

DATASITE TRANSFORMS WITH STRATEGY AND TEAMWORK COLLECTIONS

How Datasite drove \$500,000+ in productivity savings in five months and transformed product development with Atlassian

4,000+

Meetings eliminated in five months with Loom

10x

Return on Loom investment

90%

Decrease in headcount needed for monthly business review meetings to track OKR performance

With Atlassian's Strategy & Teamwork Collections, Datasite cut 4,000+ meetings and saved \$500K+ in five months by unifying strategy, execution, and reporting on one System of Work.

With Atlassian's Strategy & Teamwork Collections, Datasite traded endless meetings, fragmented tools, & static data for a faster, smarter, unified solution.



DATASITE

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JR HARRELL

EVP of Product Operations and Enablement

DATASITE

Datasite is a global SaaS provider of AI-powered workflow collaboration and automation solutions for M&A, investment and strategic projects. Datasite's innovative products drive execution, while generating unique data insights to empower knowledge workers around the world to succeed across the entire project lifecycle. For more information, visit datasite.com

INDUSTRY

Software

NUMBER OF USERS

1,400

Location

Americas

CHALLENGE

Teams at Datasite, the global SaaS provider of AI-powered workflow collaboration and automation solutions for mergers and acquisitions (M&A), investment, and strategic projects, needed to improve efficiency, strengthen compliance, and shift from fragmented to dynamic, real-time planning. With too many goals and no single source of truth, teams didn't have enough time or focus to move the most meaningful work forward, and executives lacked visibility to track progress and performance.

SOLUTION

Datasite implemented Atlassian's Strategy Collection and Teamwork Collection, connected with Jira Product Discovery and Jira Service Management, to create a unified platform that connects teams so they can work faster and smarter, together.

IMPACT

The company has shifted from static reporting and a feature-factory mindset to a new way of working that is more focused on outcomes and innovation. This transformation has already saved thousands of hours and achieved 10x ROI within a few months.

PRODUCTS USED



Jira

Flexible project management



Confluence

Knowledge, all in one place



Loom

Quick, async video updates



Rovo

Transform teamwork with AI



Jira Product Discovery

Capture & prioritize ideas



Jira Service Management

High-velocity service delivery



Jira Align

Enterprise strategy alignment

Fewer meetings, more meaning: Datasite's transformation with Atlassian

Even if you've never heard of Datasite, you've likely heard of the mergers and acquisitions its platform has facilitated. In 2025, Datasite supported more than 39,000 projects, including four of the top five largest global deals. As JR Harrell, EVP of Product Operations and Enablement, puts it, "Any big transaction you read about in The Wall Street Journal, The New York Times, or the Financial Times, odds are it was done on our platform."

Datasite's strategy and execution were spread across fragmented tools and static documents, leading teams to spend too much time in meetings, searching, and reporting instead of building and innovating. JR realized the company didn't just need another tool – they needed a new way of working.

For help making this shift, they turned to Atlassian. By implementing Atlassian's Strategy Collection and Teamwork Collection, Datasite created a unified platform that has helped:

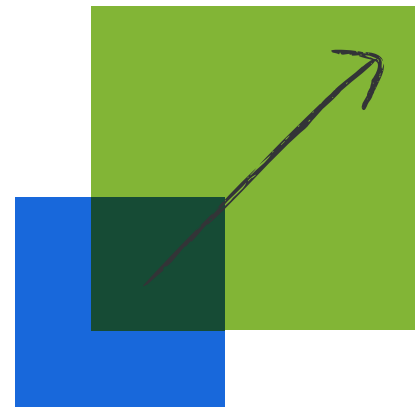
- **Eliminate 4,000+ meetings** – representing \$500,000+ in time savings – in the first five months alone
- **Rationalize OKRs** from 216 to three company-wide objectives and 12 key results
- **Replace time-intensive**, static reporting with real-time, self-serve dashboards

With the entire company working the same way on the same platform, Datasite's teams can come together to deliver even better work – and customer deals – faster.

An executive request sparks the shift to a more connected, productive way of working

Before Atlassian, Datasite had more than 200 objectives and key results (OKRs) but no single source of truth or collaboration hub to help teams work toward and track those goals in real time. The calendar became everyone's default coordination tool, often leaving team members double or triple booked.

Chief Product Officer Doug Cullen, who JR's Product Operations and



Enablement Team reports to, summarized the problem: “I need the factory-floor view – not a summary, not a deck, but a live view of everything from strategy to work across teams.”

This demand for a ‘factory-floor view’ was the catalyst for Datasite’s transformation. It was time to break out of the endless meeting cycle and evolve their processes and platforms so teams could spend more time on the work that matters most.

New solutions stem from a longstanding partner

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JR discovered that optimizing Datasite’s Atlassian platform would help the company transition to more dynamic, real-time planning and support greater collaboration, transparency, and efficiency during execution.

On the strategy side, Datasite rolled out Atlassian’s Strategy Collection – Focus, Talent, and Align – to give leaders the real-time, strategy-to-execution view they’d been missing. On the execution side, they upgraded to Atlassian’s Teamwork Collection to connect their existing Jira and Confluence instances, while adding Loom to reduce meeting overload. With Rovo running under all of these apps, Datasite’s employees also gained an AI teammate to help them find answers faster, make even better decisions, and automate work.

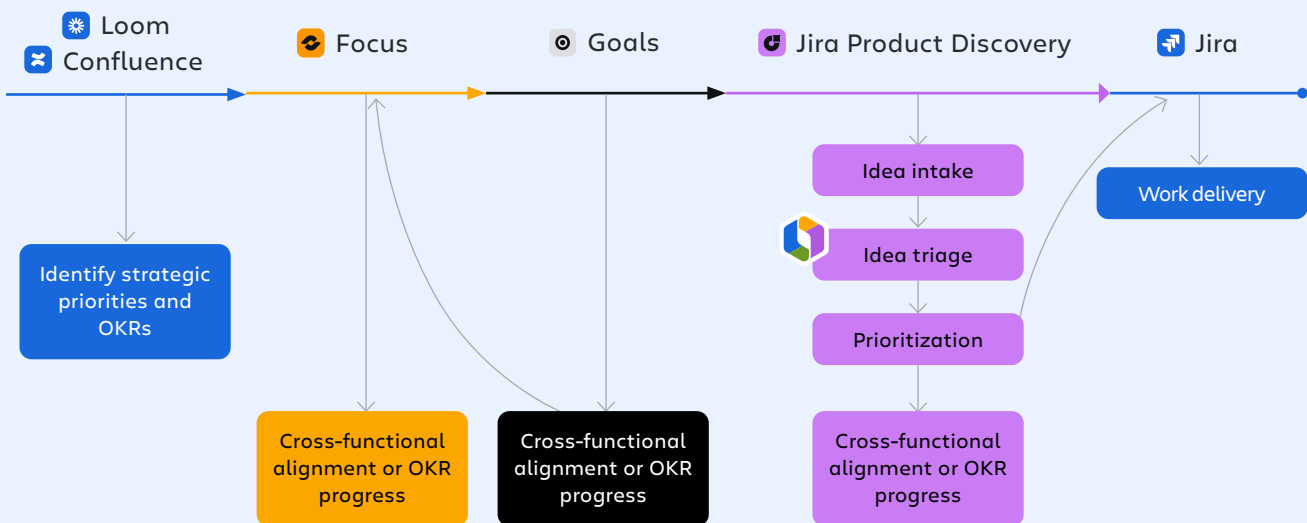
JR’s team enlisted Atlassian Advisory Services for strategic guidance and technical support throughout the process. “If you hire Atlassian’s Advisory Services, you don’t need to have a plan – you just need to know the outcomes you’re trying to get to,” JR says. “If you can explain the ‘what’ and the ‘why,’ Atlassian can help explain the ‘how’. With their help, we’ve made a staggering amount of progress in a short period of time.”

Building a unified platform where teams go from idea to impact

Connecting Strategy and Teamwork Collections with Datasite's other Atlassian apps – Jira Product Discovery and Jira Service Management – created a unified System of Work that underpins the entire product lifecycle. Datasite calls this the “Idea to Impact Framework.”

“We now have one workflow where we can track work from idea to discovery, development, release, monitoring, and measurement, JR says.

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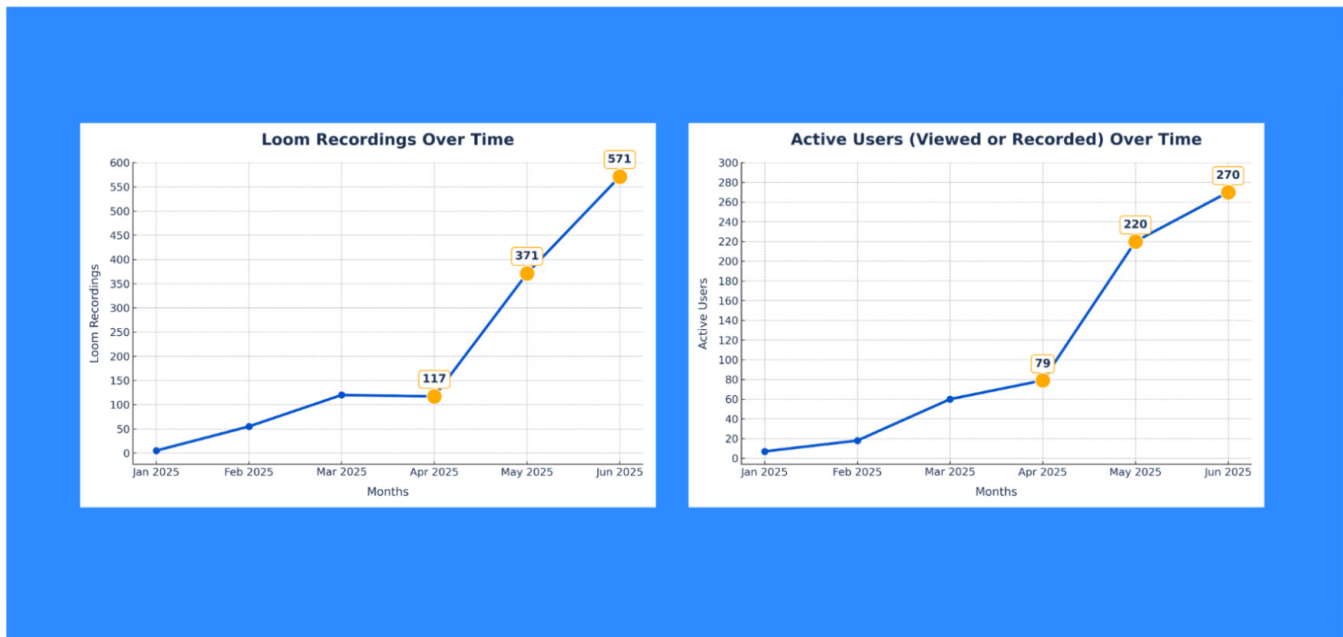
Here's how it works:

1. Datasite uses Teamwork Collection and Strategy Collection to unify and collaborate on goal setting and strategic planning.
2. Ideas are centralized through Jira Service Management and Jira Product Discovery, using Rovo Agents to quickly triage and score new initiatives.
3. Approved ideas move into Jira, and the rest stay in the Jira Product Discovery backlog with full context for future consideration.
4. Teams use Teamwork Collection (Jira, Confluence, Loom) for collaborative execution – managing delivery in Jira, storing knowledge in Confluence, and using Loom and Rovo agents for self-service and communication.
5. Leaders rely on real-time dashboards to track progress and on Strategy Collection to keep execution aligned with strategy.

This framework has delivered the “factory-floor view” leaders wanted, along with the collaboration and visibility teams needed to work faster and smarter. Doug says, “All these tools couple together in a purpose-built manner that creates this force multiplier effect. We were able to drive value in six months during the middle of a very, very busy time at Datasite, and that’s been transformative for us.”

Loom and RoVo: Datasite’s new accelerators

Within Teamwork Collection, employees have gravitated toward their new Loom app and RoVo. They’ve replaced back-to-back meetings with short Loom videos while using the app’s AI notetaker to make remaining meetings more efficient.



LOOM ADOPTION SKYROCKETED, SAVING THOUSANDS OF HOURS AND HUNDREDS OF THOUSANDS OF DOLLARS

For example, Datasite has transformed a massive monthly business review meeting into a smaller, focused conversation guided by its Atlassian platform. “We’ve gone from a 125-person, two-hour Monthly Business Review to a 15-person meeting informed by our Atlassian framework and a short Loom recap that goes out to everyone else. That’s a 90% reduction, which is a huge time and money savings,” JR explains. “That recap also becomes part of our organizational knowledge, so others can ask RoVo to catch them up on that meeting or find specific information from it.”

With Rovo, Datasite's leadership can instantly answer questions like "Which initiatives are impacting churn this quarter?" and create live reports, eliminating the need for manual status updates. JR says this has been a game-changer for employees and leaders alike. "At first I thought it was going to be a challenge to get executives into Rovo, but they're obsessed with it. The first thing they do in the morning is talk with Rovo to self-serve information and see how things are going in real time."



- OKR/MBR attendees down from ~125– ~12
- 4,000 meetings (\$500,000+) saved in the first 5 months



- 216 OKRs rationalized to ~3 objectives + ~12 KR
- Executives see goal-to-work traceability in second



- Jira Product Discovery "went viral" because the work is easier to find and act on
- Just doubled JPD license due to popularity!

"We shifted from spending hours every week reporting on work to a new mantra: 'The work is the report,'" JR says. "We focus on building and innovating, and the system reports on the work in real time."

Doug attests that this shift has delivered the visibility he asked for – and so much more. "Atlassian's Strategy and Teamwork Collections, plus Rovo, provide a clear 'factory-floor view' for our leaders and a single hub for teams to collaborate. This has helped improve our strategic alignment, focus, efficiency, and visibility – saving 4,000+ meetings and \$500,000+ of time in just four months."

JR says these platform improvements are not only supporting Datasite's new ways of working but also driving a deeper cultural shift that's reaching their customers. "With Atlassian as our System of Work, we've moved from a feature factory to an outcome-based innovator. That's been transformative for our teams, our customers, and our business."

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Ready to revolutionize your own system of work?

Start your journey with [Strategy Collection](#) and unlock your organization's full potential.