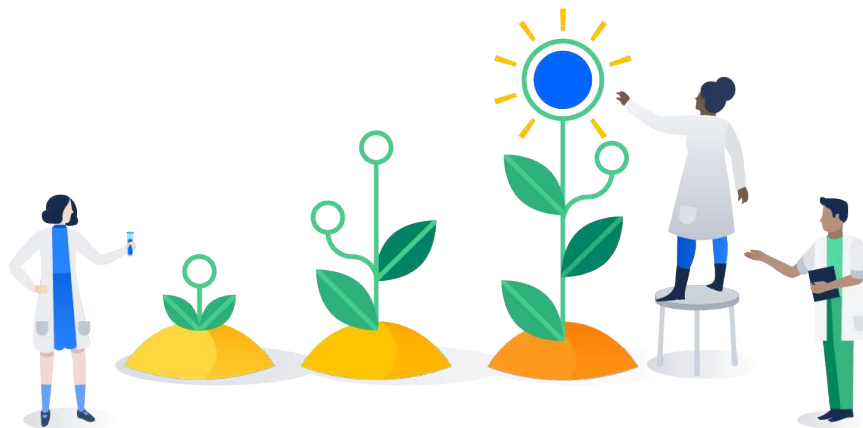# Customer love for Atlassian Cloud

From strategic assessments to hands-on migration, here's how Atlassian Solution Partners help on-premise organizations successfully move to Atlassian Cloud.

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❝ By migrating to Atlassian cloud, we moved away from being pure support to focusing on process enablement and adding value back to the business.

DANIEL CAVE
Senior Infrastructure Engineer

SOPHOS

2 Engineers shifted from admin to value-driven enablement

Sophos elevates cybersecurity, productivity, and impact with Atlassian Cloud

As Sophos evolved from a regional firm to a global cybersecurity leader, managing their on-premise Atlassian infrastructure and processes grew more complex. By migrating to the cloud with the help of Solution Partner, Sophos has increased availability of their services while tripling their global workforce.

INDUSTRY
Internet & Software

LOCATION
Abingdon, UK

NUMBER OF USERS
5,000

ATLASSIAN PRODUCTS & APPS

Confluence
Data Center

Jira Software
Data Center

ScriptRunner
The leading automation
and customization app

Connector for Salesforce & Jira
Streamline and automate
cross-functional workflows

By improving their internal systems, Sophos has been able to scale to the global cybersecurity pioneer they are today.

In the early 2000s, Sophos' Engineering team implemented server-based deployments of Atlassian products for project management, product development, and collaboration. As usage increased, the team upgraded to Atlassian Data Center, which was the perfect interim solution to improve performance and stability.

Over time, Sophos continued growing, and their needs continued to change. Migrating to Atlassian Cloud presented an opportunity to empower and unblock the team, using tools they already knew and loved. By making the move with help from the Atlassian Migration Program and a Solution Partner, Sophos has improved availability amid almost 300% growth in headcount, elevated IT's role as a strategic business partner, and streamlined workflows so employees can focus on their core mission of providing superior cybersecurity outcomes for enterprises around the world.

Simplifying for efficiency and enablement

After upgrading from Server to Data Center deployments of Jira Software and Confluence in 2019, Sophos' headcount growth, global expansion, and wide adoption of Atlassian tools continued putting stress on their infrastructure. With so many users and so much activity, the load was becoming unmanageable.

> 66 Our engineers and the business aren't being disrupted by unplanned events. Now we're able to think about how we can make our users' lives better, rather than just addressing stability and performance issues.

RAJEEV KAPUR
Director of Enterprise Engineering

The pace of change was also accelerating. "Everything is moving faster. And when the business runs fast, IT has to run faster," says Director of Enterprise Engineering Rajeev Kapur. The team wanted to test new tools and agile processes for the sake of innovation, but integrating new technology was difficult because their software was behind a firewall. Plus, IT was spending the majority of their days fixing issues, leaving little time for strategic projects and forward-thinking initiatives.

A cloud migration offered an opportunity to optimize on all fronts. "The business cannot possibly survive if we have multiple ways of doing the same thing," says Senior Infrastructure Engineer Daniel Cave. "Moving to the cloud was an opportunity to clean up the mess and improve from a technology and process perspective."

This focus on optimization and simplification became the North Star for Sophos' migration. "You need to have a key reason for migrating to the cloud and use it as a mantra for your team and your users. For us, that was simplicity and enablement," Daniel explains. "Our ethos is that you shouldn't spend an infinite amount of time configuring and managing the system. It should just run by itself and get you back to doing your job. — By moving to Atlassian Cloud, we shifted our focus to championing adoption, improving efficiency, and looking toward the future."

Migration success comes in waves

With the decision made to migrate, the next question was how. Sophos considered lifting and shifting the whole system at once, but ultimately decided to optimize and shift (Atlassian's recommended approach) and migrate instance by instance to show value as quickly as possible. The team hoped staggering the project into waves would also help boost adoption.

IT began the planning process with a spider web exercise to identify which Confluence and Jira Software projects were linked so they could be migrated as a unit. Then, they gathered a set of key stakeholders from each business area to help plan and test the migration and serve as champions among their teams. "Get key decision-makers in each business unit involved: both the technical people and the most influential people," Daniel suggests. "They understood the value proposition, complexities, what people could and couldn't get out of this, and they took that information back to their teams."

IT planned the next phase around the business units that would feel the biggest impacts if errors occurred. For this wave, they took even more time with planning and testing to minimize risk. Rajeev says, "Stakeholder management and user acceptance testing are what make the migration successful. You absolutely have to be honest and consistent."

To help with stakeholder communication, an Atlassian admin created an internal press release to set expectations on the new functionality and get teams excited.

Partnering and problem-solving throughout the process

During each phase of Sophos' migration, IT used Jira Cloud Migration Assistant (JCMA) and Confluence Cloud Migration Assistant (CCMA) to assist with planning and implementation. "You have to be optimistic that the migration tool is going to take care of the vast majority of data," Daniel says. "Then you can focus on the shortest way to get an operational system.'"

Their Solution Partner also played an invaluable role in providing migration planning expertise, as well as testing and technical support. Rajeev says, "Our Solution Partner was truly part of our project team. Bringing in a partner allowed us to leverage their knowledge, connections with app vendors, and experience to migrate faster. They also helped massively with user engagement by explaining to stakeholders and users what they can do with Atlassian Cloud."

Atlassian's APIs also helped to streamline the process. "Have a look at the APIs for Atlassian Cloud to understand what they do. There were many instances throughout the project where the API provided solutions to management at scale,"

Dan explains. "For example, because we migrated in stages, we created a process whereby content was made 'read-only' before it was moved, then made 'read/write' once it arrived in the cloud environment. This meant that we needed to switch Jira permission schemes in bulk both on the on-premise deployment and then on the cloud. During our first iteration, this took one engineer a few hours to do by hand. By our second iteration a script, based on the APIs, did it automatically."

Leveraging resources and guidance from both Atlassian and their Solution Partner, Sophos completed the majority of their migration in about six months. The team is already reaping the rewards of working on the cloud and looking ahead toward more enhancements in the future.

Free to focus on improving lives and bottom lines

Now that Sophos is collaborating on Atlassian Cloud, teams across the organization and around the world can work confidently without disruption, and IT can serve as a more productive, strategic partner in the business.

"Availability on Atlassian Cloud has definitely been better. Our team's work has changed from 'Why is Jira having issues?' to 'How can I do this in Jira?'" Rajeev shares. "Now we're able to think about how we can make our users' lives better, rather than just addressing stability and performance issues."

Daniel says this shift has been meaningful to both individual employees and the organization as a whole. "My position has completely changed from a database administrator (DBA) to an enablement role. We're no longer a bunch of DBAs or server engineers. We're attracting and developing employees who are focused on efficiencies, improvements, and utilizing systems. Those people have a much more significant impact on operational effectiveness for the business."

❝ My position has completely changed from a database administrator (DBA) to an enablement role. We're getting people who want to talk about efficiencies, improvements, and utilizing systems. Those people have a much more significant impact on operational effectiveness for the business.

DANIEL CAVE
Senior Infrastructure Engineer at Sophos

On the subject of efficiencies, Sophos is reveling in their newfound productivity thanks to native cloud functionality. "Automation in Jira Software is helping us run faster, manage things better, and adopt new practices," Rajeev says. "For example, when a sprint starts, anything that's in the sprint gets nudged along automatically, and internal customers get status updates. Automations like these are faster, smoother, easier, and provide a better experience for people requesting work." Daniel adds, "Anyone can use automation because it's so simple."

It all ties back to Sophos' biggest migration win: achieving their goal of simplifying and enabling. "We have simple products that are easy to use. We want the same thing internally to help our employees be more successful. It shouldn't be a burden. It should just work," Daniel says. "By migrating to Atlassian Cloud, we moved away from being pure support to focusing on process enablement and adding value back to the business."

❝ We trust Atlassian to take care of security, availability, and scalability, freeing up time for us to focus on more strategic topics. Moving to the cloud has been a chance to improve today and prepare for our future.

TIM BRUTSCHER
Enterprise IT Architect

software AG

Germany's Software AG strengthens security and fosters innovation with Atlassian Cloud products

Software AG's rapid growth was overextending their on-premise tools, increasing costs, and complicating security and compliance. Like many European businesses, they weren't sure whether a cloud deployment would meet the EU's (and their own) stringent requirements. But by partnering with Atlassian and a Solution Partner to implement Jira Software, Jira Software Management, and Confluence Cloud, Software AG is proving it's possible to lead in both innovation and security.

INDUSTRY
Internet and Software

LOCATION
Headquarters in Darmstadt, Germany

NUMBER OF USERS
1,300

ATLASSIAN PRODUCTS & APPS

Confluence
Document collaboration

Jira Software
Project and issue tracking

Deep Clone
Advanced cloning in Jira

Refined
Custom, themed Confluence sites

Jira Service Management
High-velocity ITSM

Atlassian Access
Security and control for cloud

Scriptrunner
The leading automation and customization app

No matter how many advantages there are to working on the cloud, there's often one major concern, especially for European businesses: security and compliance. While the resources required to meet data privacy and sovereignty requirements are considerable, the consequences of security threats and regulator intervention – not only financial, but also reputational and organizational – are even higher. It's easy to see why security and compliance can seem like hurdles for cloud migrations and a hindrance to innovation.

However, where many companies see these challenges as obstacles, Software AG saw opportunity. By shifting to a cloud-first approach and adopting Atlassian Cloud products with the help of a Solution Partner, the Germany-based software pioneer has helped over 5,000 employees innovate while strengthening security and compliance across 70 worldwide locations.

Speed, security, and scalability prompt a push to the cloud

Software AG supports enterprises in their digital transformation every day. From integrations and APIs, to analytics and Internet of Things networks, their technology helps customers thrive in today's crowded technology landscape. To ensure their own company could thrive as they grew, the team re-evaluated their internal tooling as well. Many of Software AG's on-premise systems were no

longer meeting their needs. Speed and availability were suffering, costs were rising, and it was becoming increasingly complex to maintain security and compliance. These pain points would only worsen as the company continued scaling.

With encouragement from their new CIO, Michael Sonne, Software AG decided it was time to shift to a cloud-first approach. Just as they started planning this transition, a ransomware attack accelerated their efforts. "Our cloud-first approach was set in 2021. We said, 'We're no longer going to accept on-prem solutions'," says Enterprise IT Architect Tim Brutscher. "The conversations about moving to the cloud were already in progress, and that incident was the final trigger to push us to do it."

Trusting Atlassian Cloud Enterprise for a fast, flexible, secure solution

With newfound urgency, Software AG began researching new cloud solutions for project management, collaboration, and service management. The company had been using a combination of Plan.io, Microsoft Project, Excel, and OTRS, all of which were on-premise solutions. The lack of integration between the tools impaired efficiency and visibility.

Software AG's R&D team had been using and enjoying Jira Software and Confluence for their department's initiatives, so Tim and his IT colleagues started considering these tools, along with Jira Service Management Cloud and Confluence Cloud, for other teams across the company.

> 66 In Germany, we have to be both innovative and compliant with strict regulatory standards. With Atlassian Cloud, we can do both.

TIM BRUTSCHER
Enterprise IT Architect

Their research showed that the Atlassian Cloud Enterprise plan not only met Software AG's stringent data residency, security, and feature requirements, but also offered flexibility, an extensive collection of Marketplace apps to fuel their productivity, and multiple instances.

"Creating multiple instances without any additional costs allows you to segregate data for security reasons and accommodate multiple use cases with the same solution, which is totally in line with our idea of harmonizing our application landscape," Tim says. "From a functional and technical perspective, splitting use cases is also helpful to reduce the overall complexity of single instances. This is particularly useful for reducing side effects if you have to change instance-wide settings or when a scenario makes use of many apps."

Energized by the promise of Atlassian Cloud products, Software AG was ready to put their cloud ambitions into action.

A prime partnership for strategic planning, testing, and training

After meeting their certified Solution Partner at an Atlassian event in 2019, Software AG reconnected with their team to explore the possibility of working together. "We didn't have the knowledge about cloud implementations and migrations, so we decided to work with them as an external partner," says Radoslav Danchev, VP of Collaboration, Workplace, and Support. Together, the teams decided to approach the project iteratively. After collecting requirements from each department, their Solution Partner helped Software AG develop a proof of concept using the simplest workflows possible, test them with real users, gather feedback, and make improvements before launching.

Throughout each step, the Solution Partner reframed conversations around practices rather than specific products. "We focused on methods and processes over tools. The first question is always how we can reach a goal, not about how to do something within a tool," explains, owner and Managing Director of Solution Partner firm.

As Software AG neared launch, they collaborated with the Solution Partner on training as well. "We worked with the Partner firm to make sure we had enough training materials and that our main stakeholders and users were well prepared," Tim says. This proactive communication and education were key ingredients to the team's success.

Starting simple, then scaling fast

Since going live with their Atlassian Cloud ecosystem, Software AG has created over 200 projects in Jira Software, laid the foundation for enterprise service management with Jira Service Management, and started testing Confluence as their central knowledge base. They especially appreciate the simplicity and added security of using Atlassian Access for identity and access management.

Advanced Roadmaps and automations within Jira Software have become IT favorites. With Advanced Roadmaps, the team can plan and track projects quickly, easily, and flexibly. They also save time on small-but-important tasks (such as risk calculations for changes, notifying specific groups when a status changes, and cloning project templates) with native automations and apps like Deep Clone.

In addition, the team has simplified and increased security by cordoning off confidential projects to a separate instance and by leveraging Atlassian Access. Tim says, "With Atlassian Access integrated with our Azure Active Directory, we get a comprehensive overview of which cloud instances each user has access to. Access is a crucial component in ensuring enterprise-wide, regulated access management in the cloud. It's a significant advantage over our previous on-premise instances as we are able to apply security policies in a simplified way."

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TIM BRUTSCHER
Enterprise IT Architect

> **❝** Many people think innovation and compliance are contradictory. But we have to do both of them. We drive innovation by being compliant and showing that we can adhere to regulations.

RADOSLAV DANCHEV
VP of Collaboration, Workplace, and Support

What's even more exciting about these invaluable improvements is that they are just a taste of what's in store for Software AG. "We are just at the beginning of our journey with Atlassian. We're trying to keep things as simple as possible at first. However, there is high demand for automations coming from the business. Atlassian is a strategic partner for us, so it will always be the first place to investigate new capabilities." Tim says. Radoslav adds, "We also see Jira Service Management becoming the one place for service automations and requests."

Together, these cloud tools are not only helping Software AG improve productivity and security today, but also equipping the company to scale even faster and more confidently in the future.

Innovation and compliance with Atlassian Cloud

Despite common perceptions, Software AG is proving innovation and compliance can coexist. In fact, the team has bolstered both by migrating to the cloud. "Many people think innovation and compliance are contradictory. But we have to do both of them. We drive innovation by being compliant and showing that we can adhere to regulations," Radoslav says.

Offloading maintenance to a central, cloud-based platform has enabled the

team to save time and resources for more valuable work. Automatic updates have also helped ensure Software AG always has the latest functionality and security patches, without requiring time or effort on their part. Tim says, "New functionality is auto-populated and deployed. I'm a fan of the 'use it, discover it, get familiar with it' approach."

While Software AG initially believed that the cloud couldn't meet their needs, Tim is glad they put their trust in Atlassian and seized the opportunity. "In Germany, we have to be both innovative and compliant with strict regulatory standards. With Atlassian Cloud, we can do both," he says. "We trust Atlassian to take care of security, availability, and scalability, freeing up time for us to focus on more strategic topics. Moving to the cloud has been a chance to improve today and prepare for our future."

" By moving to the cloud and converging around Atlassian solutions for service management, we can scale non-linearly, have the metrics to support making the investments we need, and drive profitability.

DAVE TREFF
Head of Digital Operations

GINKGO BIOWORKS
THE ORGANISM COMPANY

Ginkgo Bioworks scales to save the planet with Atlassian Cloud

Ginkgo Bioworks aims to triple output and halve costs each year. Here's how migrating to Atlassian Cloud for storage, speed, and scalability helps them do it.

DNA programming. Slime molds. Biosynthetic gene clusters. Not the typical terms you'd find in a Jira Software or Confluence instance. But the team at Ginkgo Bioworks discusses complex bioengineering topics over their morning coffee.

Ginkgo was founded in 2008 with a simple question in mind: "What if we could grow anything?" Their work in synthetic biology centers around engineering and programming DNA to create alternatives for chemicals and organisms that are in high demand or low supply, from supporting Moderna in creating the raw materials for their COVID-19 vaccine, to developing resource substitutions that could save endangered species and plants. "I tell people I work for the coolest company on the planet," says Head of Digital Operations Dave Treff. "Ginkgo Bioworks is a mission-driven company. We exist because we want to save the world from climate change. That's why people like working here."

Engineering new organisms to meet such lofty goals requires the latest and greatest technology in every aspect of their business. Ginkgo Bioworks had been leveraging on-premise deployments of Atlassian products to power their work for years before accelerating growth sparked a need for more storage, speed, and scalability. As a forward-thinking, lean-operating company that prioritizes cloud solutions, a migration to Atlassian Cloud Premium was a clear solution.

By moving to the cloud with support from Atlassian and a Solution Partner Ginkgo Bioworks has offloaded maintenance, greatly improved data accuracy and visibility for better decision making, and unlocked new features that are

helping drive their exponential growth. With more time, energy, and budget to dedicate to their core business, the team is on track to more than triple the output they're doing today, cut costs by over 50%, and perhaps even bring slime molds into the mainstream.

On a mission to migrate for storage, speed, and service

Over the years, Atlassian has become an indispensable part of daily life for employees across Ginkgo Bioworks. Confluence has served as the company-wide knowledge base for basic instructions and policies, scientific lab notes and documentation, and financial recordkeeping (integrated with the Comala Document Management plugin for compliance). Software developers and synthetic biologists have also used Jira Software to manage and track their work. Realizing that development and operations groups were using two different tools for service management, the team sought to consolidate around a single solution by replacing their existing ticketing system and unruly spreadsheets with Jira Service Management. Now the product is being scaled throughout the company as the primary way to invoke service from other teams.

"Within days of implementing Jira Service Management, we had other teams coming to us and saying, 'Hey, I need to manage requests the same way you do,'" says Bruce Kozuma, Senior Group Product Manager. "We built it, and they were there immediately. Teams from environmental, health, and safety (EHS); lab operations; automation teams; and even business development – all wanting to use Jira Service Management."

As more and more departments started using Atlassian tools, Ginkgo Bioworks started encountering several common challenges of on-premise deployments: storage limits, maintenance commitments, and operational headaches. "When Atlassian decided that they were going to focus on the cloud and took away the storage limit per account, I said, 'Get us off servers now! We can't scale like that.'" Dave recalls. "Everyone agreed we needed to get to the cloud. We run very lean, and every other tool we use is cloud-based. It was a natural decision."

> 66 When Atlassian decided that they were going to focus on the cloud… I said, 'Get us off servers now! We can't scale like that.' Everyone agreed we needed to get to the cloud.

DAVE TREFF

Head of Digital Operations

In addition to achieving quick consensus on migrating, the team was also aligned around their need for a Solution Partner. "We knew we needed a really good, reliable partner who knows their stuff and could help us move to the cloud. We went with a top-tier Solution Partner," Dave says.

Together, the teams embarked on a migration process that would alleviate their immediate challenges and spark long-lasting improvements to transform the service they provide to each other and the world.

Cleanup and collaboration set the stage for a smooth transition

The Solution Partner's first order of business was to lay out a clear plan for each step, from preparation to migration and post-production support. Cleanup was their first big priority. Dave says, "Our Jira and Confluence were messy because there was nobody curating them. We couldn't find anything, there were holes in the data, and information was scattered across Google Docs, too. We asked the Solution Partner to help organize everything." Their Solution Partner expected Ginkgo Bioworks would want to transfer all of their data to the cloud, so they were pleasantly surprised that Ginkgo Bioworks were so open to cleaning up first. "There's a trend of getting to the cloud faster, rather than needing to keep data in the same resolution as it was on-prem," said Managing Consulting Partner.

The Solution Partner began by evaluating Ginkgo Bioworks's on-premise instances and providing suggestions for restructuring so that users could find information faster and more easily post-migration. Then, they upgraded Jira

Software and Confluence, evaluated which apps could and should be carried over to the cloud, and updated links to avoid errors. Along the way, everyone collaborated to troubleshoot any issues that arose. "We worked with Atlassian to handle some of the backend transition. They provided really great service, like poking into the database, so there were no weird technical issues," Bruce says. He also believes their Solution Partner was critical to their migration success. "The overall migration experience was as smooth as it could be due to the efforts of our Solution Partner" he explains. "They're consistently delivering what we want, checking in on us, and giving us their A team. I can throw them at anyone and know they will be professional, thorough, and knowledgeable; that they're going to follow a very intelligent process; and that we can trust that they're giving us the best information."

> 66 From a user's perspective, the migration was seamless and uneventful. They signed in, and everything was the same but better.
>
> **DAVE TREFF**
> Head of Digital Operations

With trusted partners and a strategic approach, Ginkgo Bioworks felt confident they had all the ingredients they needed for a smooth migration.

"Usage exploded" as employees discover new features, integrations, and automations

As the team made the official transition to Atlassian Cloud a few months later, Dave and Bruce's teams breathed a sigh of relief. "From a user's perspective, it was seamless and uneventful. They signed in, and everything was the same, but better," Dave says.

Once both teams confirmed the migration was successfully completed, they began integrating new tools, features, and automations for efficiency, security, and visibility. "There's no longer this friction of 'I can't see that ticket because it's in a different system entirely.' For example, we got a report of some unhappy customers in one system. We were able to do the research and go from one ticket to another ticket and another team because they were linked in the same system," Bruce explains.

Post-migration, Dave says "usage exploded across the company," uncovering a need for enhanced security and streamlined permissions management. By integrating Atlassian Access and Okta, Ginkgo Bioworks now has single sign-on and role-based administration, which enables IT to quickly grant employees access to exactly what they need by assigning them to a group, rather than providing access person by person or tool by tool. "People want access immediately, and getting them started quickly is super important," Dave says. "We reconfigure people and teams regularly, so we need to keep data segregated but available. Role-based permissions via one central location make it easy."

Ease and speed are common themes for Ginkgo Bioworks, so they have also been working with their Solution Partner to leverage more tools and features within Jira Service Management. "Jira Service Management Premium allows us to use Insight for asset management and more tightly integrate Opsgenie [for major incident management], so we have everyone's schedule and shifts. That has been huge," Bruce says. He and Dave point to Ginkgo Bioworks's extensive lab equipment inventory as one area where Jira Service Management will make a huge impact. The asset management capabilities will help IT keep track of well over 700 pieces of equipment, which are frequently moved from lab to lab. When one goes down, the major incident response features alert the on-call employee for maintenance, which not only speeds up resolution, but also enables lean staffing. Bruce says, "Insight is going to be a linchpin of our IT asset management and change management strategy."

Triple the output, half the costs, exponential possibilities

Access to the latest and greatest cloud features is fueling Ginkgo Bioworks's growth and innovation. The first year post-migration was all about foundational capabilities. The second year will be focused on data-based decision-making and compliance. The team has a long wish list of optimizations on the horizon, including expanding Jira Service Management across the company, making it easier to find data in Slack,

> 66 There's no longer this friction of 'I can't see that ticket because it's in a different system entirely.'
>
> **BRUCE KOZUMA**
> Senior Group Product Manager

analyzing ticket data to identify training needs and profitability trends, and enhancing search in Confluence – all of which will have ripple effects throughout the organization. "This is well outside of just ticket handling. We're working with an Atlassian Solution Partner to set up projects that are really transformational for the business," Bruce says.

These impacts are made possible by Ginkgo Bioworks's partnership with the Solution Partner and Atlassian. "Since we don't have to worry about hardware or operating systems, we can focus on governance and procedures, Sarbanes-Oxley [financial recordkeeping and reporting], quality assurance, auditability, compliance, and other recommendations, so Ginkgo Bioworks can stay ahead," says Bruce.

Staying ahead of their past performance and industry peers is exactly what Ginkgo Bioworks plans to do. They have big dreams, and with a solid cloud platform and partner, the team is well on their way to achieving them. "We've been tripling our output and trying to cut costs per strain by half," Dave explains. "That means in three years, we would theoretically need 27 times the network and storage we have today. But by moving to the cloud and converging around Atlassian solutions for service management, we can scale non-linearly, have the metrics to support making the investments we need, and drive profitability."

" We wanted to position ourselves as a leader in the industry. You don't see leaders in the SaaS industry using on-premise solutions.

Lucid

30 days to increased innovation and employee happiness: Lucid's cloud migration story

Lucid Software, the leading provider of visual collaboration software, believes customer happiness is built on employee happiness, so they invest heavily in internal improvements in addition to external. Their migration to Atlassian Cloud helps achieve both goals. In just 30 days, Lucid and their Atlassian Solution Partner smoothly transitioned the company's on-premise deployment of Atlassian tools to the cloud, solidifying Lucid's position as a SaaS leader while increasing time savings, innovation, and employee satisfaction. Read on to learn more about their journey and biggest lessons learned.

As modern professionals, we hear over and over that the customer is king, and that organizations' focus should be on making their lives better. While the team behind Lucid Software, the leading provider of visual collaboration software, agrees with this mantra wholeheartedly, their approach to achieving it is a bit out of the box: They believe customer happiness is built on employee happiness, so they invest heavily in internal improvements in addition to external. Lucid's migration to Atlassian Cloud was a win on both fronts.

The team had used on-premise deployments of Jira Software and Confluence in their daily work for years, and regularly assessed whether – and when – they should move to the cloud. In 2021, all signs indicated the time was right. To solidify themselves as SaaS leaders, use their product on the cloud (the same way their customers do), and deliver the fast, secure experience employees were craving, Lucid engaged a Solution Partner to migrate in record time.

In close collaboration, the partners made strategic tradeoffs to move quickly, transforming the company's Atlassian products into a high-performing, scalable cloud system that supercharged Lucid's efficiency and effectiveness. Today, employees are saving time and worrying less, which fosters a happier work environment and, in turn, happier customers.

Along the way, Lucid achieved big wins and learned important lessons. Here's how they navigated the transition to Atlassian Cloud, along with their top tips for small and mid-size businesses embarking on their own migration journey.

Seeing and building the future for their customers and company

Lucid's Visual Collaboration Suite (which includes products Lucidchart, Lucidspark, and Lucidscale) caters to modern ways of working and collaborating. Instead of relying on an endless flow of text to get a point across, colleagues can work in a shared canvas from anywhere in the world to visualize just about anything. Think executives gathering on a virtual whiteboard to brainstorm a new strategic plan, or a DevOps team collaborating on the visual design for a new cloud architecture.

When Lucid was founded in 2010, cloud technology was still in its infancy. Their small team relied on Google Docs for knowledge sharing and Mantis for ticketing, but as the company grew, VP of Infrastructure and IT David Torgerson says those tools "quickly fell over." "It was impossible to find anything," he recalls. "Once we had grown beyond a handful of people, we needed a more consistent way to store information. That's where Jira and Confluence came in."

David's team implemented on-premise deployments of Jira Software and Confluence – Atlassian's most popular deployment method at the time – which the entire company quickly adopted. Jira Software became their go-to tool for prioritizing and completing epics, stories, and development tasks. They turned to Confluence for documentation and roadmapping, runbooks, call logs, reporting, and more.

While many businesses "set it and forget it" when they add new technology solutions, Lucid's mission is to help their customers see and build the future – and they take the same approach with their own company. Using Atlassian on premise met their needs at the time, but they were always looking ahead and exploring ways to optimize their environment.

❝ SREs are our most tapped team. They save 25% of their time in a given week by being on Atlassian Cloud now.

DAVID TORGERSON
VP of Infrastructure and IT

A "perfect storm" precipitates a quick move to cloud

Over time, cloud technology grew stronger and became the industry standard, while server-based tools got more expensive and difficult to maintain. Plug-ins were complicated to manage, ongoing updates had to be manually implemented, and capacity was dwindling as Lucid grew.

In 2019, the company upgraded to Atlassian Data Center to offload some of the operational headaches of maintaining on-premise tools and take advantage of a more modern experience. They knew even then that migrating to the cloud was their eventual goal – it was just a matter of timing.

"We wanted to position ourselves as a leader in the industry. You don't see leaders in the SaaS industry using on-premise solutions," David says. "The value that our company provides is by making features, making our product more stable, and innovating. Any amount of time that we spend maintaining internal tools is an opportunity cost lost."

In addition to following industry best practices and offloading maintenance, Lucid also wanted to migrate so they could use their own cloud-based products and their Atlassian Cloud-exclusive apps in the same way their customers do (an invaluable step for encouraging empathy and innovation), while improving security and providing remote access for employees.

As Lucid weighed the costs and benefits of cloud migration each year, the scales tipped in favor of a transition in 2020. The decision was easy thanks to all the analysis they had done over the years. David says it was "finally a perfect storm" of having the right reasons and the right people, all aligned at the right time.

PRO TIP

Reach out to a Solution Partner when you need more support, speed, and/or expertise.

Lucid asked the Solution Partner for help because they wanted to better understand the nuances of cloud and have an experienced team who could quickly guide them on how to organize data, structure permissions for security, and solve complex problems.

David's team appreciated that their trusted Solution Partner had deep expertise in Atlassian Cloud migrations, but was also willing to admit when they needed to do more research or thinking. "We knew we had a gap. When we kicked off this process on our own, it wasn't clear whether challenges we faced were known issues, expected changes, or gaps in our own understanding. The Solution Partner's team was quick to call out when problems were common or completely new," David says. "We trusted them as experts, so we were able to come together, filter out the noise, and collaborate on solving the truly hard problems."

Lucid's executive team was fully on board with migrating, and true to their innovative spirit, they challenged Engineering to push themselves even further. "Our CEO has always created a sense of urgency – not from an unrealistic standpoint, but just making sure that people are always hungry and fighting to stay on top. So he said, 'What would it take to get this migration done in two weeks?'"

Their Atlassian Solution Partner was up for a challenge but told the team a migration like this would normally take about six months. After discussing tradeoffs, they agreed on an aggressive yet doable timeline: 30 days. It would be difficult, but with close collaboration and strategic compromises, both teams felt confident they could hit the mark.

PRO TIP

Get aligned on a crystal-clear vision with your Solution Partner..

Connect with your local Solution Partner as early as possible. Doing so will help us align on a shared vision to understand your needs and requirements better. This step will prepare our teams for a successful migration and accelerate the process.

Concentrate, validate, communicate: Lucid's three keys to migrating in one month

With a well-defined vision of being able to practice what they preach (working on the cloud) and an aggressive timeline to achieve it (30 days), Lucid and the Solution Partner started preparing for the migration by focusing on moving only the most necessary and valuable assets. "We decided as a company that getting to the cloud was more important than making sure we had 100% parity with what we had on premise. That made a big difference," David recalls. "Our internal philosophy is that if we're no longer getting value from it, we're not going to continue to invest resources and maintain it."

This philosophy had informed Lucid's plugin governance over time. They had already identified which plugins were no longer heavily used or would be too difficult to move, which helped both teams as they planned the cloud migration. Rather than having to do extensive mapping of old functionality to new, the team pinpointed what they wanted and needed to move, then retired the rest.

Atlassian's updated **Jira Cloud Migration Assistant** tool also came in handy by making user mapping more intuitive, providing more advanced support for custom field types, and enabling migration of cross-project boards. Saving time on these tasks meant Lucid could focus more on testing, which was important not only for avoiding problems, but also for gaining buy-in and managing organizational change. They enlisted about 20 testers from across the organization, so Engineering could see how the cloud environment worked for various use cases.

Their Solution Partner found that a cadence of migration dry runs paired with UAT helps socialize people to the differences between Atlassian's on-prem and cloud deployments. They were able to take the best resources from Atlassian and Lucid's internal documentation to clearly communicate what to expect ahead of time, giving employees confidence they had a plan to ensure a stable experience.

PRO TIP

Include a wide range of users, including champions and skeptics, in migration planning and testing.

Recruiting testers from across the organization and including both cloud supporters and skeptics in the process helped Lucid identify more gaps in the tools, win them over, and develop champions and liaisons for their departments. David says, "It was really important that we included all types of users in our testing. For example, we engaged our daily users, who are the experts, as well as the SRE team, who are lighter users and not as familiar. Having a wide range of testers helped convey excitement, and the less frequent users and skeptics were great at pointing out technical deficiencies."

These intentional investments in testing and communication paid off as Lucid completed several dry runs and flipped the switch on their move to cloud just a few weeks later. The migration was completed within a weekend and was mercifully uneventful. "Because we had gone through so many dry runs and UAT testing on multiple instances, there was only one issue on the day of migration. We were able to fix it immediately," David says.

The change was so smooth that it barely registered with employees. "When people came back on Monday, they mostly didn't notice a change, which is what we wanted. They just knew they could access the system from their phone," David says. People who had expressed concern over losing data or experiencing interruptions in their work were pleasantly surprised. Hours and weeks later, it was as if they had been working on Atlassian Cloud all along. "When I first heard we were moving to Atlassian Cloud, I was worried how it would impact my existing data and workflow. Now I can't even remember a time before we were on cloud," says Emma Reece, Senior Quality Assurance Specialist.

PRO TIP

Communicate the value of cloud, not just the changes.

People are creatures of habit, so changes – no matter how big or small – are often met with resistance. To gain buy-in, overcome objections, and generate excitement, Lucid was honest about the changes employees could expect after the migration and heavily promoted the benefits of the transition. "We had to deliver some challenging messages. Our goal was to make employees' lives as easy as possible and lead with the things they would find most valuable – things they could look forward to," David says. "Making that real for every employee and conveying the value that they would get from it helped outweigh the pain and went a long way to building that internal excitement."

Employees are also enjoying the improved experience and helpful features of Atlassian Cloud. "The Jira Software interface is better, and the experience is smoother," explains Product Manager Chance Ramey. "Advanced Roadmaps are a game-changer too. As priorities change, we can update our plans on the fly and better track if we're ready for releases."

Major time savings, plus priceless employee satisfaction

Just 30 days after making the decision to migrate, Lucid was working seamlessly on Atlassian Cloud and enjoying the speed, security, and stress-free experience they'd been looking forward to for years. "We've been able to stop caring about the database maintenance, the server maintenance and configuration, automating the configuration of Data Center, and differences in environments. We know Atlassian is going to patch vulnerabilities that come up. There are fewer things for the SRE team to be aware of and worry about. They're able to manage our production environment consistently, which alleviates stress, the amount of testing that they have to do, and more," David says.

His team has also saved significant time on fixes, scaling, and interruptions, many of which required effort but didn't add much value. "SREs are our most tapped team. They save 25% of their time in a given week by being on Atlassian Cloud now," he says. "At least twice a month, one of our ten team members would have to stop what they were doing and spend five minutes to a few hours fixing something. Then, there were the updates and revisions. Scaling was difficult to adjust for too. All of these tasks independently only took a couple minutes, but it added up, didn't create much value, and often interrupted us during meetings or on the weekends. Now, all of these activities have gone away," David explains.

With fewer interruptions and tedious tasks, along with easier ways of working and collaborating, Lucid's employees finally get to experience the same joys their customers do. As they continue charging forward, the team looks forward to having Atlassian Cloud at their fingertips and a dedicated Atlassian Solution Partner by their side to support employee happiness, power their productivity, and help customers build their future.

" I've done dozens of migrations in the past, and our Atlassian Cloud migration at Sun Life is the best I've seen.

PAUL MCNALLY
Jira Cloud Technical Product Owner

Sun Life

> $250k
Time savings captured in the first 10 months

97%
Atlassian Cloud user satisfaction scores

80%
Increase in efficiency with Confluence Cloud

How Sun Life unlocked a brighter future by migrating to Atlassian Cloud

Turns out, old firms can learn new tricks. Learn how Sun Life migrated to Atlassian Cloud products to digitally transform and increase speed, security, and collaboration.

INDUSTRY
Financial Services

LOCATION
Toronto, Canada

NUMBER OF USERS
1,300

ATLASSIAN PRODUCTS & APPS

Confluence
Document collaboration

Jira Software
Project and issue tracking

Aura
Content formatting macros

Draw.io
Diagrams and whiteboards

When you envision a company that's been around for over 150 years, the words "forward-thinking" and "digital innovator" probably aren't the first to come to mind. But Canadian financial services firm Sun Life is proving that a historic company can be a modern leader.

Sun Life strives to maintain its position not only as a top financial planning and benefits provider, but also as a top place to work. Many employees have been with the company for decades and have adapted to new ways of working together and serving their customers.

Recently, Sun Life began a digital transformation initiative to stay competitive and provide a superior customer experience. The initiative included adopting agile methodologies and cloud-based tools to increase efficiency, encourage collaboration, and deliver even better products.

Like many teams in a similar position, employees were skeptical about changing their processes and platforms, especially given the strict security and compliance requirements they were beholden to. But just as they always do, Sun Life embraced the challenge, mitigated risks, and reaped the rewards.

Since migrating to Atlassian Cloud with the help of their Solution Partner, and the Atlassian Migration Program, Sun Life has captured hundreds of thousands of dollars in time savings in less than a year, achieved 97% user satisfaction scores, and created a more agile, collaborative working environment that will help ensure their next 150-plus years are just as successful as their first.

Centralizing and modernizing with Atlassian Cloud products

When Cynthia Brind'Amour joined Sun Life in 1999 (as a second-generation employee following in her mother's footsteps), the most sophisticated piece of technology she used at work was a microfiche reader. There was no email, let alone collaboration or ticketing software.

As Cynthia worked her way up from a call center representative, to a trainer, to a process specialist, she became known for her deep company knowledge and relationships. This reputation made her the perfect fit for helping Sun Life through its digital transformation.

After implementing on-premise deployments of Confluence and Jira Software in 2008, employees saw how much faster, easier, and better their work could be. Cynthia helped the team upgrade to Atlassian Data Center on AWS to offload maintenance, but over time, they realized they needed even more flexibility and agility to stay ahead in their industry.

In 2020, IT began an agile transformation to modernize their practices and achieve these goals. "Before, we had a traditional IT model for financial services that was more focused on cost control than delivering value. We had a system with a lot of capabilities, but it was very controlled and difficult to change," says Paul McNally, Jira Cloud Technical Product Owner at Sun Life. "We wanted to be agile, move quickly, provide a better experience for our teams, and deliver value – not just control costs."

At the same time, Cynthia was hearing feedback that the number of disparate tools at Sun Life was making it hard for employees to find the information they needed. Although Confluence and Jira Software were popular products among IT and Operations, some team members were still using Lotus Notes, Sharepoint, Microsoft Excel, Microsoft Project, and other software to do their work. "People were complaining that everything was everywhere. There wasn't one place where they could do their job," Cynthia says.

As the pain points accumulated, it became clear to the team that Sun Life's platform needed to be transformed along with their processes. "At a certain point, you can only do so much on Server and Data Center," Cynthia says.

> **❝ Jira Cloud and Confluence Cloud are a big step in the right direction from the on-premise versions and the other previous tools we were using. All the new functionality really improved my day to day.**
>
> SUN LIFE EMPLOYEE

However, there was hesitance from users and leadership around change management and cloud security. Cynthia and Paul's teams overcame these concerns by explaining how sensitive data would be protected, sharing the benefits of cloud security, and introducing them to cloud capabilities such as advanced permissions.

Once leadership realized that the rewards far outweighed the risks, they wanted to make the change as soon as possible. They set a target timeline of three months, but after working so closely with the tools for years, Cynthia knew it would take more time to do it right. She set up a sandbox to demonstrate cloud functionality, discussed costs, and walked them through the process.

Cynthia says this approach helped set leadership's expectations and develop a more strategic plan for migration, and the team benefitted from working together from the start. "Never assume. Just because you are migrating from the same platform does not mean this will be seamless," she explains. "Sandboxes are your friend. They immensely helped the project team and the business visualize what the space would look like once in the cloud. This also helped us determine which spaces were not a good fit for the cloud and which macros will work."

Confluence makes the first move

Sun Life began their cloud migration with Confluence, one of their most widely used Atlassian tools. During the planning process with leadership, Cynthia suggested using an "optimize and shift" approach so that they could move as quickly as possible, while also setting up their new platform for sustainable success. With this approach, the team focused on identifying which sites, apps,

> ❝ **Confluence Cloud blows on-prem out of the water.**

CYNTHIA BRIND'AMOUR
Confluence Cloud Technical
Product Owner

and workflows were most needed. "I'll never migrate a site just because. I meet with the team members, understand their desired user experience, and see if it makes sense and is worth the time and resources for migration and ongoing management," Cynthia explains.

During these meetings, Cynthia demoed Confluence Cloud for each team and discussed their specific needs. For some sites, it made perfect sense to move to the cloud. For others, Cynthia offered three options: migrate to the cloud, move to another legacy tool within Sun Life, or archive their content. Through these conversations, the team identified 25 sites out of 350 for cloud migration.

From there, Sun Life worked with their Solution Partner, to devise a migration plan. They created a phased timeline to migrate groups of sites in five waves, lasting two weeks each. During each wave, the Solution Partner built new instances in their sandbox and transferred them to Sun Life's sandbox for demo to users, remediation, testing, and final migration.

Her team also trained users so that they were aware of any functionality that would be different and new features they could use. For example, based on user feedback, the migration team introduced several new cloud-based Marketplace apps, including Aura to elevate page design, Table Filter and Charts for Confluence to enhance business analysis, and Draw.io for diagram creation (soon to be implemented). "There's a lot you can do in Confluence Cloud that you can't do with on-premise or Data Center deployments," Cynthia notes. Users are starting to see this, too. "Once we're finished converting, I see many instances where the new Confluence Cloud will provide efficiencies not available in the on-prem version," one employee shared.

The optimize-and-shift approach worked remarkably well. "Everyone said what a smooth migration it was," Cynthia recalls. "I've done four migrations at Sun Life. This one was the most successful. It was nice to hear people who had been through the others say, 'This one was seamless.'"

Testing and support make the Jira Software migration "the best I've seen"

As Cynthia wound down the Confluence migration with their Solution Partner, Paul and his team started working with them to ramp up with Jira Software Cloud. They collaborated with Sun Life's Agile Transformation Office to gain approval from leadership, then assembled an architecture team to shepherd the project through planning and implementation.

Similar to Cynthia's approach, Paul and his team organized the migration into waves, then surveyed users to understand how to best set up Jira Software Cloud to meet their needs and support an agile approach. Throughout the architecture process, the migration team strived to standardize workflows and keep the system as open as possible while maintaining security. "Instead of being strictly locked down, we're striving for moderation," Paul says. "And if someone wants a workflow for their business area, we talk about standardizing and facilitating that process. That's been a big win."

As the team began the migration, they used the Jira Cloud Migration Assistant (JCMA) to make the process easier. When challenges arose, they leaned on their Atlassian Cloud Migrations Manager (CMM) for help. For example, the group hit a snag with duplicate email addresses in Active Directory, so they collaborated with

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CYNTHIA BRIND'AMOUR

Confluence Cloud Technical Product Owner

the CMM to resolve the issue. "We could not have been successful without the help of Atlassian. JCMA and the CMM's support were crucial. I've done migrations with other companies, but Atlassian actually helps and cares," Paul says.

Paul admits he was a bit hesitant to take advantage of the CMM and do testing, but eventually he saw the value they both added. "In hindsight, I would have listened more to the Migration Manager. They suggested testing and remediation, which I now realize are key. If you check the data in the originating system, do as much cleanup of the source system as possible, and test early and often to resolve any data issues, the migration should be pretty straightforward."

Sure enough, preparation and testing are paying off. Paul and Cynthia's teams surveyed users after the migration, and the feedback was resoundingly positive, with consistent praise for how smooth the transition has been. Paul says, "When the teams came in after their migration was complete, they didn't see that much difference other than a new link, which has been a big win. People have been happy that their whole history was there and the keys were the same. I've done dozens of migrations in the past, and our Atlassian Cloud migration at Sun Life is the best I've seen."

"You can do it all with Atlassian"

Sun Life's Confluence migration was just recently completed and their Jira Software migration is still in its final phases, but the company is already seeing undeniable improvements in collaboration, efficiency, and security.

Sun Life's Jira Software Cloud platform is much more open than their Data Center system, while maintaining rock-solid security. The team has customized the tool to reflect their internal processes, enabling people to find the information they need, work together more, and be more strategic. "Jira Cloud has made my tasks very organized and easy to understand. All the necessary information and files relevant to an issue are easily accessible," one employee says. Paul adds, "I see a lot more collaboration across the team and a lot more attention toward portfolio management. We're even looking into adding Jira Align to see the big picture and be able to track organizational OKRs."

IT and Operations are loving cloud apps like qTest and Tableau Connector Pro, as well as native features like Advanced Roadmaps and automations, such as the creation of an onboarding request triggering the creation of stories and subtasks. "Automations save a few minutes each time, which adds up over a year with over 3,300 users," Paul explains.

The feedback has been equally positive with Confluence Cloud, which Cynthia says "blows on-prem out of the water." Employees have been especially enjoying templates, in-line commenting, analytics, search (which she calls "out of this world"), and cloud-only features and apps that reduce the need for email. She also notes, "The fact that you can create a Jira Software ticket through a Confluence page is money!"

From IT to the Call Center, employees across departments agree that centralizing from multiple tools to one cloud-based platform has made a monumental impact. In a recent survey, users reported an 80% increase in efficiency using Confluence Cloud, enough time savings in Jira Cloud to cover 94% of license costs, as well as 97% satisfaction with the new platform as a whole. One employee said, "Jira Cloud and Confluence Cloud are a big step in the right direction from the previous tools we were using. All the new functionality really improved my day to day."

These are exactly the types of improvements that will sustain Sun Life's reputation as a top financial services provider and employer. No matter what the market forecast is, they'll continue to shine brighter in the cloud.

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