sketch development

Better Teams // Better Software

Optimizing Jira for One Source of Truth

A large insurance company with a Global Analytics Organization (GAO) came to Sketch to discuss adopting agile practices and tooling. They wanted to migrate from a large spreadsheet that held all their tasks, data, etc., into Jira, a new work management tool used throughout their company. They needed help optimizing the tool, but they didn't know where to get started.

> It's been such a pleasure working with Sketch. And I hope there may be opportunities for us to work together again in the future, especially as more teams come into the project and need to mature in their use of Jira and agile processes. Recommendations will also be sent to another team in hopes they will consider an engagement with Sketch to make connections between this project and additional ways they may need to utilize to support their separate and connected processes. What a difference this has made for us. Thank you!"
>
> — **Global Analytics Program Manager**

CHALLENGE

Migrating from a large spreadsheet into Jira was going to take time, patience, and a lot of effort. It wasn't something that Sketch could do independently. We needed to work hand in hand with their Program Manager to map out a plan, lay the foundation and then work in phases migrating information from one layout to the tool.

SOLUTION

At first, we started with some initial mapping of the GAO excel workbook to Jira fields and then began laying out the foundation as we worked with the company's Jira administrators to get the necessary fields added to the test project. The next steps required working through phases of training and then the final migration:

Project Admin training for continuity in GAO post engagement:

· Conducted a Jira Project Admin training

· Facilitated the bulk move from test to production GAO project

· Created a sample dashboard to show the art of the possible for reporting and transparency

Second phase of training for leaders:

· Conducted Jira training for leads and managers

· Overview on basic Jira functions and operations for daily use

Migration from the spreadsheet to Jira:

· Recorded a User Story training to be watched on demand

· Supplied quick reference guides for board creation and board ownership

· Linked other projects' work to GAO epics and initiatives to provide that trail for reporting without forcing everyone to abandon their previous work in Jira

RESULTS

After assisting Global Analytics Organization (GAO) with their initial implementation of Jira by laying the groundwork for a sustainable and standardized analytics project management, **the adoption of Jira and sunsetting of the spreadsheet translated to more trust in the data's timeliness.** These changes to their visualization and tracking of work will give increased transparency to the organization. After moving away from spreadsheets and into an online work management tool, the integrity of the data has increased now that there is only one source of truth rather than many versions.