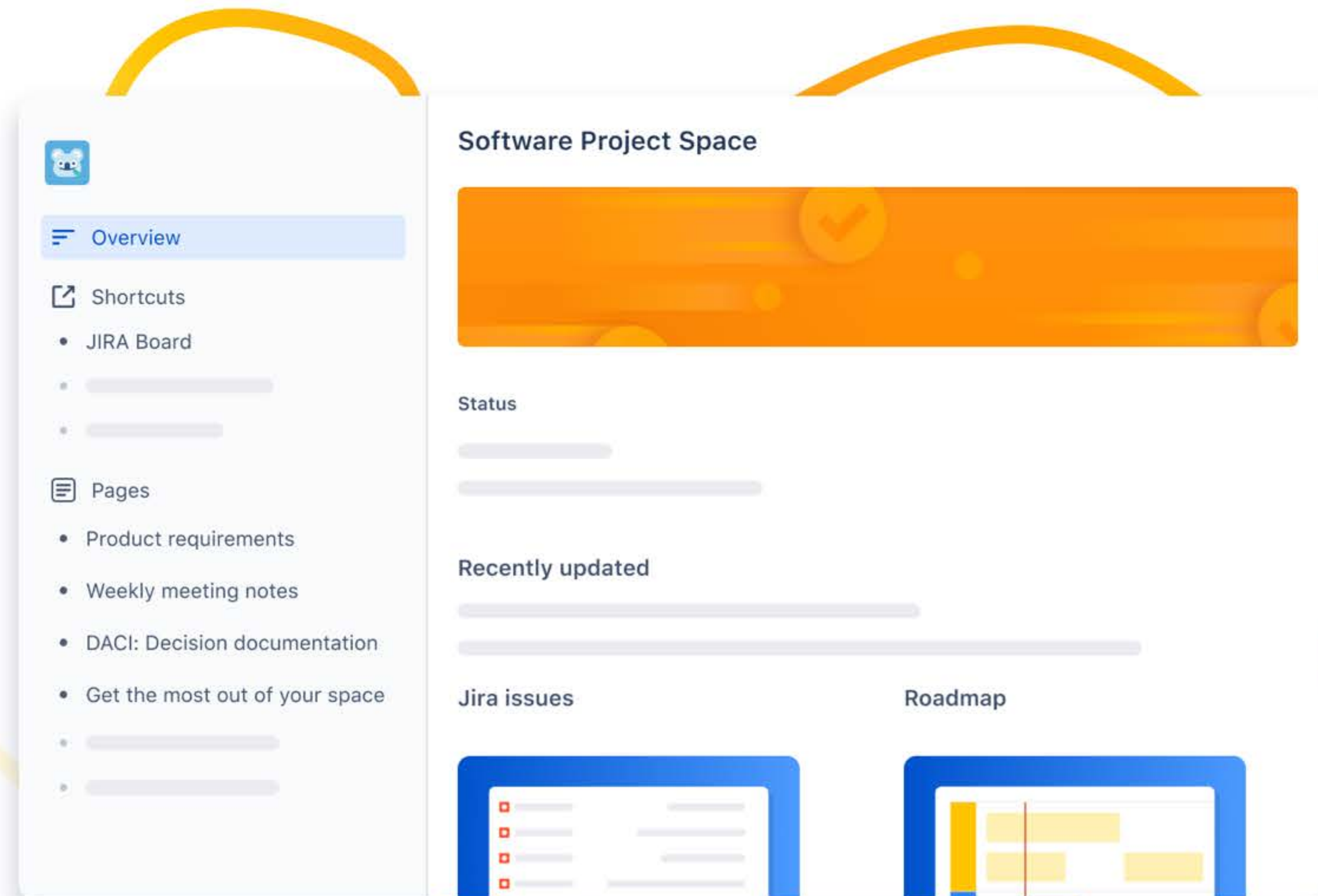
Showcase your team's work

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

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- Marketing
- Design
- Operations
- Project Manamagent



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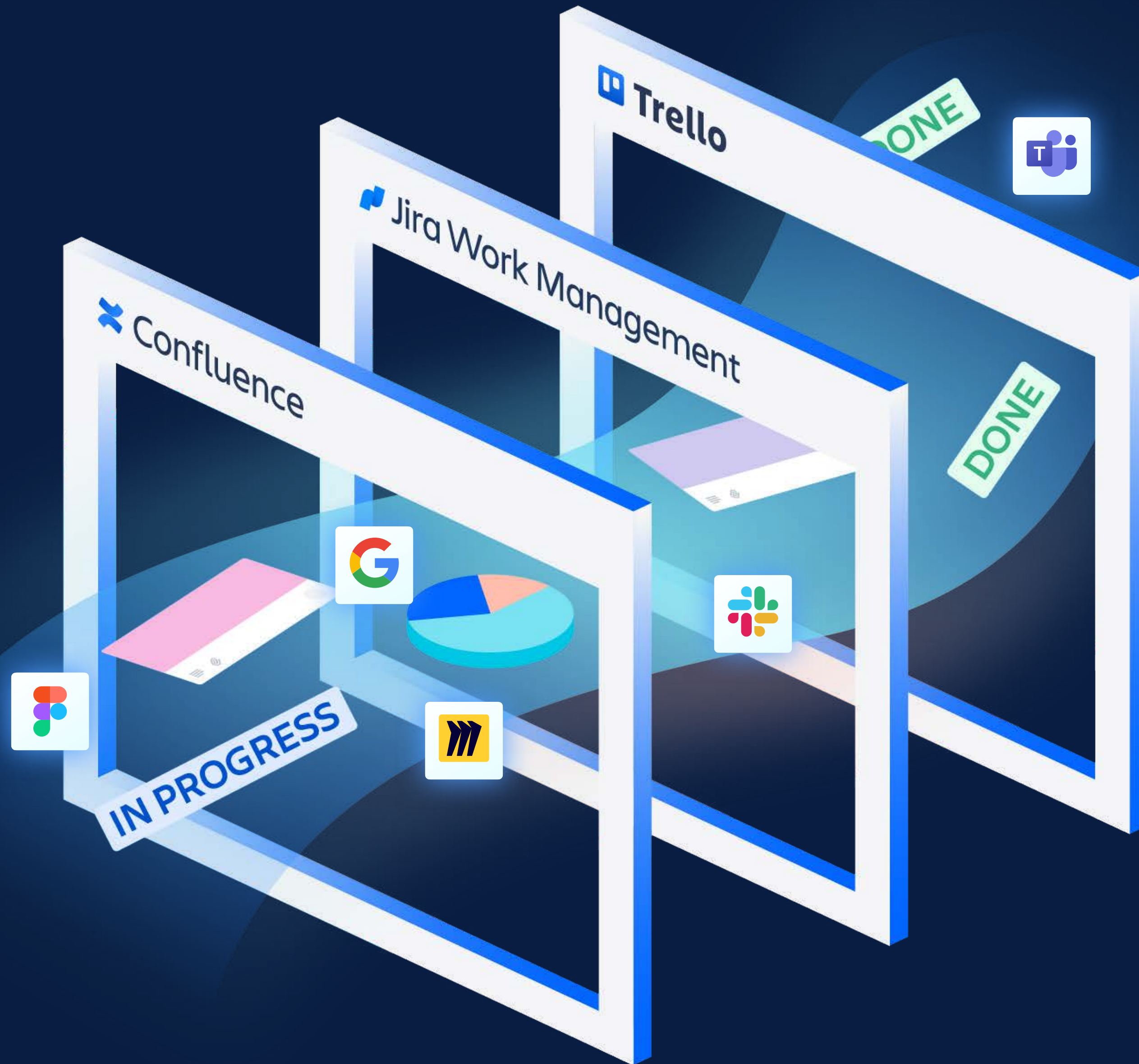


Jira integrations

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



[Home](#)[Recent](#) ▾[Spaces](#) ▾[Teams](#) ▾[Apps](#) ▾[Templates](#)[Create](#)

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.



OKRs

Add net new customers through product + marketing

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

HomeRecent ▾Spaces ▾Teams ▾Apps ▾TemplatesCreate

Q Search

?

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

OKRs

+2

Created by Meg Bailey

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

Team	@Gabby Williams @Brittany Sudlow
Timeline	Apr 20, 2023
OKR Key Updates	<div><div><div><div></div><div>Q4 Marketing Campaigns</div><div>ON TRACK</div></div><div><div>Updated 1 hour ago</div><div>1 APR 20, 2023</div></div><div>Launch new financial literacy event series in partnership with community centers.</div><div><div>Atlas</div><div>Full screen view</div></div></div></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



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



Home

Recent ▾

Spaces ▾

Teams ▾

Apps ▾

Templates

Create

Search



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

HomeRecent ▾Spaces ▾Teams ▾Apps ▾TemplatesCreate

Q Search

1

?

>

← Back to library

→

Archive inactive pages when scheduled (recurring)

Turn it on

Archive pages inactive for 12 months

i

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](#)

Automation

[NEW](#)[Publish rule](#)[Return to list](#)

Rule details

Actor: Cindy Ji



When: Space created

Rule is run when a new space is created.



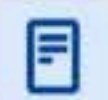
Then: Publish new page



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

Template space

Select a space

Template

Select a template

Cancel

Save



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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 ⓘ



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1



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principles for your Confluence site

UX

UX principles for organizing and scaling your Confluence site

Created by Shaziya Tambawala

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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



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