

# Solution Delivery Guide

MARCH 2023



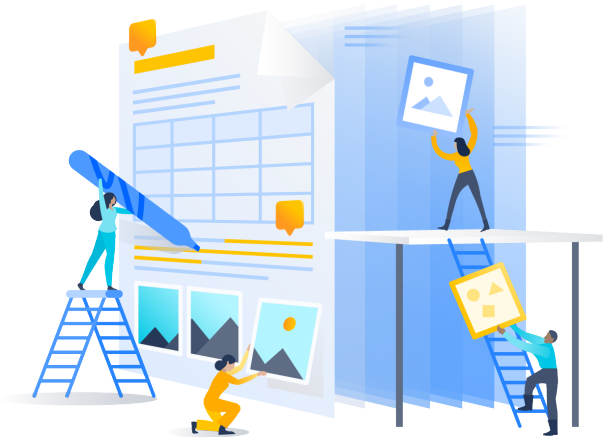
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## About this guide

The guide provides a comprehensive overview of how to deliver and implement Atlassian tools and IT Service Management (ITSM) practices using a standardized delivery process while getting an opinionated view and leveraging best practices. It is written for those of you that are about to set up a Jira Service Management (JSM) implementation project.

The target with this guide is to make ITSM implementations easier, with less pain and getting happy customers. The guide will be regularly updated with new information and feedback to ensure that it stays current and effective.



# Introduction

Implementing Atlassian tools in an ITSM environment requires a solid understanding of the technical aspects of each tool, as well as best practices for integrating them into your existing infrastructure.

Before you start your journey to implement the ITSM platform, let's set the arena with an action plan. We will guide you through each step so that you can focus on the delivery without having to think about the what and the how.

You are free to use your own method to plan and set up your implementation project. Here are the stakeholder skills and capabilities you will need to successfully deliver the project.

## Stakeholder Skills and Capabilities

Here is a list of stakeholders that commonly take part in this type of implementation. What we also recommend is that the persons taking on these roles, should also have the right skills and experience as follows. Ensure you choose the roles and responsibilities that best fit your implementation. One person can take on several roles if applicable.

Depending on the size and maturity of the organization, titles and responsibilities may vary.

Customer side	
EXECUTIVE SPONSORS	Executive sponsors are high-level executives who provide strategic direction and oversight for the project. They should have excellent communication and leadership skills, and the ability to champion the project within the organization.
PROJECT SPONSOR	The project sponsor is typically a high-level executive or senior leader who champions the project and provides strategic guidance and resources to the project team. They should have excellent communication skills, the ability to manage and motivate stakeholders, and experience in managing complex projects.
PROJECT MANAGER	The project manager is responsible for ensuring that the project is completed on time, within budget, and to the satisfaction of stakeholders. They should have excellent organizational and planning skills, the ability to manage resources and schedules, and experience in managing projects of similar size and scope.
PRACTICE LEADS	Practice leads are responsible for managing the delivery of specific aspects of the project, such as process design or solution architecture. They should have excellent technical and analytical skills, experience in their area of expertise, and the ability to lead and manage teams.
BUSINESS ANALYSTS	Business analysts are responsible for analyzing business requirements and translating them into technical requirements for the project team. They should have excellent analytical and problem-solving skills, experience in requirements gathering, and the ability to communicate effectively with stakeholders and the project team.

<b>END-USERS</b>	End-users are the individuals who will be using the JSM system on a daily basis. They should have a good understanding of the business processes that the system will support, as well as the ability to provide feedback on system functionality and usability.
<b>SUBJECT MATTER EXPERTS (SMES)</b>	SMEs are individuals with deep knowledge of a specific business process or area of expertise. They should have excellent technical and analytical skills, experience in their area of expertise, and the ability to provide guidance and support to the project team.
<b>CHANGE MANAGEMENT TEAM</b>	The change management team is responsible for managing the people side of the project, including communication, training, and stakeholder engagement. They should have excellent communication and interpersonal skills, experience in change management, and the ability to manage resistance to change. This team comes specifically in play when there is a larger ITSM implementation of a more complex nature.
<b>IT SUPPORT TEAM</b>	The IT support team is responsible for providing technical support for the JSM system, including troubleshooting and issue resolution. They should have excellent technical skills, experience in IT support, and the ability to work effectively with the project team and end-users. This is the team that generally gets handed over the implementation project once completed and therefore takes the core administrator responsibility for JSM.
<b>PRODUCT OWNERS</b>	Product owners are responsible for defining and prioritizing the features and functionality of JSM. They should have excellent communication and analytical skills, experience in product management, and the ability to work effectively with the project team and stakeholders.
<b>TESTING TEAM</b>	The testing team is responsible for ensuring that the JSM implementation is tested thoroughly and meets the requirements of stakeholders. They should have excellent attention to detail, experience in testing software systems, and the ability to work effectively with the project team and end-users. It is recommended that this team sign off the deliverables from the project together with the sponsor, project requestor, project owner or equivalent.

### Consulting firm/Atlassian Partner

<b>PROJECT MANAGER</b>	The project manager is responsible for planning, executing, and closing projects, including the implementation. They should have excellent organizational and planning skills, the ability to manage budgets and resources, and experience in managing projects of similar size and scope.
<b>SOLUTION ARCHITECT</b>	The solution architect is responsible for designing the technical architecture and solution for the implementation. They should have excellent technical skills, experience in system design, and the ability to work effectively with the project team and stakeholders.

<b>BUSINESS CONSULTANT</b>	The business consultant is responsible for providing guidance and advice to stakeholders on how the JSM can support their business processes. They should have excellent communication and analytical skills, experience in business process design, and the ability to work effectively with stakeholders and the project team.
<b>IMPLEMENTATION CONSULTANTS</b>	The implementation consultants are responsible for configuring and customizing JSM to meet the needs of stakeholders. They should have excellent technical skills, experience in software implementation, and the ability to work effectively with stakeholders and the project team.
<b>DEVELOPERS AND SYSTEM INTEGRATORS</b>	Developers are responsible for developing customizations and integrations for the Jira Service Management system. They should have excellent technical skills, experience in software development, software integrations and the ability to work effectively with the project team and stakeholders.
<b>QUALITY ASSURANCE (QA) TEAM</b>	The QA team is responsible for testing the JSM implementation to ensure that it meets the requirements of stakeholders. They should have excellent attention to detail, experience in testing software systems, and the ability to work effectively with the project team and stakeholders.
<b>TRAINING AND DOCUMENTATION TEAM</b>	The training and documentation team is responsible for creating user guides, training materials, and other documentation to support the use of JSM. They should have excellent communication and writing skills, experience in training and documentation, and the ability to work effectively with the project team and stakeholders.
<b>CUSTOMER SUCCESS MANAGERS</b>	Customer success managers are responsible for ensuring that JSM meets the needs of stakeholders and delivers business value. They should have excellent communication and interpersonal skills, experience in customer success, and the ability to work effectively with stakeholders and the project team.
<b>ACCOUNT MANAGERS</b>	Account managers are responsible for managing the relationship with stakeholders and ensuring that the JSM implementation meets their needs. They should have excellent communication and interpersonal skills, experience in account management, and the ability to work effectively with stakeholders and the project team.

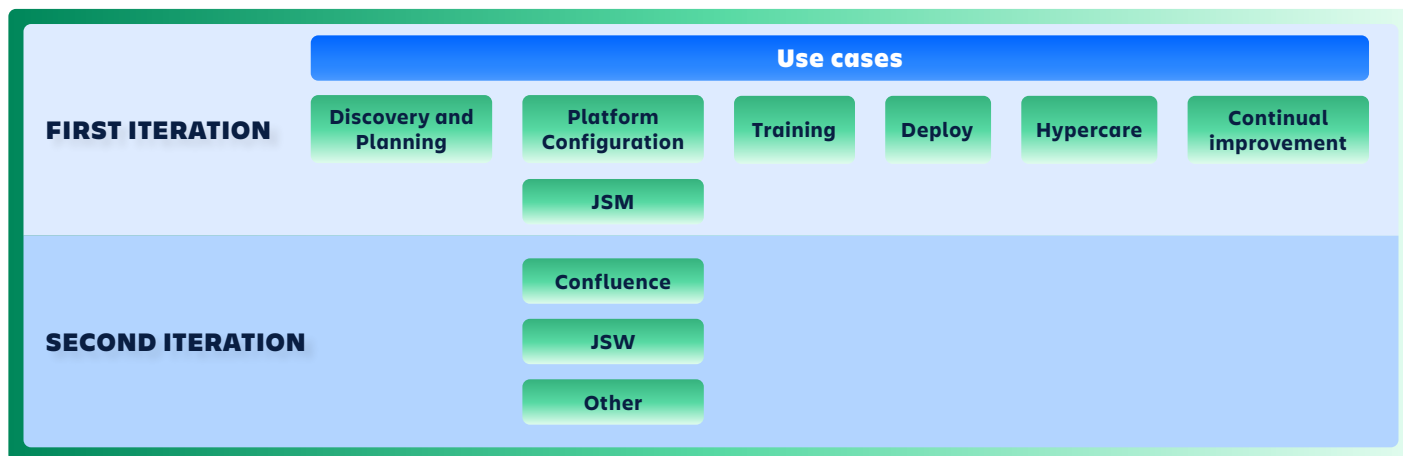


**NOTE:**

Not all the stakeholders participate in the implementation of course. You decide who will be best for your implementation project.

# Delivery overview

Below is a diagram of the Implementation and its main phases.



By following these main phases, you can ensure that your implementation of Atlassian tools in an ITSM environment is successful and delivers the desired benefits. We recommend that you iterate your implementation and don't implement it all at once. One iteration can contain several sprints depending on the complexity of your setup.



## Discovery

First we go through some critical success factors for you to consider.

### Communication and Collaboration

Effective communication and collaboration among the project team, stakeholders and other parties involved are key for the success of the implementation. If this is done properly then you have added extra value in terms of how to use the platform for communication and collaboration, during and after the project.

#### ACTIVITIES:



#### Define communication channels

Identify the best communication channels for different types of information and stakeholders. Ensure that everyone is aware of the channels being used and how to access them.



#### Conduct regular meetings

Schedule regular meetings with the project team, stakeholders, and any other relevant parties. These meetings can be used to review progress, discuss any issues or concerns, and plan next steps.



#### Assign clear roles and responsibilities

Make sure that each team member and stakeholder knows their specific roles and responsibilities within the project. This can help to avoid confusion and ensure that tasks are completed on time.



#### Encourage open communication

Encourage team members and stakeholders to ask questions, provide feedback, and share their ideas. This can help to identify potential issues early on and foster a collaborative environment.



### Use Jira platform collaboration features

Jira has many features that can be used to improve communication and collaboration. For example, use @mentions to draw attention to specific team members or stakeholders, use labels to categorize and track issues, and use custom fields to capture additional information about tasks or issues.

## Clearly defined goals and objectives

Defining clear goals and objectives is essential for a successful ITSM implementation. It involves setting specific, measurable, achievable, relevant, and time-bound (SMART) goals and identifying the problems that the ITSM solution will solve.

### ACTIVITIES:



#### Define SMART goals

Set clear and specific goals that are measurable, achievable, relevant, and time-bound. This will help to ensure that everyone involved in the ITSM implementation is working towards the same objectives.



#### Conduct a needs analysis

Identify the specific pain points and challenges that the ITSM solution is intended to address. This will help to ensure that the solution is tailored to meet the specific needs of the organization.



#### Conduct a gap analysis

Determine the current state of the organization's ITSM capabilities and identify the gaps that need to be addressed to achieve the desired future state.



#### Define success criteria

Identify the metrics that will be used to measure the success of the ITSM implementation. This will help to ensure that progress is being tracked and that the project is on track to achieving its goals.



#### Involve stakeholders

Ensure that all relevant stakeholders are involved in the goal-setting process. This includes senior management, IT staff, and end-users.



#### Prioritize goals

Prioritize goals based on their level of importance and urgency. This will help to ensure that the most critical objectives are addressed first.



#### Develop an action plan

Develop an action plan that outlines the specific steps that need to be taken to achieve the ITSM goals and objectives.



#### Communicate goals and objectives

Communicate the goals and objectives to all stakeholders and ensure that everyone is aware of their role in achieving them. This will help to foster a collaborative and focused approach to the ITSM implementation.

## Stakeholder Involvement

Engaging key stakeholders in the planning and implementation process is critical for ensuring that the ITSM solution is successful and meets the needs of all parties involved.

### ACTIVITIES:



#### Identify key stakeholders

Identify the stakeholders who will be affected by the ITSM implementation and their roles in the process. This could include senior management, IT staff, end-users, and external vendors.



#### Involve stakeholders in discovery and design

Involve stakeholders in the discovery and design phases of the project. This could include conducting surveys, focus groups, or interviews to gather feedback on what stakeholders need from the ITSM solution.



#### Engage stakeholders in ownership

Engage stakeholders in the ownership of the ITSM solution. This could involve establishing a governance structure and involving stakeholders in decision-making processes.



#### Include stakeholders in testing

Involve stakeholders in the testing phase of the project. This could include conducting user acceptance testing to ensure that the ITSM solution meets the needs of end-users.



### PRO TIP:

By involving stakeholders throughout the ITSM implementation process, organizations can increase buy-in and ensure that the solution meets the needs of all parties involved.



## Planning

A well-planned and executed project is more likely to be successful.

### ACTIVITIES:



#### Define Requirements, Goals, and Objectives

Determine the objectives and outcomes that the project aims to achieve. Identify the project's requirements and prioritize them. Update the Requirements from your Discovery and add more if appropriate.



#### Assess Practices and Tools

Determine the practices that need to be implemented for the project, such as:

- Incident Management
- Problem Management
- Change Management
- Service Catalog
- Service Request Management
- Knowledge Management
- Asset Management
- Identify the necessary tools required to support each process.





### Choose Deployment Option

Select a deployment option that best suits your needs. You can choose between cloud-based, or Datacenter deployment options for JSM implementation. We strongly recommend cloud based because of the added benefits it provides.



### Create a detailed project plan

Develop a project plan that outlines the project's:

- timeline
- milestones
- deliverables
- include regular checkpoints for monitoring the project's progress.



### Identify potential risks and issues

Identify and evaluate any potential risks or issues that may arise throughout the project lifecycle. Develop a mitigation plan for each identified risk.



### Determine the scope of the project and definition of done

Define the scope of the project and the definition of done. This involves identifying the specific features, functions, and outcomes that the project will deliver.



### Gather use cases and prioritize requirements

Collect all use cases and create a prioritized list of requirements for the project. This step involves gathering feedback from stakeholders and aligning their requirements with the project's objectives if you haven't done so in the Discovery phase.



### Go through examples of use cases and requirements for effective platform setup

Review and refine the use cases and requirements to ensure they align with the project's objectives.



## Platform Configuration (Jira Administrator)

Now it is time to set up the platform and implement the ITSM solution. We recommend configuring the following to get a better experience when setting up a new ITSM solution:

### Configure Jira Service Management

It is important to properly set up Jira Service Management (JSM) by configuring the service desk, queues, and SLAs. This includes creating custom fields and workflows to fit the specific needs of your organization. Additionally, proper permissions and access controls should be established to ensure that only authorized users have access to sensitive information.



#### PRO TIP:

As a Jira Administrator it is good practice to set up an initial platform with one Service Project where you can configure according to your use cases.

Keep it simple at the first iteration. Setup the platform with one portal and one Service Project and continue your implementation according to your use cases in your following iterations.

## ACTIVITIES:



### Verify domain/s



### Set up Atlassian Access

if identity and access management (IAM) features are required.



### Configure product access

with Active Directory groups and make sure to include groups for your use cases such as approvers.

## Configure Jira Service Management

Confluence is a collaboration and knowledge management tool that helps teams work together and share knowledge more effectively. By using Confluence, teams can create, organize, and share information in a centralized and easily accessible location.

Confluence should be integrated with JSM to provide a centralized knowledge base for your team. This includes setting up the appropriate spaces, permissions, and integrations with other tools such as Jira Software.

## ACTIVITIES:



### Set up the site structure

Create a site structure that reflects your team's needs and how you plan to use Confluence.

- set up spaces
- set up pages
- use templates that make it easy for teams to collaborate and find information



### Configure user permissions

Define user roles and permissions to ensure that team members have access to the right information and can collaborate effectively.



### Customize Confluence settings

Customize Confluence's appearance and settings to match your team's branding and preferences.

- configure the homepage
- configure navigation, and language settings



### Configure integration with other tools

Integrate Confluence with other tools that your team uses, such as:

- JSM
- Trello
- Slack
- other



### Configure add-ons and macros

Add additional functionality to Confluence by installing add-ons and macros such as:

- drawing tools
- project management
- other tools that are important to your team



### Configure search functionality

Setup Confluence's search functionality to make it easy for team members to find the information they need quickly.

- configure search filters
- highlighting search results
- set up search macros

## Configure Jira Software

Jira Software (JSW) should also be configured to work with JSM and Confluence, including integrating with other development tools such as Bamboo and Bitbucket. Additionally, it is important to establish a clear workflow and issue management process, as well as proper permissions and access controls for development teams.

### ACTIVITIES:



Integrate Jira Software with JSM and Confluence



Establish a clear workflow and issue management process



Set proper permissions and access controls for development teams



Integrate with other development tools such as Git and Bitbucket to streamline the development process

## Automation



### PRO TIP:

Automation and pre-built templates are key factors to speed up the delivery process, reducing the time and resources needed to implement the solution

This includes identifying the automation possibilities and creating templates that can be used as a starting point for future projects.

## Customize the tools

Customize the tools to fit the specific needs of your organization and make sure they align with the goals of the project.

## Test and evaluate

Test and evaluate your service desk implementation to ensure that it meets your requirements, goals, and objectives.

# Training and Support

One pitfall to avoid is to not properly configure the tools to fit the specific needs of your organization, leading to inefficiencies and user frustration. Another pitfall is to not properly train users on the tools, leading to a lack of adoption and underutilization of the tools.

Proper training and support are crucial for ensuring a successful implementation.

### ACTIVITIES:



Providing ongoing support and resources to ensure that the solution is being used effectively.

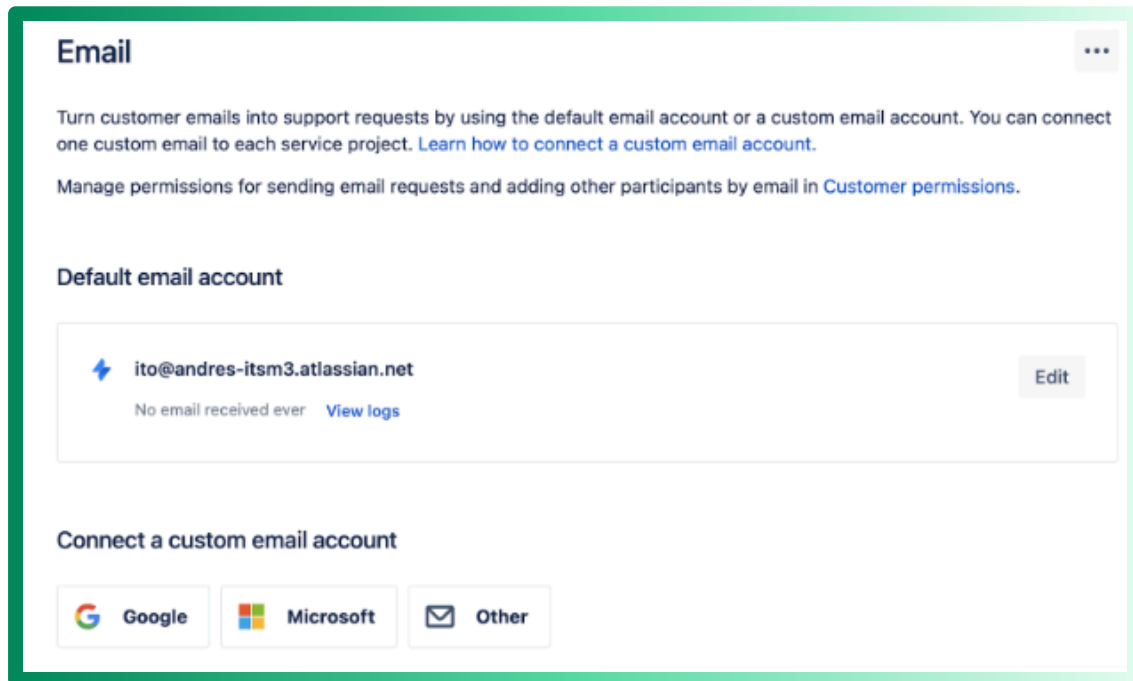


Train your team and key stakeholders on how to use JSM and the practices that are implemented.

# Deploy

In this phase you will launch your ITSM Service Project to your customers and users.

If you have done all the steps prior to the Deployment then the deployment itself will be a swift one - update the email routing path so that JSM can retrieve emails.






Although all activities are done we recommend that you perform some final checks since finalizing the Go Live step for JSM involves a series of activities that need to be performed to ensure a successful deployment.



## Checklist



- ✓ **Verify system readiness:**  
Verify that all necessary configurations are in place, including user access, project workflows, custom fields, and any integrations with external tools or systems.
- ✓ **Perform a final data import:**  
Check that all data from the previous system has been successfully imported into JSM. Validate that the data is accurate and complete.
- ✓ **Conduct final testing:**  
Ensure that everything is working correctly. Test key functionality such as ticket creation, status changes, and SLA calculations.
- ✓ **Teams trained?**  
Ensure that all team members who will be using JSM are trained and familiar with the features, workflows, and processes.

- 
**Communicate the Go Live:**  
 Communicate the Go Live date and time to all stakeholders, including end-users, management, and any external partners. Providing clear instructions on how to access and use the system, especially the link to the Help Center, is important.
- 
**Monitor your JSM implementation:**  
 Monitor closely after Go Live to ensure that everything is working correctly. This includes performance, resolving any issues, and addressing any user feedback. This is also the start of your Hypercare phase.
- 
**Provide ongoing support:**  
 Provide ongoing support to end-users and continue to train them on how to use the system effectively. Continuously monitor the system for potential issues and address them proactively. We recommend you to set up a separate channel for the Jira administration issues.

By completing these activities, you can ensure that your team is well-prepared to use Jira Service Management effectively and that the system is running smoothly after Go Live.








## Tips for a successful deployment

-  Remember to deal as early as possible with resistance to change from your team, stakeholders and end users to prevent people from starting to avoid the newly installed ITSM platform.
-  Don't finalize your project until your Hypercare period is over and you can enter a continuous improvement modus operandi.

## Hypercare

Hypercare is the period of extra support and monitoring after the go-live to ensure that the new solution is working as expected and to resolve any issues that may arise. This step will ensure a smooth transition to the new solution and to ensure that the stakeholders are satisfied with the solution.

### ACTIVITIES:

-  Provide hyper-care support immediately after go-live to ensure a smooth transition and address any issues that may arise.
-  Regularly monitor and review the usage of the tools and its performance.
-  Make necessary adjustments to improve efficiency and user satisfaction to ensure that it is meeting the business requirements.
-  During this stage there might be an opportunity to improve your JSM implementation by bolstering it with other [Atlassian suite of products](#).
-  Handover to the core Jira administration team so they can take over the maintenance of the solution.

# Continuously improve

Continuously look for ways to improve your implementation, and make changes as necessary to ensure that the practices and tools are delivering the desired benefits to your organization.

## ACTIVITIES:



Conduct regular reviews to assess JSM effectiveness.



Refine the implementation as necessary.



Identify your next steps to go for after your first iteration.



Collect feedback from stakeholders.



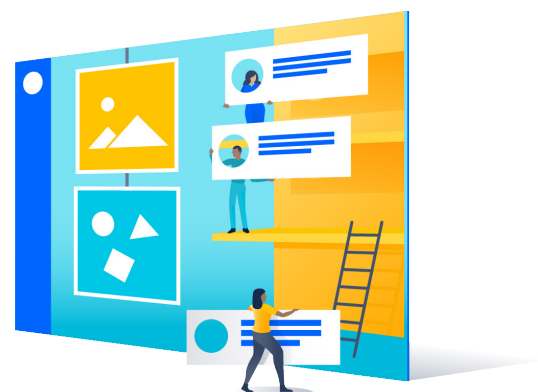
Identifying areas for improvement.



Implement changes to ensure that the solution continues to meet the needs of the organization.



Set up [On-call teams](#) in Opsgenie.



# Glossary

<b>SERVICE REQUEST</b>	<p>A request is an expression of need for something to be provided. In Jira Service Management, requests can be tracked and managed using the service desk's request management features. To implement requests in Jira Service Management, you can create a new service desk project and configure it with the appropriate queues, SLAs, and custom fields. Once the project is set up, users can submit requests through the service desk's customer portal or via email.</p>
<b>INCIDENT MANAGEMENT</b>	<p>An incident is an unplanned interruption to, or a reduction in the quality of, an IT service. In Jira Service Management, incidents can be tracked and managed using the service desk's incident management features. To implement incidents in Jira Service Management, you can create a new service desk project and configure it with the appropriate queues, SLAs, and custom fields. Additionally, you can set up incident management workflows and assign incident management roles to specific users or groups.</p>
<b>PROBLEM MANAGEMENT</b>	<p>Problem management is the practice of identifying, diagnosing, and resolving the root cause of incidents. In Jira Service Management, problem management can be implemented by creating a new problem management project and configuring it with the appropriate custom fields and workflows. Additionally, you can set up integrations with other tools, such as incident management projects, to ensure that problems are identified and resolved in a timely manner.</p>
<b>CHANGE MANAGEMENT</b>	<p>A change is the addition, modification, or removal of anything that could have an effect on IT services. In Jira Service Management, changes can be tracked and managed using the service desk's change management features. To implement changes in Jira Service Management, you can create a new service desk project and configure it with the appropriate queues, SLAs, and custom fields. Additionally, you can set up change management workflows, and assign change management roles to specific users or groups.</p>
<b>SERVICE CATALOG</b>	<p>A service catalog is a complete list of services provided by the IT organization. In Jira Service Management, a service catalog can be set up to provide customers with a centralized location to view and request services. To implement a service catalog in Jira Service Management, you can create a new service project and configure it with the appropriate queues and custom fields. Additionally, you can set up a dedicated customer portal that displays the service catalog and allows customers to submit requests for services.</p>
<b>ASSET MANAGEMENT</b>	<p>Asset management is the practice of managing the entire lifecycle of assets, from procurement to retirement. In Jira Service Management, there is a feature called Asset that can be setup in such a way that you can keep track of all your IT and Business assets. It is also called Configuration Management Database (CMDB).</p>
<b>KNOWLEDGE MANAGEMENT</b>	<p>Jira Service Management enables you to create, organize, and share knowledge articles with your customers and users through Confluence.</p>