



AVARATAK

CASE STUDY / FINANCIAL SERVICES

From Tickets to Trends: Operational Insight with Rovo and Jira Service Management

Connecting service requests, incident history and operational knowledge with accountable decisions using Rovo and JSM.

Client	Financial services organization
Industry	Financial services
Engagement	JSM operational insight / Rovo-assisted investigation / governance
Products	Rovo / Jira Service Management / Confluence



WHEN IT MATTERS, BRING IN AVARATAK

Avaratak helped a financial services company use Rovo and Jira Service Management to investigate recurring service issues and connect operational insight with accountable review.

The challenge

A financial services company worked with Avaratak to connect its Jira Service Management (JSM) data with operational insight using Rovo. Its service records captured incidents, requests and support activity, but leaders still had to investigate which issues kept returning and where recurring work warranted attention.

Answering those questions required reviewing incidents and requests, comparing descriptions, checking previous fixes and finding internal knowledge. The same underlying problem could appear as an access request, an onboarding exception or an application incident. Ticket volume was visible. The causes behind the volume were harder to see.

The engagement brought together operational investigation and the permissions, traceability and human accountability required in financial services. Avaratak's [ITSM services for financial institutions](#) provided the service-management context for the work.

Our approach

Avaratak started with the operational decisions. The work focused on the questions service leaders needed to investigate: Which requests recurred? Where were escalations concentrated? Which documented fixes were repeated without addressing the underlying cause? The review process connected each question with an owner, a defined set of source records and a decision it supported.

Avaratak reviewed the Jira Service Management foundation, including request types, service ownership, severity, resolution categories and escalation conventions. Confluence knowledge and post-incident reviews were assessed for relevance and access controls. Native JSM dashboards remained the reference for ticket volumes, SLA measures and other numerical reporting.

Rovo was used as an investigative layer over permissioned operational information. The workflow brought together related incidents, similar resolved requests and relevant knowledge to support the investigation of patterns in ticket narratives. Source work items accompanied the analysis, and human review checked the interpretation against the underlying records.

The governance process separated AI-assisted suggestions from approved operational findings. Service owners reviewed candidate patterns, and incident and change authorities retained responsibility for material actions. Access boundaries and auditable work records remained part of the workflow.

What we built

Operational taxonomy: The work addressed request categories, service ownership, severity and resolution reasons to support consistent review of service records.

Rovo-assisted investigation: Reusable, scoped prompts brought together related tickets, historical context and candidate operational themes with source links.

Management insight review: JSM dashboards were paired with analyst review of recurring work and service questions that needed further investigation.

Problem and improvement loop: The review process connected validated issues with problem records, accountable owners, follow-up tasks and subsequent checks.

Governance and access controls: Permission-aware retrieval, handling of sensitive material and human approval gates were incorporated into the investigation workflow.

Operational handover: Reporting definitions, prompts and administrator guidance were prepared for the internal team to maintain the workflow.

The results

The engagement delivered a repeatable workflow for investigating service patterns and connecting the findings with operational review.

Less manual work to prepare an investigation: Rovo helped analysts assemble related tickets, prior resolutions and knowledge before reviewing the underlying records.

Clearer visibility into recurring service issues: Service owners could review related incidents together and identify themes that individual ticket reports did not explain.

More focused service-improvement decisions: Reviewed findings were connected with accountable owners and existing problem, improvement and change workflows.

Traceable AI-assisted analysis: Teams retained the source records and human approval responsibilities behind operational recommendations.

What made the difference: The engagement kept numerical reporting in Jira Service Management and used Rovo to help investigate the context behind the measurements. Operational decisions remained with the people responsible for the services.

Explore Avaratak's [ITSM services for financial institutions](#) and [related JSM case study](#), or [book a 30-minute conversation](#) about Rovo and service operations.



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In their words

"We already had the service data. Avaratak helped us connect it with the questions our operations team needed to answer. The combination of Rovo and Jira Service Management gave us a clearer way to review recurring issues, check the source records and assign the next action."

CTO

"Avaratak kept our service owners at the center of the process. Rovo supported the investigation, while the underlying records, access controls and responsibility for decisions stayed visible."

Director of IT

Turn service activity into operational insight

Bring your service operations questions to Avaratak. Our senior consultants can help connect Rovo and Jira Service Management with clear ownership, source records and human review.

Book a 30-minute conversation with Avaratak

calendly.com/avaratak/30min

ABOUT AVARATAK

Avaratak is an Atlassian Solution Partner. Our senior consultants design maintainable Jira, Jira Service Management, Confluence and Rovo solutions with clear accountability, practical governance and direct delivery.

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