Atlassian

Atlassian for Marketing Teams:

Workflows

About the Authors

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Jamey believes Thomas Mann had it right when he said, "A writer is someone for whom writing is more difficult than it is for other people." When he isn't twisting his beard staring at words on a screen, Jamey might be wandering the streets listening to Spotify, teaching his kids the finer points of rochambo, indulging a basketball jones, or generally spending an inordinate amount of time feeling completely amazed by it all. Find him on Twitter: @jameyaustin.

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Claire (Fisher) Drumond is a writer turned product marketer. She enjoys taking apart complex ideas and processes and putting them back together, hopefully simpler than she found them, though no promises. When she's not writing about writing and discussing the depths of process visualization, you can find her running with her 100-pound yellow lab, mountain biking in the desert or getting her nails done. You can read her rambles on her blog so-do-we.com.

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Introduction

Has this ever happened to you? You've got a blog due tomorrow. After your morning cup of inspiration (coffee, not whiskey; we can't all be like Papa), you make your last edits and email the latest draft to stakeholders. And then you wait. Throughout the day, the feedback trickles in. You start a list of things mentioned. You respond to some emails, but the back and forth is getting confusing, so you decide to call an impromptu meeting to discuss competing feedback. You make more edits. Maybe someone schedules *another* meeting. More feedback. More edits. You draft the latest, *latest* version. Repeat. Hopefully, you still make your deadline.

If that sounds familiar—maybe *too* familiar—we've got something for you: the workflow. Because to call the above a "workflow" (and some might) seems a little crazy. I mean, it has really no *flow* at all. It's more like a marketing eddy. A never-ending whirlpool of words, cycling around. What you need is organization, consistency, and transparency. And that's where workflows come in, and they can really help your marketing efforts.

All marketers face competing priorities, last-minute requests, ever-changing deadlines, overly solicitous (or impossible to find) stakeholders, and many other ~~challenges~~ joys. But when you add a tangled web of emails, spreadsheets, and static document versions to the mix, it makes even the simplest task feel like getting a bill passed through the congress.

And here's something else: with all the project tracking and collaborative editing tools out there, you'd think we'd have figured it out by now. But the truth is, it's not as easy as installing new software. It also requires a culture shift. Because to have a marketing workflow, the process would sound more like this: The blog is due tomorrow. (First, coffee. Maybe this time a latte.) First, you check the live document and read through inline comments, where you happily discover competing feedback has already been discussed and *resolved* by stakeholders. Next, you make edits to address decisions *in the same doc*, and then you change the status to "Final

Review," after which the Approver gets notified, reviews, and changes the status to "Approved." Ship it. Go back to your latte, which is still warm.

Sounds better, right? The point is, to do this takes the right software *and* a willingness to iterate on a solution until your workflow, well, *flows*, just the way your team works. It takes effort, and a commitment to collaboration, transparency, and the belief that your projects can *and will* be vastly improved with a good workflow.

In this ebook, we begin by getting your marketing team familiar with the concepts of visualizing and implementing a workflow. Next, we discuss ways to outline a blog process and develop blog posts using Confluence, Atlassian's collaborative editing tool, to show you how a common marketing task like writing a blog fits into the context of a workflow. Then, we go over how to track blogs using JIRA Core, which is Atlassian's project management and tracking tool for business teams. Last, check out the worksheet, which you can download and use to start creating your own workflows.

Visualizing Your Work

By Claire Drumond

For most marketing people, the word "workflow" sounds like a terrible mix of crossfit and vinyasa yoga. Torture, basically. Yet workflows provide a huge advantage to your marketing process and the success of your projects. As a visualization tool, workflows can help your marketing team come to consensus on the steps needed to complete tasks, anticipate or remove bottlenecks, and move quicker. Creatives are free to do more creative things, like photoshop battles on Reddit. Managers get a better sense of control and insight into project statuses, and execs can stay in the loop. Put simply, workflows give everyone a sense of ownership and accountability.

Before coding anything into a project management tool, here are three best practices for getting your team ready to workflow.

Step 1: List and group your content

Make a list of all the different content or assets you might create as a marketing team. Group the content using criteria that makes sense for your team.

Here's an example of how the JIRA product marketing team broke our content into groups:

	Group 1 (Default)	Group 2	Group 3
Criteria	Basic content, fast turnaround Needs editorial oversight Needs Jr. Manager approval	Medium-visibility content Needs subject matter expert Needs editorial oversight Needs Sr. Manager approval	High-visibility content Needs subject matter expert Needs editorial oversight Needs Sr. Manager approval Needs executive approval
Content	Banner ad Non-paid social post Email copy	Webinar abstract Webinar deck Newsletter article Blog post Microsite article Customer story	Product announcement Thought-leadership article Landing page Website update Video Press release

This exercise made us realize just how many assets we work with. It forced us to talk about existing approval processes and ones that we needed to create. Prior, we never discussed official processes. Most approvals were done either ad hoc or in siloes. The system didn't feel broken, necessarily, but when new team members joined it was impossible to explain. It just didn't scale. Grouping different assets highlighted the similarities of certain types of content, the people that needed to be involved, and the steps necessary to get stuff done.

Step 2: Draw the process

All you need is a marker, a whiteboard, and coffee. (We like coffee at Atlassian.) Draw out what steps are needed, the people involved, and the normal review cycles you go through to get something published. Get all the details out on the board, even if the process is complex. Spoiler: Next, I'm going to tell you to simplify it.
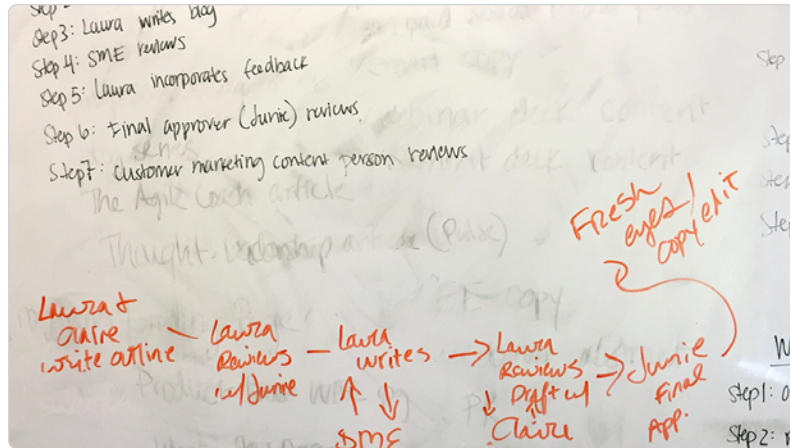
For this meeting, ask all the stakeholders to pick an asset and explain how they get it approved or done. You'll start to see patterns where certain assets overlap— this informs your workflow needs. Much like grouping your content, this will make something that was implicit into something that's *explicit*, and in a way that everyone can understand.

> **Pro tip:** Take your work through the most complex workflow to get feedback and approval. This will allow you to test it out before you ship it.

Step 3: Simplify the $#!* out of it

Using a tool like JIRA Core, you can customize your workflow with as much detail as you like. However, I highly recommend starting with a simple workflow to get the hang of it. This could be as simple as To Do, In Progress, In Review, and Done. Take the work you did in Step 2 and assign different stakeholders to the various steps of your simplified workflow.

The following is an example of a complex workflow our marketing team established in Step 2. You'll see that we explicitly assigned the type of role needed for the various steps in the process:
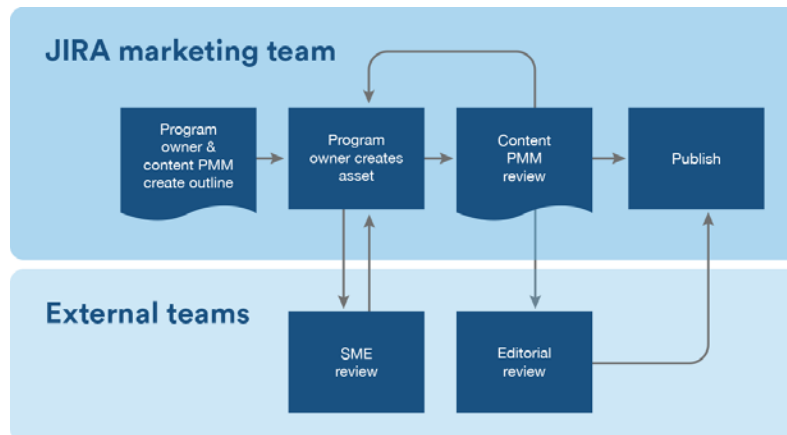
We then took this model and simplified it down to just: Open, Draft, Under Review and Publish. We kept track of who was responsible for each step in Confluence, our collaborative document sharing tool. While a tool like JIRA Core would allow you to actually assign people to certain stages, we chose to do this first while we tested it out.

Here's what the workflow looked like:

By working with a simplified workflow to start, your team can spend time defining roles and getting used to having a pre-defined process before going through the work of coding it.

When we started this exercise, we had three workflows that mapped to our content grouping in Step 1. We ended up consolidating into two: one that served as a default workflow, and another that captured a more complex process, requiring an added layer of approvals. We did this because our two most complex workflows actually ended up being very similar, if not ostensibly the same. We learned that having too many variables, statuses, and transitions slowed our progress with getting our workflows shipped. So we took a step back, simplified, and then added in more complex variables later, once we learned what worked best for our team.

A note on review cycles: Review cycles can have several steps and continue until that stage is complete. So, for example, Draft and Under Review could contain more than one person's review. In the above example, the asset doesn't move to Under Review until the "program asset owner" has shared their work with the "subject matter expert."

Why your team will love workflows

Getting your marketing team to agree on the steps of a process can be an empowering exercise for everyone. When you're finished, everyone will know their exact role in getting marketing assets out the door. You can put at least some structure behind your creative process. Everyone can keep tabs on what's coming and going. You'll realize that the CMO doesn't always have to be the final approver and that different content deserves different processes. But best of all, you'll be able reduce, or even eliminate fire drills, which should be music to any marketers ears.

Once you've gotten the hang of your newly defined process, you can set up your workflow in JIRA Core. JIRA Core has three different templates that you can customize to visualize your workflow to fit exactly how your team works.

Outlining a blog process and developing blog posts
(using Confluence!)

By Jamey Austin

We have a surplus of blog authors at Atlassian, and that makes us lucky.

But many companies have people who like to contribute to the blog, writers and non-writers alike. Folks on the marketing team, HR folks, software folks… it's a regular content-creation hoedown.

The kicker is, while some of these authors are also darn good writers, writing often isn't their main bag. What's more, regardless of any contributor's talent or experience, all your blog authors need guidance. Things like:

- Company voice and tone
- Format, length, style
- Focus keywords and SEO

- Goals
- CTAs, subheads, pro tips, call-outs

… and everything else you've spec'd out for your blog. We have loads of specifications for our authors and contributors. Not to mention the fact that with so many writers offering up content, and a tight publishing schedule, we're often scrambling to find space on the blog calendar.

So, how do you make sure every author knows your guidelines? And how do you create a baseline for consistency, especially so trickier elements—SEO, headlines, tags—get the attention they need before a post is submitted for review?

This article talks about why it's important to create blog guidelines and make them available to everyone, and about how creating a blog page template will help your writers get started. It also covers why Confluence (as opposed to another tool, heaven forfend!) is ideal for this effort.

Create a page that outlines your blog authoring process

Here's our Confluence page called "How to write a blog post for Atlassian." It gives our blog authors the information and guidance they need up front, before they begin to write. It uses a simple page format and employs a few macros to help organize the content. (If you're unfamiliar with Confluence terminology, don't flinch at the word macro. Macros are easy-to-use chunks of awesome that help add functionality to your pages.)

The Info macro lets you create a quick callout box. We use them to begin docs all the time.
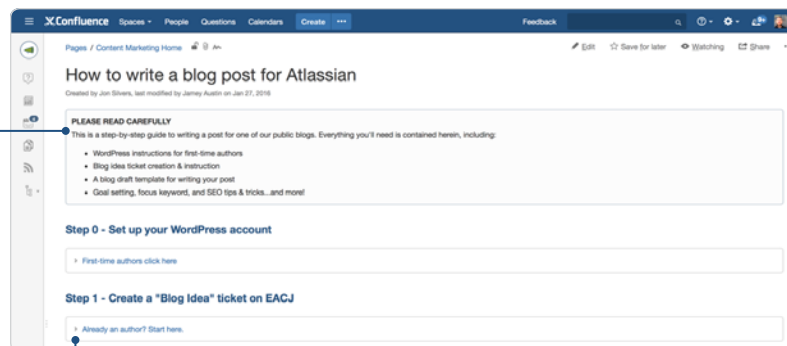

The Expand macro lets you hide info so your pages don't become overloaded with text.

Below is the same page in "edit" mode. See how the page includes lots of information that isn't shown above? That's because it's contained inside the **Expand macro**, and it keeps your page from looking cluttered and overwhelming. But all a reader needs to do is click the link and boom, all the content appears.

The information inside the Expand macro, revealed to users when they click the link

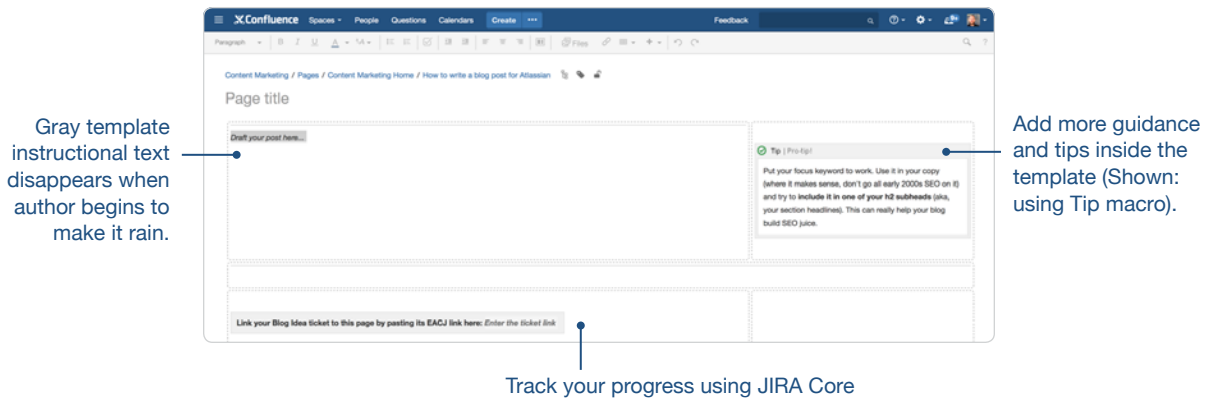Headings organize content (shown: Heading 3) and can be used to the Table of Contents macro.
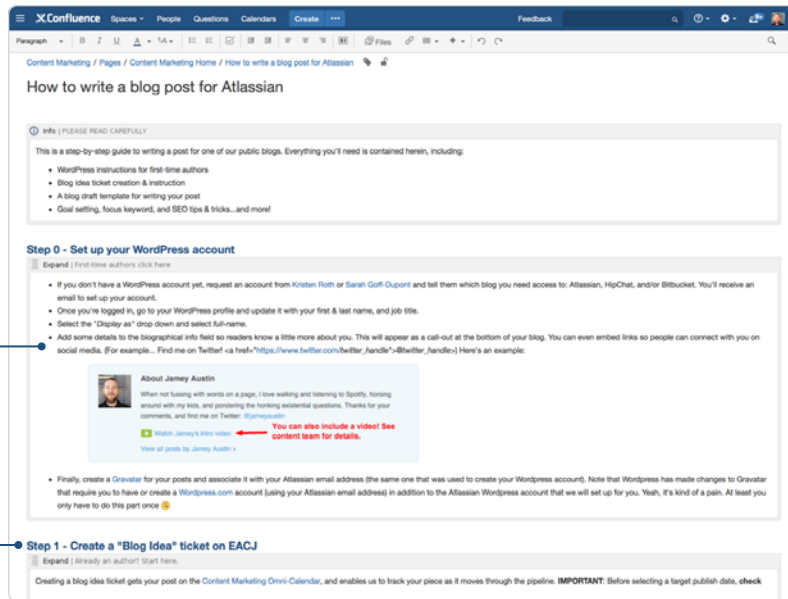
Use a page template to get blog authors started and ensure consistency

Now let's go to **Step 2: Draft your blog**. When our blog authors are ready to get their Hemingway on, they click the button "Create public blog post from template."
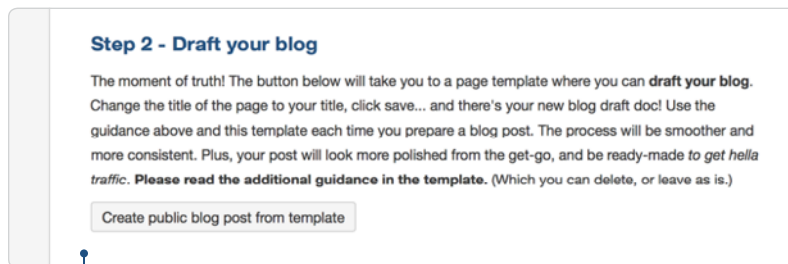
Create a blog template that every author can use.

A page template—that we've set up—appears auto-magically.

Gray template instructional text disappears when author begins to make it rain.

Add more guidance and tips inside the template (Shown: using Tip macro).

Track your progress using JIRA Core

On this page, authors can add a title (where it says "Page title") and start writing in the space provided (Draft your post here…). There's more instructional content (Pro tip), and there's also a place to add a JIRA Core issue link so it can be linked with the page. When the author clicks "Save," this becomes his draft document. He or she won't have to create one from scratch, we've already done it.

Templates: Confluence lets you create page templates that can be used again and again. By standardizing with a page template, you'll establish a level of consistency for all your blog posts. Learn more about Creating a template in Confluence.

So, why use Confluence for blogging and to outline your blog process?

Sure, you could create an outline in Word. Heck, you could even create an outline in email. (Don't do that.) And using those tools for a reusable template? Fuhgeddaboudit.

Confluence helps you **centralize** this information for easy access by anyone in the company. In our example, it means that anyone at Atlassian can find the page "How to write a blog post for Atlassian." All authors can read the guidance and start a new blog draft with the information they need.

Confluence also enables teammates to review posts and give feedback right on the page with **comments**. Blog posts are iterative; each goes through the process of drafting, reviewing, and editing. And I *know* you've experienced how painful this process can be, the scattered feedback (often in different places like email) and not knowing if someone has seen the post. Comments in Confluence are the height of content review and collaboration for a piece of writing.
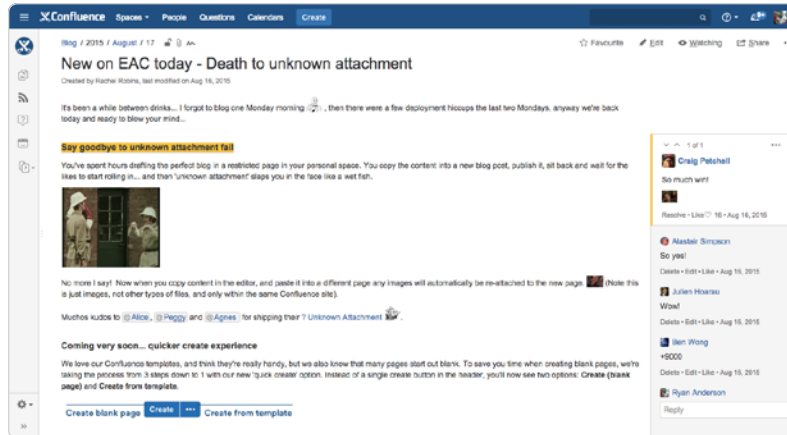
> **Pro tip:** Confluence has two kinds of comments: inline and page comments. Each offers a way to comment on pages and blog posts to provide feedback and have conversations on the same page.

And, using Confluence lets you **standardize** your blog posts for consistency and reduce needless repetitive effort. By creating a page template that everyone can use, an author doesn't have to create a new page every time the muse makes an appearance. Plus, he or she knows all the requirements. (The muse may have appeared, but the muse don't care about no SEO.) This frees up time for the author to help with goal setting, to think about headlines and focus keywords, and to complete required fields. Trust me, this will make your content manager or Editor-in-chief… HAPPY.

Rest easy by outlining your blog process and creating a blog page template

By using a page that outlines our process and requirements, and offering a page template to get our blog authors started, we rest easy (or easier!) knowing our authors have the information they need and that the blogs we receive will have a high level of consistency. Plus, we get these immediate benefits!

- Eliminates repetitive back-and-forth questions (self-service FTW!)
- Educates authors and familiarizes them with *all* publication requirements (feel our pain!)
- Allows much more time to review, edit, re-write, rinse & repeat ("Writing is REwriting."—Robert Kelley)

Tracking blog projects

(with example JIRA workflows)

By Sarah Goff-Dupont

Chances are, your marketing team manages blog projects on spreadsheets. You probably track who is working on it, what state it's in, when it's going to be published, what it's about, how it fits into larger marketing campaigns… And that's just the stuff you're concerned with *before* it's published.

With that many facets to a (seemingly) simple project, it's no wonder details get missed. But many teams that publish high-quality blogs on a regular basis have discovered a trick for keeping everything in order: they use a project management tool with a workflow engine so they can spend less time squinting at Excel and more time crafting a catchy turn of phrase.

It'll come as no surprise that Atlassian's marketing team uses JIRA Core, Confluence, and HipChat to keep our blogs running smoothly. So today I'm going to get all meta with a blog about how we use JIRA Core, including some example workflows, to track our blogs. (If your company employs developers, chances are they're using JIRA Software to track their work. That'll work well too—contact your friendly neighborhood JIRA admin to get user accounts set up for you and your team.)

Start with a great workflow

JIRA Core's default workflow is really basic, with just three workflow states: *Open*, *In Progress*, and *Done*. This is a great one to start with because it's simple and flexible.

Of course, as veteran bloggers know, there are sub-flavors of "in progress": panicking, drafting, reviewing, editing, formatting, obsessing… and it's usually a different person involved in each of those. So rather than getting granular with states, workflow newbies can assign issues to the different people involved in each step as a sort of proxy for status.

"Ah, I see Thursday's blog is In Progress and it's assigned to Jamey, our editor. Sounds like it's on track!"

But we Atlassian marketers are hardly workflow newbies. So we geeked out and created a customized workflow and a custom issue type to go with it.

Issue type

Having a custom issue type gives us a quick way to distinguish blogging work from other types of marketing work—both when searching for issues and when looking at all the issues assigned to us. It's even got its own little icon. We called the issue type "Blog Idea."

Workflow states

Our blog projects flow through eight states: *Triage*, *To Do*, *Drafting*, *In Review*, *In WordPress*, *Scheduled*, *Published—Pending Analysis*, and *Analysis Completed*.
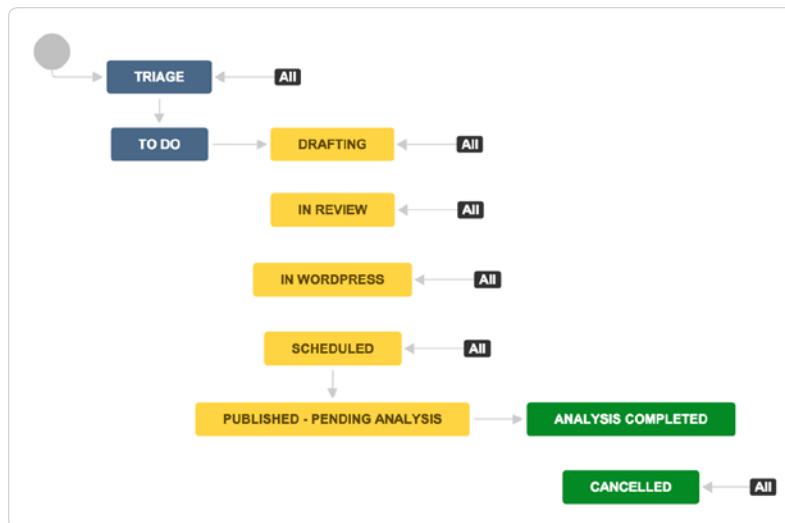
It's dangerously easy to go wild with workflows and add like 40 states. If you remember nothing else about custom workflows, remember this: **whatever you're tracking in JIRA, only create custom workflow states for distinct stages in your process.**

For example, we triage incoming blog ideas to make sure we understand why they're worth writing and what the storyline will be before anybody puts pen to paper (*Triage*). Then the author writes the initial draft (*Drafting*), and sends it around for review to their fellow subject matter experts, as well as the content marketing team (*In Review*). During the *In WordPress* stage, my team and I put the finishing touches on: polish up the copy, add images, look at SEO, and then schedule the blog for publish. It's common for this to happen several days in advance of publishing, so we added a *Scheduled* state to make it clear to stakeholders that everything is ready to go.

Once the blog is live, we move its JIRA issue to *Published—Pending Analysis*. And 30 days after publish, we perform a lightweight analysis on how the blog performed. How many times was it read? What was the bounce rate? Did it meet its initial goals? All of which is also tracked inside the issue (more on that in a moment). Only then does the issue reach its final state of *Analysis Completed*. We also have a terminal state called *Cancelled* for blog ideas that are abandoned.

> **Pro tip:** For maximum flexibility, set up your workflow such that an issue can move freely between states, rather than in a strict linear progression. The "All" labels in the diagram above indicate that an issue can transition there from any other state.

Remember it's a work in progress

Making the move from managing your blog with spreadsheets to managing it with JIRA Core is a significant change in the way your team works. (Hopefully for the better!) If you're feeling overwhelmed just thinking about it, take heart: we didn't have all this custom stuff on day 1.

We've been evolving our use of JIRA over several years, with a special focus on it over the past 10 months. In fact, I noticed a handful of opportunities for improvement while writing this article! After talking with my team, we re-worked our workflow to better reflect the way work actually happens on the ground.

My point is this: just start somewhere. Anywhere. But start now. Take a first stab at it, and keep iterating.

Tracking blog categories and performance with JIRA custom fields

By Sarah Goff-Dupont

I can hold my own with math and numbers, but I don't love them. I have to admit though, I'm starting to love data. Like many marketers, I spend a lot of time thinking about blogs.

And blogging itself is becoming increasingly data-informed (if not fully data-driven, but that's another story). How awesome is it that we marketers can know exactly how many people clicked on that CTA button, or how long people spent reading our blog posts?? Pretty awesome, really.

In Chapter 3, I showed some example JIRA workflows for tracking a blog's progress from concept to publish to promotion. Here in Chapter 4, I'll show you how our content marketing team tracks the performance of blogs, as well as several other attributes, using JIRA's default and custom fields.

Start with the basics

Much like numbers and math, some fields are universal. *Assignee* lets us know who's on the hook for the next step: our Blog Idea issues bounce from author to subject matter expert to editor, and finally to analyst. *Priority* is an under-used field for us, honestly, but I think it's worth having so you can find your most urgent ideas easily.
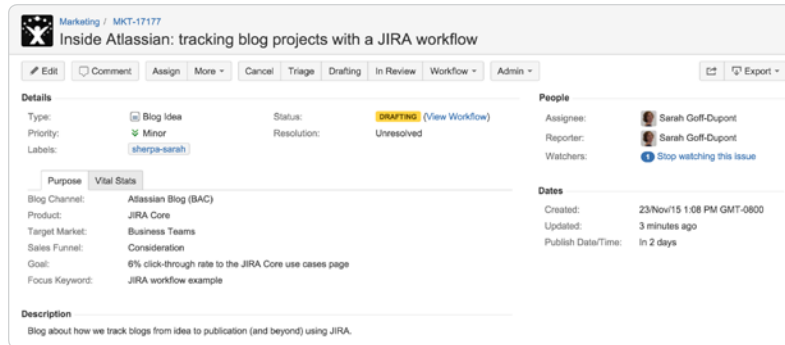
And of course, *Description*. It's not that you need to put a full abstract in this field, but it's important to put something meaningful there. Especially if you work with an editorial board who triages incoming ideas. *Description* is a great place to lay out a few points you want to make in your blog, and what you're hoping to achieve with it unless you want to track your goal in a separate field. Speaking of which…

Now add some custom fields

We have 17 custom fields on our Blog Idea issues. And yes: we actually use each one. Here's the complete list, along with each field's type, for the benefit of your JIRA admin.

Pre-publish fields

Part of good governance is keeping an inventory of the different types of blogs we've published. And since we already create a JIRA issue to manage each blog's workflow, why not track its attributes in JIRA Core as well? Sure beats a spreadsheet.

- **Blog Channel** (multi-select menu): We have the primary Atlassian blog, as well as separate blog properties for Bitbucket, HipChat, and SourceTree.
- **Product** (multi-select menu): Not all blog posts are tied to a product, so we include a N/A option in addition to options for all Atlassian's products.
- **Target Market** (multi-select menu): Is the blog most relevant to IT teams, software teams, or non-technical teams, or all of the above?
- **Sales Funnel** (radio button): The stage in the sales funnel the blog maps to.
- **Goal** (text field): We set a 30-day goal for each post, typically measured by views, social shares, or click-through rate (and it *must* be measurable).
- **Focus Keyword** (text field): The search term or phrase we're optimizing for.
- **Publish Date/Time** (date field): When the piece will be published. This field comes in handy for visualizing the schedule using JIRA's issue calendar dashboard widget or Confluence Team Calendars.

Post-publish fields

Blogging is like gardening. Figuring out which seed to plant at which time of year, and where to plant it is only half the story. You've got to nurture it and see how it grows, too. Naturally, we use fields in the JIRA issue to manage that as well.

- **Publish URL** (text field): A record of where it was published.
- **Campaign Key** (text field): Y'know that "utm_campaign=*<blah>*" thing? That goes here so we can associate the blog's traffic with larger marketing campaigns.
- **Total Pageviews** (number field): Total views after 30 days.
- **Unique Pageviews** (number field): Unique views after 30 days.
- **Views from New Web Users** (number field): Number of first-time readers the post drew to our blog in the first 30 days.
- **Bounce Rate** (number field): The lower the better…
- **Views from Unpaid Social Referral** (number field): Views brought in by social shares and social posts from our accounts, also in the first 30 days.

- **Views from Organic Search** (number field): Views brought in from search (basically, a temperature reading on the post's SEO juice).
- **Social Interactions** (number field): Shares + likes + tweets + comments at the 30-day mark. We use BuzzSumo to help tabulate this now that Twitter is charging for access to their tweet count API.
- **Goal Met?** (single-select checkbox): Was the 30-day goal achieved?

We also use the *Labels* field to track which social networks it's been posted to, whether it's product-neutral thought leadership vs. product-specific, and high-level topic areas (agile, continuous integration, Git, distributed teams, etc).

Pro tip: Use tabs to group related fields together, and prevent information overload when you're viewing your issues. Tabs are created as part of your screen configurations.

Dig into the data using JIRA filters

Tracking attributes in JIRA means that issues are the single source of truth for everything we want to know about each blog. But the best part is that JIRA lets us search by any field, which helps when refining new blog ideas and building out an editorial calendar.

For example, if a Blog Idea issue comes in with *Product* set to "Confluence" and *Sales Funnel* set to "Evaluation", I can search JIRA Core to see how many similar pieces we've already published. I'll suggest aligning the piece with a different stage of the sales funnel if we already have lots of evaluation-stage content for that product.

We can even refine our search using mathematical operators for numerical fields. Let's say my boss wants to know how many of last year's awareness-stage pieces got more than 5000 total views in their first 30 days. It's just a search away.

The best part about tracking blog performance with JIRA issues is that it keeps us focused.

For example, if our goal next quarter is to boost evaluation-to-purchase conversion rates, my team and I can help make sure blogs are mostly aligned with that stage of the sales funnel. Or if a blog's stated goal is to drive webinar sign-ups, then the call-to-action button ought not point to a product tour.

It also helps us plan for future posts. In the screenshot above, you can see that I didn't achieve my goal with that blog. That immediately leads me to ask why. Was it poorly written? Did I not promote it enough? Was the goal unrealistic? (Likely a blend of possibilities 2 & 3, in this case.) Now when a someone sets out to write a thought leadership blog on continuous delivery, we can go into JIRA to look at past posts and form an ambitious-but-not-delusional goal based on historical data.

At the moment, adding performance data like views and bounce rate is mostly a manual process. But I think it could be automated by connecting our database through the public API JIRA exposes.

Content marketing made ~~easy~~ easier

In content marketing circles, we often hear about the importance of cataloging and periodically auditing your content. Storing those catalog-able attributes and data relevant to audits in JIRA makes that exercise a whole lot easier. All that info is baked right into each Blog Idea issue, so capturing it happens automatically in the course of bringing a new blog to life.

But the big win is how this makes running the blog day-to-day so much easier. All of our bloggers have a wealth of data at their fingertips (which doesn't require advanced SQL skills to access), which means they can self-serve answers to a lot of their questions.

I may never consider myself a "numbers gal," but "data nerd" is beginning to sound about right. I wonder if Atlassian makes a T-shirt for that yet…

Conclusion

Before starting your work, it's important to understand all the necessary steps from "open" to "done." A great way to begin is by visualizing your process and creating a workflow. When you take the time to map out your process, it helps you anticipate potential roadblocks and lets you build safeguards into your timeline.

In this ebook, we offer ideas on how to start visualizing your work using JIRA Core and Confluence. These techniques help whether your project involves managing a complex process with loads of stakeholders, or something less involved.

In Chapter 1, we discussed the different ways to visualize your work, like listing and grouping your content, and drawing the process. (Whiteboard, FTW!) We also talked about the need to keep things as simple as possible, and why your team will love starting projects this way.

In Chapter 2, we talked about outlining your blogging process and developing a blog post using Confluence. For a marketing team, we thought the blog process would be a great place to start developing workflows because it can touch many members of the team, usually has multiple phases, ends in shipping a product, and is an accessible process everyone is familiar with.

In Chapter 3 we discussed in greater detail how to use JIRA Core to manage and track your blog process, and in Chapter 4 we delved into how to take your process a step further by introducing custom fields.

So, ready to get started? Get visual! We suggest using the included worksheet to help your team begin to visualize a workflow. Copy it on a whiteboard when you're ready, or print copies for other team members. Either way, your team will now have a visual idea of all the necessary steps to take any marketing project from open to done.

Worksheet

Example

Open	Draft	In Review	Publish
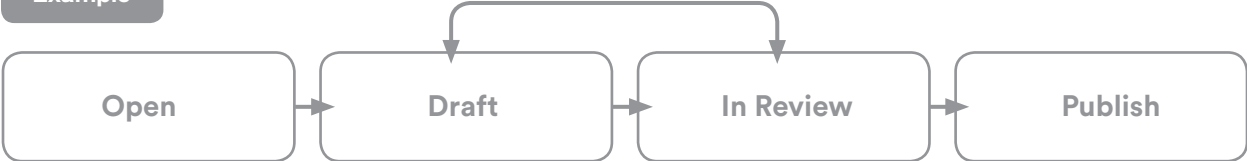
Who owns it: Blog author

Steps to complete this phase:
- Write outline
- Review outline with SME
- Map outline to themes

Who owns it: Blog author

Steps to complete this phase:
- Write draft
- Add draft images
- Finalize publish date

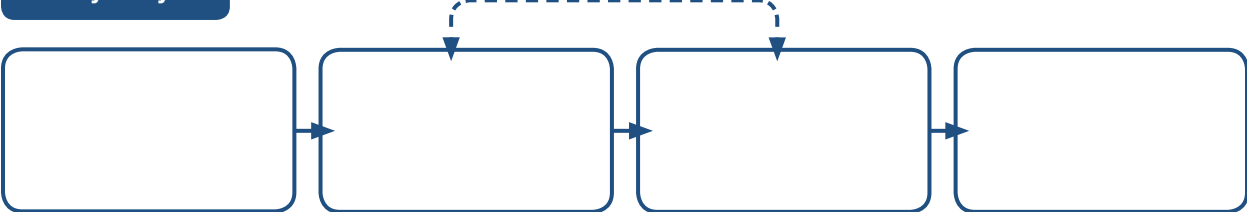**Who owns it:** Stakeholder(s)

Steps to complete this phase:
- Send to SME for review
- Send to executive sponsor for review
- Get final sign-off from Blog Editor
- Add final graphics

Who owns it: Editor

Steps to complete this phase:
- Add to Wordpress
- Run through Yoast
- Edit keywords
- Add metadata
- Schedule publish date

Now you try it!

Who owns it:

Steps to complete this phase:

Who owns it:

Steps to complete this phase:

Who owns it:

Steps to complete this phase:

Who owns it:

Steps to complete this phase: