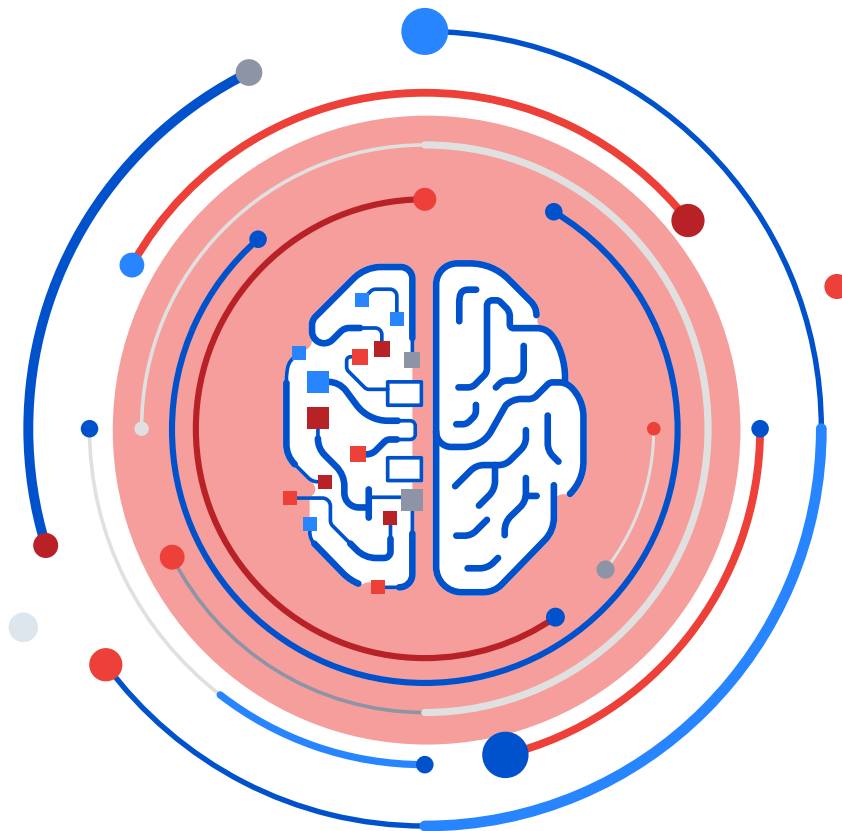


The **Complete Guide** to **Getting Started** with **ATLASSIAN** Intelligence ✱ + **Rovo**



Danielle Paula
Principal Agilist,
Isos Technology

isōs
technology



Platinum
Solution Partner
ENTERPRISE

The Complete Guide to Getting Started with Atlassian Intelligence & Rovo

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An intro to Atlassian AI

All across the world, in every industry and vertical, organizations are racing to incorporate artificial intelligence (AI) into their workflows to work more efficiently, access and understand their data more easily, and gain a competitive edge. Leading enterprise software and solution providers are incorporating it into their platforms and products for all the same reasons. The trend is accelerating—67% of respondents to the [Q32024 Deloitte U.S. State of GenAI Report](#) said their organizations were increasing investment in AI.

Atlassian was among the first major software providers to begin integrating AI into its solutions. The company introduced [Atlassian Intelligence](#), its first AI offering, in April of 2023, and it became generally available in December of that year. Atlassian Intelligence, which is built into the company's Cloud Premium products like Jira, and Jira Service Management, is designed to streamline work and enhance collaboration within the Atlassian ecosystem.

More recently, Atlassian has introduced [Rovo](#), its first standalone AI-powered product. Rovo is different from Atlassian Intelligence in that it offers even more powerful functionality and is designed to work across not only the Atlassian ecosystem, but also any third-party solutions you connect to it.

While enabling Atlassian Intelligence and Rovo is straightforward, organizations that want to make the most of their investment should also consider whether their data is clean and AI-ready so that the information and results the system delivers are accurate; if the appropriate permissions and data access guardrails are in place; what initial use cases will drive impact and value; and how they can support adoption with user training.

In this white paper, we will:

- Explain the difference between Atlassian Intelligence and Rovo and provide a high-level overview of the capabilities of each solution.
- Guide you through key considerations and areas you may need to address to make the best use of Atlassian Intelligence and Rovo.
- Provide a roadmap for successful implementation and adoption.

About Atlassian Intelligence and Rovo

Atlassian's mission is to unleash the potential of every team, and that mission extends to its approach to AI. Both Atlassian Intelligence and Rovo are designed to help your teams harness the information and data in your Atlassian stack and across your company, to make better decisions faster, and to take impactful action instantly.

Next, we'll take a high-level look at the types of things you can do with Atlassian Intelligence and Rovo.

ATLASSIAN Intelligence ✨

What Atlassian Intelligence can do for you

Atlassian Intelligence combines state-of-the-art generative AI developed by OpenAI with large language models that understand how your teams work, and use the data in your Atlassian tools to provide additional context. It is natively embedded in Atlassian solutions, but also unique to you, your teams, and your workflows.

Atlassian Intelligence AI capabilities are only available in its Cloud Premium and Enterprise products—primarily in Jira, Jira Service Management, and Confluence, although some functionality is also available in Jira Product Discovery, Bitbucket, Trello, and Atlassian Analytics.

With Atlassian Intelligence, you can:

- **Work faster:** Atlassian Intelligence can create and summarize content, polish rough drafts, summarize smart links, define terms, and, in some cases, create automation.
- **Get insights:** Atlassian Intelligence can search issues and answers, and generate SQL queries.
- **Keep projects moving:** Atlassian Intelligence can suggest request types, automate support interactions, and review code.
- **Define terms and acronyms:** Atlassian Intelligence can define terms and acronyms that are unique to your organization by quickly combing through your Confluence instance.

While Atlassian Intelligence has many practical applications, how you use it will be highly dependent on your organization's practices. The following list provides a better understanding of how you can use it on a product-by-product basis.

- In [Jira Service Management \(JSM\)](#), Atlassian Intelligence serves as a [virtual agent](#). It can summarize issue descriptions and search knowledge base articles to help deflect tickets. AI can handle some simple requests, like providing software access and resetting passwords, writing customer communications or clarifying instructions, and writing knowledge base articles.
- In [Jira](#), Atlassian Intelligence makes it possible to use natural language to filter issues instead of JQL. You can also use it to improve the way you communicate, whether that's writing user stories, summarizing updates, or changing the tone of your descriptions, comments, and responses.
- In [Confluence](#), Atlassian Intelligence can write articles for you or improve what you've already written; search articles for answers to your questions; summarize pages with key takeaways; define terms and acronyms; and create automation rules.

Keep in mind that Atlassian is continuously advancing Atlassian Intelligence capabilities across all its products. You can find the latest information on Atlassian Intelligence's capabilities per product on [Atlassian's website](#).



What Rovo can do for you

Atlassian Rovo is a standalone product that works across both your Atlassian stack and any third-party solutions that you connect it to. You can use its search functionality to find information and data, its chat functionality to get answers to both straightforward and complex questions, and its agent functionality to take action.

Rovo has a host of built-in functionality, but like all Atlassian products, it is designed to adapt to your ways of working.

Find – Rovo’s search functionality

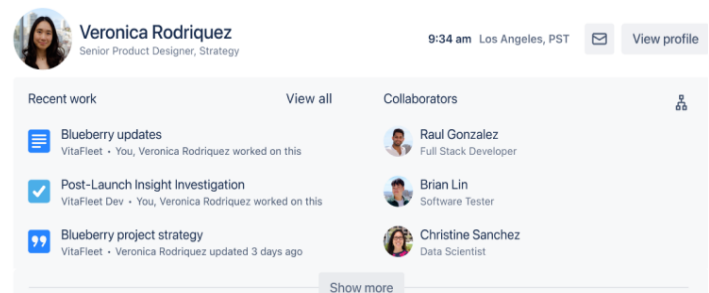
Rovo is an enterprise search solution—it’s designed to search for documents and information across your entire Atlassian stack, as well as any third-party tools you connect to it.

Rovo comes with an initial set of **out-of-the-box connectors**, so you can connect it to the solutions your team uses the most, like Google Drive, Github, Slack, SharePoint, and Teams. We expect Atlassian to add to this list over time. But just because a connector hasn’t been built yet, doesn’t mean you can’t connect to other important information and data sources. You can build custom connectors to connect to third-party tools and your own internal purpose-built solutions.

Rovo is also designed to minimize switching between solutions, so it can be accessed and used both within your Atlassian stack and outside of it, via browser extensions for Chrome and Edge. Once you’ve installed the browser extension, you can access Rovo from your home page, use its search and chat functionality, get definitions, and even access agents.

Learn – Rovo’s chat functionality

Rovo Chat is a conversational interface. You can use natural language to ask Rovo questions, and it will look across all your connected Atlassian and third-party solutions to give you answers and explanations—with context—the same way a teammate would. For example, you can ask Rovo what Jira tickets are assigned to you or what your company’s PTO benefits are—and how much you have left. You can also ask it to do all the things you’d expect from a chat interface, like summarize documents, turn your notes into an article, or draft content from scratch.



[Figure 1: Atlassian Rovo’s Knowledge Card Feature]

Using your company’s Teamwork graph, Rovo Chat can answer questions about people and teams in your organization and commonly used definitions in an easy-to-understand Knowledge Card format. So, for example, if you ask Rovo Chat who someone is, it will bring up a Knowledge Card showing information like what team that person is on, what projects they are working on, and people they frequently work with. [See Fig. 1]

Act—Rovo’s agent functionality

Rovo Agents are preconfigured utilities designed to carry out specific tasks or deliver specific types of information—think of them as AI-powered teammates. The idea is that they can do the bulk of the heavy lifting on time-consuming, labor-intensive, and repetitive tasks, so your team can focus on things that are more innovative and truly require a human. For example, there is an Agent that looks at Jira issues and groups them into themes, one that looks at Jira issues and generates release notes, and one that writes product requirement documents.

Rovo comes with an initial set of **out-of-the-box Agents** that cover some common use cases for all types of teams, and we anticipate that Atlassian will continue to add to these over time. In addition, **third-party Marketplace partners** are getting into the act by building Agents that connect to and enhance the functionality of their solutions. You can also build your own Agents using no code capabilities or Atlassian Forge, which is important if you want to connect to a solution that either does not yet have an Agent or is proprietary to your organization.

A big part of getting the most out of Rovo will be identifying the best opportunities to ease your team’s workload through the use of Agents, and a key part of that will be understanding both the Atlassian platform and solutions, as well as your own team’s workflows. An Atlassian Solution

Partner that understands both best practices for how different types of teams work and has deep Atlassian domain knowledge can be particularly helpful here, especially when it comes to building custom Agents.

Getting ready for Atlassian Intelligence and Rovo

While activating Atlassian Intelligence and Rovo are straightforward, there are some key considerations to explore and areas you may need to address before getting started. Chief among these is ensuring your data is AI-ready and that you have data governance practices in place to ensure that you are getting quality results. You'll also want to ensure that your permission schemes are up to date and that your internal AI policies align with Atlassian's approach to trust.

To get the most out of Rovo in particular, you'll need to think through what data sources you want to connect it to and how your teams will use it so you can build custom agents to help them.

Data quality and governance

Artificial intelligence is only as useful as the data it taps into. If your data isn't clean and well-structured, you are not going to get useful results. Atlassian users inherently understand this—we know that if there are a ton of old projects and workflows, inconsistent nomenclature for statuses, etc., which means it's hard to get clean reporting. AI compounds this, especially when you're searching across products, as Rovo can do.

While you may need to do some data cleanup across your Atlassian ecosystem and any third-party solutions you connect to Rovo, you should also be looking ahead. It's a good time to put good governance practices in place for managing and maintaining your data so that outdated and inconsistent data doesn't accrue, and Rovo continues to deliver the quality results you need.

You may not need to do this all at once. If you're standing up a Rovo MVP that connects to a limited set of solutions and uses agents to support a limited set of use cases, focus on what you need to do to

make those effective first. As you scale your use of Rovo, you can tackle any related data cleanup that needs to be done.

Permissions and data success

Permissions exist for a reason—you don't want anyone to have access to information if they're not authorized to see or use it. Rovo makes this straightforward—it respects the permissions you've set both within Atlassian and across any third-party products it is connected to. That means that if a user asks a question or conducts a search, Atlassian Intelligence and Rovo will only provide answers based on spaces and information they have permission to view.

That said, before launching Rovo, you would be wise to closely review your Atlassian permissions and others to make sure a broad search does not inadvertently yield results that include sensitive data. If you delete information or data from a third-party app, that information is immediately no longer accessible via Rovo. However, if you disconnect a third-party app from Rovo, that information may still be indexed for up to 30 days.

Trust

If you are enabling AI within your organization, then you likely have AI governance policies in place. Before getting started with Atlassian Intelligence and Rovo, it is important to ensure that Atlassian's AI policies and data governance are in compliance with your own. Atlassian Intelligence and Rovo both adhere to the company's [Responsible Technology Principles](#) and their [Trust Center](#) has answers to important questions about the LLMs that back the solutions, how your data is stored and used, and compliance with common standards.

Connecting to external data sources

Atlassian Intelligence only searches across Atlassian products, but Rovo can search across any third-party products it is connected to—Hubspot, Salesforce, Tableau, Workday, etc. Before getting started with Rovo, you'll need to think through what data sources you would like to connect to and why. This may tie into specific use cases for departments or teams or it may tie into reporting needs.



The opportunities here are endless. If you're not sure where to get started, an Atlassian Solution Partner that brings both best practices in Atlassian products and expertise in Rovo can work with you to identify some initial areas of impact and use cases based on your ways of working and business needs.

Building custom agents

Rovo comes with a number of out-of-the-box agents that cover common use cases, and we anticipate Atlassian will continue to add to these. However, every organization has discrete processes that can be streamlined by custom agents. Think about the ways your team works. What are they spending time on that a custom agent could handle?

Making Atlassian Intelligence and Rovo Work for you

As you have likely gathered by now, there is more to getting started with Atlassian Intelligence and Rovo than just activating it. You need a solid plan in place to ensure it is implemented in ways that meet the needs of your organization and that your teams adopt it. There is no one more qualified than an Atlassian Solution Partner to help you get started with Atlassian Intelligence and Rovo. They bring a deep understanding of the Atlassian ecosystem to the table and best practices for teams that use the tools—and they have expertise and hands-on experience with Atlassian Intelligence and Rovo.

In this section, we'll cover the high-level steps you can expect your Atlassian Solution Partner to take to ensure Atlassian Intelligence and Rovo are properly implemented and strongly adopted.

1. Planning and discovery

All well-executed programs begin by bringing the right people to the table, determining roles and responsibilities, and identifying desired objectives and outcomes. Once that's been done, your Atlassian Solution Partner will evaluate your current state, including your processes, users and groups,

permissions, and pain points. This will help inform opportunities to streamline and accelerate work using Atlassian Rovo. You can also expect them to hold stakeholder workshops to get a better understanding of your governance policies and to hash out technical requirements in detail.

2. Building a backlog

With a solid understanding of what your organization's goals and objectives are, and how your teams work, the next step is to create a backlog that details what work needs to be done to achieve your initial goals. It should capture things like what integrations and agents need to be built. The backlog may have more in it than can reasonably be achieved in the initial engagement based on both your timeline and budget. If that is the case, you will need to prioritize what the opportunities for the greatest impact are and start there. Other action items can remain in the backlog and be addressed at a later date.

3. Activating and integrating Rovo

At this phase, your Atlassian Solution Partner will activate Rovo on each of your sites as required. (Atlassian Intelligence is automatically activated on Premium and Enterprise levels, so it will only need to be activated if you have previously turned it off.) Then, they will configure them for the use cases identified as part of your initial implementation. They will also configure out-of-the-box functionality and build any needed custom agents and integrations.

4. Testing and iteration

Once everything in your backlog that was part of the initial implementation has been addressed, your Atlassian Solution Partner will test everything to ensure things are working as they should. As issues surface, your Partner will refine the solution, including making revisions to the "instructions" Rovo Agents are based on. Another key part of this is ensuring sensitive or confidential data is not unintentionally surfaced and making adjustments to permissions and data classifications as needed.



5. User enablement

Ensuring your teams have a basic understanding of Atlassian Intelligence and Rovo and how to effectively use them within the scope of the initial use cases is critical to adoption success. Your Atlassian Solution Partner should develop a user onboarding plan that includes written and video training materials and outlines how and when to communicate with your team.

The plan should also include processes for transferring knowledge from your Atlassian Solution Partner to your internal team. A “train the trainer” approach in which key stakeholders, admins, and/or power users receive comprehensive training so they can manage current capabilities, support the rest of the organization, and perhaps even build out new capabilities.

6. Go-live and post-live support

Once your initial functionality, including agents and integrations, has been enabled and built, tested and validated, and your teams have been

trained, it's time for the changes to your production environment. You may require a few days of post-go-live support to resolve any issues or answer any questions that arise, but for the most part, you should be good to go!

How Isos Technology can help

If you are considering implementing Atlassian Intelligence and Rovo, Isos Technology can help. Our Atlassian AI Readiness Program is designed to ensure a smooth and successful setup of the Rovo and Atlassian Intelligence and effective adoption so your team can harness the power of its data, make better decisions faster, and take impactful action instantly. Our team of experts will set up a set of custom AI use cases tailored to your organization.

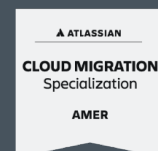


About Isos Technology

Isos Technology accelerates the innovation curve for companies that are changing the world. Since 2005, we've partnered with hundreds of organizations to help them tackle tough business challenges and achieve their strategic goals. In November 2022, Isos became a portfolio company of The Acacia Group, joining forces with the Atlassian practice of MajorKey Technologies. Furthermore, Isos announced the acquisition of HyperVelocity in February 2023, cementing its status as one of the largest Platinum Solution Partners in the Atlassian ecosystem.

As an Atlassian Platinum Solution Partner with ITSM, Cloud, and Agile at Scale specializations, Isos helps organizations optimize their technology, develop effective practices, and guide people towards agility and resilience. Headquartered in Tempe, Arizona, and with offices across the U.S., Isos has been recognized as an Atlassian Partner of the Year in the ITSM and Enterprise categories for the last five out of six years, an Inc. 5000 Fastest-Growing Private Company, and a CIOReview Most Promising Agile Consulting Company.

For more information, visit isostech.com.



855-924-4767 info@isostech.com

