



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.



# Optimize your Atlassian tools

Strategies to drive lasting adoption



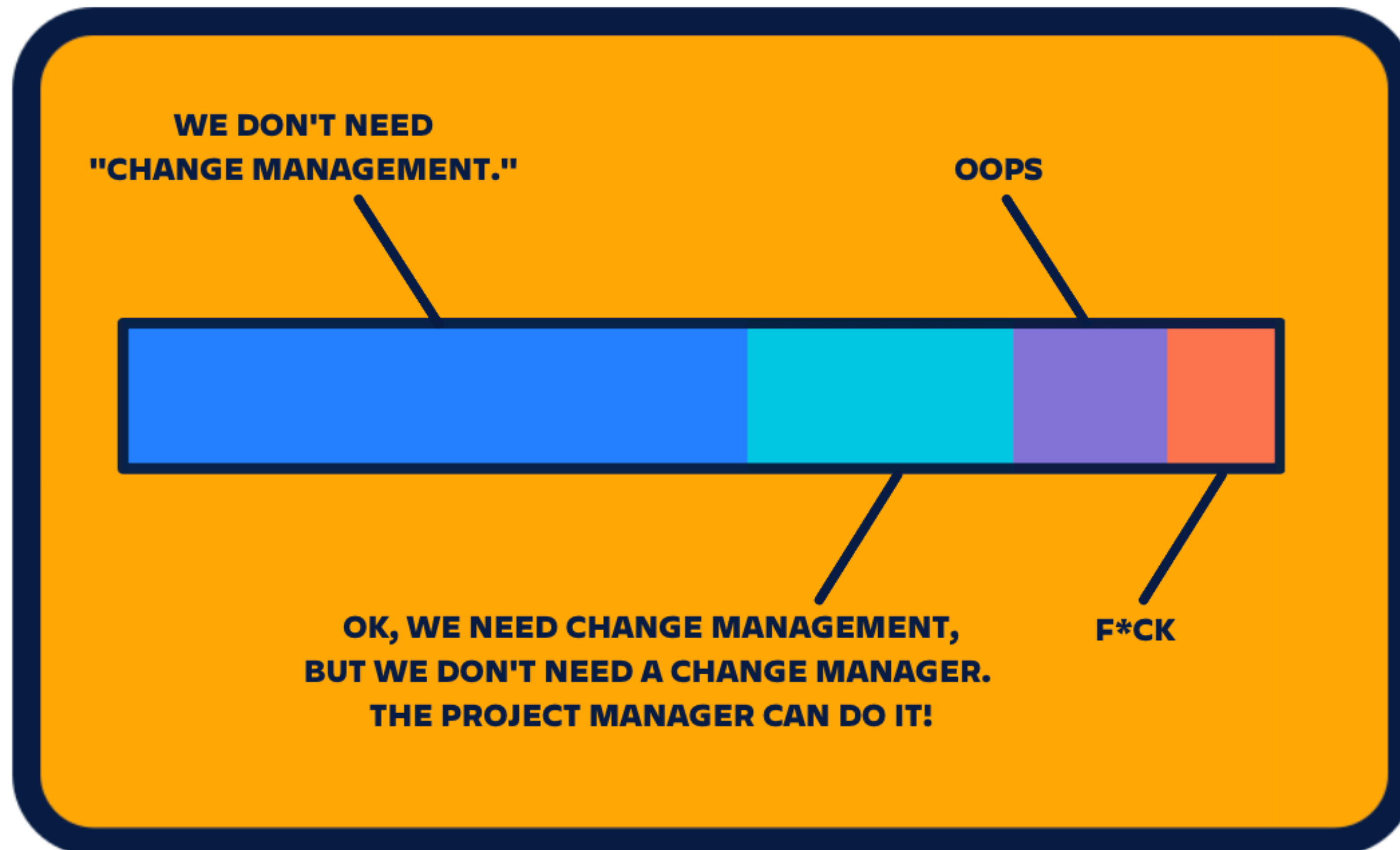
**SARAH JOSHI | GROUP PRODUCT MANAGER - ENTERPRISE | ATlassian**

**GERTIE RIZZO | HEAD OF CUSTOMER SUCCESS | ATlassian**



# Why projects fail

## A TIMELINE



# Agenda

The people side of change

---

*Your plan for a successful rollout*

*Driving lasting change*

*Supporting your adoption journey*

**Q&A**



# Adoption and change management (ACM)

**A FRAMEWORK THAT EQUIPS THOSE INVOLVED IN A CHANGE WITH SOLUTIONS TO**



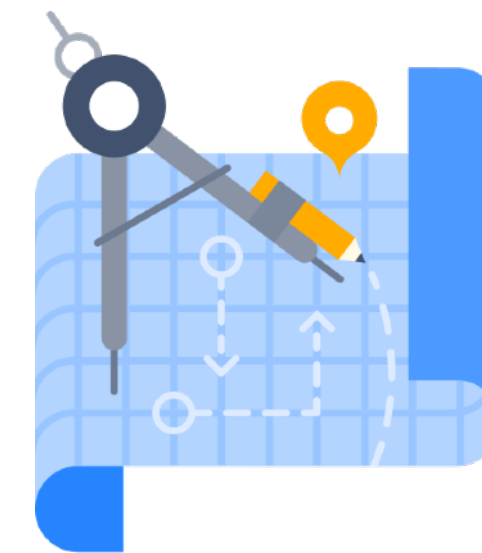
## Understand

why the change is happening.



## Stay engaged

in the organization during a period of disruption.



## Create

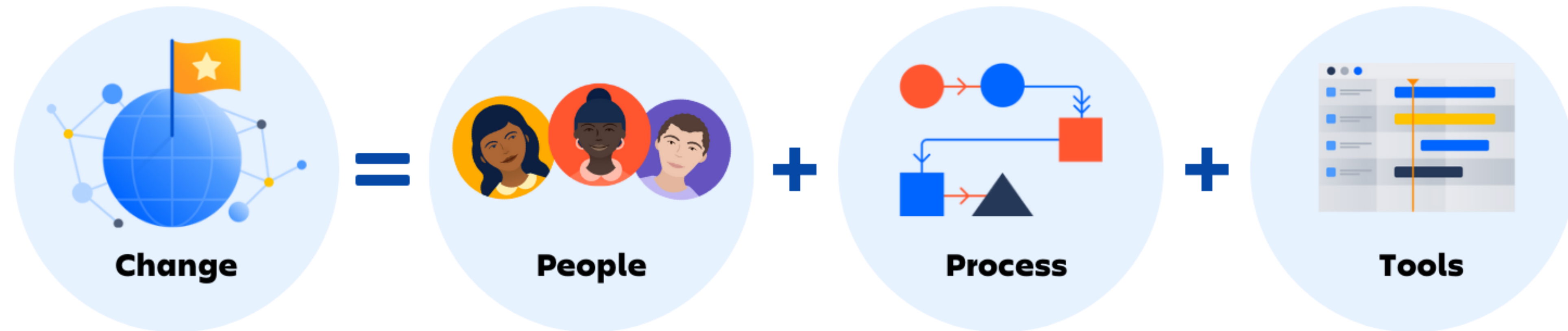
time and resources to get on board, feel heard, and stay supported.



## Adopt changes

faster, more completely, and proficiently.

Why a **SUCCESSFUL ROLLOUT** matters



**LASTING CHANGE** takes work

A successful **organizational**  
move to a future state



**Current**



**Transition**



**Future**

requires **individuals** to move from  
their current to their future state.



**Current**



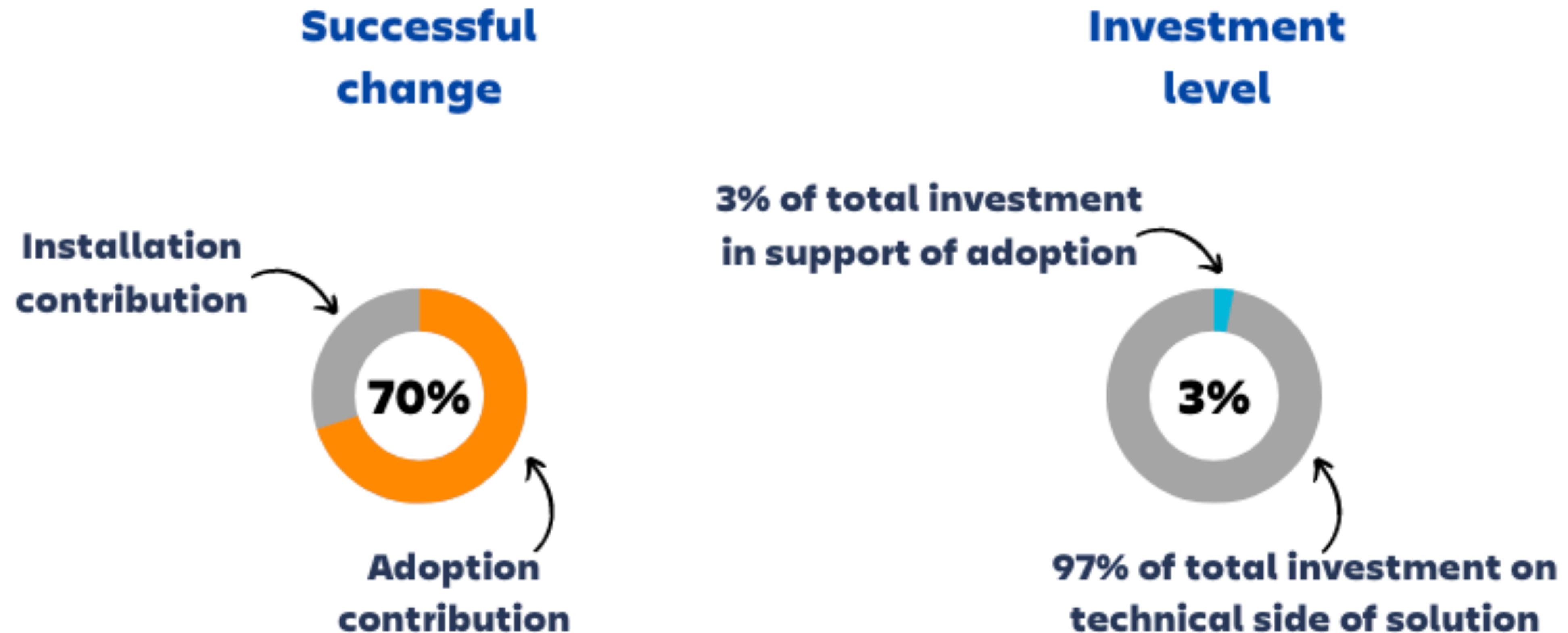
**Transition**



**Future**

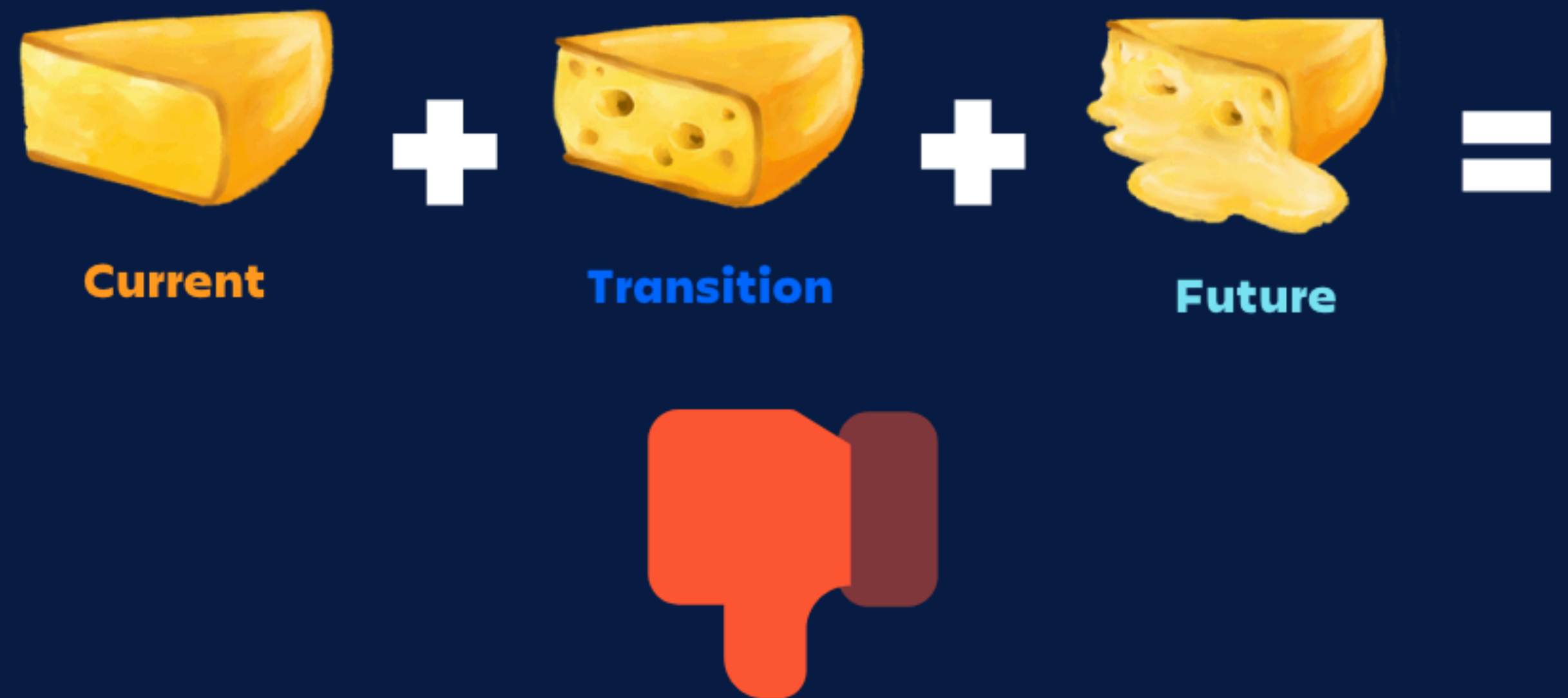


# Organizations aren't investing enough in adoption



# Without change management

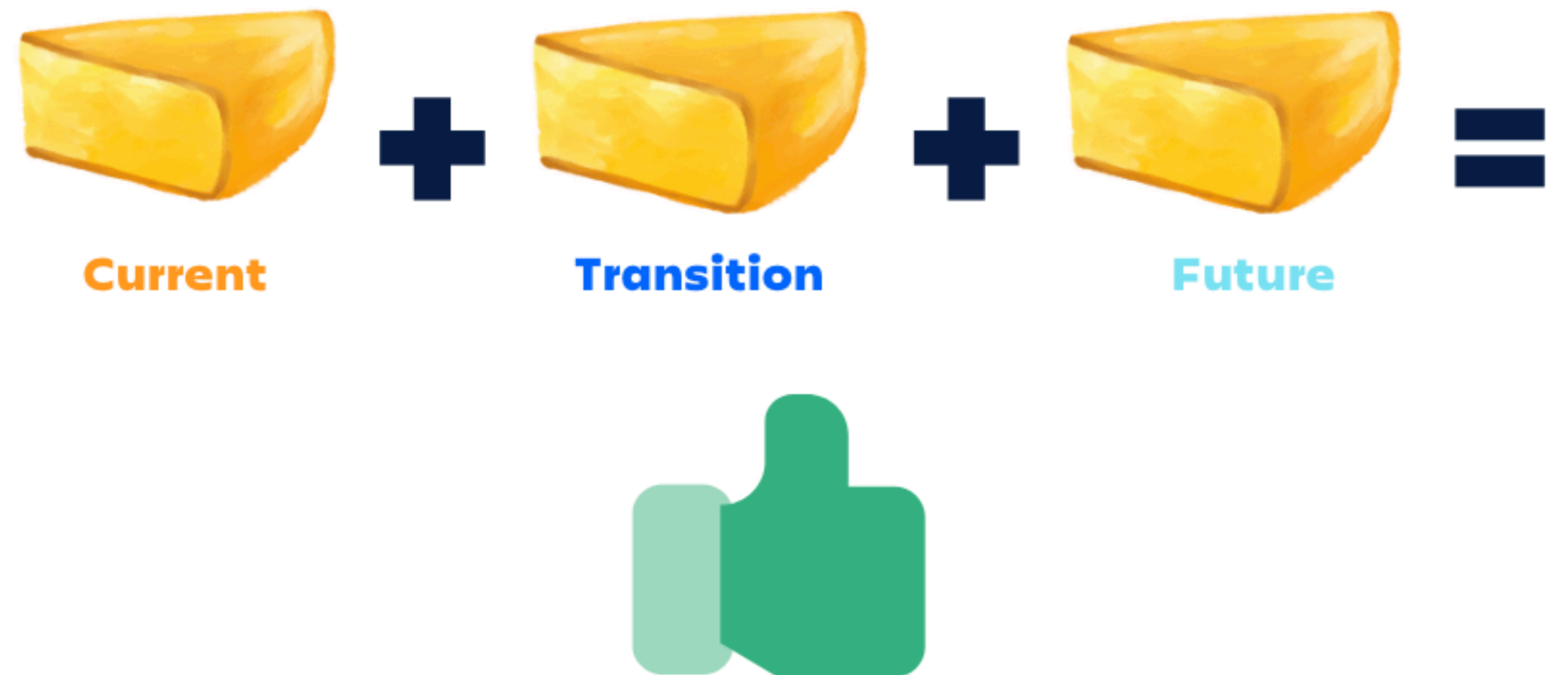
- Chaos and confusion
- Overwhelmed teams
- Low adoption rates
- Lost productivity
- Failed change project
- Costly re-rollout



# With change management

“

*We use Jira and Confluence across every department in our company; each team setup was slightly different. To be well prepared for the migration to cloud, we had a diverse group of UAT members. This allowed us to anticipate and plan for unique use cases and SMEs to help with post-migration questions.*





# Agenda

*The people side of change*

Your plan for a successful rollout

---

*Driving lasting change*

*Supporting your adoption journey*

Q&A

# Change comes in all shapes and sizes

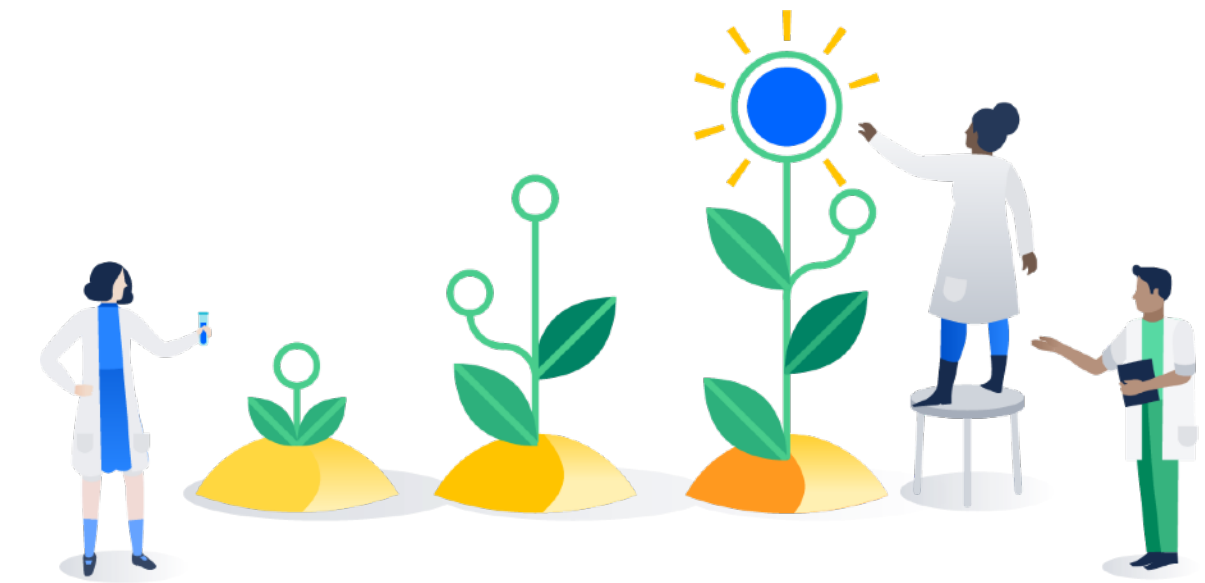
## COMMON TRIGGERS OF CHANGE



Cloud transformation



Geographical expansion



Rapid growth



Consolidation



New product launch



Acquisition/merger



# How to build a strategic rollout plan

- 1 Set your vision
- 2 Define success
- 3 Assemble your adoption team
- 4 Scope the rollout
- 5 Identify key use cases
- 6 Build your training and support plan
- 7 Build your communications plan
- 8 Identify Champions and build your network
- 9 Ship it!
- 10 Monitor & engage



## **STEP 1**

# Set your vision

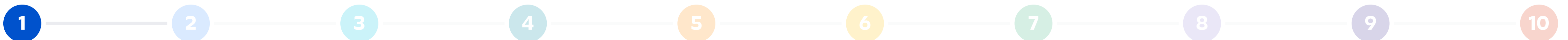
**What** are we trying to achieve?

**Why** are we doing this?

**When** are we doing this?

**Who** will be impacted?

**How** will they be impacted?



## STEP 2

# Define success



### CSAT

Can you measure how happy your users are with the change?



### Active usage

How many people are using the tools? How often?  
By department? By region?



### ROI

Have you seen any cost savings or time savings?

1

2

3

4

5

6

7

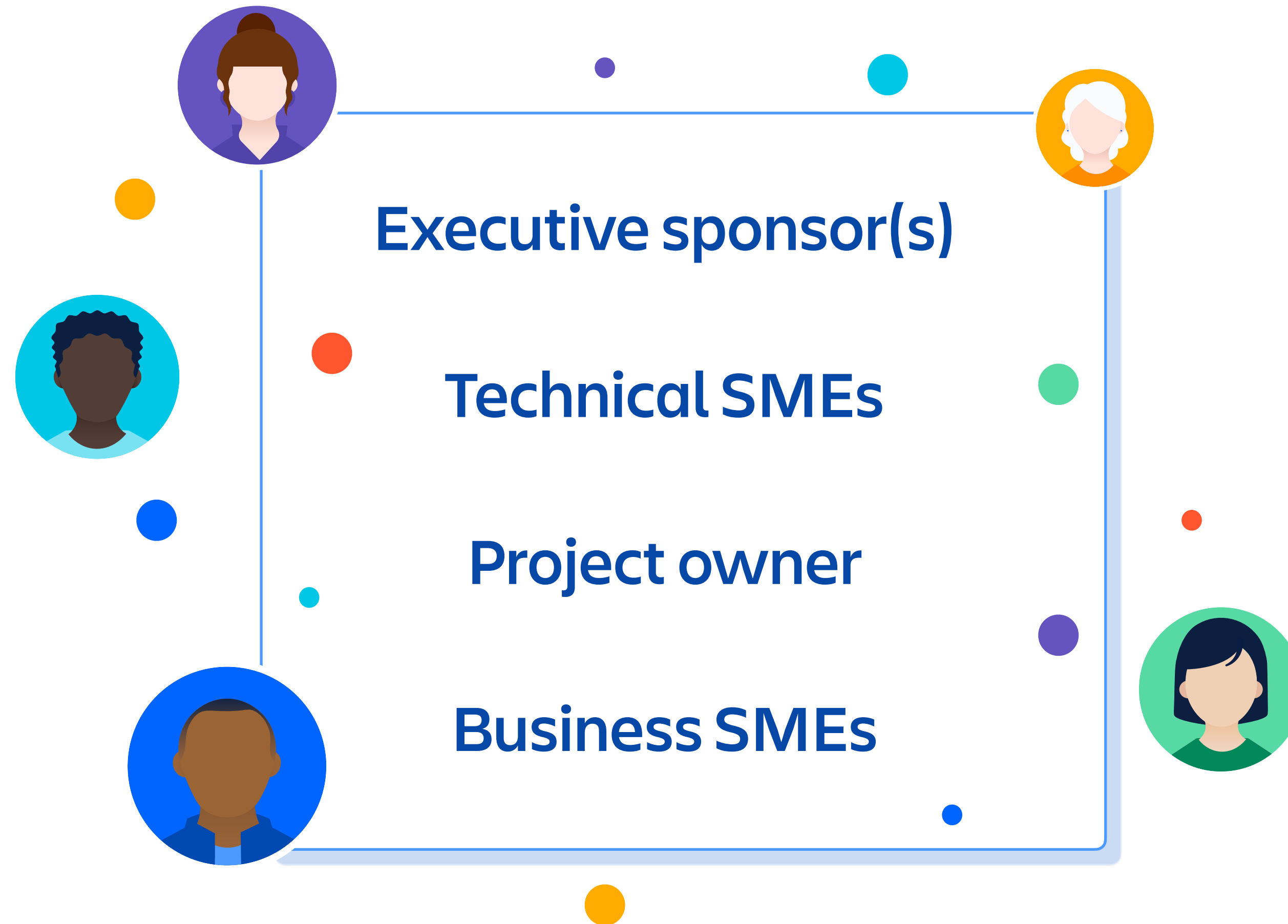
8

9

10

## STEP 3

# Assemble your adoption team



1

2

3

4

5

6

7

8

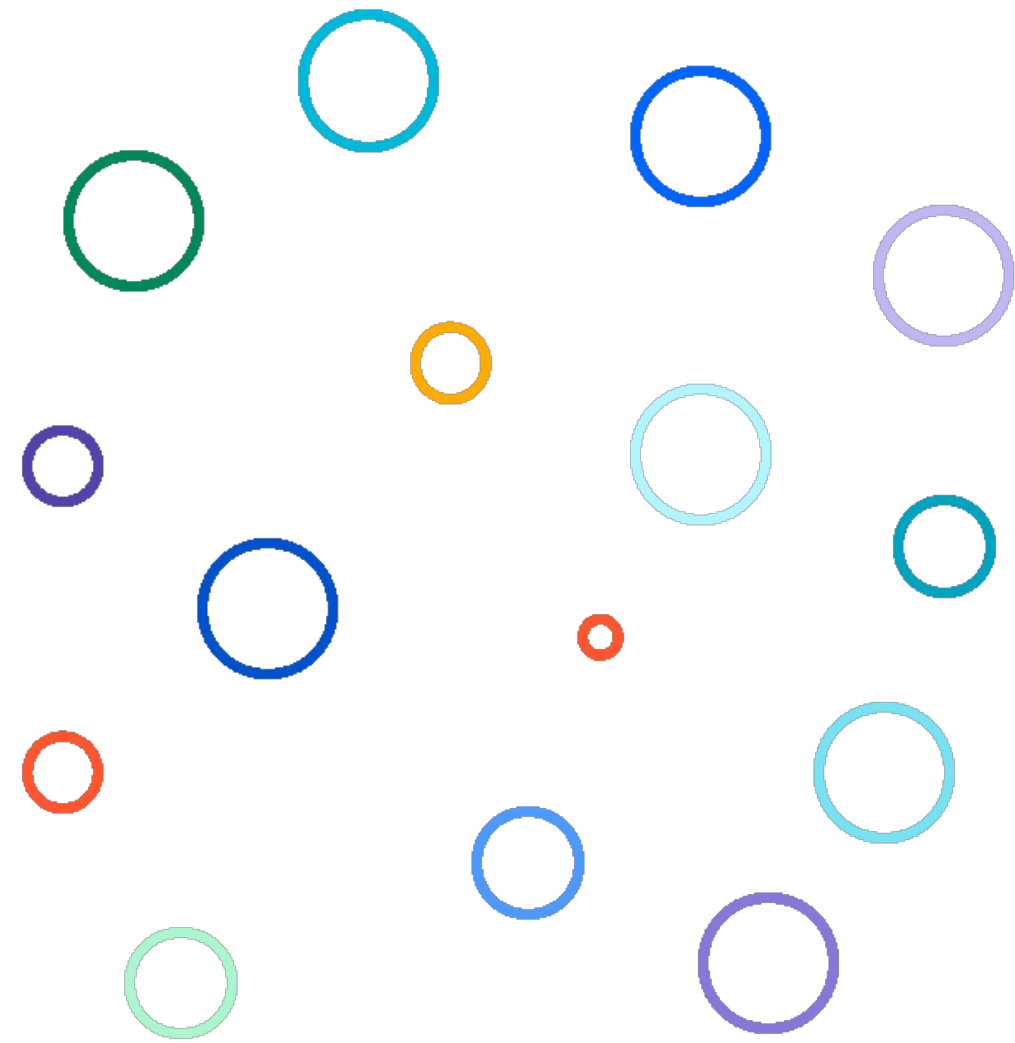
9

10

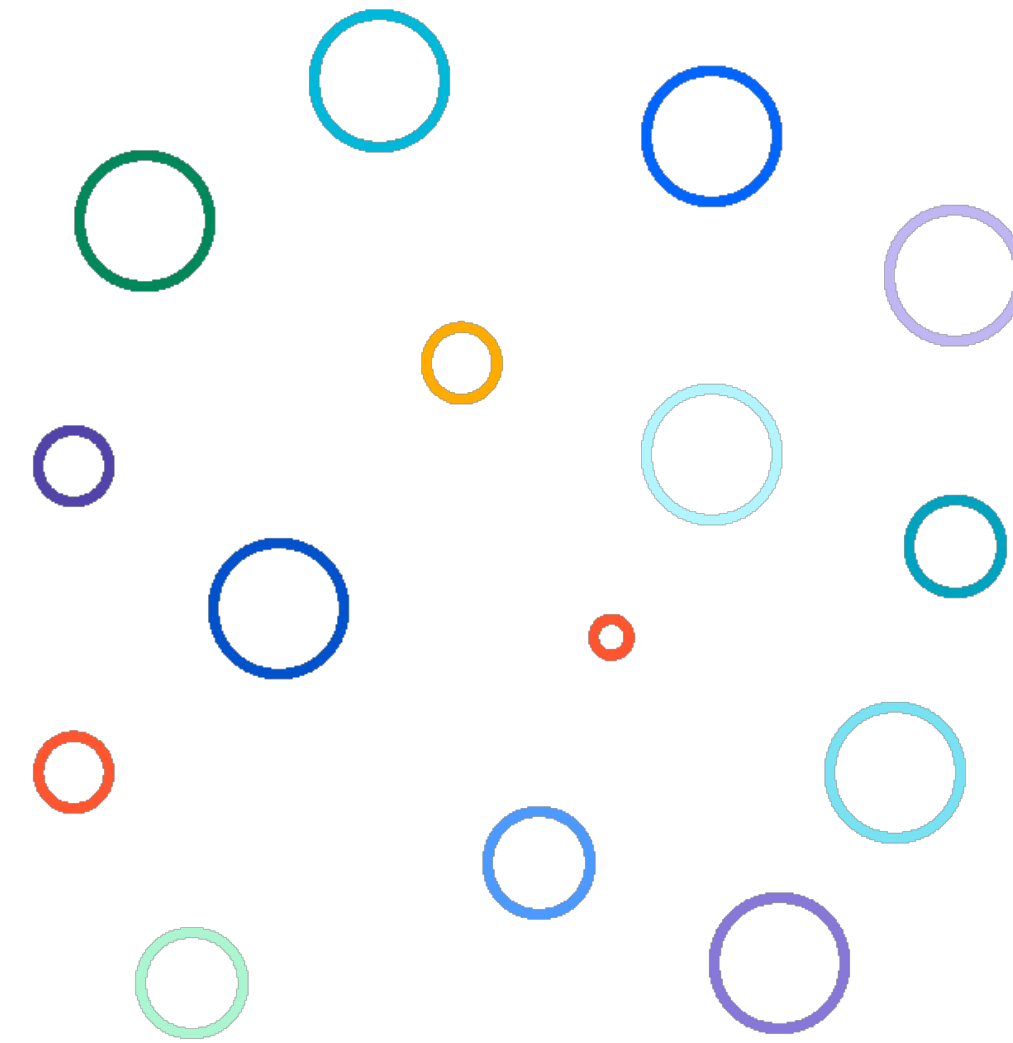


## STEP 4

# Scope the rollout



Phased rollout



Big bang rollout

## STEP 5

# Identify key use cases

Current challenges

Potential use cases

	Current challenges	Potential use cases
Marketing	<div></div> <div></div>	<div></div> <div></div>
HR	<div></div> <div></div>	<div></div> <div></div>
Legal	<div></div> <div></div>	<div></div> <div></div>

1

2

3

4

5

6

7

8

9

10

## STEP 6

# Build your training and support plan

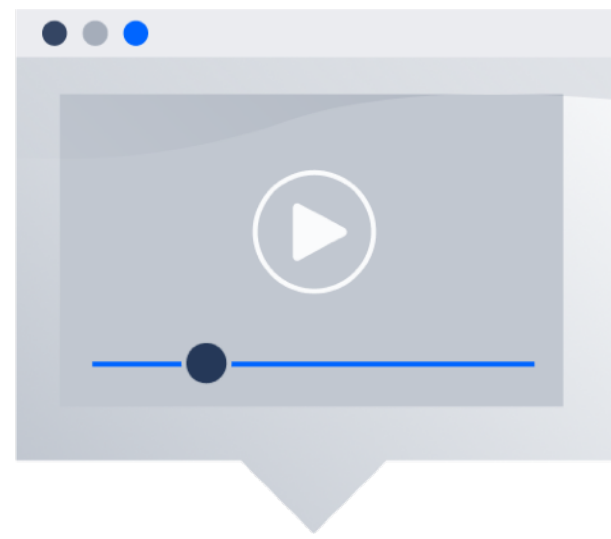


How will you train your teams to use new tools?

How will you train your IT department to support new tools?

## STEP 6

# Build your training and support plan



On-demand



In-person



Lunch & learns



Office hours

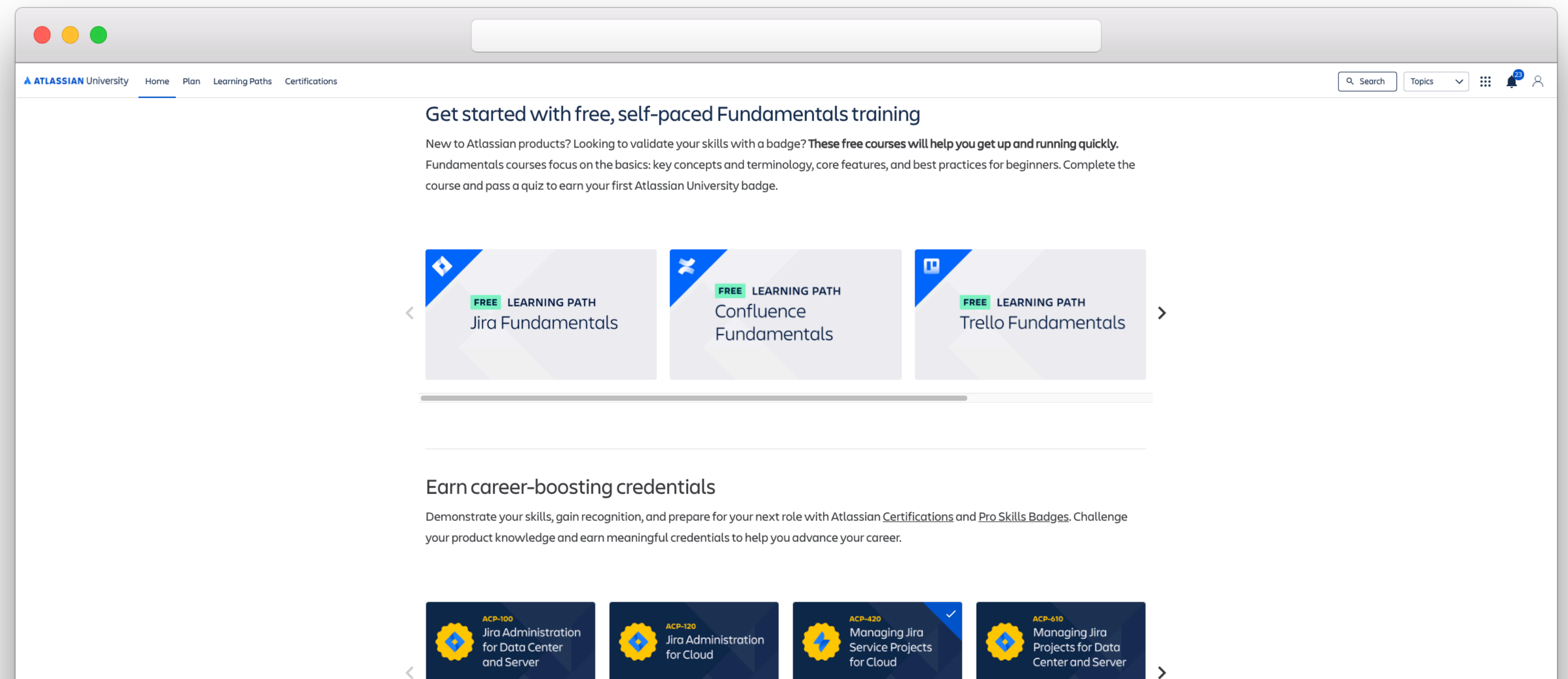
Offer a variety of **formats** and **cadences** to increase engagement and improve the effectiveness of your rollout.



## STEP 6

# Build your training and support plan

Check out  
**ATLASSIAN** University  
for online training modules,  
certifications, and more!



1

2

3

4

5

6

7

8

9

10

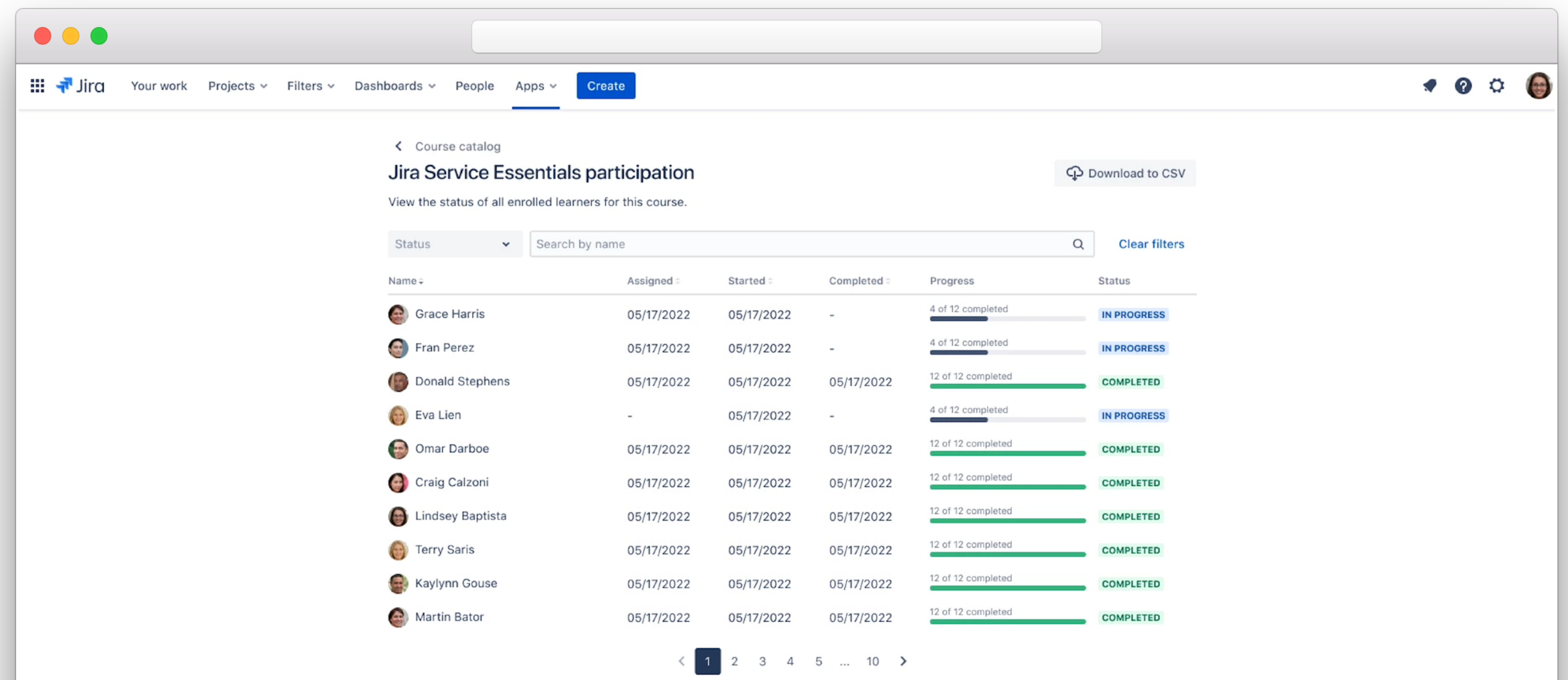
## STEP 6

# Build your training and support plan

### Training for Jira

available in

 **ATLASSIAN** Marketplace



The screenshot shows the 'Jira Service Essentials participation' page in the Jira interface. It displays a table of enrolled learners with columns for Name, Assigned, Started, Completed, Progress, and Status. The progress is visualized with a bar chart and a percentage. The status is either 'IN PROGRESS' or 'COMPLETED'.

Name	Assigned	Started	Completed	Progress	Status
Grace Harris	05/17/2022	05/17/2022	-	4 of 12 completed	IN PROGRESS
Fran Perez	05/17/2022	05/17/2022	-	4 of 12 completed	IN PROGRESS
Donald Stephens	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Eva Lien	-	05/17/2022	-	4 of 12 completed	IN PROGRESS
Omar Darboe	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Craig Calzoni	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Lindsey Baptista	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Terry Saris	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Kaylynn Gouse	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED
Martin Bator	05/17/2022	05/17/2022	05/17/2022	12 of 12 completed	COMPLETED

1

2

3

4

5

6

7

8

9

10

*“Atlassian University courses and Atlassian YouTube videos were critical in training both users and admins. We built training plans for Jira Software, Jira Work Management, Confluence, and Advanced Roadmaps using only these free resources provided and prebuilt by Atlassian. In addition to async training, we also held open office hours before and after migration to answer specific questions and host UI/UX walk-through sessions, all of which were vital to the success of our change management plan.”*

**CLEARWATER**  
ANALYTICS

# **STEP 7** Build your communications plan

## HOW ORGANIZATIONS OFTEN HANDLE CHANGE

Monday	Tuesday	Wednesday	Thursday
 <b>Email on Monday</b>	 <b>Training on Tuesday</b>	 <b>"GO-LIVE" on Wednesday</b>	 <b>...</b>

1

2

3

4

5

6

7

8

9

10

## STEP 7

# Build your communications plan



Email from Executive Sponsor  
(more likely to be noticed than one  
from IT)



Corporate intranet or social platforms



Newsletter update



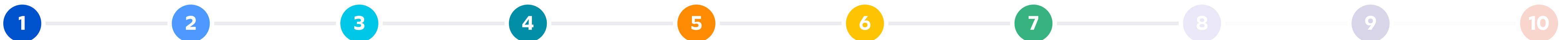
Showcase in org-wide or department-  
wide town halls/team meetings



Desktop backgrounds/screensavers  
or Zoom backgrounds



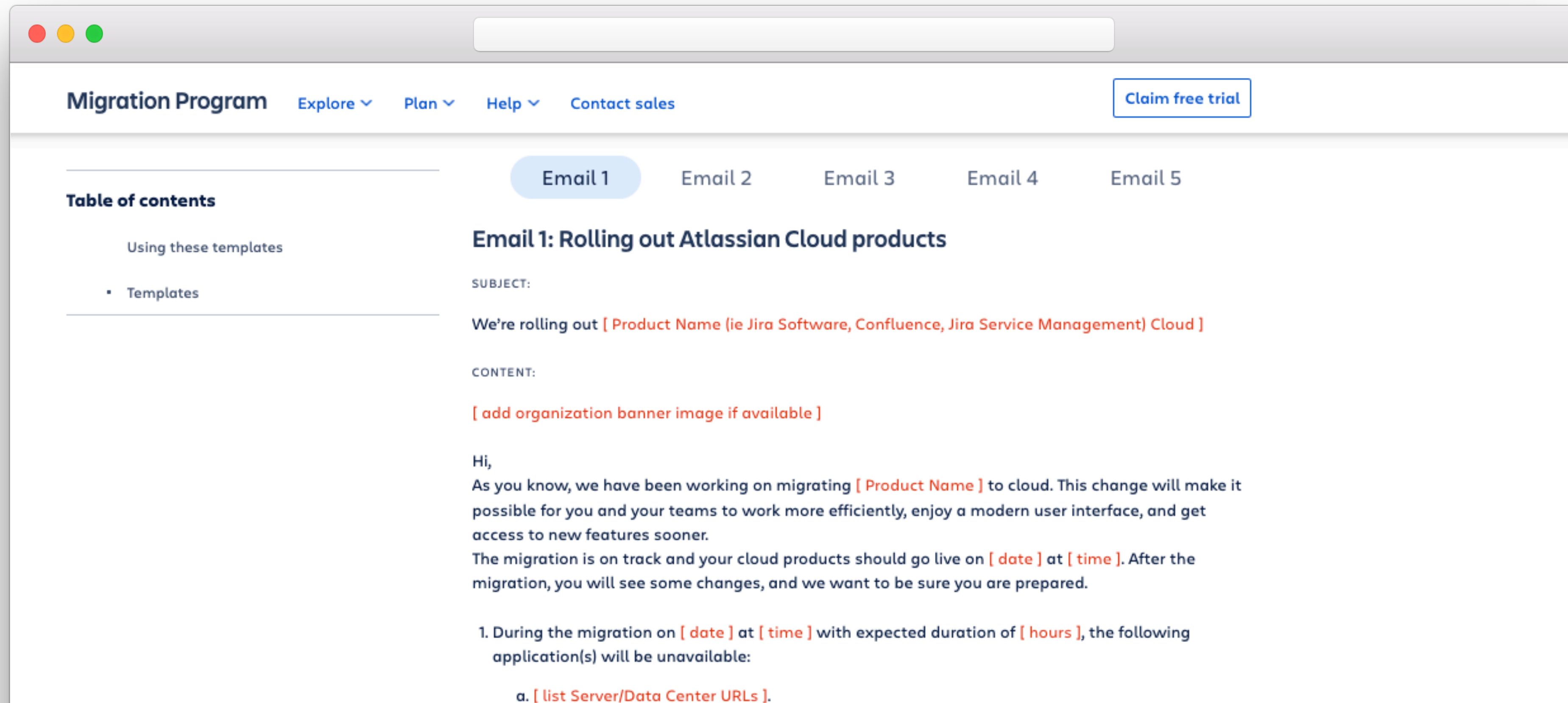
Physical signage or swag like posters,  
laptop stickers, etc.





## STEP 7

# Build your communications plan



1

2

3

4

5

6

7

8

9

10

# *STEP 7* Build your communications plan

## MANAGING RESISTANCE TO CHANGE



We can't avoid resistance entirely, but we can anticipate and plan for it to set the stage for successful adoption and change management.

## STEP 8

# Identify Champions and build your network

### BUILD, TRAIN, AND NURTURE A CHAMPIONS COMMUNITY



#### Create

a Champions Slack/Teams channel to communicate.



#### Host

monthly office hours where Champions can network.



#### Reward

your Champions and recognize their hard work.



**“** *A Company User Group is a great idea to get alignment and speed-up adoption...we started 2023 with "Refresher" workshops on our ways of working, and based on the feedback, we have already scheduled monthly mini-workshops on specific topics, such as estimation and reporting. The workshops combine brief concept presentations, tools (Jira, Confluence), best practices, and demos.*



## STEP 9

# Ship it!





# Agenda

*The people side of change*

*Your plan for a successful rollout*

Driving lasting change

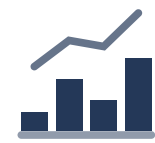
---

*Supporting your adoption journey*

Q&A

## STEP 10

# Monitor & engage



Were we successful? What are our **success metrics** telling us?  
Do we need to course-correct?



Are there successes in one department that can be highlighted and shared to **keep up the momentum**?



How are our teams feeling about the change? What other steps can we take to **support** them?



Are teams asking for **additional features**, add-ons, or products? Are there other helpful training resources?



Are we ready for teams to start using another Atlassian product to help **solve an ongoing challenge**?



How can we take this to the next level? Is there a **new use case** we want to land org-wide?

1

2

3

4

5

6

7

8

9

10

## STEP 10

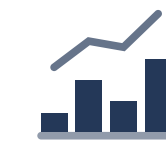
# Monitor & engage

## MEASURING ROI



### Survey

Touch base with users via survey plugins available in Atlassian Marketplace.



### Admin Hub

Access Atlassian's centralized user management portal at [admin.atlassian.com](https://admin.atlassian.com).

1

2

3

4

5

6

7

8

9

10

## STEP 10

# Monitor & engage

## SURVEY USERS TO GAUGE



### Overall satisfaction

with the rollout, training, communications, and the new tools and processes.



### New use cases

for products, including unexpected ways teams are using tools to get work done.



### Future needs

such as opportunities for growth and innovation down the road.

1

2

3

4

5

6

7

8

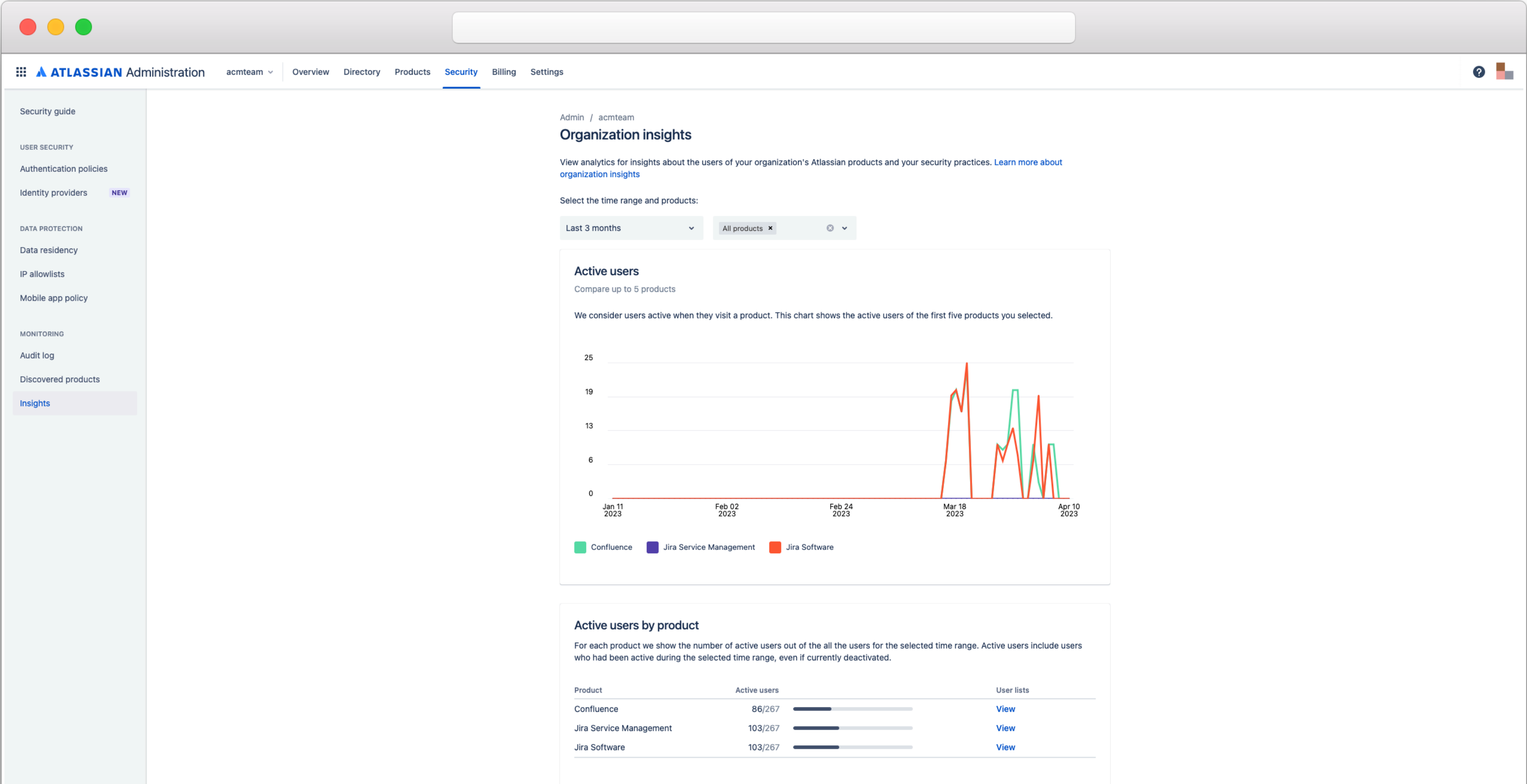
9

10

Demo time



# View organization insights



# Understand user activity via CSV export

The screenshot shows the Atlassian Admin interface with the 'Users' section selected. A modal dialog titled 'Export users to CSV' is open, allowing users to select the data to include in their CSV file. The dialog includes options for 'Users' (All users in the organization or Users from selected groups only), 'User status' (All users or Only active users), and 'Additional data' (Group membership or Product access and role). The background interface shows the 'Users' section with a search bar, a list of users, and a table of user activity.

**Export users to CSV**

Select the data to include in your CSV file. We'll send an email to you when your download link is ready. [Learn more about exporting users](#)

**Users**

- ☒ All users in the organization
- ☐ Users from selected groups only

**User status**

- ☐ All users
- ☒ Only active users

**Additional data**

- ☐ Group membership
- ☐ Product access and role

Cancel **Export users**











**Users**

Admin / acmteam

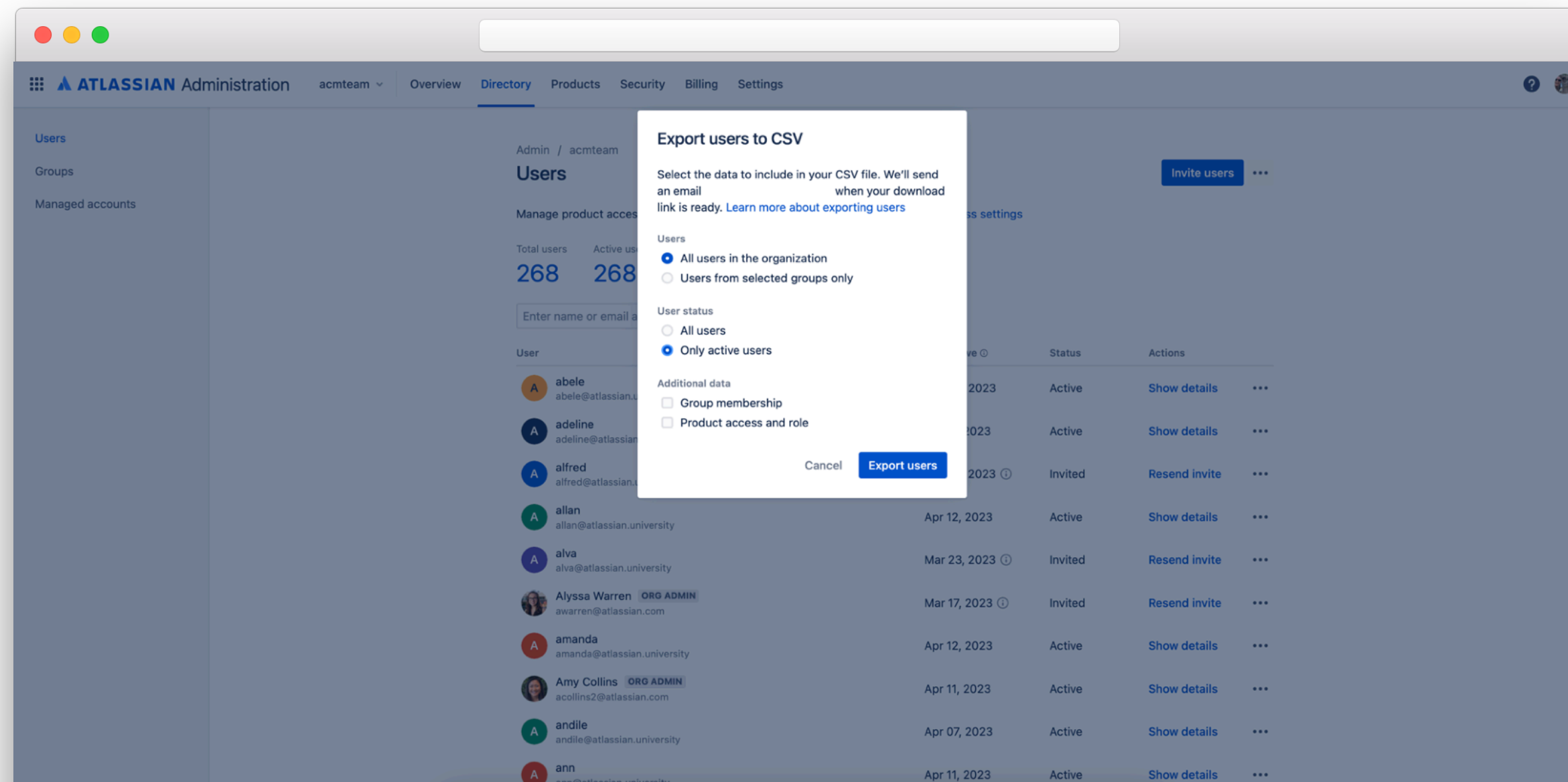
Manage product access

Total users: 262 Active users: 262

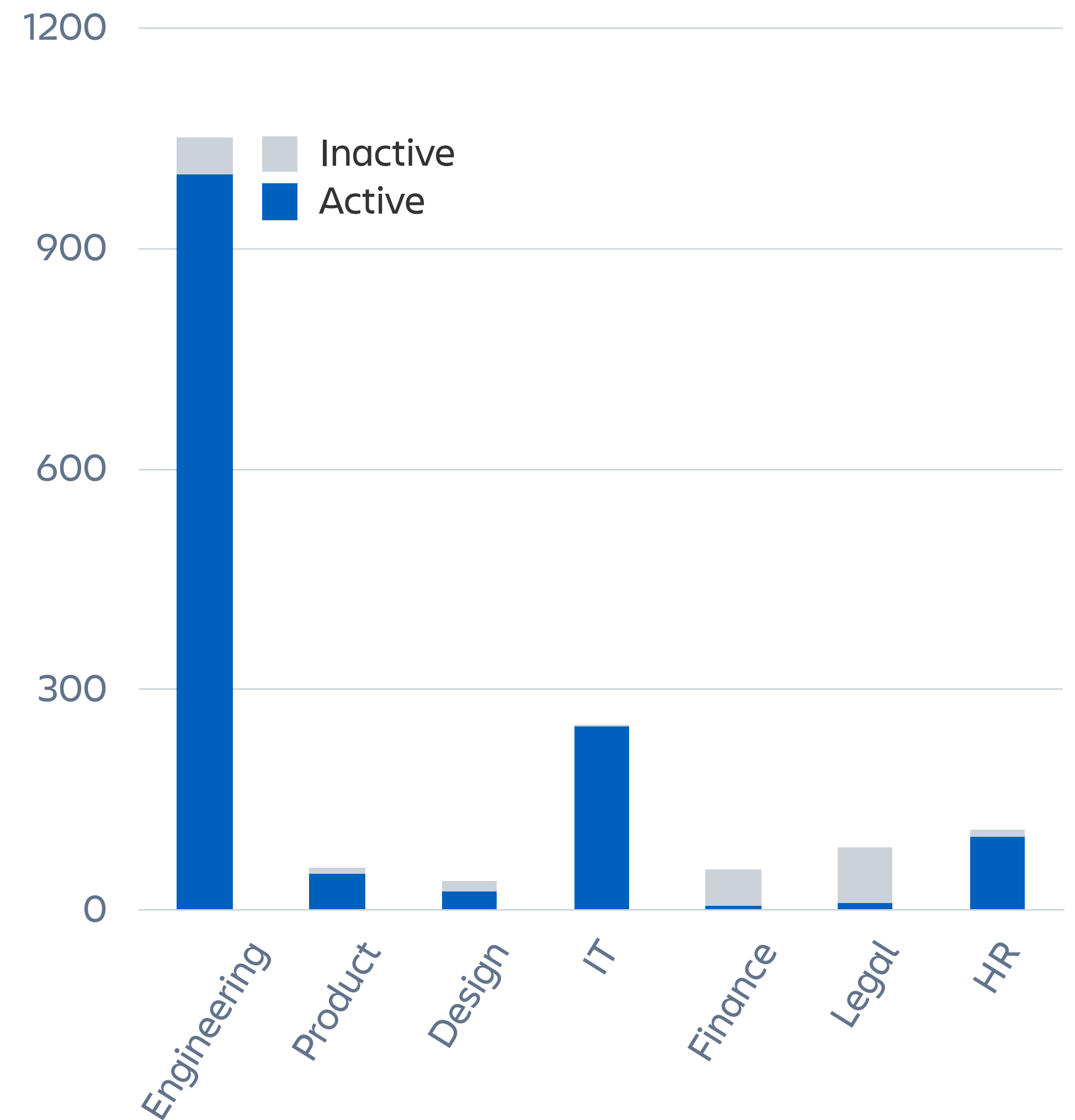
Enter name or email

User	Active	Status	Actions
  @atlassian	<input checked="" type="checkbox"/>	Active	<a href="#">Show details</a> <a href="#">...</a>
  @atlassian	<input checked="" type="checkbox"/>	Active	<a href="#">Show details</a> <a href="#">...</a>
  @atlassian	<input checked="" type="checkbox"/>	Invited	<a href="#">Resend invite</a> <a href="#">...</a>
  @atlassian.university	<input checked="" type="checkbox"/>	Invited	<a href="#">Resend invite</a> <a href="#">...</a>
  @atlassian.university	<input checked="" type="checkbox"/>	Invited	<a href="#">Resend invite</a> <a href="#">...</a>

# Measure adoption by department



Adoption by Department



# Identify Champions via audit log actions

ATLASSIAN Admin

acmteam

Overview

Directory

Products

Security

Billing

Settings

Security guide

USER SECURITY

Authentication policies

Identity providers

DATA PROTECTION

Data residency

IP allowlists

Mobile app policy

MONITORING

Audit log

Discovered products

Insights

Admin / acmteam

Audit log

Your organization's audit log tracks activities that occurred from your organization and across your sites within the past 180 days. For product-specific activity, visit the product's audit log. [Learn more about your organization's audit log](#)

To save activities before they pass 180 days, regularly export the log or use the organization REST API to store activities to another location. [Learn more about the organization REST API](#)

Search by name, group,

Date

Activities

Apply

Showing 30 activities

Date	Location
Apr 10, 2023 15:45 PDT	
Mar 30, 2023 05:20 PDT	
Mar 30, 2023 05:20 PDT	
Mar 30, 2023 05:19 PDT	
Mar 30, 2023 05:19 PDT	
Mar 30, 2023 05:19 PDT	
Mar 30, 2023 05:18 PDT	
Mar 30, 2023	

jira

JIRA USER ACTIONS

Added Jira issue security scheme

Deleted Jira issue security scheme

Created Jira issue

Removed member from Jira project role

Updated Jira issue security level

Added member to Jira project role

Removed permission from Jira project permission scheme

Added Jira issue security level member

26 of 26

@atlassian.com to organization

@atlassian.university to organization

am.atlassian.net

@atlassian.university to organization

am.atlassian.net

@atlassian.university to organization

am.atlassian.net

@atlassian.university to organization

am.atlassian.net

@atlassian.university to organization

https://acmteam.atlassian.net

Invited @atlassian.university to organization

https://acmteam.atlassian.net

Invited @atlassian.university to organization



# Simplify invitations via user access settings

ATLASSIAN Admin

acmteam ▾

Overview

Directory

Products

Security

Billing

Settings

Products

User access settings

Product URLs

RELEASE MANAGEMENT

Product updates

Release tracks

Sandbox

SITES AND PRODUCTS

acmteam Site

Admin / acmteam

User access settings

These settings control how users get access to your products. If you wish to transfer your products to another organization, you can [reset your user access settings](#). If you exceed the user limit on any product's Free plan, we'll upgrade that product to a trial of the Standard plan with unlocked user limits. Trials can be cancelled at any time. [Learn more about configuring user access settings](#).

Approved domainsUser invitesInvitation links

Control how existing users can invite and request access for other people.

Product	Existing user permissions
<div><div></div>Confluence acmteam.atlassian.net</div>	<div>Require admin approval ▾</div> <div><div>Invite anyone</div><div>Can invite anyone, from any domain (no org admin approval). Can request access for anyone from any domain (requires org admin approval).</div></div> <div><div>Invite approved domains</div><div>Can invite people with approved domains only (no org admin approval). Can request access for anyone from any domain (requires org admin approval).</div></div> <div><div>Require admin approval</div><div>Unable to invite anyone. Can request access for anyone from any domain (requires org admin approval).</div></div>
<div><div></div>Jira Work Management acmteam.atlassian.net</div>	
<div><div></div>Jira Service Management acmteam.atlassian.net</div>	
<div><div></div>Jira Software acmteam.atlassian.net</div>	
<div><div></div>Jira Administration acmteam.atlassian.net</div>	





# Share updates via Jira announcement banner

The screenshot shows the Jira Cloud interface with the 'Edit Announcement Banner' page open. The top navigation bar includes the Jira logo, 'Your work', and various menu items like Projects, Filters, Dashboards, Teams, Plans, Assets, and Apps, along with a 'Create' button. A search bar and utility icons are on the right. The left sidebar lists system configuration options, with 'Announcement banner' selected at the bottom. The main content area is titled 'Edit Announcement Banner' and explains the banner's purpose. It features a text input field containing a welcome message, a toggle for 'Banner is shown to users' (which is turned on), a toggle for 'Users can dismiss the banner' (which is turned off), and a 'Visibility level' section with radio buttons for 'Private' (selected) and 'Public'. A 'Save' button is at the bottom.

Welcome to Jira Cloud! Please review our onboarding guide to learn about Jira Cloud, changes from the previous version, and take training courses to get started with Jira: [bit.ly/traininglink](https://bit.ly/traininglink). If you have any questions, please reach out to IT at #help-jira-cloud

## Edit Announcement Banner

You can set text that will be shown in a banner at the top of all pages in Jira. This is useful for alerting users of upcoming system-wide changes.

Announcement

Welcome to Jira Cloud! Please review our onboarding guide to learn about Jira Cloud, changes from the previous version, and take training courses to get started with Jira: [bit.ly/traininglink](https://bit.ly/traininglink). If you have any questions, please reach out to IT at #help-jira-cloud

Banner is shown to users ☒

Users can dismiss the banner ☐

Visibility level \*

☒ **Private:** show to logged in users only

☐ **Public:** show to anyone on the internet

Save

## STEP 10

# Monitor & engage

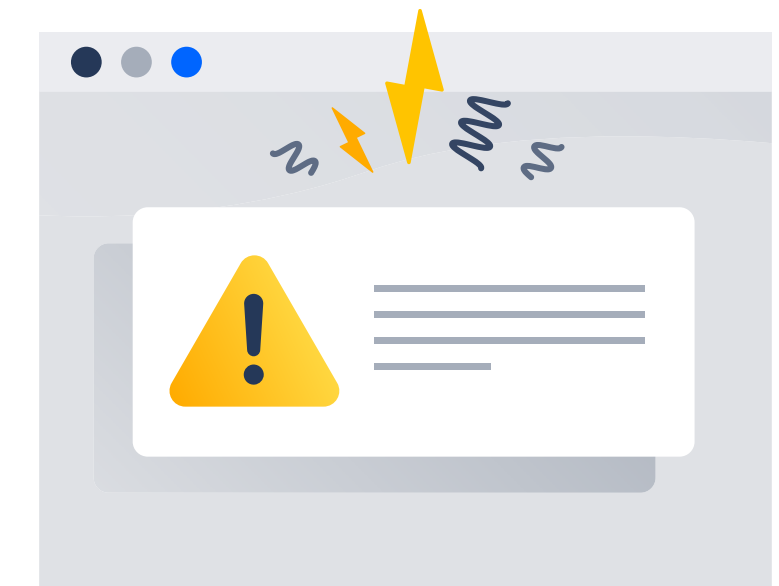
**SIGNS THE CHANGE WAS UNSUCCESSFUL**



Backsliding into old  
ways of working



Decrease in activity  
usage



Presence of  
Shadow IT

## STEP 10

# Monitor & engage

## IMPROVING ADOPTION



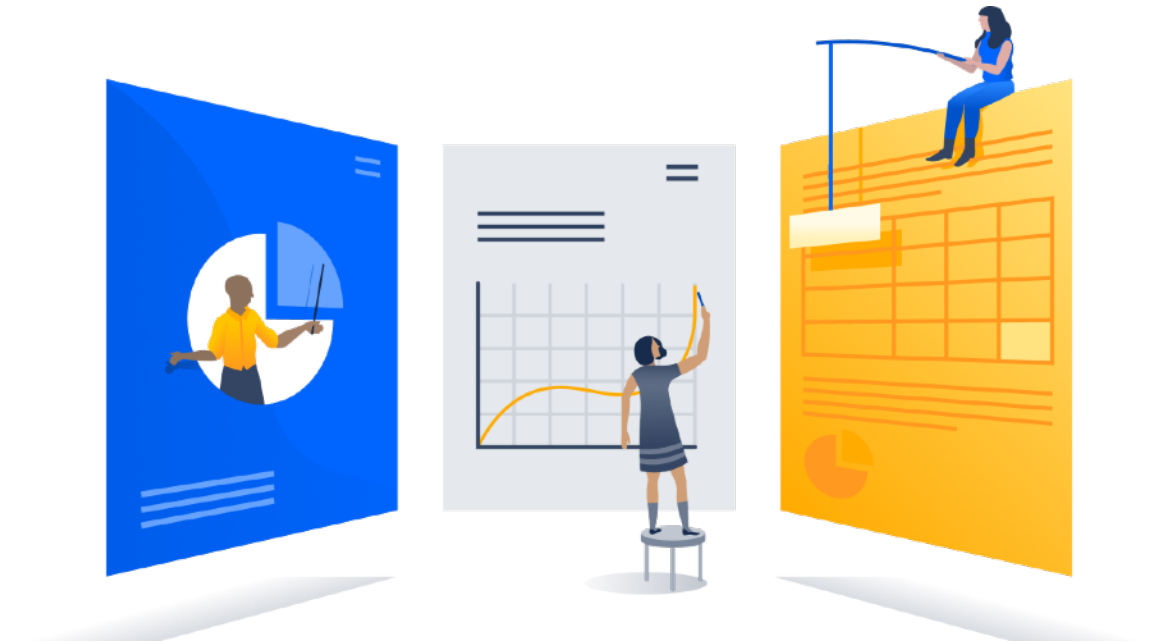
### Re-rollout

to departments with lower adoption; include targeted communication and training plans.



### Identify

Champions to drive change and reinforce adoption from within teams.



### Spread

current tooling across the organization; adopt new product use cases to fit team needs.

1

2

3

4

5

6

7

8

9

10

# Agenda

*The people side of change*

*Your plan for a successful rollout*

*Driving lasting change*

Supporting your adoption journey

---

Q&A

# Resources to support your Atlassian journey



## Atlassian University

Quickly get started with free courses and hands-on trainings to upskill, get certified, or guide your team to new heights.

## Partners

Extend the power of our tools with trusted Atlassian Partners, offering a wide range of accredited services and solutions.

## Customer Success & Advisory Services

Tap into Enterprise services to access personalized support from experienced advisors.



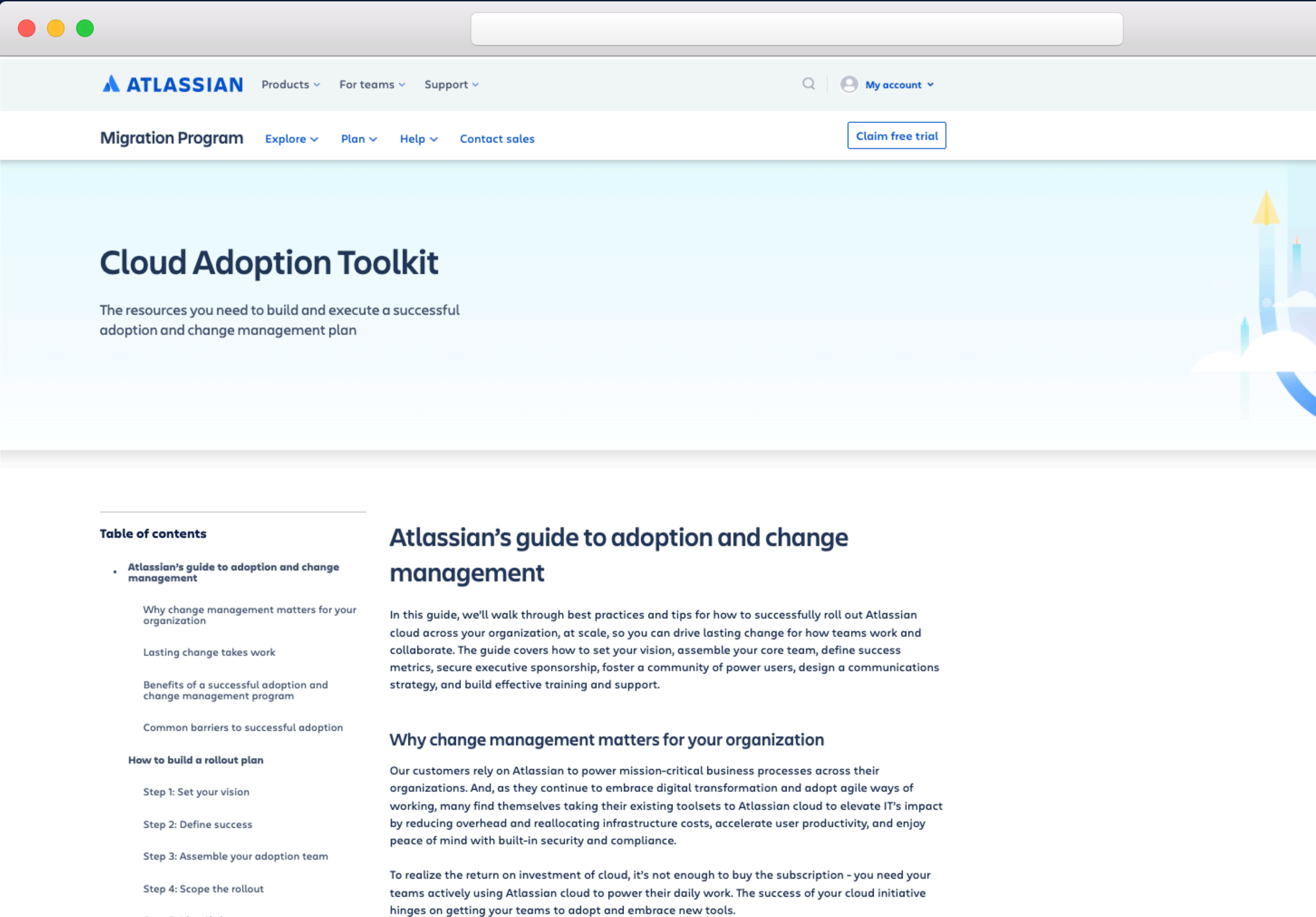


# HIT THE GROUND CLOUD RUNNING

Check out the [Cloud Adoption Toolkit](#) for everything you need to build an adoption & change management plan and set your users up for success.

# INTRODUCING THE CLOUD ADOPTION TOOLKIT

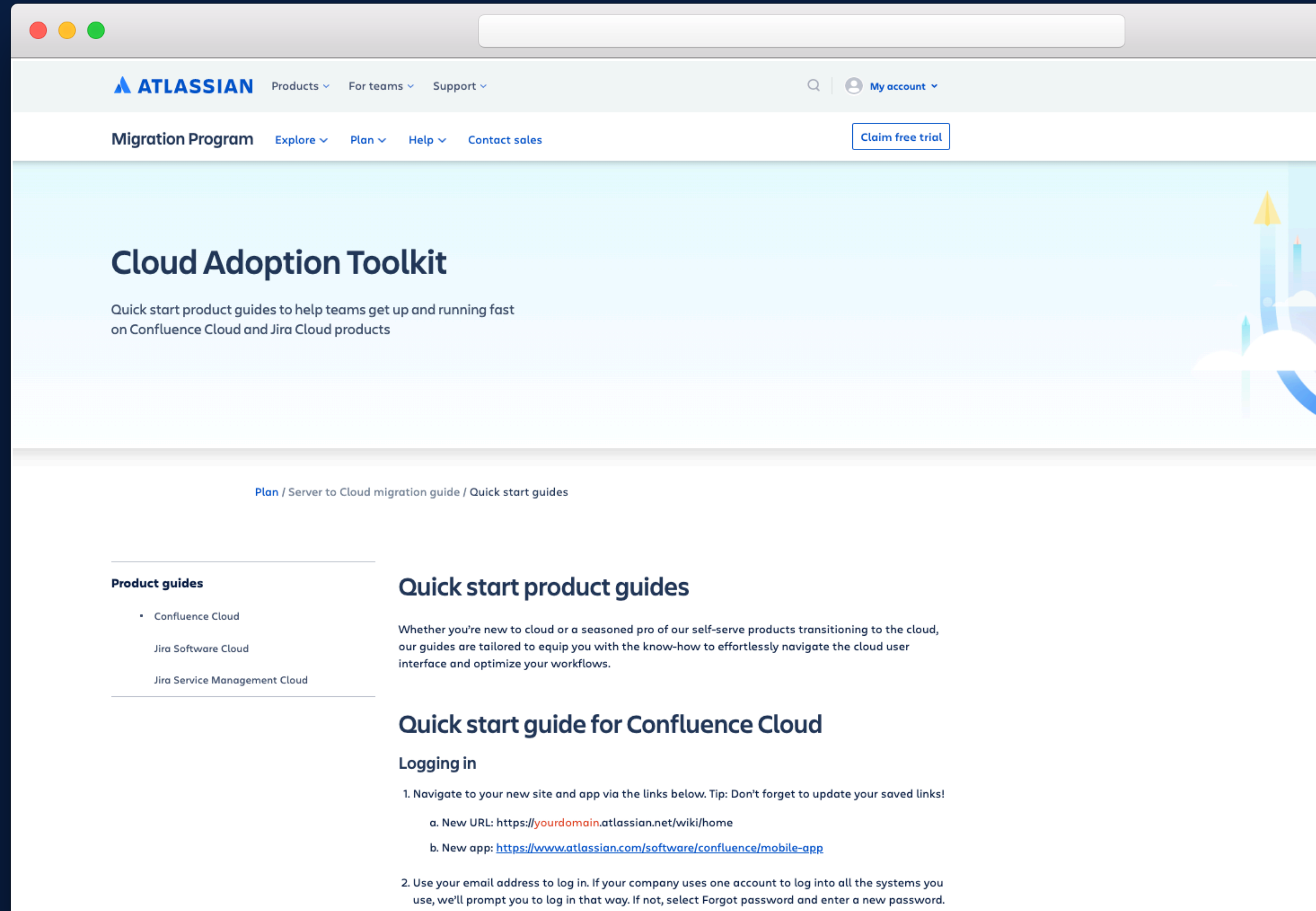
Step-by-step guidance  
Learn about the importance of adoption & change management and follow our steps to a successful rollout plan.



# INTRODUCING THE **CLOUD ADOPTION TOOLKIT**

## Quick start guides for users

Give your users a high-level overview of UX changes the can expect moving to cloud so they can get productive, fast.

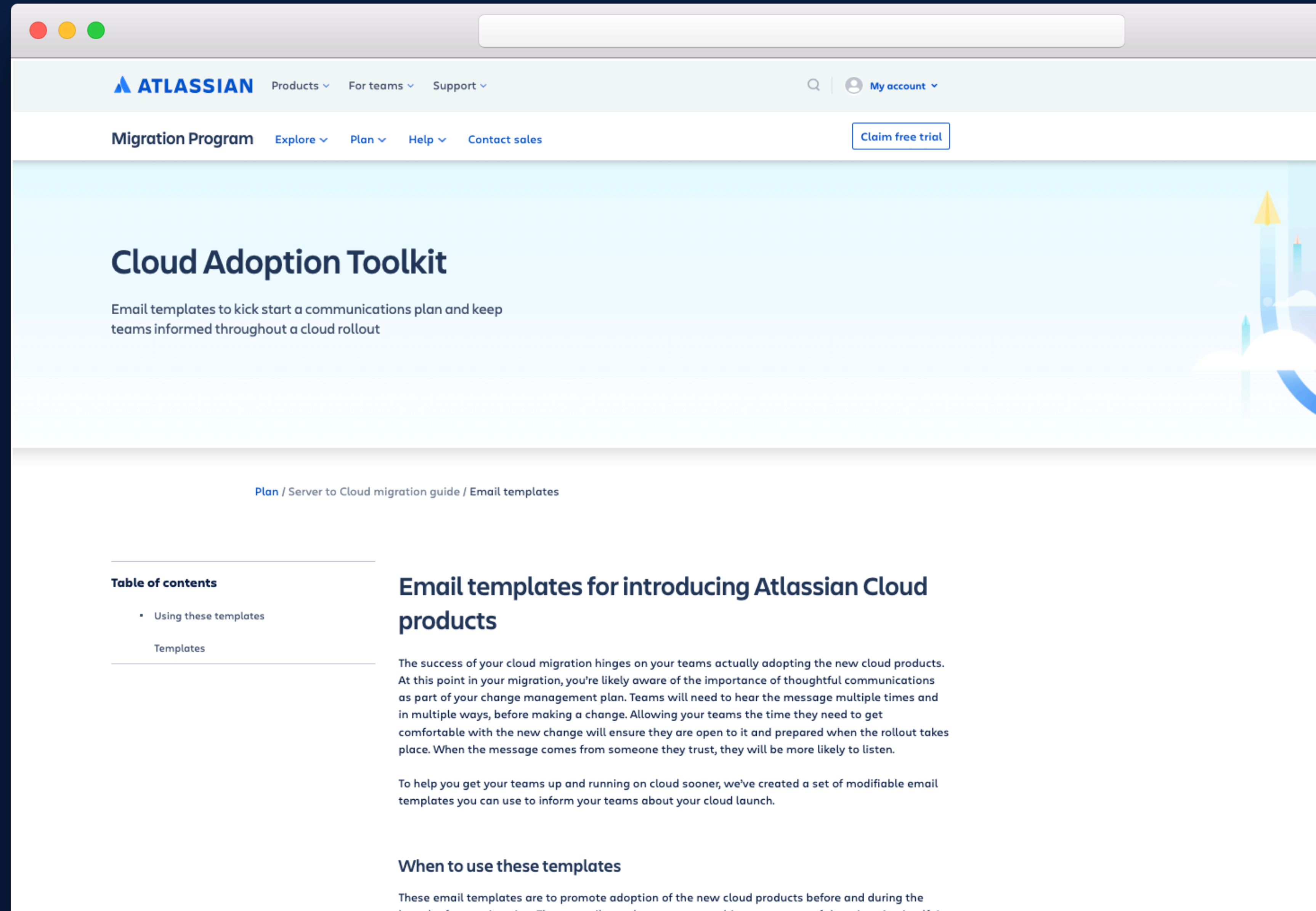




# INTRODUCING THE **CLOUD ADOPTION TOOLKIT**

## Customizable email templates

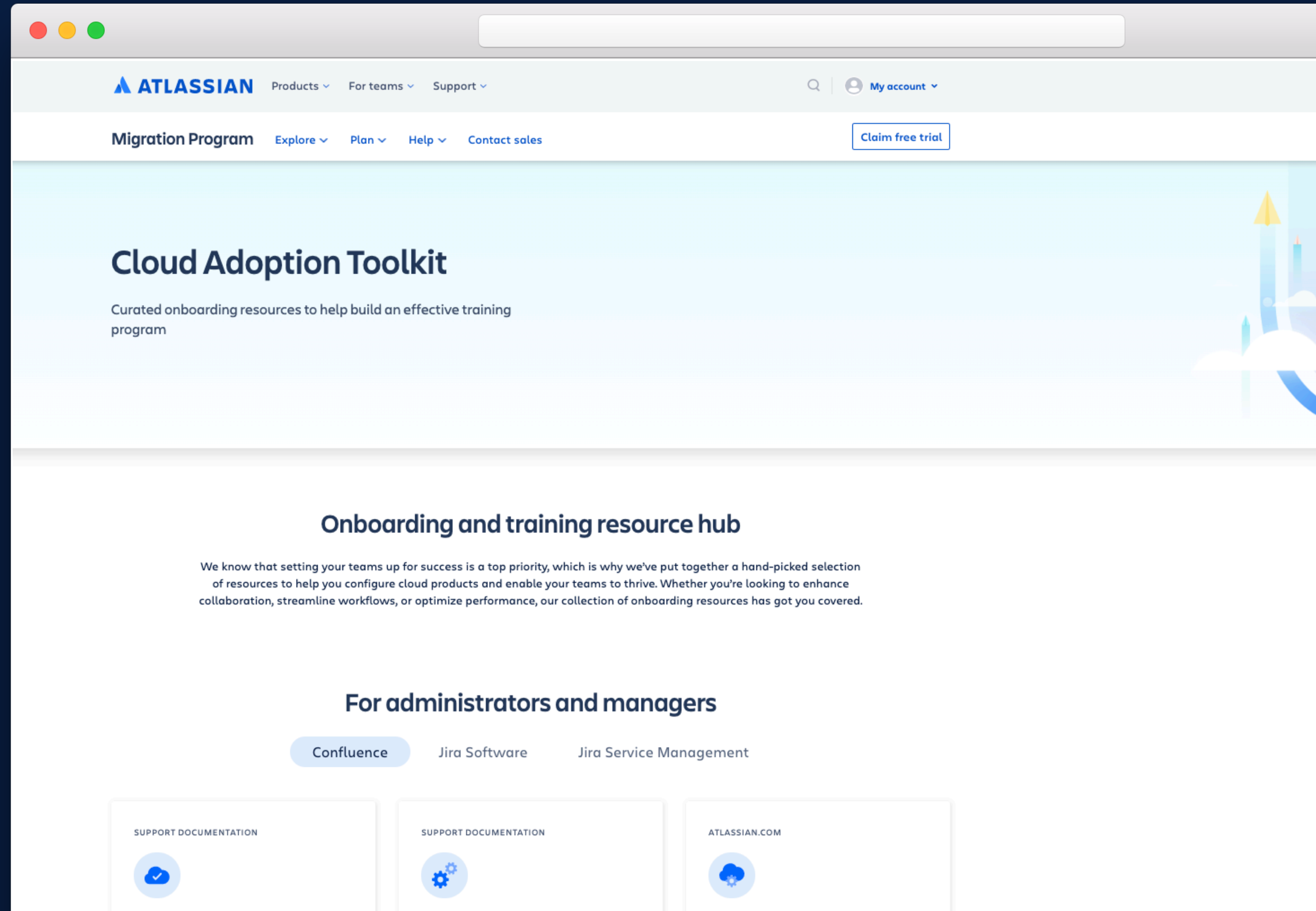
Ace your  
communications plan  
with a set of email  
templates designed to  
prepare your users for  
upcoming change.



# INTRODUCING THE **CLOUD ADOPTION TOOLKIT**

## Comprehensive training resources

Get inspiration for your user training plan by exploring our curated list of popular training materials for users and admins.





## Key Takeaways

- 1** The people side of change is as critical as the technical side of change.
- 2** Organizational change is the result of *individual* change. We all move through change at different speeds.
- 3** Your strategic rollout plan for adoption and change management will set you up for long-term success.
- 4** The Cloud Adoption Toolkit is your go-to resource for Atlassian cloud adoption & change management!





Access the  
**Cloud Adoption Toolkit**  
[atlassian.com/adoption](https://atlassian.com/adoption)