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## Successful Jira Service Management Implementation for a major US Bank

### OVERVIEW

When our client, a multinational investment bank, needed a better way to track requests across the entire company, they turned to Jira Service Management and our roster of certified experts for a solution. Previously burdened with an outdated legacy system that could not withstand the payload of data, this financial services company required custom configuration of JSM and an accompanying Confluence knowledge base to provide superior functionality and performance. Used to track a variety of requests across the company, from HR to IT equipment, our solution needed to meet their specific use case and requirements – and be completed by the start of their new fiscal year.

## CHALLENGE

Our client's previous issue-tracking system of seven years no longer provided the functionality the bank required. Not only was their version no longer supported (and the cost of upgrade was not proportionate to the results needed), but the system lacked reporting and search capabilities. While tickets transferred from one queue to another, the information in their custom fields didn't. Server upgrades were even halted at the risk of breaking the already tenuous legacy ticketing system, which was no longer supported. Both system administrators and technicians providing help had become frustrated with the software and set out to find a better solution to their issue tracking needs.

## SOLUTION

Three potential replacements for the previous issue tracker were set up in a test environment to allow hands-on evaluation for accurate feedback. At the end of the trial, stakeholders overwhelmingly voted for Jira Service Management, citing integration of documentation, clean, modern interface, and customization options (in addition to solving the searching and reporting issues of their previous system) as their cause for enthusiasm around the product. Our client's IT staff collaborated with over half a dozen teams to determine their requirements of Jira Service Management before designing and implementing the platform. Many teams required custom workflows and each needed their own specific fields, which could be easily achieved with the



customization abilities of Jira Service Management. Tiers of tickets were established to aid the efficient triage of tickets, ensuring that help desk agents could address their queue for speedy resolution of issues. As a financial institution, our clients timeline was tight with work needing to be completed before year-end audits commenced. To expedite the process of the implementation, our client sought our expertise to assist in the process, modifying workflows and fields per the needs of the Help Desk. Once design was complete and Jira Service Management was integrated with the clients knowledge base, offering a self-service option for front-end users, the new platform was rolled out with great success and enthusiastic reception.

## **RESULT**

The successful customized design of Jira Service Management gave each group exactly what they needed. Front-end users loved Jira Service Management because of it's easy-to-use interface, which they took to immediately; technicians loved how it streamlined their workflow, with dashboard and queues created to optimize prioritization and organization. Additionally, adoption of the linked Confluence knowledge base significantly reduced the number of tickets received, as end-users could now get immediate answers themselves.