

# Case Study: Standing Up Jira the Right Way— From Zero to Scalable Governance

**Client:** Mid-market technology organization migrating from Asana to Jira

**Industry:** Software/IT

**Engagement Type:** Jira & JSM implementation, governance, and licensing advisory

**Project Window:** Target go-live within three months as Asana license was expiring

# The Situation

The client's leaders aligned on a single Jira foundation that would scale with their growth trajectory. Their previous tooling, Asana, had become a significant constraint for governance, service delivery, and cross-team reporting capabilities.

## They asked Avaratak to:

1. **Advise on Atlassian licensing** to right-size cost and future-proof renewals
2. **Establish governance & configuration standards** to keep Jira clean and auditable
3. **Structure a net-new Jira instance** for scalability, maintainability, and clear reporting from day one

Key stakeholders included the VP of IT, CTO, Legal and the organizational PMO.



# Why Avaratak

## Senior Expertise

Senior Atlassian consultants engaged directly with deep platform knowledge.

## Tailored, Lifecycle Approach

Comprehensive support spanning licensing, implementation, governance, training, and change management—all customized to their needs.

Avaratak differentiates through Senior Atlassian expertise, bespoke solutions, boutique responsiveness, and cost transparency—delivering "small team, big results" without surprises.

# Our Objectives

01

## Exit Asana

Move to a **sustainable, cost-efficient** Atlassian footprint with Annual cycles and optimized user allocation within 3 months

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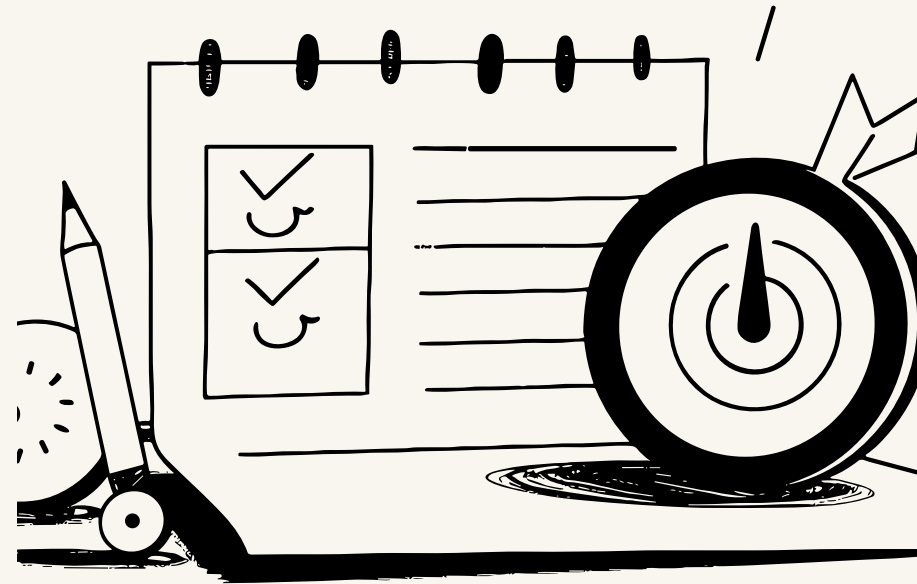
## Enable Self-Service & Security

Stand up **role-appropriate permissions, reusable workflow patterns,** and a **service portal** for business users to request support efficiently.

02

## Launch with Clean Foundations

Implement **clean data structures** and **lightweight governance** frameworks that can evolve safely as the organization grows.



# Our Approach: Licensing & Governance

## 1) Licensing & Cost Optimization

- **User segmentation analysis:** Current and near-term needs (agents vs. collaborators) to right-size Jira/JSM licenses
- **12-month demand forecast:** Avoid overbuying and manage renewal cliffs strategically
- **App marketplace review:** Replace costly add-ons with native automation where feasible



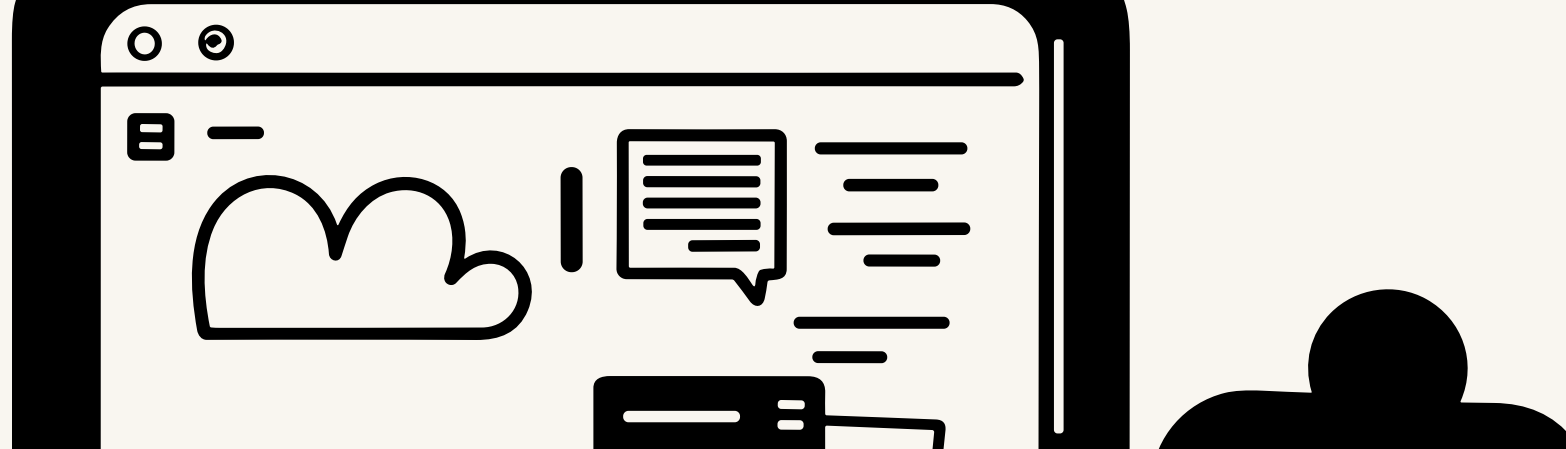
## 2) Governance by Design

### Governance Charter (lightweight):

- Ownership model with tool owner and product council
- **Change policy** with versioned standards
- **Project taxonomy & naming** for consistent roll-up reporting (HR-, IT-, OPS- prefixes)
- **Role model & permission sets:** creators, maintainers, agents, requestors

**Reusable workflow patterns:** Sprinted delivery, intake→triage→fulfillment, approvals, SLAs, and guardrails for custom flows.

**Configuration standards:** Custom field registry, screens/schemes library, and change request templates to prevent "config sprawl."



# Our Approach: Architecture & Delivery

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## Instance Architecture & Foundations

**Greenfield Jira Cloud** implementation featuring:

- **Managed project templates** (Software, Service, Business) aligned to governance
- **Issue type architecture** mapped to HR and IT services (onboarding, access, incidents, requests)
- **Automation** for transitions, field hygiene, and notifications
- **JSM Portal** branded and simplified for non-technical users with knowledge-base linkage for self-service

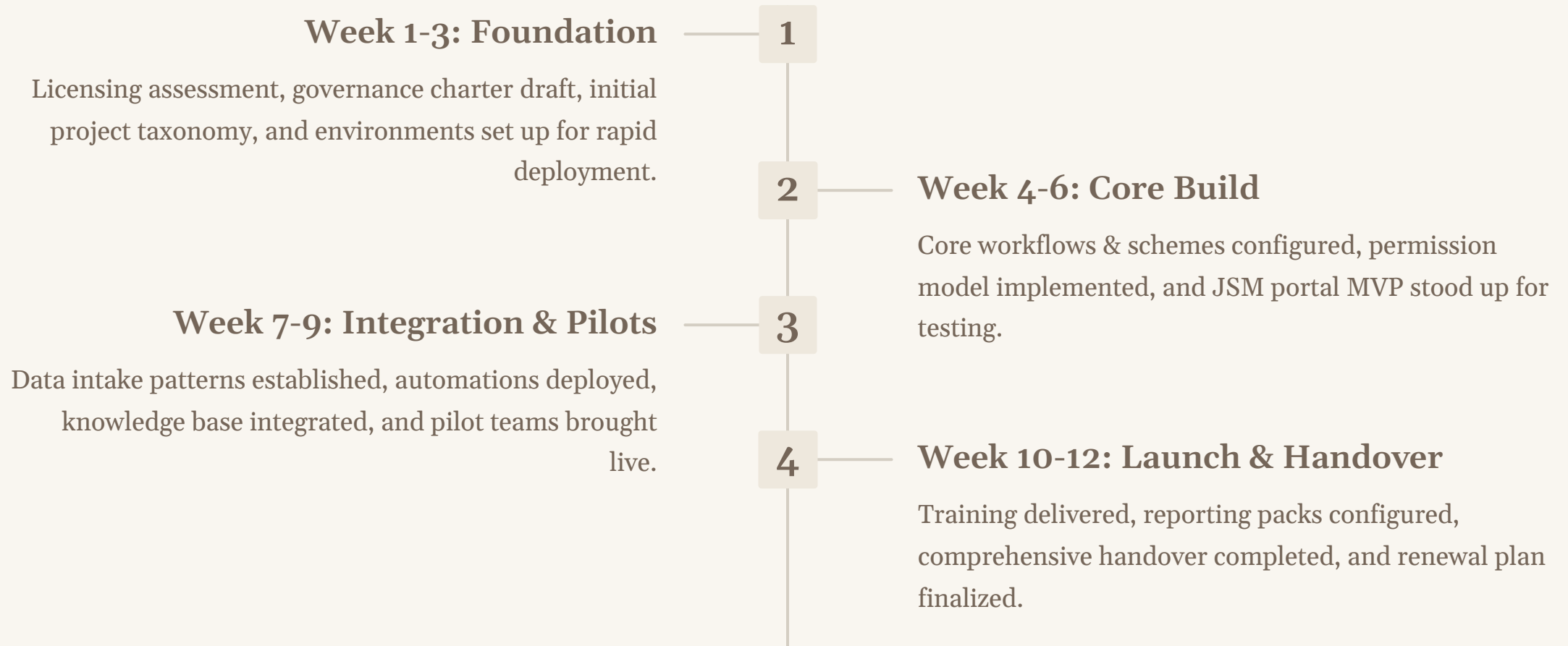
**Reporting & Analytics:** Standardized fields to power board and leadership reporting (cycle/lead time, SLA attainment, backlog health).

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## Delivery & Commercials

- **Engagement model:** Flexible—project, hourly, or block of hours to match client preferences
- **Cadence:** Weekly working sessions plus office hours; change advisory checkpoint baked into sprint review
- **Documentation:** Living governance docs in Confluence; admin runbooks and playbooks shipped as part of handover

# Timeline: Fast-Track to Value



- ❑ The schedule was designed to meet the client's aggressive target of migrating within 3 months and exiting costly Asana licensing.

# Early Outcomes



## Cost Clarity & Predictability

A right-sized license plan and comprehensive renewal roadmap enabled the team to exit Asana with the assurance and predictability of annual Atlassian billing.

## Clean, Governed Start

A governed Jira instance with naming conventions, permissions, and field standards that **prevent future rework** and technical debt.

## Faster Intake & Visibility

A simplified service portal for HR, Legal and IT teams, dramatically improving request visibility and reducing time-to-triage.

## Executive Reporting

Consistent project taxonomy enabling portfolio-level dashboards and insights without manual data stitching or reconciliation.

# What We Delivered



## Governance Charter

Complete with change policy and RACI matrix



## Project Taxonomy & Naming Standards

For consistent organization-wide reporting



## Role-Based Permission Model

Plus comprehensive scheme library



## Workflow Pattern Catalog

Software delivery, request/incident, and approvals



## JSM Portal MVP

With integrated knowledge-base for self-service



## Automation Pack

Status transitions, field hygiene, notifications



## License Optimization & Renewal Plan

Cost-effective footprint for sustainable growth



## Admin Runbook & Training

Comprehensive documentation and enablement



# Client Voice

“Avaratak stood up a clean, governed Jira quickly. We didn't think it was possible, we exited Asana with a right-sized plan. Not only did they standardized our projects, issue types and screens, but we finally have portfolio-level reporting without manual stitching in excel! It's the first time our data actually tells the truth.”

— Program Manager

“The new JSM portal and reusable workflows have made a significant impact for both Legal and IT. Intake is clear, approvals are built in, and SLAs are visible. Our time-to-triage is clear, and we're confident we can scale without the config sprawl we struggled with before.”

— CTO

# Key Takeaways

Setting Jira up "the right way" is less about toggles and more about **governance, structure, and adoption**. By aligning licensing, classification, permissions, and reusable workflows from day one, the client avoided common traps—config sprawl, dirty data, and reporting blind spots—while achieving a **rapid path off of a technology they no longer liked or met their needs**.

The foundation we built enables the organization to scale confidently, knowing their Jira instance can evolve without requiring costly rework or migration projects down the road.



# Ready to Build Jira That Scales?



## About Avaratak

Avaratak is an Atlassian Solution Partner delivering **enterprise-grade expertise with personalized service and honest pricing**—from licensing through implementation, training, and ongoing improvement.

We bring senior Atlassian consultants, transparent pricing, and a commitment to building solutions that scale with your organization's unique needs.

## Let's Design Your Governance-First Jira Foundation

Start with a licensing and governance health check to identify opportunities for optimization and sustainable growth.

**Book a consultation** to explore how we can help you stand up Jira the right way—from zero to scalable governance.

[Book Now!](#)