

Leading Healthcare Technology Company Partners with Isos Technology to Implement Jira Align

The Challenge

A multi-billion dollar healthcare technology leader inherited several lines of business through acquisitions, with stakeholders in each line of business making their own decisions about what their teams would work on. With dozens of teams working in different ways, people were spending a lot of time compiling manual reporting for each portfolio, trying to pull information out of different roadmapping and dependency tools to get a big picture view of performance. The company had no clear understanding of its investments in products and how people were working, or how much money was being spent. The company needed to get everyone in the organization working toward the same strategic goals, increase financial agility, and find an easier way to do roll-up reporting.



As a first step, the company adopted the Scaled Agile Framework (SAFe®) for its documentation and structure around ways of working. Next, because teams were already using Jira and Confluence, the company looked within the Atlassian ecosystem for a solution and chose Jira Align to reduce manual work and administration, and take advantage of native integrations between the Atlassian tools. Due to the depth and breadth of Jira Align, Atlassian requires customers to work with a Solution Partner to ensure an effective implementation, tailored to each organization's specific needs. The company was already working with Isos Technology as its Managed Services provider, and was happy with that relationship, so chose Isos for the Jira Align implementation as well. The company knew that coordination between Isos' ongoing Jira administration services and Jira Align implementation services would be critical to its success.

The Solution

The company was committed to implementing Jira Align in Atlassian Cloud, and wanted to show results with a few teams as a proof of concept before onboarding the rest of their lines of business. Given the configuration of Jira Align in Cloud, and the need to connect with Jira and Confluence in Atlassian Data Center, difficult trade-off decisions had to be made to ensure the company would get what it wanted out of Jira Align. An Isos expert consultant worked with the company's enterprise agile coach and main Jira administrator, as well as an Atlassian Solutions Architect, on the Jira Align implementation. Isos later brought in an Enterprise Agile Coach to help ensure the success of the project, as well.

Step 1: Standardize Jira

Jira is the foundation for Jira Align, so in order to get the right information to feed into Jira Align, Isos first worked with the company to standardize its Jira instance. Stories in Jira had been set up in ten different ways, with different fields, statuses, and workflows. Isos and the company had to figure out where all the deviations were and roll out new, standard configurations and processes for teams working in Jira to make sure clean data would roll up into Jira Align. The company also decided to reconfigure all of the teams inside of Jira before moving to Jira Align.

This included a significant amount of change management around not only tools but people and processes, as all teams needed to share the same understanding of work and get on board in order to get the best results out of Jira Align. This also required coordination with Jira admins both internally at the company and externally through Isos' Managed Services, to ensure everyone was aware of and trained on these changes, as well as understood the implications of Jira and Jira Align being connected moving forward.

Step 2: Set Up Jira Align

While the company had jerry-rigged Jira previously to provide some agile at scale functionality and get financial information like LPM capital expenses and operating expenses out of it, it is not easy to scale. Jira Align is designed specifically to be used for agile at scale out of the box, so the company knew it would provide a much more elegant way for stakeholders to get the information they needed. Isos configured Jira Align according to agile best practices to be able to sync with Jira and house all of the information from the company's newly standardized Jira instance, but that was just the beginning of the Jira Align implementation.

Step 3: Onboard ARTs into Jira Align

Because the company's goal was to be able to visualize progress being made on enterprise-wide initiatives, the most visible, high priority, and meaningful work needed to be included in Jira Align first. This meant Isos and the company had to onboard diverse employees, teams, agile release trains, and portfolios into Jira Align, and then train and support them, in order of importance to the company's enterprise initiatives.

As each portfolio was onboarded, learning along the way led to changes in onboarding the next portfolio team, which would then require making that change across the board in Jira Align. One example of this is that the initial way the portfolio kanban was set up caused friction for the first portfolio team in Jira Align, so the configuration was improved and rolled out to each subsequent portfolio team that onboarded.

Results and Outcomes

Tool Standardization and Adoption

Implementing Jira Align was a huge lift that required significant time, effort, and change management. Ultimately, the company got 500+ people across 70 agile teams, 8 agile release trains (ARTs), and 5 portfolios onboarded into Jira Align, and using both Jira and Jira Align in standardized ways to produce clean roll-up data.

Reduced Administration

Prior to implementing Jira Align, people at the company were spending a lot of time pulling information out of various tools and compiling manual reporting for each portfolio in an attempt to get a big picture view of progress and performance. With all of the necessary data in one tool designed specifically for agile at scale, the company was able to train stakeholders to look at reports out of Jira Align, significantly reducing administration around reporting and communication.

Identification of Dependencies and Inconsistencies

The company was able to immediately start visualizing dependencies and work being done that informed day-to-day decision making. Jira Align is able to identify logical inconsistencies in a way the company wasn't able to before, such as "the due date for this dependency is after the target completion sprint for the feature." This helps teams catch and correct inconsistencies faster, and ultimately helps prevent customer dissatisfaction due to churn or excessive back-and-forth delays between teams.

Visualization of Large-Scale Trends and Metrics

The company's main goal in implementing Jira Align was to achieve financial insights, which remains a work in progress. What the company was able to see and act on immediately was aggregate data, for instance an investment vs. spend report that showed a single portfolio had hijacked an entire ART for multiple program increments (PIs). This data can help drive financial decisions, such as where more investment needs to be made.



"A Jira Align implementation drives organizational alignment on the way work is delivered in your company. If there are misalignments, those will very quickly and visibly bubble up and require hard decisions to be made. One of the things I really valued about working with the Isos team was their ability and willingness to hang through those tough conversations, whether they were technical, tool, or change management-related."

— Enterprise Agile Coach

About Isos Technology:

Isos Technology helps organizations solve complex business challenges with Atlassian tools and industry best practices to drive enterprise excellence. Whether optimizing service management, upgrading to the cloud, or developing long-term IT strategies, Isos Technology partners with teams to achieve measurable results. As an Atlassian Platinum Solution Partner, Isos specializes in ITSM, cloud migrations, and enterprise strategy. The company has been recognized multiple times as an Atlassian Partner of the Year. Since 2005, Isos Technology has helped Fortune 1000 companies and public sector organizations innovate and build sustainable success.

For more information, visit isostech.com.

Project Snapshot

- A multi-billion dollar healthcare technology company decided to implement Jira Align to get multiple lines of business working toward the same strategic goals, and to get financial insights on enterprise-wide initiatives.
- The project was a huge lift that required significant time, effort, and change management to get 500+ people across 70 agile teams, 8 ARTs, and 5 portfolios onboarded into Jira Align.
- Because the company already worked with Isos Technology as its Managed Services provider, it enlisted Isos' help to implement Jira Align and coordinate knowledge sharing among teams as Jira and Jira Align were connected.
- Isos helped the company standardize its Jira instance, set up Jira Align, and onboard, train, and support teams in Jira Align in order of strategic importance to the company's enterprise initiatives.
- After implementing Jira Align, the company was immediately able to reduce administration time for enterprise-wide reporting, identify work dependencies and inconsistencies and resolve them faster, and visualize large-scale trends and metrics to help drive financial decisions.



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